



**SOUND**  
DIPLOMACY

# Music Strategy in Alaskan Communities

## Final Report

Client: MusicAlaska/Alaska Independent Musicians Initiative  
(AKIMI)

Final Report Draft: October 2023

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# 1. Introduction

## 1.1 About the Project

In the summer of 2021, Sound Diplomacy was engaged by MusicAlaska/the Alaska Independent Musicians Initiative (AKIMI) to prepare a music strategy for Alaska, with particular focus on two of the state’s major cities, Anchorage and Juneau. This report is the culmination of that work, outlining a comprehensive regulatory assessment and comparative analysis, economic impact assessment, and recommendations to harness Alaska’s unique music ecosystem and foster sustainable development of the sector.

The objectives of the Music Strategy in Alaskan Communities report are to:

- Develop Alaska’s music sector in an equitable and sustainable fashion.
- Reform and enhance regulations to better support the music ecosystem.
- Improve communication between the diverse actors within the state music ecosystem.
- Develop Alaska’s reputation as a place for music - regionally, nationally, and internationally - and increase recognition for the state as a leading music/culture destination.

- Improve opportunities for local artists to create, produce, and exhibit music.
- Expand programming to support artists with the key skills needed to professionalize.

## 1.2 About Sound Diplomacy

Sound Diplomacy is a global research and strategy consultancy with expertise in music, the nighttime economy and wider creative industries. Sound Diplomacy works with regions, cities, venues, and property developers to help identify, quantify, and amplify opportunities for economic, social, and cultural development. Sound Diplomacy's team of economists, analysts, researchers and consultants are based across the UK, Europe, North America and Latin America and have delivered results across six continents, in over 100 cities and 25 countries. They also run the leading series of conferences and events focused on music and public policy, Music Cities Events, and are the creators of the international Music Cities Awards. For more information, please visit [www.sounddiplomacy.com](http://www.sounddiplomacy.com).

## 2. Methodology Summary

The following processes informed the development of the Music Strategy in Alaskan Communities report:

**Regulatory Assessment** - Analysis of local and regional reports, plans, policies, and regulations relevant to Alaska's music ecosystem. The analysis includes a regulatory assessment of current city and state regulations impacting the music ecosystem, as well as a related best practice case relevant to each area to guide how existing regulations can become more music friendly.

**Comparative Analysis** - Analysis of select regulation and policy relevant to Alaska's music ecosystem in three jurisdictions with characteristics relevant to Alaska: Portland, Oregon; Reykjavik, Iceland; and Boise, Idaho.

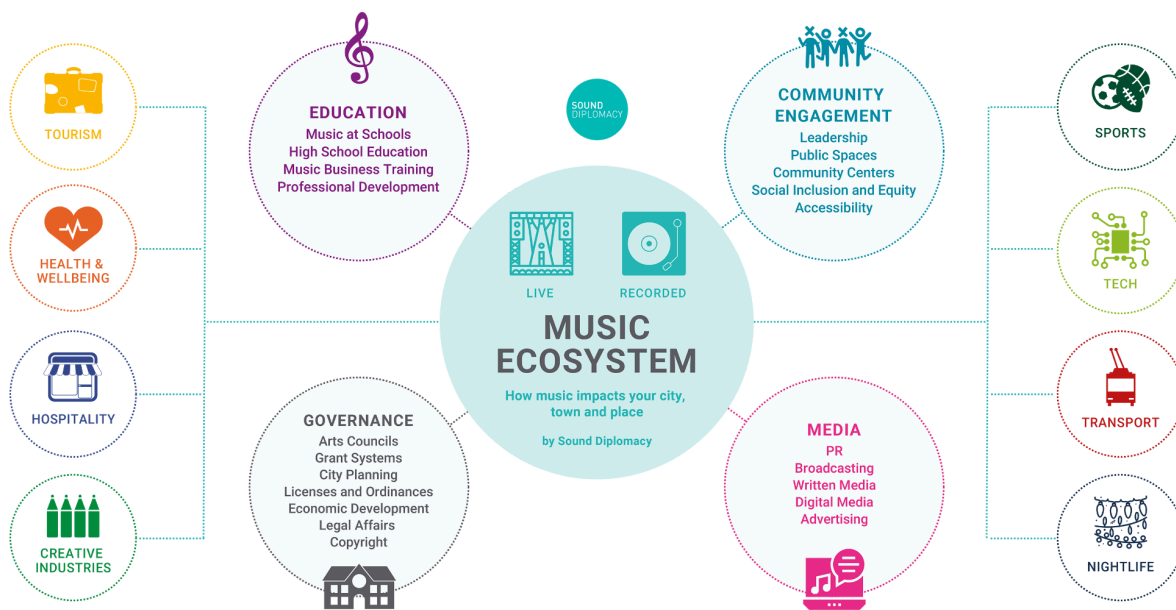
**Music Asset Mapping** - Mapping of music related assets in Anchorage and Juneau. Using data provided by MusicAlaska/AKIMI, Sound Diplomacy created an interactive digital map for both Anchorage and Juneau.

**Economic Impact Assessment** - Assessment of the direct and indirect economic value of the music ecosystem in Alaska.

**Strategic Plan** - Informed by the research and analysis outlined above, a set of 12 actionable recommendations that serve as a blueprint for developing and maintaining a thriving music ecosystem in Alaskan communities.

## 2.1 Definitions

Figure 1. Music Ecosystem Impact



### 2.1.1 Definition of the Music Ecosystem

Music in a place is part of an ecosystem. Like in nature, a music ecosystem is formed by a group of agents, a set of resources, and an environment where stakeholders develop their activities and connect with one another, as well as with other ecosystems. Like in all ecosystems, the relationships between

agents in the music ecosystem are interdependent. Often, one agent's existence relies on the existence of another, or on the presence of a sustainable environment that favors its survival.

The agents that make up the music ecosystem can work across diverse areas of the overall sector. The common thread is that their activities are related to music. Some elements of the music ecosystem, such as music venues or labels, are obvious. However, others, such as IT suppliers, police officers, or government organizations, are less obvious. However, these less prominent roles play an indispensable role in the overall music ecosystem.

For the music ecosystem to be healthy and to thrive, institutions must support, connect and provide resources to the agents that form it. Developing and implementing a music strategy is a helpful tool for achieving this goal, as supportive programming, policies, and regulations can facilitate musical activity, fostering strong relationships and increased collaboration between the diverse actors in the music ecosystem.

## 2.1.2 Economics of Music

The economics of music can be understood as a segment of the economics of culture.<sup>1</sup> The economics of music seeks to explain the phenomena of the music sector using economic and statistical tools, providing data to inform both private decision-making, as well as public policy. It is broader than a simple analysis of the transactions of goods and services in the market. It also serves as a valuable tool for understanding the dynamics of non-monetary resources within the music ecosystem.

For the purposes of the economic impact assessment of the Anchorage and Juneau music ecosystem, the overall music ecosystem is defined as the set of agents grouped in one of the five links in the music value chain: Creation, Distribution, Exhibition, Production and Transversal (see Table 1 and Figure 2). Any economic contributions generated by agents that are indirectly related to the sector are incorporated into the impact assessment through the measure of indirect impact of the sectoral value chain.

Table 1 provides an overview of the links that make up the music ecosystem. Further information is provided in Section 4, which details the economic impact of the music ecosystem in Anchorage and Juneau.

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<sup>1</sup> United Nations Educational, Scientific and Cultural Organization. (2009). The 2009 UNESCO Framework for Cultural Statistics (FCS). *UNESCO Digital Library*. Retrieved February 15, 2023 from <https://unesdoc.unesco.org/ark:/48223/pf0000191061>

Table 1: Links in the Music Ecosystem Value Chain

Value Chain Link	Category	Agent	Description
Creation	Music creation	Musicians, artists, composers, bands, orchestras and choirs.	Independent musicians, artists or composers, professional and community bands and orchestras, professional and community choirs and singing groups, including church choirs
Distribution	Music publishing	Radio stations, radio networks and record stores.	Retail outlets that sell recorded music; public, community and commercial music radio networks; and public, community and commercial music radio stations.
Exhibition	Live music	Spaces and the support system for the presentation of live music. Included are: dedicated live music venues; multi-purpose venues; occasional venues; art venues with music; arenas; nightclubs, bars, cafes, and restaurants with music; live events producers; festivals; and bookers and programmers.	Establishments where live music performance is the main focus and with dedicated live music programming; venues for hire, performing art theaters, corporate event spaces, smaller sports facilities that host music at least two times a year; spaces different than venues that occasionally host live music (e.g. parks, churches); galleries, museums and other 'art' spaces that occasionally host live music; large capacity venues (over 2,000 seats) that primarily host sports and live music; nightlife establishments with regular DJ nights and occasional live music performances; establishments where live music is performed regularly although their prime function is the sale of food and beverages; organizations that present and/or produce artistic performances and events; ticketed or free to attend special events and concert series focusing on, or featuring live music programs and happening over one or multiple days; and registered, tax-paying businesses working in music talent booking and event promotion.



Production	Music publishing	Recording and publishing businesses, such as recording studios and rehearsal spaces, record labels, and music publishers.	Registered music and audio studios offering music recording, mastering and rehearsal services; persons (or organizations) responsible for licensing and administering the composition copyrights of songwriters; and organizations engaged in the business of developing, producing, distributing, and/or otherwise exporting recorded music.
Transversal	Support	Music managers; music PR and marketers; music publications and newspapers; music associations and nonprofits; instrument manufacturers; musical Instrument and equipment stores; academies / schools with music programs; conservatories / universities with music programs, universities / colleges with music business programs; and private music tutors; traineeship programs in the music field; and other commercial and administrative support organizations for the music sector.	Persons (or organizations) who oversee the business affairs of a musician or band; registered, tax-paying businesses working in music marketing and social media; publications, magazines and periodicals specialized in music; music associations and nonprofits, associations of artists and/or music industry, music nonprofits and charities; organizations engaged in the business of manufacturing music instruments; music instruments, equipment, including rentals; public and private music schools and programs; private music tutors that operate independent to an organization, often offering tutoring services from their own studios or home; traineeships programs in the music field; individual music companies ranging from accounting or content creation to photography, event production, PR, publishing and licensing, and music associations/nonprofits.

Figure 2 provides an illustration of the links that make up the music ecosystem value chain, providing a pictorial representation of how they fit together to form the overall music ecosystem.

Figure 2. Music Ecosystem Value Chain



Developed by: Sound Diplomacy

## 3. Music Ecosystem Overview

### 3.1 Alaska at a Glance

Information highlighted in the following table is intended to provide an overview of key contextual information on the demographics of Alaska. The statistics reflected in the table below, as well as the following regulatory assessment, are specific to Alaska, or, when noted, to the Municipality of Anchorage or City and Borough Juneau.

#### 3.1.1 Alaska Population Statistics<sup>2,3</sup>

Table 2. Alaska Population Statistics

Population: 732,673 <sup>4</sup>	
Median Age: 34.6 <sup>5</sup>	Sex ratio: 47.6% female/52.4% male <sup>6</sup>
Per Capita Income: \$39,236 <sup>7</sup>	Median Household Income: \$80,287 <sup>8</sup>
Unemployment (November 2022, not seasonally adjusted): 4.3% <sup>9</sup>	

<sup>2</sup> Statistics Canada. (2021). *Profile Table, Census Profile 2021 Census of Population*. Retrieved February 15, 2023, from <https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/details/page.cfm?Lang=E&SearchText=niagara%20falls&DGUIDlist=2021A00053526043&GENDERlist=1.2.3&STATISTIClist=1&HEADERlist=0>

<sup>3</sup> Note that per capita income, median income, percentage of persons with high school or Bachelor’s education, and households with a broadband internet subscription are calculated for the period 2017-2021. Number of companies is calculated for 2020.

<sup>4</sup> United States Census Bureau (2021) “Quick Facts: Alaska.” Online at <https://www.census.gov/quickfacts/AK> accessed 12-20-2022

<sup>5</sup> Data Commons (n.d.) “Timelines Explorer.” Online at [https://datacommons.org/tools/timeline#&place=geold/02&statsVar=Median\\_Age\\_Person](https://datacommons.org/tools/timeline#&place=geold/02&statsVar=Median_Age_Person) accessed 5-24-2022

<sup>6</sup> United States Census Bureau (2021) “Quick Facts: Alaska.” Online at <https://www.census.gov/quickfacts/AK> accessed 12-20-2022

<sup>7</sup> Ibid.

<sup>8</sup> Ibid.

<sup>9</sup> U.S. Department of Labor, Bureau of Labor Statistics (2022) “Seasonally Adjusted Unemployment Rates for Alaska and United States 2012 - 2022”. Online at <https://live.laborstats.alaska.gov/labforce/index.html> accessed 12-20-2022

**Ethnicity:** 64.5% White, 15.7% American Indian or Alaska Native, 7.5% Hispanic or Latino, 6.6% Asian, 3.6% Black or African American<sup>10</sup>

**Persons (25+) with a High School Diploma or Higher:** 93.3%<sup>11</sup>

**Persons (25+) with a Bachelor’s Degree or Higher:** 30.6%<sup>12</sup>

**Households with a Broadband Internet Subscription:** 88.4%<sup>13</sup>

**Number of Companies:** 21,184<sup>14</sup>

**Cost of Living index:** 1271<sup>15</sup>

### 3.1.2 Municipality of Anchorage Population Statistics<sup>16</sup>

Table 3. Municipality of Anchorage Statistics

**Population:** 288,121<sup>17</sup>

**Median Age:** 33.9<sup>18</sup>

**Sex ratio:** 48.8% female/51.2% male<sup>19</sup>

<sup>10</sup>United States Census Bureau (2021) “Quick Facts: Alaska.” Online at <https://www.census.gov/quickfacts/AK> accessed 12-20-2022

<sup>11</sup> Ibid.

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

<sup>14</sup> Ibid.

<sup>15</sup> World Population Review (2022) “Most Expensives States to Live In 2022.” Online at <https://worldpopulationreview.com/state-rankings/most-expensive-states-to-live-in> accessed 5-24-2022

<sup>16</sup> Note that per capita income, median income, percentage of persons with high school or Bachelor’s education, and households with a broadband internet subscription are calculated for the period 2017-2021. Number of companies is calculated for 2020.

<sup>17</sup> United States Census Bureau (2021) “Quick Facts: Anchorage Municipality, Alaska; Alaska.” Online at <https://www.census.gov/quickfacts/fact/table/anchorage municipalityalaska.AK/PST045221> accessed 12-20-2022

<sup>18</sup> Data Commons (n.d.) “Timelines Explorer.” Online at [https://datacommons.org/tools/timeline#place=geold%2F0203000&statsVar=Median\\_Age\\_Person](https://datacommons.org/tools/timeline#place=geold%2F0203000&statsVar=Median_Age_Person) accessed 12-20-2022

<sup>19</sup> United States Census Bureau (2021) “Quick Facts: Anchorage Municipality, Alaska; Alaska.” Online at <https://www.census.gov/quickfacts/fact/table/anchorage municipalityalaska.AK/PST045221> accessed 12-20-2022

Per Capita Income: \$43,125<sup>20</sup>      Median Household Income: \$88,871<sup>21</sup>

Unemployment (November 2022, not seasonally adjusted): 3.3%<sup>22</sup>

Ethnicity: 56.1% White, 7.2% American Indian or Alaska Native, 9.5% Hispanic or Latino, 9.7% Asian, 5.4% Black or African American<sup>23</sup>

Persons with a (25+) High School Diploma or Higher: 94.2%<sup>24</sup>

Persons with a (25+) Bachelor's Degree or Higher: 36.8%<sup>25</sup>

Households with a Broadband Internet Subscription: 92.7%<sup>26</sup>

Number of Companies: 1,100<sup>27</sup>

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<sup>20</sup> Ibid.

<sup>21</sup> Ibid.

<sup>22</sup> U.S. Department of Labor, Bureau of Labor Statistics (2022) "Seasonally Adjusted Unemployment Rates for Alaska and United States 2012 - 2022". Online at <https://live.laborstats.alaska.gov/labforce/index.html> accessed 12-20-2022

<sup>23</sup> United States Census Bureau (2021) "Quick Facts: Anchorage Municipality, Alaska; Alaska." Online at <https://www.census.gov/quickfacts/fact/table/anchoragemunicipalityalaska.AK/PST045221> accessed 12-20-2022

<sup>24</sup> Ibid.

<sup>25</sup> Ibid.

<sup>26</sup> Ibid.

<sup>27</sup> Ibid.

### 3.1.3 City and Borough of Juneau Population Statistics<sup>28</sup>

Table 4. City and Borough of Juneau Statistics

Population: 31,973 <sup>29</sup>	
Median Age: 38.5 <sup>30</sup>	Sex ratio: 49.1% female/50.9% male <sup>31</sup>
Per Capita Income: \$45,607 <sup>32</sup>	Median Household Income: \$90,126 <sup>33</sup>
Unemployment (November 2022, not seasonally adjusted): 2.9% <sup>34</sup>	
Ethnicity: 62.5% White, 10.1% American Indian or Alaska Native, 7.0% Hispanic or Latino, 6.7% Asian, 1.0% Black or African American <sup>35</sup>	
Persons (25+) with a High School Diploma or Higher: 95.4% <sup>36</sup>	
Persons (25+) with a Bachelor's Degree or Higher: 40.1% <sup>37</sup>	
Households with a Broadband Internet Subscription: 92.0% <sup>38</sup>	

<sup>28</sup> Note that per capita income, median income, percentage of persons with high school or Bachelor's education, and households with a broadband internet subscription are calculated for the period 2017-2021.

<sup>29</sup> United States Census Bureau (2021) "Quick Facts: Juneau City and Borough (County)." Online at <https://www.census.gov/quickfacts/fact/table/juneaucityandboroughcountyalaska.anchoragemunicipalityalaska.AK/PST045221> accessed 12-20-2022

<sup>30</sup> Data Commons (n.d.) "Timelines Explorer." Online at [https://datacommons.org/tools/timeline#place=geold%2F0203000&statsVar=Median\\_Age\\_Person](https://datacommons.org/tools/timeline#place=geold%2F0203000&statsVar=Median_Age_Person) accessed 12-20-2022

<sup>31</sup> United States Census Bureau (2021) "Quick Facts: Juneau City and Borough (County)." Online at <https://www.census.gov/quickfacts/fact/table/juneaucityandboroughcountyalaska.anchoragemunicipalityalaska.AK/PST045221> accessed 12-20-2022

<sup>32</sup> Ibid.

<sup>33</sup> Ibid.

<sup>34</sup> U.S. Department of Labor, Bureau of Labor Statistics (2022) "Seasonally Adjusted Unemployment Rates for Alaska and United States 2012 - 2022". Online at <https://live.laborstats.alaska.gov/labforce/index.html> accessed 12-20-2022

<sup>35</sup> United States Census Bureau (2021) "Quick Facts: Juneau City and Borough (County)." Online at <https://www.census.gov/quickfacts/fact/table/juneaucityandboroughcountyalaska.anchoragemunicipalityalaska.AK/PST045221> accessed 12-20-2022

<sup>36</sup> Ibid.

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

Number of Companies: 1,109<sup>39</sup>

All Topics	Juneau city and borough, Alaska	Anchorage municipality, Alaska	Alaska
Population Estimates, July 1, 2022, (V2022)	31,685	287,145	733,583
<b>BUSINESSES</b>			
<b>Businesses</b>			
Total employer establishments, 2021	X	X	21,641
Total employment, 2021	X	X	251,093
Total annual payroll, 2021 (\$1,000)	X	X	16,639,374
Total employment, percent change, 2020-2021	X	X	-5.6%
Total nonemployer establishments, 2020	X	X	55,293
All employer firms, Reference year 2017	955	6,796	16,193
Men-owned employer firms, Reference year 2017	510	3,341	8,250
Women-owned employer firms, Reference year 2017	155	1,574	3,506
Minority-owned employer firms, Reference year 2017	86	918	1,870
Nonminority-owned employer firms, Reference year 2017	704	4,763	12,241
Veteran-owned employer firms, Reference year 2017	63	554	1,331
Nonveteran-owned employer firms, Reference year 2017	665	5,068	12,469

### 3.2 Regulatory Assessment Snapshot

To foster the development of the local music industry, policies that incentivize the production and exhibition of music must be introduced, while policies and regulations that hinder and restrict music activity should be reviewed and adapted when possible. As such, to create a supportive local music ecosystem, it is necessary to assess the state of current regulations and policies, especially as they relate to the processes for facilitating music events. This includes areas such as noise, event and liquor permitting, funding, economic development incentives, night time transit options, parking and other regulations. An overview of these regulations and policies are provided in the tables below, with particular focus on the Municipality of Anchorage and City and Borough of Juneau.

<sup>39</sup> Ibid.

### 3.2.1 Overview of Local Regulations and Policies

Table 5. Alaska at a Glance

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
Music Education	YES and NO	<p>The State of Alaska outlines standards for general music instruction for the Kindergarten to 8th grade level, which can be accessed <a href="#">here</a>. As a local control state, the teaching of the arts in Alaska's K-12 education system is voluntary and determined by each of the state's 54 school districts; there are no music requirements at the state level.<sup>40</sup></p> <p>The 21st Century Community Learning Centers<sup>41</sup> and Alaska Youth Orchestras<sup>42</sup> offer state-wide afterschool programming and Juneau Alaska</p>	<p>Nashville's Music Makes Us initiative is a partnership with Metro Nashville Public Schools, the Mayor's Office and the Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation while adding a contemporary curriculum that embraces new technologies and reflects the diverse student population.<sup>49</sup></p> <p>Music Makes Us achieves this by providing "world-class music education and support for Nashville students" through course offerings</p>

<sup>40</sup> Internal documents from government staff and officials

<sup>41</sup> Anchorage School District (2022) "21st Century Community Learning Center." Online at <https://www.asdk12.org/21cclc#calendar25800/20200804/month> accessed 05-26-2022

<sup>42</sup> Alaska Youth Orchestras (2021) Website. Online at <https://www.alaskayouthorchestras.org> accessed 10-02-2022

<sup>49</sup> Music Makes Us (2019) "Home". Online at <https://musicmakesus.mnps.org> accessed 07-02-2022



		<p>Music Matters<sup>43</sup> offers local after school programming.</p> <p>The University of Alaska: Southeast offers a “Music Appreciation” course<sup>44</sup> and the University of Alaska: Anchorage has a Bachelor of Arts and Bachelor of Music Program.<sup>45</sup></p> <p>The Alaska Music Educators Association,<sup>46</sup> the Anchorage Keyboard Teachers Association,<sup>47</sup> and the Anchorage Concert Association<sup>48</sup> offer support, advocacy, and professional development resources for local musicians and professionals.</p>	ranging from concert band and jazz ensemble to music production and songwriting. <sup>50</sup>
Funding Support	YES	There are several different types of grants available through the Alaska State Council on the	Creative Victoria, in Australia, has created a music-specific funding program. The fund is aimed at helping with minor structural soundproofing

<sup>43</sup> Juneau Alaska Music Matters (n.d.) “Our Program.” Online at <https://www.juneaumusicmatters.com/our-program.html> accessed 5-26-2022

<sup>44</sup> University of Alaska Southeast (2021) “Music (MUS).” Online at <https://catalog.uas.alaska.edu/course-descriptions/mus/> accessed 06-06-2022

<sup>45</sup> University of Alaska Anchorage (2021) “Areas of Study.” Online at <https://www.uaa.alaska.edu/academics/college-of-arts-and-sciences/departments/music/students/> accessed 06-06-2022

<sup>46</sup> Alaska Music Educators Association (n.d.) “Home.” Online at <https://www.alaskamea.org/> accessed 06-06-2022

<sup>47</sup> Anchorage Keyboards Teachers Association (2023) “Home.” Online at <https://www.pianoakta.org/> accessed 06-06-2022

<sup>48</sup> Anchorage Concert Association (n.d.) “Home.” Online at <https://www.anchorageconcerts.org> accessed 06-06-2022

<sup>50</sup> Metro Nashville Public Schools (n.d.) “Programs.” Online at <https://musicmakesus.mnps.org/programs> accessed 11-01-2022

		<p>Arts. The Council provides grants for operation, collaboration, education, and development.</p> <p>These grant and fellowship opportunities are listed in section 4.2 which goes into detail on the types of funding available.</p> <p>However, neither the individual municipalities of Anchorage and Juneau nor the state government provide business incentives directly for the music sector.</p>	<p>changes to prevent venues from having to make major structural adjustments, and protect from complaints that could lead to closure. Grants can be used to source professional acoustic advice, install double-glazing, purchase sound-absorbing furnishings, and install technology that ensures high-quality sound at lower volumes.<sup>51</sup></p> <p>With Alaska’s latest changes to liquor license legislation allowing for breweries to host musical events, providing structural funding could go a long way towards making these spaces music-friendly.<sup>52</sup></p>
Liquor Licensing	YES	<p>Liquor licenses are managed and processed by the state Alcohol and Marijuana Control Office.<sup>53</sup></p> <p>The type of liquor license determines whether or not a musical broadcast or performance is legal in a venue. Currently, it is illegal for taprooms to hold</p>	<p>Milwaukee, WI introduced less restrictive city codes which allow venues to present all-ages shows while still serving alcohol to guests 21+.</p>

<sup>51</sup> Creative Victoria (2019) “Music Works - Good Music Neighbours”. Online at <https://livemusicoffice.com.au/creative-victoria-good-music-neighbours-grants/> accessed 07-02-2022

<sup>52</sup> Sean Maguire (2022) “‘Delicate compromise’: Big changes could come to Alaska bars, breweries as part of broader alcohol law rewrite.” Online at <https://www.alaskanewssource.com/2022/02/15/delicate-compromise-big-changes-could-be-coming-alaska-bars-breweries-part-broader-alcohol-law-rewrite/> accessed 11-02-2022

<sup>53</sup> State of Alaska (n.d.) “Alcohol and Marijuana Control Office.” Online at <https://www.commerce.alaska.gov/web/amco/AlcoholLicenseApplication.aspx> accessed 06-09-2022

		live music events, though recent legislation will change this. <sup>54</sup>	Under the terms of these new codes, which were formally approved in 2019, venues are only required to have a ‘designated performance space’ and cannot sell liquor in the two hours immediately preceding and following the performance. <sup>55</sup>
Event Permitting	YES	<p>Under Sec. 4.11.240 of the Alaska State Statutes, a special events permit authorizes non-profit fraternal, civic, or patriotic organizations that have been in operation for at least two years to hold an event for a specific occasion. The license also allows the holder to sell or dispense beer or wine for the specific occasion, for a limited period of time. No more than 5 permits may be granted to a given organization in a calendar year.<sup>56</sup></p> <p>Organizations that already hold a liquor license can hold special events through a caterer’s</p>	Seattle’s Special Events Office has its own website with extensive guidelines on applying and what to expect when requesting a Special Event Permit. The main website for the Special Events Office includes clear application instructions in its online forms, Public Safety requirements, a calendar of approved events and a Special Event Handbook to refer to. Forms attached include the actual permit application (including templates and instructions), a permit fee estimator (administrative

<sup>54</sup> James Brooks (2022) “Alaska House approves major update to alcohol laws, including changes for breweries.” Online at <https://www.alaskapublic.org/2022/05/16/alaska-house-approves-major-update-to-alcohol-laws-including-changes-for-breweries/> accessed 06-09-2022

<sup>55</sup> Piet Levy (2019) “It has the potential to transform culture’: All-ages concerts would get a boost with change to law.” Online at <https://www.jsonline.com/story/entertainment/music/2019/10/09/law-limiting-all-ages-shows-milwaukee-change/3854802002/> accessed 12-04-2022

<sup>56</sup> State of Alaska (n.d.) “Sec. 04.11.240 Special Events Permit.” Online at <https://www.akleg.gov/basis/statutes.asp#04.11.240> accessed 06-09-2022

		<p>permit. In accordance with Sec. 4.11.230 of the Alaska State Statutes, a caterer's permit authorizes the holder of a liquor license to hold a special event, such as a convention, picnic, social gathering, sporting event, or similar event held off the holder's licensed premises. The permit may only be issued for designated premises for a specific occasion and for a limited period of time<sup>57</sup>. The license also allows the holder to serve alcoholic beverages on event premises.<sup>58</sup></p> <p>Both Anchorage and Juneau have special event permit processes and policies. Anchorage's permit application asks about the presence of amplified sound and advises applicants to request the proper noise permits from the Health</p>	<p>fees start at \$275 per permit), and an online handbook.<sup>61</sup></p>
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<sup>57</sup> State of Alaska (n.d.) "Sec. 04.11.230 Special Events Permit." Online at <https://www.akleg.gov/basis/statutes.asp#04.11.230> accessed 12-22-2022

<sup>58</sup> State of Alaska (n.d.) "Sec. 04.11.230 Caterer's Permit." Online at <https://www.akleg.gov/basis/statutes.asp#04.11.230> accessed 06-09-2022

<sup>61</sup> Seattle Special Events Office (2019a) Forms and Applications. Online at <https://www.seattle.gov/special-events-office> accessed 07-02-2022

		Department where applicable. <sup>59</sup> The Juneau application provides no such guidance. <sup>60</sup>	
Business Licensing and Concert Promotion	YES	<p>Business owners, including musicians and music professionals, are required to have a business license in the state of Alaska. Business licenses are processed by the Division of Corporations, Business and Professional Licensing.<sup>62</sup></p> <p>There are also regulatory processes for concert promoters. Concert promoters must have a certificate of registration issued by the Division of Corporations, Business and Professional Licensing.<sup>63</sup></p>	<p>The Southwark Council’s Statement of Licensing Policy<sup>65</sup> in the UK provides guidance for license applicants, broken down by venue type and area type (major town center and strategic cultural area, district town center, local centers and small shopping parades, and residential).</p> <p>Their policy statement lists recommended opening times for establishments based on the area they are intended for. Guidance not only comes in written form, but also from members of the Licensing and Night-Time Economy teams,</p>

<sup>59</sup> Municipality of Anchorage (n.d.) “Special Event Application.” Online at <https://www.muni.org/Departments/parks/Documents/SpecialEventApplication.pdf> accessed 11-08-2022

<sup>60</sup> Juneau Police Department (n.d.) “Instructions for Applying for a Parade/Special Event Permit.” Online at <https://juneau.org/wp-content/uploads/2018/03/ParadePermit.pdf> accessed 11-08-2022

<sup>62</sup> State of Alaska (n.d.) “Business Licensing Forms and Fees.” Online at <https://www.commerce.alaska.gov/web/cbpl/BusinessLicensing/BusinessLicensingFormsFees.aspx> accessed 06-10-2022

<sup>63</sup> State of Alaska (n.d.) “Regulation of Concert Promoters.” Online at <https://www.commerce.alaska.gov/web/cbpl/ProfessionalLicensing/ConcertPromoters.aspx> accessed 06-10-2022

<sup>65</sup> Southwark Council (2019, March 27) “Licensing Act 2003: Southwark Statement of Licensing Policy 2021 - 2026” Online at <https://www.southwark.gov.uk/assets/attach/7473/Statement-of-Licensing-Policy-2021-2026-final.pdf> accessed 12-22-2022

		In Juneau, businesses must also register with the finance department and sales tax office. <sup>64</sup>	who can advise on and support applications. Processes limit license appeals and establish good relationships between Southwark Council and their licensees from the initial stages of an application.
Noise and Curfews	YES	Anchorage has established noise controls. The Anchorage Noise Control Ordinance clearly outlines allowable times for sound, decibel limits, types of sound, and standards for sound measurement, amongst others. <sup>66</sup> Anchorage has a curfew for minors. The time of the curfew varies by season and day of the week, with it coming into effect at 11:00pm Sunday-Thursday and 1:00am Saturday and Sunday morning. In June	The Environment Protection Authority of South Australia prepared “Guideline: Music noise from indoor venues and the South Australian Planning System”. In order to avoid excessive noise from music premises, the EPA encourages new and existing music venues to have a certification by an acoustic engineer. Another criterion is that noise from music venues “should not exceed 43 decibels in any one-third octave band between

<sup>64</sup> City and Borough of Juneau (n.d.) “Business Registration Form.” Online at <https://juneau.org/wp-content/uploads/2021/03/Business-Registration-Fillable.pdf> accessed 11-08-2022

<sup>66</sup> Municipality of Anchorage. (n.d.) *Chapter 15.70 Noise Control*. Online at <https://www.muni.org/Departments/health/Admin/environment/FSS/Food%20Safety%20and%20Sanitation%20Forms/FSS%20Noise%20Ordinance%2015-70.pdf> accessed 01-20-2023

		<p>through August, the curfew begins at 1:00 am, regardless of the day of the week.<sup>67</sup></p> <p>Juneau governs noise under its city code, as an offense against public order. Unreasonable noise is outlined as a violation of S. 42.20.095, “Disturbing the Peace”. Though a number of factors are outlined for consideration in determining whether noise should be deemed excessive, including volume, intensity, type, proximity, zoning, time of day, and duration, there are no specific guidelines within each criteria that can be used as a framework for determining excessive noise.<sup>68</sup> The code outlines specific criteria for construction and vehicular noise. In addition, Juneau has a school night curfew of 10:30pm for minors under the age of 16.<sup>69</sup></p>	<p>and including 31.5 Hz and 125 Hz when assessed inside a noise-sensitive development”.<sup>70</sup></p>
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<sup>67</sup> Municipality of Anchorage. (n.d.) Anchorage Code of Ordinances. § 14.70.060. *Minors: Curfew*. Online at [http://anchorage-ak.elaws.us/code/coor\\_title14\\_ch14.70\\_sec14.70.060](http://anchorage-ak.elaws.us/code/coor_title14_ch14.70_sec14.70.060) accessed 01-20-2023

<sup>68</sup> City/Borough of Juneau. (n.d.) 42.20.095 *Definition of Disturbing the Peace*. Online at [https://library.municode.com/ak/juneau/codes/code\\_of\\_ordinances?nodeId=PTIICOOR\\_TIT42PECO\\_CH42.20OFAGPUOR\\_42.20.095DIPE](https://library.municode.com/ak/juneau/codes/code_of_ordinances?nodeId=PTIICOOR_TIT42PECO_CH42.20OFAGPUOR_42.20.095DIPE) 01-29-2023

<sup>69</sup> City/Borough of Juneau. (n.d.) 42.20.180 - *Curfew established*. Online at [https://library.municode.com/ak/juneau/codes/code\\_of\\_ordinances?nodeId=PTIICOOR\\_TIT42PECO\\_CH42.20OFAGPUOR\\_42.20.180CUES](https://library.municode.com/ak/juneau/codes/code_of_ordinances?nodeId=PTIICOOR_TIT42PECO_CH42.20OFAGPUOR_42.20.180CUES) 01-30-2023

<sup>70</sup> Music SA (2016) “Regulatory Framework for Live Music Venues in South Australia”. Online at [http://www.music.sa.gov.au/wp-content/uploads/2016/02/Best-Practice-Guide-Regulatory-Framework\\_2016.pdf](http://www.music.sa.gov.au/wp-content/uploads/2016/02/Best-Practice-Guide-Regulatory-Framework_2016.pdf) accessed 01-28-2022

Environmental Sustainability	YES	<p>The Alaska Department of Environmental Conservation is responsible for “conserving, improving, and protecting Alaska’s natural resources and environment to enhance the health, safety and economic and social well-being of Alaskans”.<sup>41</sup></p> <p>There is also an assistance program in place which provides technical support to small businesses.</p> <p>There is no specific guidance for music, arts, or culture.</p>	<p>Visit Belfast (the tourism lead for the city of Belfast) has partnered with Belfast City Council to commit to the development of a sustainable tourism plan and new sustainability policy. The City Council is also working to ensure organizations they fund and council-run festivals are delivered with the least amount of environmental impact possible. Organizers are expected to minimize an event’s energy, transport, purchasing, and waste related impact. The city’s events and festival sector is also encouraged to engage environmental sustainability specialists when possible.<sup>71</sup></p>
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<sup>71</sup> Belfast City Council (2021) “Belfast Event/Sustainability Policy”. Online at <https://minutes3.belfastcity.gov.uk/documents/s82828/Appendix%204%20-%20Belfast%20Event%20Sustainability%20policy.pdf> accessed 01-28-2022



Busking	YES	<p>Anchorage has laws<sup>72</sup> to allow busking and differentiate busking from prohibited panhandling. Anchorage also has regulations to specify where and when busking is allowed to take place in the downtown corridor.</p> <p>Through its Offenses Against Public Order,<sup>73</sup> Juneau outlines busking rules limiting where busking activity is allowed and what activities constitute busking.</p> <p>Neither city has a strong outreach program regarding how to navigate busking regulations.</p>	<p>The Asheville Busking Guide was created by the Asheville Buskers Collective to provide buskers and prospective buskers with the do's and don'ts of the practice. The guide includes specific definitions for noise disturbances and relevant city rules and laws.<sup>74</sup></p>
Audience Development	YES	<p>The Anchorage Folk Festival in Anchorage and Alaska Folk Festival in Juneau are examples of free public music events with educational outreach and active audience development. Each</p>	<p>Night Out is an Arts Council of Wales (ACW) scheme that helps local organizations to bring professional performances into community buildings at subsidized prices. This scheme helps</p>

<sup>72</sup> Municipality of Anchorage. (n.d.). Anchorage, Alaska - Code of Ordinances. Title 24 - Streets and Rights-of-way. Chapter 24.75 - Sidewalk Vendors. Online at [https://library.municode.com/ak/anchorage/codes/code\\_of\\_ordinances?nodet=TIT24STRI-W\\_CH24.75SIVE](https://library.municode.com/ak/anchorage/codes/code_of_ordinances?nodet=TIT24STRI-W_CH24.75SIVE) accessed 09-18-2023

<sup>73</sup> City/Borough of Juneau. (n.d.). Juneau, Alaska - Code of Ordinances. Title 42 - Penal Code. Chapter 42.20 - Offenses Against Public Order. 42.20.200 - Panhandling restricted. Online at [https://library.municode.com/ak/juneau/codes/code\\_of\\_ordinances?nodet=PTIICOOR\\_TIT42PECO\\_CH42.20OFAGPUOR\\_42.20.200PARE](https://library.municode.com/ak/juneau/codes/code_of_ordinances?nodet=PTIICOOR_TIT42PECO_CH42.20OFAGPUOR_42.20.200PARE) accessed 09-18-2023

<sup>74</sup> Asheville Buskers Collective (2019) "The Asheville Buskers Guide". Online at <http://avlbuskers.com/wp-content/uploads/2017/02/ashevillebuskingguide2017.pdf> accessed 05-10-2021

		has audience development programs which range from measures like discounted ticket rates to educational events that teach audiences about the importance and value of the arts.	hundreds of community groups across Wales bring the arts to the heart of their communities by selecting and hosting professional performing arts events in non-traditional smaller scale venues (mostly village halls and community centers). <sup>75</sup>
Music Office	NO	Neither Anchorage nor Juneau have a music office.	Reykjavik Music City is a project created by the city to facilitate the cross-pollination of knowledge between stakeholders within the music industry. The project was established in 2018 and mapped the city's infrastructure prior to implementing a number of initiatives that use music to grow the community. <sup>76</sup>
Zoning	YES	Aaw'k Village District is being reinvented as the Arts and Culture District in Juneau, Alaska.  The City is working closely with tribal entities and local stakeholders to develop an implementable	Austin has six official entertainment districts, each distinct in its aesthetic and offering. Downtown Austin is the main commercial area, and concentrates a higher proportion of entertainment and dining options when compared with the rest of Austin's districts. East Austin is the fastest

<sup>75</sup> Arts Council of Wales (2018) "The Night Out Scheme". Online at <http://www.nightout.org.uk/performers-info/about-night-out.aspx> accessed 12-01-2022

<sup>76</sup> Tonlistarborgin Reykjavik Music City (n.d.) Website. Online at <https://tonlistarborgin.is/en/about/> accessed 20-06-2022

		<p>district plan which includes a series of restoration projects and community outreach programs.<sup>77</sup></p> <p>In Anchorage, most cultural entertainment and recreational uses are only permitted in the Business, Industrial and Other districts.</p> <p>For example, nightclubs are only permitted in a General Business District and a Light Industrial District and a major entertainment facility is only allowed for conditional use in a General Business District, Light and Heavy Industrial Districts, and a Public Lands and Institutions District.</p>	<p>growing neighborhood, famous for its eclectic and alternative offering of entertainment, food options and bars.<sup>78</sup></p> <p>These districts have higher noise limits and extended curfews.<sup>79</sup></p>
Agent of Change	NO	<p>The Agent of Change principle is not in place.</p> <p>The Agent of Change principle places the responsibility for mitigating the impact of noise-generating activity on the person or business responsible for the change. For example,</p>	<p>Chapter 116 of the San Francisco Administrative Code was approved in December 2015 and requires venues to maintain the sound levels they operate at within the limit of their entertainment permit in order to remain under legal protection.</p>

<sup>77</sup> Aak’w Village District (n.d.) “Welcome to the Aak’w Village Arts and Cultural District”. Online at <https://www.aakwillagedistrict.com/> accessed 16-06-2022

<sup>78</sup> Visit Austin (2019) “Austin’s Entertainment Districts.” Online at <https://www.austintexas.org/meeting-professionals/get-to-know-austins-entertainment-districts/> accessed 07-02-2022

<sup>79</sup> Chad Swiatecki (2021) “Downtown Commission Objects to Proposed State Rollback of City Ordinance.” Online at <https://www.austinmonitor.com/stories/2021/04/downtown-commission-objects-to-proposed-state-rollback-of-city-sound-ordinance/> accessed 11-14-2022

		if a new condominium development were constructed next to an existing music venue, the condominium developer would be responsible for mitigating the impact of noise on the condominium’s residents.	As long as the sound limits in the venue’s entertainment permit are respected, it is the responsibility of the property developer to inform any new residents of the existing sound in the area. San Francisco also protects music venues from hotel and motel sound complaints within 300 feet of the venue. <sup>80</sup>
Parking Regulations	NO	There are no publicly available parking regulations specifically designed for musical purposes, such as designated loading/unloading zones.	<p>In Nashville, a deal was brokered between Premier Parking and the local musicians’ union, in which special \$5 nightly parking rates are offered for musicians.</p> <p>Additionally, the Renaissance Hotel in the city center has started offering \$9 valet parking services for musicians.</p> <p>Parking vouchers for the hotel are distributed in local music venues, intended to be provided to musicians so they can access lower prices.<sup>81</sup></p>

<sup>80</sup> City of San Francisco (2015) “CHAPTER 116: COMPATIBILITY AND PROTECTION FOR RESIDENTIAL USES AND PLACES OF ENTERTAINMENT.” Online at <https://sfgov.org/entertainment/sites/default/files/FileCenter/Documents/2790-Chapter116.pdf> accessed 11-14-2022

<sup>81</sup> Premier Parking (2017) “New Parking Offers for Downtown Nashville Musicians.” Online at <https://www.premierparking.com/why-premier/new-parking-offers-downtown-nashville-musicians/> accessed 08-02-2022

Transport	YES	<p>People Mover is the bus service in Anchorage. A day pass for an adult is \$5, with 50% discounts for seniors, youth, veterans and Medicaid card holders. Anchorage’s 15 bus routes run from around 6 a.m. - 12 a.m. Monday - Friday. However, there is a limited schedule on Saturdays and Sundays from around 8 a.m. - 8 p.m. Rideshare services are available in densely populated areas.</p> <p>The Municipality of Juneau’s public transportation system is called “Capital Transit.” One-way fare is \$2 for adults 19+, \$1 for youth 18 and under, and free for children 5 and under and senior citizens with local senior sales tax exemption cards. There is a “ride free zone” comprising four stops, which is free for both locals and visitors. While Capital Transit has nine routes, only seven are currently operating<sup>82</sup>. Juneau offers limited weekend transit service, with only three routes, the 1, 3 and 4, operating on weekends. Connector and express bus routes operate only on weekdays. Weekend</p>	<p>Toronto’s Blue Night Network is the most extensive night-time transportation service in North America, consisting of bus and streetcar routes that operate after regular transit service ends between 1 a.m. - 2 a.m. Routes run a minimum of every 30 minutes until morning service resumes, and are spaced with the goal of ensuring 99% of the city is within a 15-minute walk of a stop.<sup>84</sup></p>
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<sup>82</sup> Capital Transit (2022). “Public Transportation for Juneau, Alaska”. Online at <https://juneaucapitaltransit.org/> accessed 12-20-2022

<sup>84</sup> Novakovic, Stefan (2017) “TTC Set to Expand Blue Night Network in September”. Online at <https://urbantoronto.ca/news/2015/08/ttc-set-expand-blue-night-network-september> accessed 07-02-2022

		<p>bus service ends at approximately 11 p.m. on Saturdays and 6 p.m. on Sundays.</p> <p>There are no programs specifically tied to musicians' mobility throughout Anchorage and Juneau. Neither city has specific transport options linked to their live music offering.</p> <p>With respect to air transit, Alaska Airlines offers two free checked bags to all Alaska residents when entering or leaving the state. However, it is not specific to musicians and it is a private initiative, not a policy.</p> <p>When considering musical performances in airports, Juneau has a longstanding, "Music on the Fly" program that provides artists with paid performances at the airport, run through the Juneau Arts &amp; Humanities Council.<sup>83</sup></p>	
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<sup>83</sup> Juneau International Airport. (n.d.). "Airport - Public Art & Music". Online at <https://juneau.org/airport/public-art-and-music> accessed 09-19-2023

### 3.3 Asset Mapping

Asset mapping was undertaken to identify music ecosystem assets for the Municipality of Anchorage and the City and Borough of Juneau. The mapping was produced using data sourced by MusicAlaska/AKIMI and georeferenced with Sound Diplomacy's proprietary mapping tool.

Assets were organized into five categories, in accordance with the link they represent in the music ecosystem value chain: Creation, Production, Distribution, Exhibition and Transversal.<sup>85</sup>

The interactive map contains three types of analysis:

- **Cluster Heat Map:** A visual aid that illustrates clusters or groups of assets.
- **Travel time (15 min car ride):** A depiction of assets by travel time. When selecting an asset, the map will display all surrounding assets located within a 15 minute car ride from the asset selected.
- **Distance (5 mile):** A depiction of all assets within a 5-mile radius of the asset selected.

The map allows users to view assets as a heat map, and to click on individual assets to see more information about each one. The interactive map can be filtered by value chain link and type of agent, by clicking on the “type of agent” in the menu on the right.<sup>86</sup>

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<sup>85</sup> For definitions and an in depth breakdown of assets included in each Value Chain Link, please see Table 1 in the Methodology section of this report.

<sup>86</sup> If you are facing any issues when opening the map in Carto, please try to eliminate all the cookies from your browsers. Alternatively, try copying the link and opening it in a different tab or browser.

### 3.3.1 Overview of Music Ecosystem Assets

#### 3.3.1.1 Municipality of Anchorage

##### Value Chain Link and Associated Agents

A total of 232 music assets were identified in Anchorage. Details on the distribution of assets across the 5 value chain categories are outlined below:

- Exhibition: 100 total; Types of Exhibition Agents: 35 Bars, Cafes and Restaurants with Music, 23 Multi-Purpose Venues, 14 Occasional Venues, 10 Festivals, 8 Art Venue switch Music, 10 Other
- Transversal: 86 Total; Types of Transversal Agents: 41 Private Music Tutors, 16 Academies/Schools with Music Programs, 15 Musical Instrument and Equipment Stores, 5 Other Commercial and Administrative Support Organizations for the Music Sector, 4 Music Associations and Non-Profits, 5 Other
- Creation: 20 Total; Types of Creation Agents: 13 Bands, Orchestras and Choirs, 7 Independent Musicians, Artists and Composers
- Distribution: 13 Total; Types of Distribution Agents: 7 Radio Stations, 3 Record Stores, 3 Radio Networks
- Production: 13 Total: Type of Production Agents: 10 Recording Studios and Rehearsal Rooms, 3 Record Labels

#### 3.3.1.1 City and Borough of Juneau

##### Value Chain Link and Associated Agents

A total of 72 music assets were identified in Juneau. Details on the distribution of assets across the 5 value chain categories are outlined below:

- Exhibition: 46 total; Types of Exhibition Agents: 19 Bars, Cafes and Restaurants with Music, 12 Multi-Purpose Venues, 7 Occasional Venues, 3 Festivals, 2 Live Events Producers, 3 Other



- Transversal: 10 Total; Types of Transversal Agents: 4 Academies/Schools with Music Programs, 3 Musical Instrument and Equipment Stores, 2 Private Music Tutors, 1 Music Association and Non-Profit
- Distribution: 7 Total; Types of Distribution Agents: 4 Radio Stations, 3 Record Stores
- Creation: 6 Total; Types of Creation Agents: 4 Bands, Orchestras and Choirs, 2 Independent Musicians, Artists and Composers
- Production: 3 Total: Type of Production Agents: 2 Recording Studios and Rehearsal Rooms, 1 Record Label

## 4. Economic Impact Assessment

### 4.1 Overview

The economic impact analysis is based on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic impact of the music ecosystem in both Anchorage and Juneau, Alaska, using three different measures: direct, indirect, and induced impact.

The results in this report correspond with data from 2019, with additional insights for 2020. The analysis is limited to this period due to the three-year reporting delay that most official data sources are subject to. As such, at the time research was conducted, the most up-to-date data available from the County Business Patterns and RIMS II multipliers was for the 2020 fiscal year. Furthermore, 2019 was used as the base year of analysis because 2020 was an atypical year for the music industry, due to the restrictions implemented as a result of the COVID-19 pandemic.

More detailed information on the three types of economic impact assessed is provided in Table 6.

Table 6. Economic Impact Dimensions

ECONOMIC IMPACT	DEFINITION
<b>Direct Economic Impact</b>	The direct impact is the economic value and employment directly generated by the economic activities of the links of the music ecosystem in Alaska and Juneau.
<b>Indirect Economic Impact</b>	The indirect impact is the economic value and employment generated by the suppliers of the music ecosystem as a result of demand created by the local music ecosystem. This encompasses local businesses that provide goods and services to the local music ecosystem, such as advertising, legal affairs, and food and beverage suppliers.

<b>Induced Economic Impact</b>	Induced impact is created when the workers of the direct and indirect music ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.
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The variables evaluated as part of the economic impact assessment include the music ecosystem’s output, employment and gross value added (GVA). More detailed information on each is provided in Table 7.

**Table 7. Variables Evaluated in the Economic Impact Assessment**

VARIABLE	DEFINITION
<b>Output<sup>87</sup></b>	The economic value produced by the sales of goods and services created by the music ecosystem. For example, concert ticket sales, recording studios services, etc.
<b>Employment<sup>88</sup></b>	The number of active jobs created by the production of music ecosystem goods and services.
<b>Gross value added (GVA)<sup>89</sup></b>	The output of the music ecosystem minus intermediate consumption. Intermediate consumption refers to the costs of all inputs – for example, food and beverage suppliers, legal services, transportation costs, equipment, etc.

### 4.1.1 Classifications

**The Classification of Economic Activities of the North American Industrial Code 2017 (NAICS)**, is used to define the various segments of the music economy. This code is used by federal statistical agencies to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy. These classifications are used to calculate the value of the

<sup>87</sup> Bureau of Economic Analysis. (2017). Glossary. Online at <https://www.bea.gov/help/glossary/value-added> accessed 23-01-2023

<sup>88</sup> Ibid.

<sup>89</sup> Ibid.

economic activity in Anchorage and Juneau that can be attributed to the music ecosystem. Please see the Appendix for additional information on the NAICS.

### 4.1.2 Geographical Scope

The geographic scope of the economic impact assessment carried out for this report includes the Municipality of Anchorage and the City and Borough of Juneau, Alaska.

### 4.1.3 Data Sources

Five main data sources have been used to conduct this economic impact analysis. More information on each is provided in Table 8.

Table 8. List of Data Sources

DATA SOURCE	DETAILS
<b>County Business Patterns: 2019, 2020</b>	This source allows for the calculation of the number of establishments and employees in the music ecosystem.
<b>Quarterly Census of Employment and Wages 2019, 2020</b>	This source provides a complementary source of data on the number of employees in the music ecosystem
<b>BEA Regional Economic Accounts GDP by State 2001 - 2020</b>	This source provides GDP data by industry at both the state and municipal level.
<b>Regional Input-Output Modeling System (RIMS II)<sup>90</sup></b>	RIMS II provides both Type I and Type II regional input-output multipliers to estimate the indirect and induced economic impact of economic activities classified by the NAICS.  Type I multipliers account for the direct and indirect impacts of the music ecosystem supply chain. Type II multipliers account for both indirect and induced impacts of the music ecosystem.

<sup>90</sup> More information on the NAICS can be found in the Appendix.

<b>Mapping dataset</b>	The mapping dataset identifies any missing assets in the music ecosystem.
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## 4.2 Economic Impact Assessment for the Municipality of Anchorage

### 4.2.1 Executive Summary

- In 2019, the music ecosystem in Anchorage generated a total output of \$221.3 million and contributed a total GVA of \$139.6 million to the local economy. The total employment generated and supported by the music ecosystem in Anchorage amounted to 1,496 jobs.
- For the same year (2019), the direct output created by Anchorage’s music ecosystem was \$148.4 million, with \$89.8 million in GVA.
- In 2019, the music ecosystem directly generated 911 jobs, contributing 0.62% to the overall local workforce. When examining the total employment over the same period, which includes direct, indirect, and induced employment, Anchorage’s music ecosystem generated and supported 1.01% of the local workforce, which is slightly lower than the national average of 1.66%.
- When examining the value chain links in the local ecosystem, the Exhibition Link generated the highest share of employment (38%), while the Distribution Link generated the highest percentage of output (30%).
- Music education in Anchorage strongly contributed to local employment, with an estimated 107 jobs falling within the music education sub-sector. This represents 10.8% of the total employment generated by Anchorage’s music ecosystem.
- In 2019, the multiplier effect of Anchorage’s music ecosystem is 1.491. This means that for every \$1,000 of output generated by the music ecosystem, an additional \$491 of output is generated in the local economy.
- Based on survey data, it is estimated that COVID-19 led to a \$42.8 million (-29%) decrease in output and the loss of 427 jobs (-47%) in Anchorage.
- Based on survey data that gathered responses from local artists and businesses, it is predicted that the music ecosystem will exhibit signs of recovery in 2022. In 2022, it is estimated that 1,029 individuals will work directly within the music sector, generating a direct output of \$184.4 million, which will surpass the figures observed in 2019.
- At \$374, the music output per capita in Anchorage falls well below the national average of \$541.

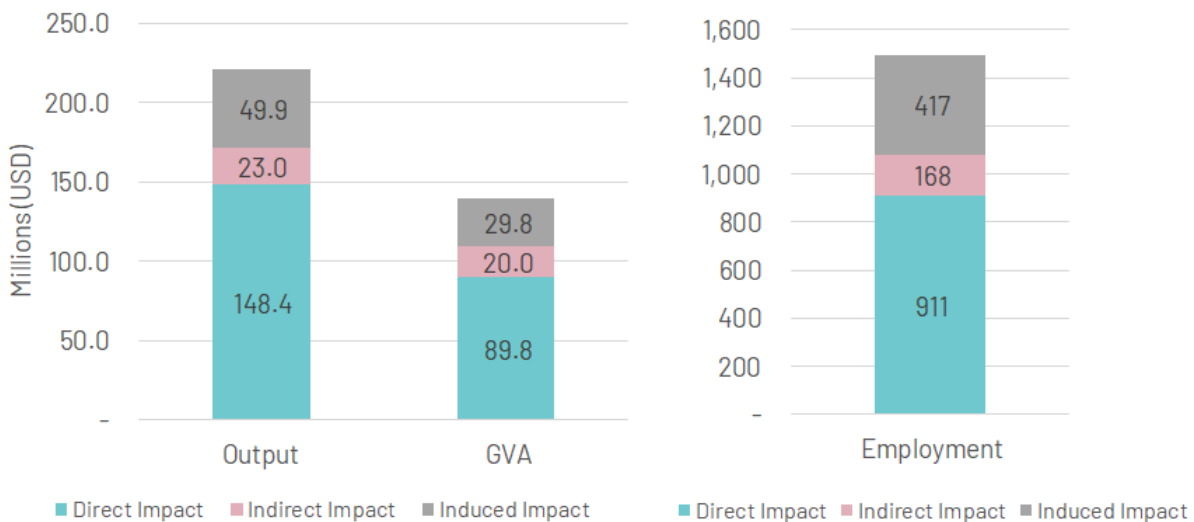
Table 9 summarizes the economic impact (direct, indirect, and induced) of the music ecosystem in Anchorage for the 2019 year, while Figure 5 provides a pictorial representation. In total, the music ecosystem generated and supported a total of 1,496 jobs (1.01% of overall local employment). The total output generated was \$221.3 million, with a total GVA of \$139.6 million.

Table 9. Economic Impact, Output, and Employment Generated by Anchorage’s Music Ecosystem (2019)

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT MILLION \$	GROSS VALUE ADDED MILLION \$
<b>Direct</b>	991	148.4	89.8
<b>Indirect</b>	168	23.0	20.0
<b>Induced</b>	417	49.9	29.8
<b>Total Impact</b>	1,496	221.3	139.6

Table 9. Direct, Indirect, Induced and Total Economic Impact

Figure 5. Economic Impact, Output, and Employment Generated by Anchorage's Music Ecosystem (2019)



Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

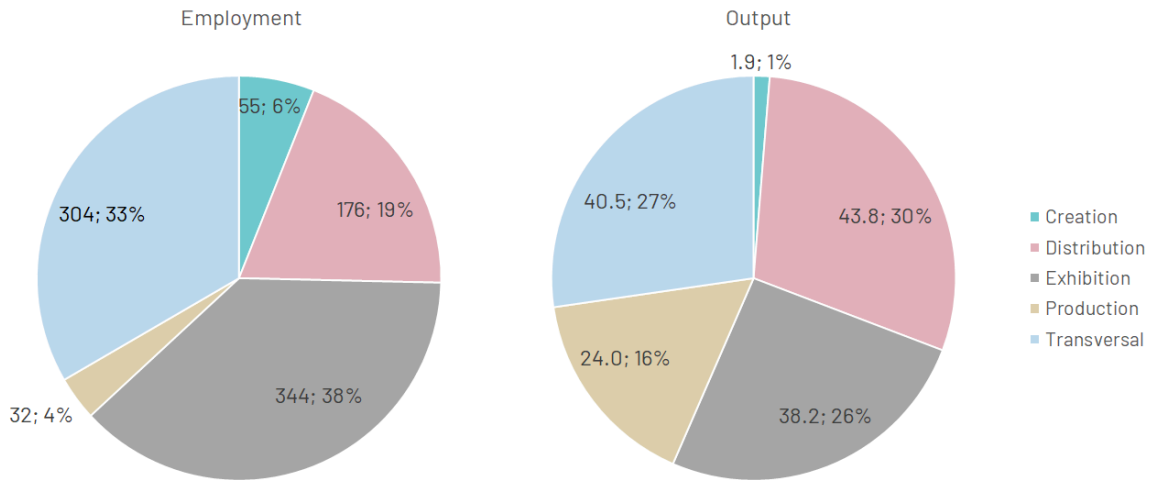
## 4.2.2 Direct Impact

The direct impact measures the economic value created directly by the activities of the music ecosystem. In 2019 Anchorage's music ecosystem produced a direct output of \$148.4 million, a GVA of \$89.8 million, and was responsible for the direct creation of 911 jobs.

When examining the links of the value chain that make up Anchorage's music ecosystem by employment, it is evident that most jobs fall within the Exhibition link with 344 (38%), followed by the Transversal link with 304 jobs (33%), and the Distribution link with 176 jobs (19%). In contrast, the Creation link generated only 55 jobs (6%), while 32 jobs (4%) fell within the Production link.

When analyzing output, the breakdown is more evenly distributed. The Distribution link makes the most significant contribution to overall output, with \$43.8 million (30%), followed by the Transversal link with \$40.5 million (27%), the Exhibition link with \$38.2 million (26%), and the Production link with \$24.0 million (16%). The smallest share in terms of output is generated by the Creation link with \$1.9 million (1%).

Figure 6. Output and Employment By Value Chain Link



Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

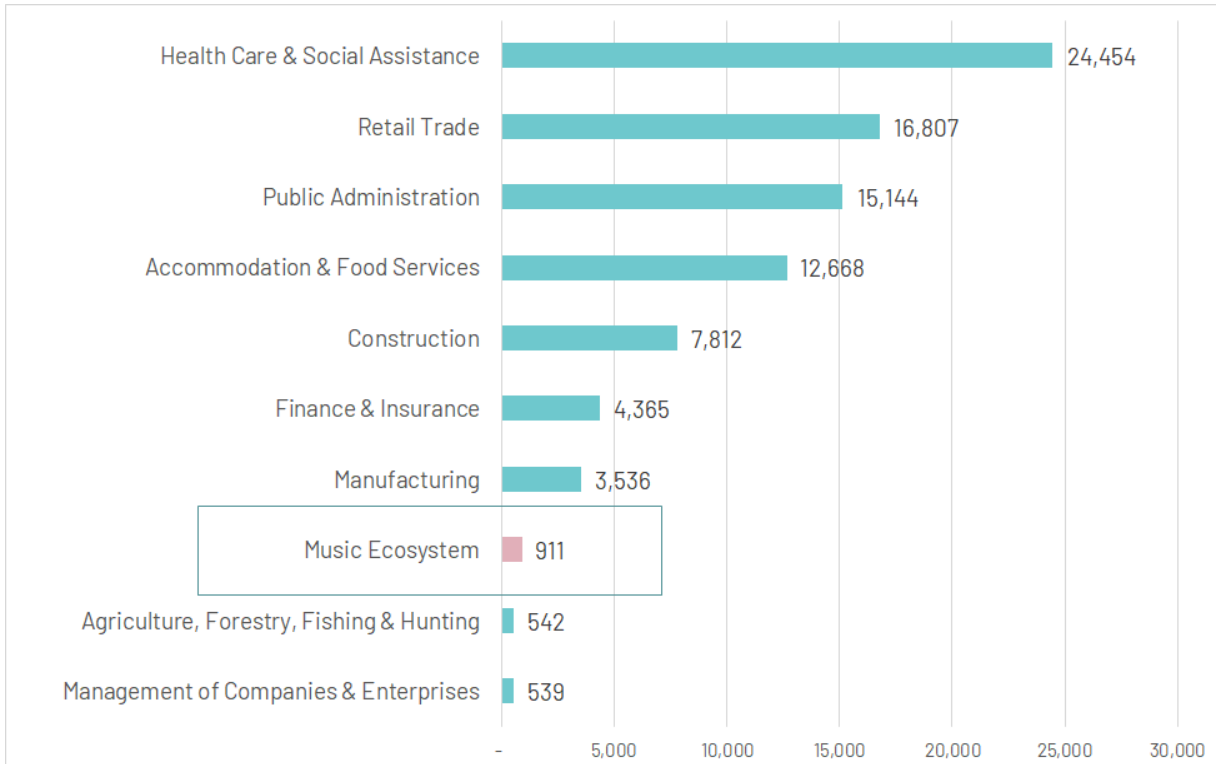
When analyzing the Distribution link, almost all output and employment generated within the link can be attributed to radio networks and radio stations, which created 160 jobs and generated \$42.4 million in output. Within the Transversal link, the most significant contributor to employment is music education, which created 107 jobs (40.7% of the total employment within the Transversal link). This is followed by professional and technical services, which generated 61 jobs (23.2%) and musical instrument and supply stores, with 54 jobs (20.5%).

The music ecosystem directly created 911 jobs, which represents 0.62% of the overall workforce in Anchorage. The music ecosystem contributed more to overall employment in the city than sectors such as “Agriculture, Forestry, Fishing & Hunting”, which represented 542 local jobs or “Management of Companies & Enterprises”, which accounted for 539 jobs. Despite this, the contribution of the music ecosystem to overall employment was low, especially compared to traditional industries, such as



“Construction”, which encompassed 7,812 jobs or “Accommodation & Food Services”, which included 12,668 jobs.

Figure 7. Direct Employment by Industries, Anchorage



Source: ACS, County Business Patterns 2019, Sound Diplomacy Research

### 4.2.3 Indirect Impact, Induced Impact and Multiplier Effect

The indirect economic impact is calculated by analyzing changes to output and employment driven by suppliers of the music sector. It represents the jobs, output, and GVA generated by local businesses that supply goods and services to Anchorage's music ecosystem. An estimation of indirect economic impact includes economic exchanges with sectors that do not belong to the music sector, but supply the goods and services needed for the music sector to operate, such as advertising, transportation, maintenance, legal services, and communication. The calculation of indirect impact is carried out using the Type I Multipliers available in the BEA, RIMS II model for 2019 and 2020.

In 2019, the indirect economic impact in Anchorage generated \$23.0 million in output and \$20.0 million in GVA. Over the same period, it is estimated that the music ecosystem indirectly supported 168 jobs.

It is estimated that \$1,000 of output generated by the music ecosystem indirectly supported \$154.99 of output across other sectors of Anchorage's economy. This low indirect effect in comparison to other local music ecosystems that Sound Diplomacy has studied is an indication that the local music ecosystem is reliant on imports. Rather than producing goods and services needed to support the music sector within Anchorage's local economy, they are imported from outside the city.

Induced economic impact refers to the value (output, employment, and GVA) created by music sector workers spending their earnings in the local economy, often called the household-spending effect. The induced impact is generated by the expenditures of workers whose wages are supported directly and indirectly by the music sector. This includes, for example, money spent on services, food, entertainment, and transportation, amongst other things.

The induced output generated by Anchorage's music ecosystem reached \$49.9 million in 2019, with a GVA of \$29.8 million. Overall, the induced impact of the music sector supported 417 jobs in 2019. Data showed that \$1,000 of induced output generated an induced effect of \$336.25 on the local economy.

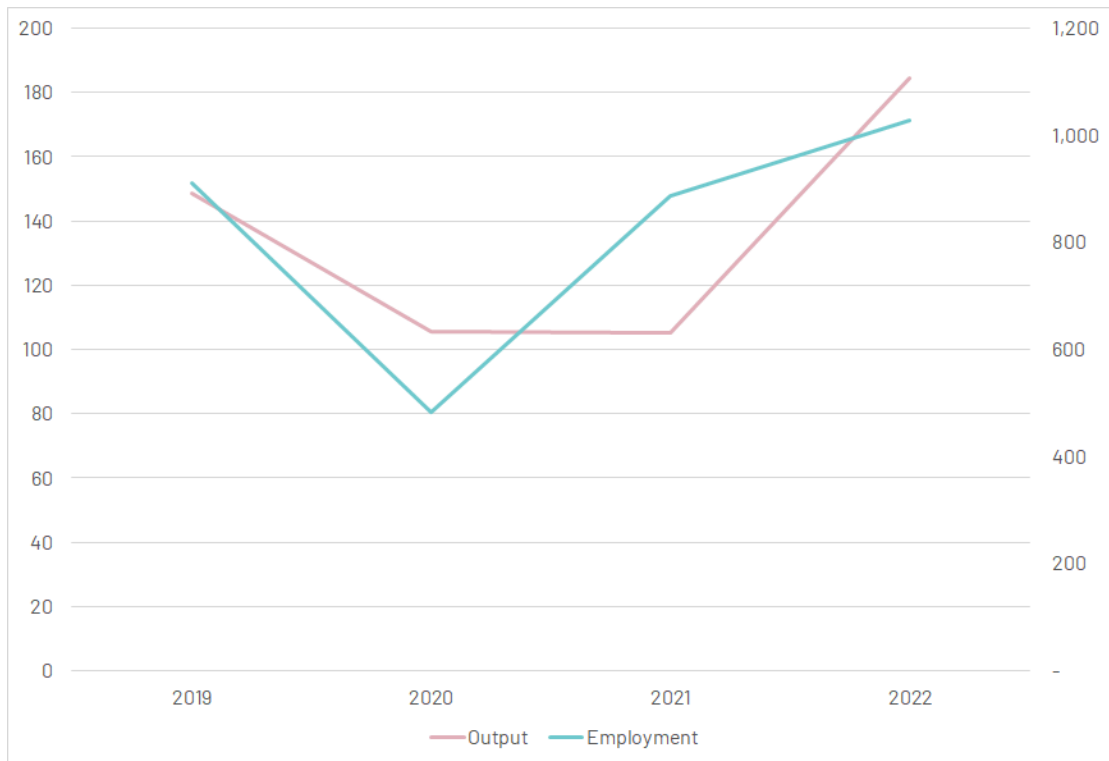
Overall, the total output multiplier effect of the music ecosystem in Anchorage equaled 1.491. This means that for every \$1,000 of output generated by the music ecosystem, an additional \$491 of output was generated in the local economy.

#### 4.2.4 COVID-19 Impact

From 2019 to 2022, the music industry in Anchorage, Alaska witnessed fluctuations in both output and employment. In 2019, the local music ecosystem generated \$148.4 million in output, with 911 individuals employed within the music ecosystem. However, the year 2020 led to a substantial decline in both output and employment, with output plummeting to \$105.6 million (-29%), and employment declining to 484 jobs (-47%). While 2021 saw a further decrease in output, dropping to \$105 million (-1%), employment greatly recovered, jumping to 887 jobs (83%). Output and employment figures are predicted to rise notably in 2022, with an output of \$184.4 million (76%) and employment reaching 1,029 (16%) jobs. These fluctuations reflect the unprecedented challenges posed by the pandemic, with the increase in output and employment an indicator of improving conditions for the music sector.

It is important to note that this data is based on survey responses from local artists and businesses, not an official source of data.

Figure 8. Direct Output (in million \$) and Direct Employment, Anchorage (2019-2022)



	2019	2020	2021	2022
<b>Direct Output (in million \$)</b>	148.4	105.6	105	184.4
<b>Direct Employment</b>	911	484	887	1,029

Source: Sound Diplomacy Research, MusicAlaska/AKIMI

## 4.3 Economic Impact Assessment for the City and Borough of Juneau

### 4.3.1 Executive Summary

- In 2019, the music ecosystem in Juneau generated a total economic impact of \$35.5 million in output, contributed a total of \$21.5 million GVA to the local economy, and generated and supported a total of 283 jobs.
- In 2019, music businesses in Juneau directly generated \$22.8 million in output and \$13.1 million in GVA.
- In 2019, Juneau's music ecosystem directly created 181 jobs, contributing 1.06% to the overall local workforce. When analyzing the total employment, which includes jobs created by the direct, indirect, and induced impact of the music ecosystem, the music ecosystem generated and supported 1.65% of Juneau's local workforce, a contribution that almost matched the national average of 1.66%.
- When analyzing the value links that make up the local music ecosystem, the Exhibition Link generated the highest share of local music sector employment (46%) and output (41%).
- In 2019, the multiplier effect of Juneau's music ecosystem was 1.557. This means that for every \$1,000 of output generated by the music ecosystem, there is an additional \$557 of output generated in the local economy.
- Based on survey data gathered from local artists and businesses, it is estimated that COVID-19 generated an estimated 13.2 million (-58%) decline in output and a loss of 88 jobs (-49%) in 2020.
- Survey data suggests that employment in the local music ecosystem will climb to 206 jobs in 2022, generating an output of \$27.4 million, which is higher than the 2019 level for both measures.
- The music value added per capita in Juneau was \$506, slightly below the national average of \$541.

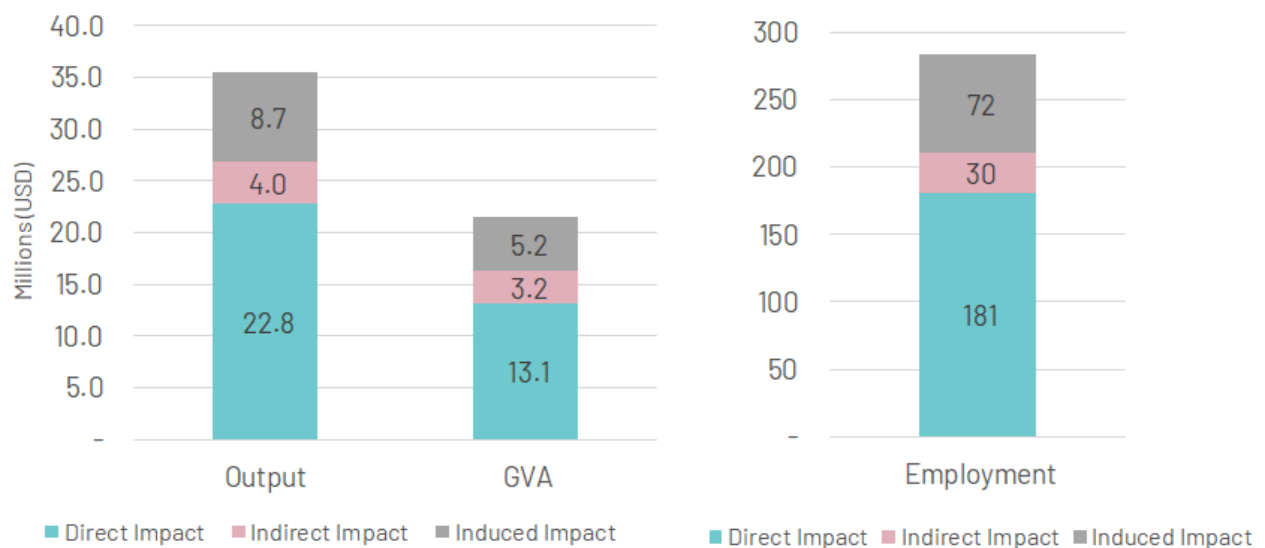
Figure 9 and Table 10 summarizes the economic impact (direct, indirect, and induced) of Juneau's music ecosystem in 2019. The music ecosystem generated and supported a total of 283 jobs (1.65% of the local employment), generating a total output of \$35.5 million and a total GVA of \$21.5 million.

Table 10. Economic Impact, Output, and Employment Generated by Juneau’s Music Ecosystem (2019)

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT MILLION \$	GROSS VALUE ADDED MILLION \$
<b>Direct</b>	181	22.8	13.1
<b>Indirect</b>	30	4.0	3.2
<b>Induced</b>	72	8.7	5.2
<b>Total Impact</b>	283	35.5	21.5

Table 10. Direct, Indirect, Induced and Total Economic Impact

Figure 9. Economic Impact, Output, and Employment Generated by Juneau’s Music Ecosystem (2019)



Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

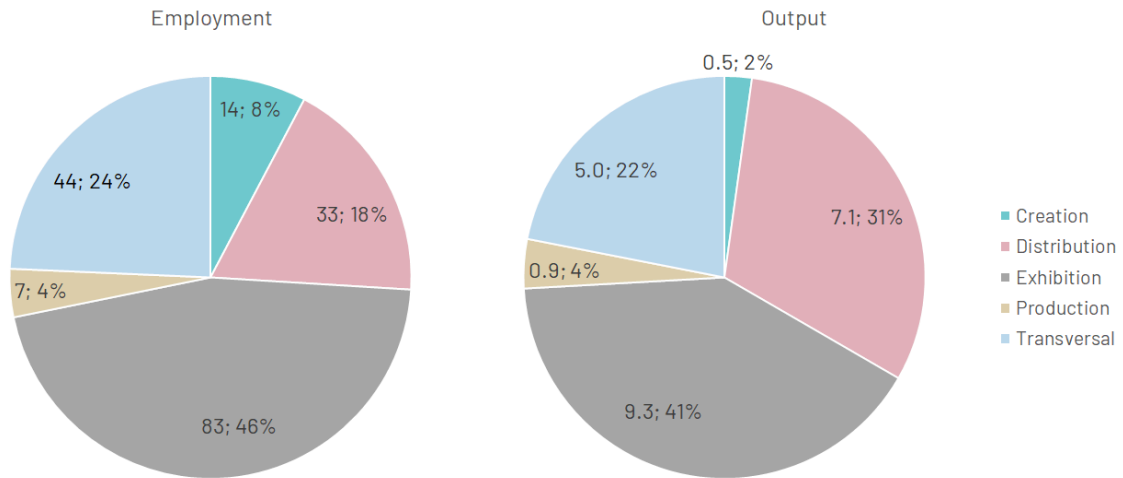
## 4.4.2 Direct Impact

In 2019, economic value created directly by the activities of Juneau's music ecosystem produced a direct output of \$22.8 million, a GVA of \$13.1 million and directly created 181 local jobs.

When analyzing employment in Juneau's music ecosystem by the links within it, it is clear that most direct employment is generated by the Exhibition link, with 83 jobs (46%), meaning musical exhibition accounted for the majority of job-related activity in the local ecosystem. This is followed by the Transversal link, with 44 jobs (24%), and the Distribution link, with 33 jobs (18%). The remaining jobs were divided between the Creation link with 14 jobs (8%) and the Production link with 7 jobs (4%). For more detail, please see Figure 10.

With respect to output, the portion generated by each link differed slightly from employment. With \$9.3 million (41%), the Exhibition link still generated the largest contribution to overall output. However, unlike for employment, the Exhibition link was followed by the Distribution link, with \$7.1 million (31%), then the Transversal link, with \$5.0 million (22%). The Production link is second to last, having generated \$0.9 million of output (4%). The Creation link made the lowest contribution to overall output, with \$0.5 million (2%).

Figure 10. Output and Employment By Value Chain Link



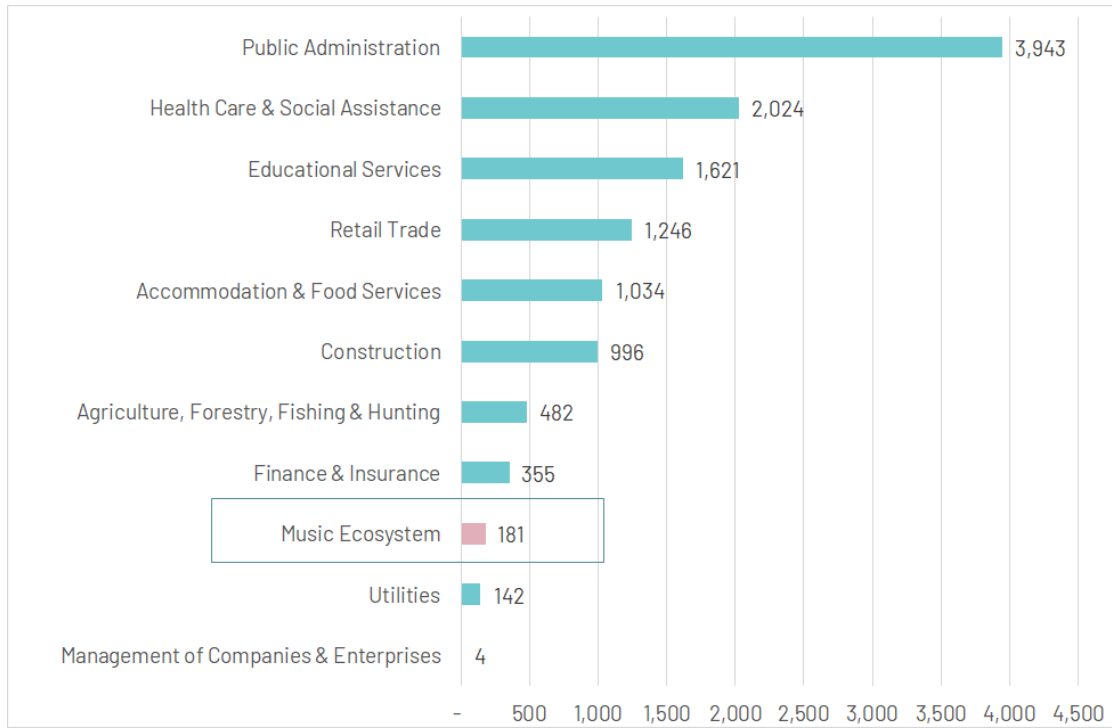
Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

When analyzing the Distribution link more closely, it is evident that radio stations were significant to the local music ecosystem. Almost all the output and employment generated can be attributed to radio stations, which created 24 jobs and produced \$6.3 million dollars of output. Within the Transversal link the greatest contributors to employment were music educators, with 21 jobs (47.7% of total employment within the link), followed by musical instrument and supply stores with 20 jobs (45.5%).

The local music ecosystem directly employed 181 people, representing 1.06% of overall employment in Juneau. Music ecosystem employment was higher than several other industries in Juneau, including “Utilities”, with 142 jobs or “Management of Companies & Enterprises”, with 4 jobs. However, the largest contributors to local employment in Juneau were more traditional industries, such as “Public Administration” with 3,943 jobs or “Health Care & Social Assistance” with 2,024 jobs. For more information, see Figure 11.



Figure 11. Direct Employment by Industries, Juneau



Source: ACS, County Business Patterns 2019, Sound Diplomacy Research

### 4.3.3 Indirect Impact, Induced Impact and Multiplier Effect

Indirect economic impact is calculated by analyzing changes to output and employment driven by suppliers of the music sector. It represents the jobs, output, and GVA generated by local businesses that supply goods and services to Anchorage's music ecosystem.<sup>91</sup> In 2019, the indirect economic impact reached an output of \$4.0 million and a GVA of \$3.2 million. At the same time, it is estimated that the Music Ecosystem indirectly supported 30 jobs in Juneau.

To give an idea of the size of the indirect effect of these industries on the local economy, it is estimated that \$1,000 of output generated from them is indirectly supporting \$175.43 of the output in other sectors of Juneau. Similar to Anchorage, this relatively low indirect effect indicates that a high proportion of the suppliers for Juneau's Music Ecosystem are not localized in Juneau, leading to a higher proportion of imports of the goods and services necessary to create the products and services generated by the music ecosystem.

The induced impact is generated by the expenditures of workers whose wages are supported directly and indirectly by the music sector and can include a broad range of spending, including music sector spending on food, services and entertainment.

The induced output generated by Juneau's music ecosystem reached \$8.7 million in 2019, with a GVA of \$5.2 million. Overall, the induced impact of the music sector supported 72 jobs in 2019. Data also showed that \$1,000 of induced output generated an induced effect of \$381.58 on the local economy.

Overall, the total output multiplier effect of the music ecosystem in Juneau equaled 1.557 in 2019. This means that for every \$1,000 of output generated by the music ecosystem, an additional \$557 of output is generated in the local economy.

### 4.3.4 COVID-19 Impact

Between 2019 and 2022, the music industry in Juneau experienced significant fluctuations in both output and employment. In 2019, the industry recorded an output of \$22.8 million, with 181 individuals employed within the music ecosystem. However, in 2020, there was a noticeable downturn, with output

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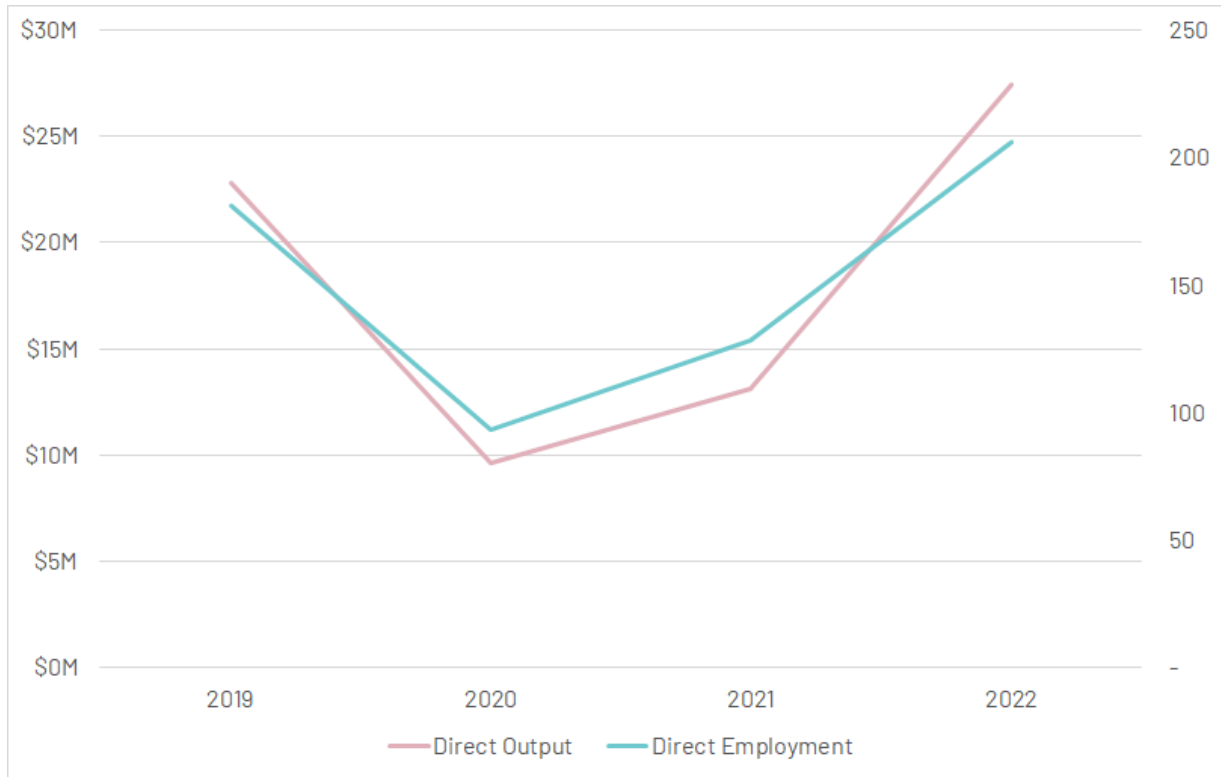
<sup>91</sup> The calculation of indirect impact is carried out using the Type I Multipliers available in the BEA, RIMS II model for 2019 and 2020.

declining to \$9.6 million (-58%), and employment shrinking to 93 individuals (-49%), due to challenges imposed on the sector by the COVID-19 pandemic.

In subsequent years, the industry exhibited signs of recovery. In 2021, output increased to \$13.1 million (36%), and employment rebounded to 128 individuals (38%). Notably, in 2022, a substantial resurgence is predicted, with output rising to \$27.4 million (109%), and employment figures jumping to 206 jobs (61%). These fluctuations highlight the resilience of the music industry in Juneau, indicating the ability of the sector to adapt to adverse conditions, rebounding in the years following the COVID-19 pandemic, as the economic landscape improved.

It is important to note that the data used to calculate these figures is based on survey responses from local artists and businesses, not national sources of data.

Figure 12. Direct Output (in million \$) and Direct Employment, Juneau (2019-2022)



	2019	2020	2021	2022
<b>Direct Output (in million \$)</b>	22.8	9.6	13.1	27.4
<b>Direct Employment</b>	181	93	128	206

Source: Sound Diplomacy Research, MusicAlaska/AKIMI

## 4.4 Anchorage and Juneau's Music Ecosystem in Comparison to Other Jurisdictions

### 4.4.1 Contribution to Local Employment

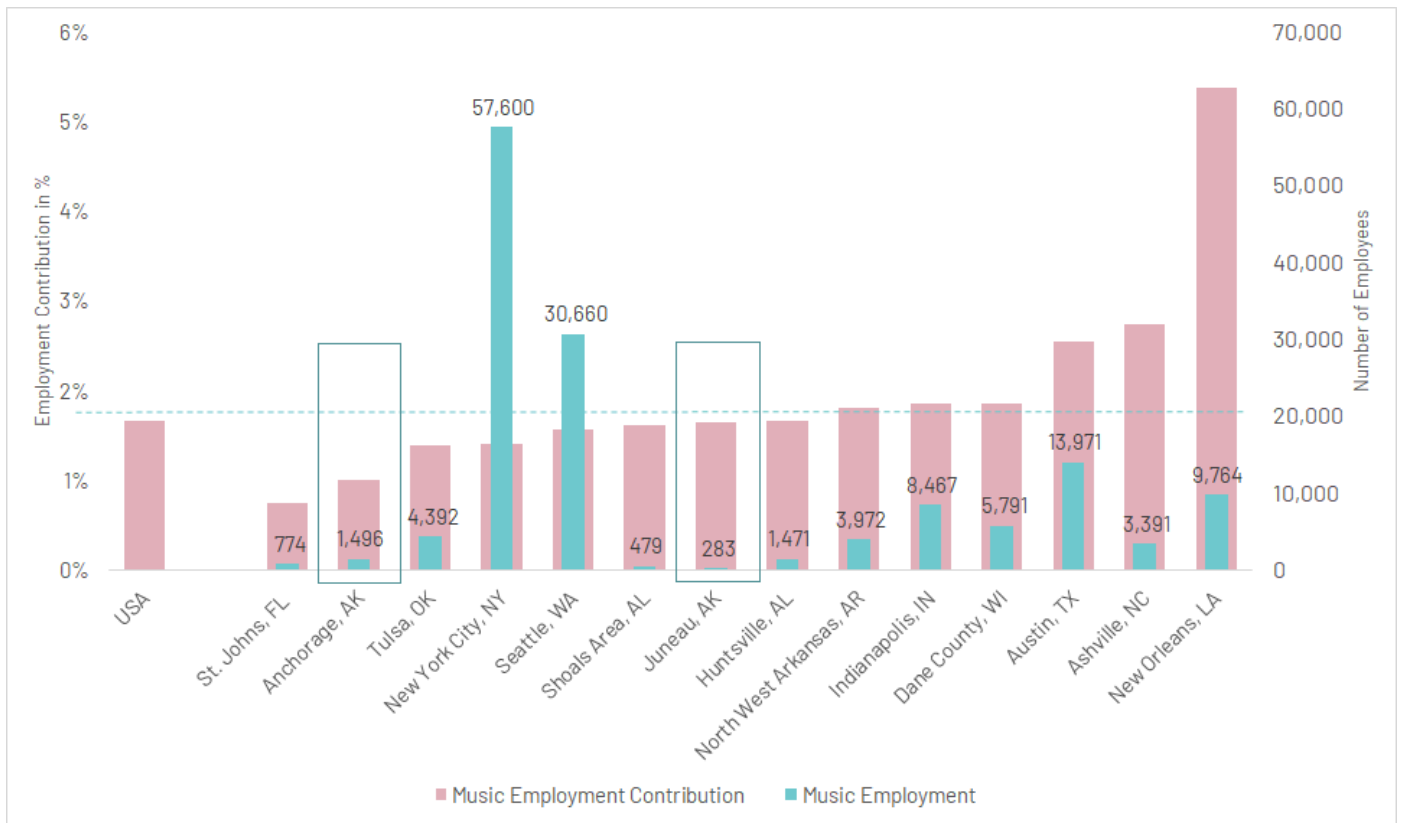
The contribution of music employment to the local economy is a measure of music employment as a percentage of overall employment. This variable is represented in Figure 13 and 14 for cities with music economic impact reports.<sup>92</sup>

For Anchorage, the music sector generated and supported 1.01% of the city's employment, less than the national average contribution of music to national employment, which is 1.66%. With respect to Juneau, the music sector generated and supported 1.65% of the city's employment in 2019, which is in line with the national average contribution of music to national employment of 1.66%. Consequently, both Anchorage and Juneau rank below cities with a historically strong music industry, such as Austin or New Orleans, where the music sector supported 2.55% and 5.37% of the local employment respectively.

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<sup>92</sup> The figures in the graph come from different sources with different methodologies and different years as reference. We use them to compare the dimension of the music sector in different locations. Sources: TXP, Inc. (2016); Asheville Area Chamber of Commerce (2016); The Boston Consulting Group, Inc. (2017); Musicians' Association of Seattle (2015); and Siwek, Stephen E. (2018), Recording Industry of America (RIAA) The US Music Industries, Jobs & benefits, 2020.

Figure 13. Music Ecosystem Total Employment for Selected American Cities, Anchorage and Juneau



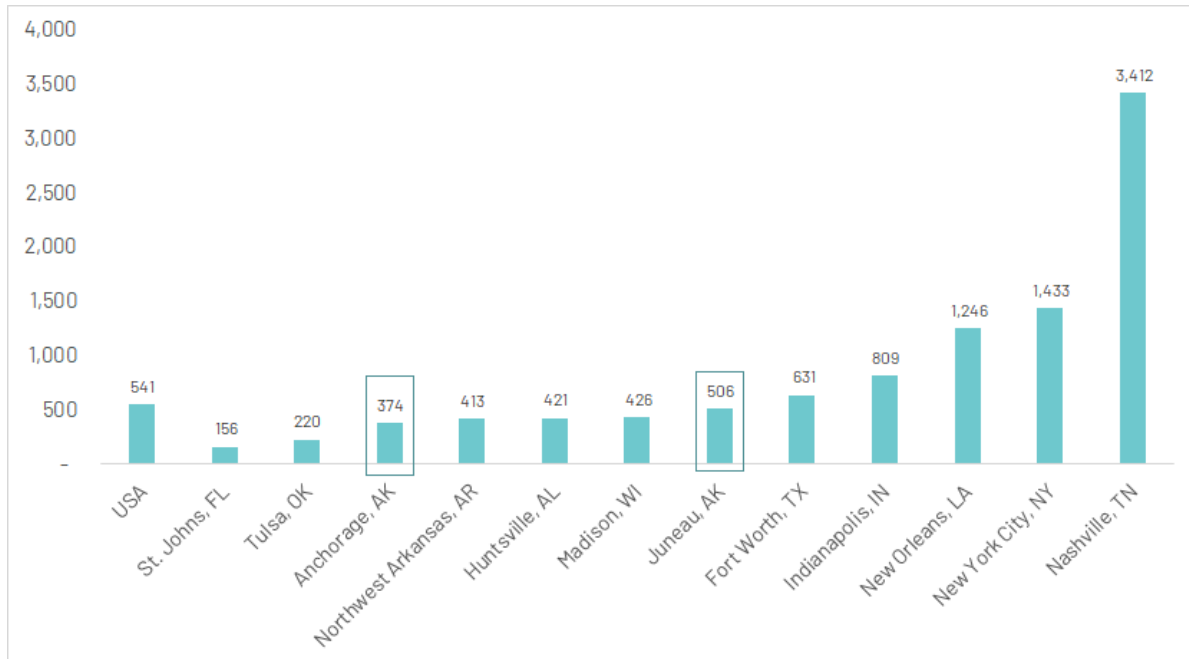
Developed by: Sound Diplomacy

#### 4.4.2 Music Value Added per Capita

The music value added per capita represents the economic resources generated by the music ecosystem in relation to its population size. It allows for comparison of the level of industrial development of local music ecosystems across jurisdictions. This measure is calculated by dividing the sum of direct and indirect GVA of the music sector in a given region by the total population of that region.

The music value added per capita was \$541 for the United States overall. In Anchorage, this figure was approximately \$374, significantly below the national average. In Juneau specifically, this figure was closer to the national average, at approximately \$506. Both cities are significantly lower than cities like New Orleans, New York, or Nashville, which have high flows of music tourism and thriving local music industries, the music value added per capita was \$1,246, \$1,433 or \$3,412 respectively (see Figure 14).<sup>93</sup>

Figure 14. Music Ecosystem Value Added-Per Capita  
Comparator USD, Anchorage



Developed by: Sound Diplomacy

<sup>93</sup> The data in the graph is derived from both Sound Diplomacy studies on music ecosystems, as well as varying external sources. It is important to note that each data source could use different methodologies and potentially different years as reference. However, the data is used to compare the music sector across different locations. Sources: The Boston Consulting Group, Inc. (2017), USA (Job & Benefits 2020) and Nashville Area Chamber of Commerce (2022).

## 4.5 Anchorage and Juneau's Music Ecosystem Compared

- Due to differences in population size,<sup>94</sup> Anchorage's music ecosystem exceeded Juneau's in absolute terms when considering employment, with 911 direct jobs in Anchorage to 181 direct jobs in Juneau, direct output, with \$148.4 million compared to \$22.8 million, and direct GVA, with \$89.8 million to \$13.1 million, respectively. However, taken in isolation, these figures are misleading; direct jobs per capita are 0.003 for Anchorage and 0.005 for Juneau; direct output per capita is \$507 for Anchorage and \$707 for Juneau; and direct GVA per capita is \$307 for Anchorage and \$406 for Juneau.
- When comparing the contribution of the music ecosystem to the local employment, Juneau's music ecosystem surpassed the music ecosystem in Anchorage slightly. Juneau's music ecosystem supported 1.65% of the local workforce, while Anchorage only supported 1.01%
- When considering economic resources generated by the music ecosystem in relation to population size, Juneau generated a per capita value of \$506, quite a bit higher than the figure for Anchorage, which was \$374.
- While both Music Ecosystems have a comparatively low multiplier effect compared to other Music Ecosystems Sound Diplomacy has studied, Juneau's multiplier effect of 1.557 exceeded Anchorage's multiplier effect of 1.491.
- In terms of employment, the Exhibition link of the music ecosystem contributes the highest share of employment (38% in Anchorage; 46% in Juneau), in terms of output this is also true for Juneau (41%), while in Anchorage the Distribution link contributes the highest share of output (30%).
- COVID-19 impacted the employment in both music ecosystems in a very comparable manner, with a 49% decrease in jobs in Juneau and a 47% decrease in Anchorage. In terms of output, Anchorage's music ecosystem was more resilient, where the output decreased by 29%, while in Juneau the output decreased by 58%.

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<sup>94</sup> Anchorage's population size was 292,545 in 2021, while Juneau's was 32,240. (Source: <https://datausa.io/profile/geo/juneau-ak> and <https://datausa.io/profile/geo/anchorage-ak>)



# 5. Recommendations

## 5.1 Introduction

This section of the report takes into account data provided from the regulatory assessment and comparative analysis, economic impact assessment, and mapping to recommend actions, programming, and regulation to advance Alaska’s unique music ecosystem and support musicians operating across the state. Recommendations have been grouped into the following strategic areas:

1. Governance and Leadership
2. Grants and Funding
3. Music Education and Professionalization
4. Music-Friendly Policies
5. Infrastructure
6. Diversity

Each strategic area has its own set of recommendations, which are supported by key research findings and include guidelines for implementation. Where relevant, Sound Diplomacy has been advised by MusicAlaska/AKIMI on relevant stakeholder bodies relevant to the implementation of these recommendations.

## 5.2 Strategic Area 1: Governance and Leadership

### Recommendation 1. Develop MusicAlaska/AKIMI to Function as a Music Office for the State

To assume a leadership position within Alaska’s music ecosystem and bridge the gap between government, the local music industry, and other sectors of the economy, a Music Office should be created to represent the state’s music sector and advocate for its needs. As of 2023, the Northern Culture Exchange (NCE) and the Alaska Independent Musicians Initiative (AKIMI) are working to rebrand AKIMI or develop MusicAlaska as a standalone organization. To further the goal of creating an independent Music Office for the state, the Alaska State Council on the Arts should recognize and support MusicAlaska/AKIMI as the state’s Music Office, although the organization should remain

independent of state government. To ensure fairness and equal opportunities for members of the state music sector, Alaska's Music Office should advocate for and implement policies that promote diversity and gender parity.

To protect its sustainability, the Alaska Music Office's budget should strive for as much diversity as possible. Funding sources to explore include:

- State government;
- Membership fees from local music professionals;
- Private foundations;
- Federal funds;
- Corporate sponsorships;
- Retention of a portion of ticket sales;
- Grants from arts organizations;
- Crowdfunding;
- Donations from individuals;
- Fundraising events; and
- Endowment funds.

The Music Office should be led by a Music Officer, who should serve as a point person for Alaska's local music sector and act as a point of contact for the state's music related activity, both for the local music industry, as well as for government actors and other industries, such as tourism. As well, the Alaska Music Office should provide an online platform centralizing all the necessary information regarding the music sector and music-related activities.

As an independent and publicly supported body, the Alaska Music Office should be led by an advisory board that would be responsible for making key decisions related to the development and strategy of the organization. The board should be created at the same time as the Music Office and include a diverse group of stakeholders with proven leadership ability and influence within the music ecosystem, for example, the music sector and related sectors such as tourism).

With support from the board, the Alaska Music Office's role should be that of a community-focused non-profit dedicated to advocating on behalf of the music industry to acknowledge and promote the value of independent music education, venues, and professionals across the state. To achieve this goal, the organization should focus on engaging with the political system to advocate for the region's music sector, attracting investment and creating opportunities for collaboration within the state music ecosystem. The Alaska Music Office should lead advocacy efforts to develop state and municipal

policies that make Alaska more music friendly, while simultaneously promoting the region as a place for music. The Alaska Music Office should also supervise and support the development of Alaskan music activity, fostering collaboration between municipalities and organizations across the state. The Music Office should also act as a regional music export agency, fostering opportunities for the exhibition of Alaskan music outside of state borders. To accomplish this, the Music Office should develop partnerships with event and festival organizers, public relations firms, record labels, and international promotional initiatives where possible.

Furthermore, it is crucial for the Alaska Music Office to adopt an inclusive approach that caters to both urban and remote/rural communities. Often, urban areas have better access to resources and opportunities for the music sector, while remote and rural regions face unique challenges that need to be addressed. To better understand these needs, the Music Officer should conduct outreach to Alaska's diverse array of communities, traveling to communities throughout the state to engage the music sector. Regular visits to remote and rural areas would not only allow the Music Officer to understand the nuances of the local music scene, but also enable them to assess the challenges faced by musicians in these regions firsthand, identify opportunities and workshop potential solutions locally. Additionally, the Music Officer should establish a network of representatives in different areas of the state, ensuring that all regions of the state are adequately represented. These representatives can act as liaisons, providing valuable insights and feedback to the Music Office.

## **Recommendation 2. Develop a Clear Brand and Music Tourism Strategy for the State's Music Scene**

A state music brand refers to the identity, reputation, and perception of a state or destination as a thriving and influential hub for music. It goes beyond just being a place with a thriving music scene; it should encompass the state's musical heritage, its diversity of musical genres, support for local musicians and artists, music-related infrastructure, and the overall cultural significance of music in communities across the state. In order to effectively consider these aspects and incorporate them in a branding campaign, it is recommended that the Music Office collaborate with both AKIMI and a marketing/branding agency to develop this strategy.

The development of a music brand for the State of Alaska should harness the unique characteristics of the state, such as the natural landscape, tourism industry and existing music events. In addition to promoting current musical activities and events, the campaign should simultaneously build out and promote new music initiatives and offerings, for instance the ability for musicians to receive economic

incentives for recording music in the distinctive settings that can be found across Alaska (see [Recommendation 10](#)).

This strategy should include a music tourism campaign, a series of marketing initiatives that aim to promote Alaska as a must-visit location for music enthusiasts and travelers interested in experiencing the state's local music scene. The campaign's primary objective should be to attract tourists and visitors by highlighting Alaska's musical activity (events, festivals, venues, and overall musical culture).

To achieve this, the Music Office should partner with state and local arts agencies, as well as tourism and government stakeholders, especially given that Alaska's tourism sector is a significant and growing part of the state economy. Potential partners include: Travel Alaska, state and local government agencies (such as the Alaska Department of Commerce, Community, and Economic Development), tourism associations (such as the Alaska Travel Industry Association), Denali National Park and Preserve, cruise lines and other transportation providers, companies that provide excursions to view the Northern Lights and winter sports, Alaska Native institutions, educational institutions, local businesses selling crafts and artwork, as well as environmental and conservation organizations such as the Alaska Conservation Foundation (ACF).

### **Recommendation 3. Select and Support a City in their Bid to Become a Member of the Music Cities Network**

To further promote its reputation as a music destination, the Music Office should consider selecting and supporting a city through the application process required to become a member of the Music Cities Network (MCN). MCN is an international non-profit organization that brings together music cities and policymakers worldwide. This network is committed to enhancing communication, collaboration, business, arts, and policies for all stakeholders in music cities. Founding members are the cities of Aarhus (DK), Bergen (NOR), Berlin (GER), Gothenburg (SWE), Groningen (NL), Hamburg (GER), Manchester (UK), Reykjavik (ISL) and Sydney (AUS).

The Music Cities Network brings member cities together to collaboratively develop practical solutions and connect various stakeholders across international music cities, including artists, music entrepreneurs, city marketing strategists, and music policymakers. These efforts align with MCN's vision to encourage decision-makers and politicians to recognize music as an integral component of sustainable city development.

Joining the network would provide the selected Alaskan city with funding opportunities, international connections, and increased resources for the local music ecosystem. Membership to the network would

also further the city's reputation as a "music city", enhancing city and state marketing and tourism strategies. This, in turn, would help increase the city's prominence and expose new audiences to the Alaskan music scene. Overall, an Alaskan city's membership in the network should help to increase the prominence of music on the local and state political agenda.

To achieve this, it will first be necessary to assess the most appropriate Alaskan city for the network. As Anchorage lacks a strong arts council to support an application to the network, Juneau or Fairbanks are a more feasible choice, given the presence of stronger arts councils. However, either the city itself or an institution representing the city can serve as the city representative at the MCN, as a member city can be represented either directly by a music policymaker or an official from a music-related organization within the city.

Regardless of affiliation, when selecting the appropriate city representative, it is imperative that local buy-in is secured to ensure the city representative is committed to active participation in the network. Potential representative organizations that could be considered to represent the member city include arts councils, as well as institutions that offer support to artists and music businesses, or music export initiatives based in the city.

The cost to join the MCN is 6,500€ (~6,883 USD) per year for full member city participation. This fee contributes to the general financing of the Music Cities Network association (such as staff, events, projects, and visibility).

## 5.3 Strategic Area 2: Grants and Funding

### Recommendation 4. Advocate for the Creation of an Agency to Fund Cultural Activities

Under existing eligibility criteria for grant funding, most non-profit organizations in Alaska that operate within the music sector have access to public grants at the local, state and federal level, as well as private grants. However, securing funding remains a structural challenge for the privately-owned and operated segment of the local music sector, especially for small and medium private businesses, as they have limited options for obtaining funding at low or negligible interest rates.

The COVID pandemic served as a notable example of how low-interest and zero-interest funding options can be made accessible to private businesses when needed, opening up the possibility of new

potential alternatives for funding.<sup>95</sup> This recommendation explores the creation of a long-term solution to private funding issues for both businesses and nonprofits. To this end, the Music Office should advocate for the creation of a new funding model accessible to both for profit and nonprofit organizations.

This program should emulate a successful pre-existing funding model. Alaska already provides a range of services and financing options for other sectors of the economy, with a focus on affordability and community development through institutions like the Alaska Housing Finance Corporation (AHFC), which plays a vital role in addressing the housing needs of Alaskans, especially for individuals in low- and moderate-income households. AHFC is financially independent from the state's general fund, generating revenue through loans, investments, and fees, which allows it to fund programs and initiatives without relying on taxpayer dollars. Although it is financially independent, its Board of Directors is appointed by the Governor of Alaska. These board members serve staggered terms and are responsible for overseeing the corporation's operations and policies.

A financial model similar to what the AHFC provides for housing, but adapted for the arts and culture sector, could help address the cultural needs of Alaskans while minimizing reliance on the state's budget for funding. Relevant financial initiatives and programs offered by AHFC could be replicated for the cultural sector, with a specific focus on funding accessibility for small and medium enterprises (SMEs), as well as non-profit organizations. It is important to note that it is crucial to ensure diversity and gender inclusivity are considered in decision-making processes related to the allocation of this funding.

Similar to the housing sector, the cultural sector should have its own funding agency, operating as a self-supported public corporation. The organization's primary mission should be to provide a range of financing options to the cultural sector. Available loans should include low-interest mortgages, down payment assistance, and other financing options designed to make cultural production activities more accessible and affordable. The agency should support community development initiatives that enhance cultural activities, infrastructure, and economic opportunities in Alaskan communities.

In addition to revenue generated by loans, the agency should consider making investments in the music being funded, retaining a percentage of intellectual property (IP) revenue once the entity funded reaches a predetermined revenue threshold. Indeed, investing in music is now accessible and simple through platforms such as [JKBX](#); however, this opportunity has not yet been explored by music

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<sup>95</sup> "What did the Fed do in response to the COVID-19 crisis?" (2021) *Brookings*. Accessed October 3, 2023: <https://www.brookings.edu/articles/fed-response-to-covid19/>

organizations to support their ecosystem. In the event that a song, co-written piece, or production achieves success, the returns would not only benefit the artist and their business, who would hold the majority of the intellectual property rights, but also contribute to Alaska's reputation as a place for arts and culture. Additionally, this initiative would result in the formation of a library of Alaskan arts and cultural output. These resources could be utilized in local advertisements to support nearby businesses, incorporated into tourism campaigns, or marketed to external partners, generating revenue for the community. As well, if a community in Alaska were to adopt such an approach, they would become a pioneer in the music sector, establishing an international standard for the creation of local music development finance institutions.<sup>96</sup>

It is also imperative to ensure that the local music ecosystem is aware of new and existing funding mechanisms. It is recommended that all funding opportunities, including grants and financing options, be prominently featured on the Music Office's official website. Regular updates, especially when a grant application window is open, should be disseminated through newsletters and other communication channels to reach a wider audience within the music community. Furthermore, the Music Office should actively offer support to individuals and organizations preparing grant applications, easing the process and increasing the likelihood of a successful application.

## Recommendation 5. Advocate to Expand Touring Support Programs

Currently, the Alaska State Council on the Arts (ASCA), in partnership with the Rasmuson Foundation, administers the Harper Arts Touring Grant, which serves as the main source of touring funds for musicians within the state. This grant program fulfills a crucial role in providing support to musicians. Nevertheless, this funding alone is insufficient to foster the growth of the local music ecosystem. Given Alaska's geographical specificities, more support is needed for the live music scene, especially touring within and outside the state.

The Music Officer should advocate for additional funding support for touring by ASCA and the Rasmuson Foundation. In many places, these funds come from performing rights organizations (for example, Connect Music Licensing in Canada or the Copyright Association in Iceland) or regional arts organizations (such as the Mid-America Arts Alliance in Arkansas, Kansas, Missouri, Nebraska, Oklahoma, and Texas).

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<sup>96</sup> Shapiro Shain (2023) "Music Rights Can Improve Places: We Just Need To Invest In Them" *Forbes*. Accessed September 3, 2023:

<https://www.forbes.com/sites/shainshapiro/2023/02/28/music-rights-can-improve-places--we-just-need-to-invest-in-them/>

Advocating for the creation and implementation of a Regional Touring Program (RTP) would provide additional support for projects and organizations that showcase artists from Alaska. Automatic financial support should be available for *in-state* musical performances, including music creation projects or touring/rehearsals. This support should cover all music genres.

Alaska could take the Regional Touring Program from the Mid-America Arts Alliance as an example.<sup>97</sup> It should be available to for- or non-profit entities that employ artists and cover travel/accommodation expenses associated with touring. For creation or touring projects, a minimum of four performances over a twelve month period should be required. The program should also include criteria to foster gender parity and artist diversity.

The program should establish different funding tiers based on artist criteria:

- For presenters booking artists from a state touring roster, consider awarding up to 50 percent of the artist's fee.
- For presenters booking regional artists not listed on a touring roster, offer up to 25 percent of the artist's fee.
- Provide an additional 10 percent of the artist's fee for presenters located in rural communities.

By implementing such a program, ASCA can foster cultural exchange, support local artists, and enrich the arts community in Alaska while ensuring fair compensation for artists.

## Recommendation 6. Create an Incentive Scheme to Encourage Local Music Recording Activity

Alaska is renowned for its breathtaking and diverse natural landscape, which encompasses a wide range of geographical features and ecosystems. As music invariably reflects its surroundings, musicians draw inspiration from the landscapes and the social atmosphere of the environment where they compose and record their music. Given Alaska's stunning natural landscape, the region could become a haven not only for outdoor enthusiasts, but also musicians seeking inspiration and a place to record music. In this sense, the Music Office should work to increase music recording activities for both local and external talents.

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<sup>97</sup> (n.d.) "Regional Touring Program" Mid-America Arts Alliance. Accessed September 3, 2023: <https://www.maaa.org/for-organizations/regional-touring-program/>



Similar to places like Iceland, incentives should be made available for music recording expenses incurred in Alaska, not only for local artists, but also for external musicians and producers who record in Alaska. To make the state more financially viable as a destination for music recording, the Music Officer should advocate for both local and visiting producers to be eligible for the incentive. For instance, The Sound Recording Incentive Program in Louisiana provides an 18 percent tax credit for qualified sound recording projects made in Louisiana. The program is subject to a cap of \$2.16 million in tax credits per calendar year.

Eligible recording costs could include:

- Hourly studio fees for recording sessions.
- Labor expenses for hired performers, producers, engineers, or studio staff during the recording process.
- Post-production costs, encompassing tasks like sound mixing and mastering.
- Travel and transportation costs related to musical instruments and lead performers.
- Personal salary (subject to specific conditions).

The program should also include gender and cultural diversity criteria. As well, given that there would be challenges for existing recording studios to meet increased demand, an additional incentive should be introduced to cover upgrades to home recording studios. This should allow individuals who invest in their own home facilities to receive reimbursements, which should incentivize the creation of more spaces for quality music recording.

The program would have the potential to generate economic benefits for Alaska. Increased music-related activities, such as recording sessions and post-production work, could lead to additional revenue for local businesses and communities, as well as a higher impact on the production and transversal links of the music ecosystem value chain. Moreover, musicians from diverse backgrounds could be drawn to Alaska, fostering cultural exchange that enriches the local music scene and promotes cross-cultural collaboration. The program could also create employment opportunities in various sectors, including music production, hospitality, and transportation, as it encourages more music-related activities in the state. Ultimately, if implemented effectively, the program should foster more live music activity as well, as visiting artists could use the opportunity to play in the state.

## 5.4 Strategic Area 3: Music Education and Professionalization

### Recommendation 7. Further Develop Music Education Through a Collaborative Working Group

In Alaska, there are various programs and institutions that support music education, including statewide afterschool programs, universities offering music courses and degrees, and associations providing resources and advocacy for musicians and educators. However, music education could be improved in several ways. To enhance the state music education landscape, it is necessary to improve communication between actors by establishing a collaborative working group that brings together educational institutions, local government, and the music community.

The primary mission of this working group should be to remove obstacles to music education, boost student engagement, and incorporate a modern curriculum that integrates new technologies and reflects the realities of the modern-day music business, while catering to a diverse student body. This initiative should start with quarterly working group meetings; based on the demand from the community and the needs of the sector, meetings can be scheduled more frequently.

During these sessions, participants should have the opportunity to share best practices, challenges, and successes to foster learning and collaboration, while breaking down silos between organizations. To improve music education across the state in a tangible way, the working group should be required to agree on a list of objectives and a work plan, revisiting them periodically to track progress and success. The working group should be led by the Alaska Music Office, who will select relevant educational organizations throughout the state for participation in the group. An annual budget should be provided to the working group to implement the actions defined through the sessions and achieve agreed-upon objectives.

### Recommendation 8. Enhance Professional Development Through a Music Entrepreneurship Accelerator

Alaska's music community is characterized by its diversity, dedication, and widespread presence, but the majority of working musicians in the state engage in music on a part-time basis, while pursuing other forms of employment. As highlighted by the Northern Culture Exchange, it is crucial to recognize

that not all musicians in Alaska aspire to become professionals, however for those who do, we recommend creating new paths toward professionalization.

With respect to professional development programming, AKIMI offers a diverse portfolio of initiatives for local independent musicians, the Alaska Music Summit, and grant mentorship, amongst others. This offering can be strengthened further by developing professional development programming that focuses on how members of the music sector can build the crucial business skills needed to succeed in the sector; for instance, through a music entrepreneurship accelerator program. The aim should be for musicians to be able to operate at a full-time level of activity in the music sector.

ASCA should partner with relevant organizations that promote creative entrepreneurship (for example, the Recording Academy) to offer a “Music Entrepreneurship Accelerator”. The initiative should go beyond activities such as informative presentations and mentoring and include consulting, support to find funding, and marketing support.

The aim of this accelerator should be to foster business opportunities for Alaskan artists and music industry professionals. The program should also encourage meaningful interaction and knowledge sharing between mentors/guest speakers and participants. To incentivize local music production and recording in Alaska (Recommendation 10), there should be a specific emphasis on sound engineering and studio skills to increase the supply of local workers skilled in these areas.

The accelerator program should be structured and advertised as a series of skill building activities and networking opportunities, with the capacity and interest of the community assessed beforehand to tailor the programming formats and topics to meet the needs of Alaskans. For instance, the program could provide customized assistance in the area of intellectual property (IP). Programming should be available to Alaska artists, industry professionals, entrepreneurs and business owners in the local music ecosystem, with particular focus on making programming accessible to groups that are currently underrepresented in the music ecosystem; including women, minority groups and members of the LGBTQIA2S+ community.

## 5.5. Strategic Area 4: Music-Friendly Policies

### Recommendation 9. Advocate for the Creation of More Music-Friendly Licenses

#### Permits

In Alaska, all business owners, including musicians and music professionals, must obtain a business license through the State of Alaska's Division of Corporations, Business, and Professional Licensing. Additionally, concert promoters must acquire a certificate of registration from the same division. In its current form, this certification lacks adaptability and fails to address the realities of Alaska's local music industry. By imposing a uniform fee on all types of promoters, regardless of scale, event frequency, or objectives, the permit creates a barrier to the proliferation of independent music activity.

To remedy this, the Music Office should advocate for the incorporation of several new elements in the the permit process:

- 1) A reimbursement of the registration fee for non-profit organizations and individuals hosting events, and;
- 2) An exemption for any organization hosting fewer than six events annually. This exemption should apply to organizations that do not host live music shows as their primary business activity; for example, cafes, pubs, and community associations.

#### Alcohol Sales

In Alaska, the legality of hosting musical performances in a venue is determined by the specific type of liquor license held. Presently, taprooms are severely limited as to the number of live music events they may host. To address this, the Alaska Music Office should leverage recent legislative efforts to advocate for greater flexibility. By working in conjunction with legislative changes to allow for taprooms to hold more music events, new avenues for musicians to perform and connect with audiences will be created, contributing to the vibrancy and diversity of the Alaskan music ecosystem.

#### All Ages Ordinances

The Music Office should also advocate for the implementation of more flexible age ordinances like those introduced in Milwaukee, Wisconsin (see section [3.2 Regulatory Assessment Snapshot](#)), which enable venues to host all-ages events while also serving alcohol to guests aged 21 and older. According

to these revised codes, which gained official approval in 2019, venues need only establish a 'designated performance space' and are prohibited from selling alcohol during the two-hour periods immediately before, during, and after the performance. Like with most license applications, all-ages event organizers need to submit health and safety plans, and are also required to submit strategies for regulating who is purchasing and consuming alcohol, as well as providing staff with training to adequately oversee alcohol consumption. Additional fees are instituted in accordance with the venue's capacity, starting at \$150 for venues with capacity under 25, up to \$2,000 for venues with a capacity over 500.

## Sound Ordinances

In Alaska, sound ordinances are managed at city level. Anchorage has clearly defined ordinances. Juneau, on the other hand, employs a broader definition of "disturbing the peace," which encompasses noise-related issues; however, it does not clearly outline decibel limits, allowable times, or other factors to distinguish between noise and excessive noise. To address this, the Music Officer should develop a comprehensive document to assist cities in navigating their sound ordinances and updating them if necessary, specifically tailored to benefit the music sector.

Ideally, all city ordinances governing sound across the state should include aspects such as decibel limits, time windows in which sound is limited, measurement methods, enforcement strategies, and complaint procedures.

## Guidelines for Alaskan Venues

The creation of guidelines that respond to the context and needs of Alaska's diverse city cities and towns can safeguard venues rather than generate negative repercussions. To achieve this, the Music Office should work on a report aiming at a more flexible framework, with three key steps:

1. Conduct a thorough analysis of ordinances in various cities.
2. Examine best practices.
3. Formulate guidelines that can adapt to different local realities in the state while upholding principles of objectivity and transparency.

This document should be complemented by a set of "best practices" for venues that serves as a guide for how venues and other businesses that host live music approach sound management in Alaska. The

document should provide detailed information on effective strategies and techniques to control and minimize noise. The content should include practical advice, an overview of relevant regulation, and enforcement tactics and should be tailored to Alaska's unique environmental and social context.

By offering clear instructions and expert recommendations, the document will empower businesses to maintain a balance between their operational needs and the surrounding community's well-being. It can serve as a valuable resource for ensuring responsible noise management practices, enhancing the overall quality of life for residents, and fostering positive relationships between businesses and their local communities.

To prevent excessive noise from music establishments, it is recommended that both new and established music venues obtain certification from a qualified acoustic engineer. Well-defined decibel limits and curfew policies in designated Entertainment Districts should also be considered, following the example set by Austin, Texas (see section 3.2, Regulatory Assessment Snapshot). Additionally, Alaska should explore the possibility of extending noise curfews for music venues, especially on weekend nights, as demonstrated in the Red River Entertainment district of Austin.

## Recommendation 10. Advocate for Entertainment Districts and Zones

Juneau's Aaw'k Village District is evolving into an Arts and Culture District, with the city partnering with tribal entities and local stakeholders in the development of a comprehensive district plan, which involves restoration projects and community outreach. Unlike Juneau, Anchorage does not have formal zoning for a cultural district.

Alaska's music sector could benefit from a formal definition for entertainment districts, with those areas specifically zoned for entertainment and recreation uses. The Music Office should provide city governments with guidance on how to better support existing entertainment hubs and create new ones. This could take the form of guidelines encompassing definitions of entertainment districts, recommendations for ideal locations (using mapping of the local ecosystem to inform decisions), stakeholder engagement strategies, a detailed list of regulations that could be adapted to foster more live activity, and potential activities that could be encouraged. In essence, these guidelines would cover all the necessary steps to create an entertainment district.

As a result, Alaskan cities could designate neighborhoods with significant entertainment offerings as entertainment districts. East Austin, known for its diverse and unconventional entertainment, culinary offerings, and bars, provides a successful example that leaders in Alaskan cities could follow. In these

designated entertainment districts, entertainment-friendly regulation should be considered and introduced where possible. For example, more lenient noise limits and extended curfew times can be implemented to accommodate a vibrant nightlife and entertainment scene, fostering a lively and diverse cultural atmosphere.

Cultural districts in Alaska can also help to preserve and promote Alaska's rich Indigenous and immigrant cultures and heritage. A cultural district can serve as a focal point highlighting efforts to preserve traditional art, crafts, languages, and customs, ensuring that awareness for these cultural elements is raised amongst the general population, and promoting the sharing of knowledge with future generations. Cultural districts can also attract tourists interested in experiencing Alaska's unique cultural offerings and local music.

## 5.6 Strategic Area 6: Diversity

### Recommendation 11. Develop Formal Processes to Ensure Marginalized Communities are Represented in the State Music Ecosystem

Alaska stands as a melting pot of diverse cultures, being home not only to Indigenous groups such as the Iñupiaq, Yup'ik, and Athabascan peoples, but also to a vibrant tapestry of immigrant communities. Alaska has attracted immigrants from diverse corners of the globe, from Filipino fishermen in coastal towns to Russian Orthodox communities in urban centers. This unique blend of Indigenous traditions and immigrant influences creates a cultural mosaic that should be represented in the region's music sector. In this sense, the Music Office should take steps to better include, represent, and promote diversity in the Alaskan music ecosystem.

The Music Office should promote and facilitate participation of these groups in the entire music production value chain, including artists, music industry professionals and audiences. For instance, the Music Officer could help to better incorporate professionals and artists from minority groups in all major music events and city-led initiatives around music. To this end, specific criteria should be incorporated in all grants, incentives, tax breaks, funding or any other support offered to the music community. Minimum requirements should also be established to ensure that consultation efforts are taken to engage both Indigenous and minority groups. These efforts could be made through the creation of a

diversity task force similar to what was established in Madison, Wisconsin.<sup>98</sup>

To highlight the cultures, traditions, and contributions from the diverse people that live across the state, Alaska's cities should also look to create and run dedicated talent showcases that provide artists from minority communities with exhibition opportunities. To ensure these initiatives are pursued, the Music Office should advocate for the creation of a working group focused specifically on diversity and inclusion, coordinated by the Music Office.

In addition, similar to the Indigenous Creative Space Project in Ontario, Canada,<sup>99</sup> Alaska should create spaces dedicated to music, art, and creativity from the region's Indigenous and minority groups. By advocating for such an initiative, the Music Officer would support the exhibition of works by underrepresented communities. The initiative should include roundtable discussions that gather community leaders from Indigenous and minority groups to discuss vision, creation, sovereignty and leadership within their existing spaces. From these discussions, select stories and webinars should be published for public consumption, followed by a "Needs and Recommendations" report. Finally, a series of best practice workshops should be held to better bridge the gap between the different communities in Alaska.

## 6. Conclusion

Alaska has everything it takes to build a thriving, bustling scene across the state, especially in cities like Anchorage and Juneau, where arts and culture, particularly music, constitute a major draw for residents and tourists alike. Even small towns can engage their music communities in ways that benefit the local and state ecosystem. Alaska is a place where part-time independent workers, creatives, and freelancers find the balance of artistry and natural beauty compelling and inspiring, where cross-collaboration is encouraged and supported, and where a mentality that believes in the coexistence of living, working, and playing is beginning to take shape in tangible and readily identifiable ways.

Though the support the private sector provides for the arts through resources, monetary and otherwise, is an aspect of the culture that is of great importance and benefit, it also presents a source of vulnerability for the region's arts sector. This type of valuable support allows music businesses,

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<sup>98</sup> "Diversity Task Force" (2015) *Madison General Library System*. Accessed October 4, 2023: <https://cms.library.wisc.edu/diversity/wp-content/uploads/sites/2/2014/02/GLS-Diversity-Task-Force-Recommendations-Report-FINAL-20151102.pdf>

<sup>99</sup> ArtsBuild Ontario's Indigenous Creative Space Project provides spaces for Indigenous art and creativity, with a focus on developing other spaces across the province. "The Indigenous Creative Spaces Project" ArtBuild Ontario, accessed October 23, 2023. <https://www.artsbuiltontario.ca/learning/indigenous-creative-spaces/>



organizations, and individual professionals to continue operating and developing the state's music brand. However, the funding landscape is susceptible to market forces, meaning a market downturn could lead to a significant decrease in funding support available. As such, it is necessary to diversify how the state's arts and culture is funded, where possible. Opportunities for the music sector to learn invaluable entrepreneurial skills and audience development programs that further educate the public on the essential nature of music to the community support this outcome as well.

For Alaska to continue moving into this next phase of musical and artistic appreciation, regulatory policies need to match the general perception and value for the music ecosystem. As well, music education is the pipeline through which music artists, professionals, organizations, and businesses are created. Consequently, the development of a body to lead efforts for the sector, the creation of working groups within the education sector, and the development and dissemination of educational resources that are publicly accessible is imperative to the successful development of the state's music ecosystem. Additionally, developing liquor licensing processes that are cognizant of the fact that live music venues can use profits from liquor sales to support their businesses as they host local and traveling acts is a cause worthy of continual advocacy.

Alaska has a unique character that is only made stronger and more captivating by the presence of a thriving music ecosystem. Organizations like MusicAlaska/AKIMI are galvanizing support and developing programming that pushes the music industry to the forefront, encouraging the entire community to see its value. Continuing to develop infrastructure that supports music and the arts can only benefit the state's goals of becoming a place where people come to live, work, and play in a harmonious way.

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## 8. Appendices

Each appendix has been created as an individual document, for the list of these please see below.

**Appendix 1.** Regulatory Assessment and Comparative Analysis

**Appendix 2.** Mapping Analysis for Anchorage

**Appendix 3.** Mapping Analysis for Juneau

**Appendix 4.** Economic Impact Assessment for Anchorage

**Appendix 5.** Economic Impact Assessment for Juneau