

# DENVER MUSIC STRATEGY



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# EXECUTIVE SUMMARY



Denver has a rich and storied musical past, and is flush with musical talent and assets, from artists and venues to festivals and promoters – many recognized nationally and internationally. The music industry within the region is thriving and live music is abundant in Denver; music enthusiasts are the core strength of Denver as a music city. In an effort to help foster continued, sustainable growth as a music city and the broader creative community driving it, Denver Arts & Venues is pleased to offer the *Denver Music Strategy*.

The *Denver Music Strategy* is a forward-thinking, community-led platform rooted in collective leadership and leveraging resources and influence. This strategy is designed to further amplify Denver as a global music city and draws upon insights from participants in the region's music ecosystem including musicians, businesses, government representatives, nonprofit leaders, and educational institutions. The *Denver Music Strategy* was developed through extensive stakeholder engagement, examination of best practices, nearly a decade of music development partnerships, and more than 90 interviews with members of the Denver music ecosystem.

The *Denver Music Strategy* is offered at a time when a demographic shift within the Denver metropolitan region, the state, and the nation is favoring a diverse millennial generation – a generation spending more on events and travel than physical items, embracing concerts and festivals, and fueling a new *experience economy*. With a rapidly-growing music industry led by musicians and those promoting, staging, and hosting live music events, an already robust tourism infrastructure and economy, and now a strategy to support future growth of its entire music ecosystem, Denver is perfectly positioned to take advantage of the new experience economy, becoming a globally-recognized music city in the process.



# DENVER MUSIC STRATEGY HIGHLIGHTS

## THE FIVE-POINT PLATFORM OF THE DENVER MUSIC STRATEGY:

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### 1. CONTINUE RESEARCH, POLICY DEVELOPMENT, AND ADVOCACY:

Through global, regional, and local partnerships, including the alignment with Colorado Creative Industries' *Music Strategy for the State of Colorado*, Denver Arts & Venues can provide additional systematic research that informs and shapes collective policies and initiatives. By partnering with the University of Colorado Denver College of Arts & Media, Denver Arts & Venues is working to develop research strategies that continue to measure the dynamics and multiple impacts music can have on our industry and economy through both qualitative and quantitative exploration.



College of Arts & Media  
UNIVERSITY OF COLORADO DENVER

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### 2. CONVENE THE DENVER MUSIC ADVISORY PANEL:

Led by Denver Arts & Venues, this advisory panel is comprised of musicians and business, and government, nonprofit, and educational leaders who represent diverse geographies, communities, and musical genres in Denver's music ecosystem. The panel will support the development and implementation of the *Denver Music Strategy* and the *Denver Music Advancement Fund* to achieve long-term, sustainable strategies amplifying Denver as a global music city. This panel will also serve as Denver's regional advisory group in partnership with Colorado Creative Industries' *Music Strategy for the State of Colorado*.

## DENVER MUSIC STRATEGY HIGHLIGHTS (CONT.)

### 3. LAUNCH THE DENVER MUSIC ADVANCEMENT FUND

In its first year, and with collective investment from Denver Arts & Venues and our partners at Illegal Pete's and LivWell Enlightened Health, the *Denver Music Advancement Fund* will provide \$80,000 to support initiatives that advance the *Denver Music Strategy* and *IMAGINE 2020* cultural plan. This fund will be piloted over the next three years with investment from Arts & Venues to demonstrate long-term financial and partnership opportunities to ensure that music continues to drive economic vibrancy, create a more resilient and connected city, and catalyze reinvestment in the community. The fund will advance music-centric initiatives that support one or more of the following core areas:



#### INTEGRATION:

Increasing arts, culture, and creativity in daily life

#### AMPLIFICATION:

Amplifying arts, culture, and creativity while supporting musical talent through the export of Denver music beyond the region and Colorado

#### ACCESSIBILITY:

Achieving access and inclusivity of arts, culture, and creativity for all

#### LIFELONG LEARNING:

Increasing lifelong exposure appreciation and participation in creativity and learning

#### NURTURING LOCAL TALENT:

Cultivating and building Denver's diverse and flourishing creative professionals

#### ECONOMIC VITALITY:

Fueling creatives as an essential component of Denver's thriving economy

#### COLLECTIVE LEADERSHIP:

Leading cultural development through shared commitment, resources, and cross-sector partnerships

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Giving back to our community is in our company's DNA, which is why we are proud to support the Denver Music Advancement Fund. There are few things in this world with the power to bring people together in positive and uplifting ways like music. The work done by the Denver Music Advancement Fund to provide resources to Denver's music ecosystem and foster economic development, education, community-building, and positive social change align well with our own goals as a local business. We look forward to working with the Denver Arts & Venues to advance music-centric initiatives with like-minded artists, businesses, governments, nonprofits, and educational institutions.

**John Lord**, Owner and CEO, LivWell Enlightened Health

”



## DENVER MUSIC STRATEGY HIGHLIGHTS (CONT.)

### 4. SUPPORTING SAFE AND AFFORDABLE CREATIVE SPACES:

By working directly with city agencies and the community, and through strong partnerships with businesses and organizations, Denver Arts & Venues can continue to explore short- and long-term opportunities for more sustainable and safe living and working spaces in Denver that protect and support creative production, youth engagement, artistic growth, and collaboration across musical genres, creative sectors, and communities.

### 5. SUPPORTING EMERGENCY PREPAREDNESS INITIATIVES:

Networking with venues and institutions will allow improvements in the spectrum of emergency preparedness needs by adapting successful models from arts and cultural communities and testing new ideas to address emergency preparedness issues.

“

Girls Rock Denver empowers girls, trans, and gender-expansive youth through music education, creation, performance and community, working to put instruments in their hands to unveil what they already possess in their feet, fingertips, vocal cords, hearts and minds.

**Monique Bourdage**, *Founder, Girls Rock Denver*



## DENVER MUSIC INDUSTRY HIGHLIGHTS

Colorado's music industry is responsible for just over

**16,000 JOBS  
AND MORE THAN  
\$1.4 BILLION  
IN REVENUE**

The music industry within the Denver metropolitan region is thriving and responsible for nearly

**8,600 JOBS  
AND  
\$842.4 MILLION  
IN REVENUE**

Colorado's music industry experienced a

**24% GROWTH IN  
EMPLOYMENT**

between 2010 and 2016

The musicians who drive the industry, along with the agents and managers who help foster their careers, represented just over

**4,000 JOBS**  
and an associated  
**\$289 MILLION  
IN REVENUE**

in 2016

The Denver metropolitan region's music industry experienced a

**30% GROWTH IN  
EMPLOYMENT**  
between 2010 and 2016  
**ADDING MORE  
THAN 1,900 JOBS**



Promoting, staging, and hosting live music events in the Denver metropolitan region resulted in more than

## **2,800 JOBS AND \$328.1 MILLION IN REVENUE**

in 2016

Employment related to Denver's music industry ranks similarly to beverage production which includes craft brewing

## **ONE OF THE FASTEST GROWING INDUSTRIES IN THE REGION**

for employment, ahead of energy, aerospace, and biotech

Red Rocks Park and Amphitheatre sold

## **1,111,990 TICKETS**

resulting in over

## **\$65 MILLION IN REVENUE**

in 2016

Denver is perfectly positioned to take advantage of the increasing consumption of live music experiences nationwide in a time when a new

## **EXPERIENCE ECONOMY**

driven by the millennial generation is emerging

**DENVER MUSIC INDUSTRY HIGHLIGHTS**

# About Denver Arts & Venues

Denver Arts & Venues' mission is to amplify Denver's quality of life and economic vitality through premier public venues, arts and entertainment opportunities. Arts & Venues is the City and County of Denver agency responsible for operating some of the region's most renowned facilities, including Red Rocks Park and Amphitheatre, the Denver Performing Arts Complex, Colorado Convention Center, Denver Coliseum and McNichols Civic Center Building. Arts & Venues also oversees the Denver Public Art Program, Create Denver, SCFD Tier III granting process, Arts Education Fund, and other entertainment and cultural events such as the Five Points Jazz Festival, Urban Arts Fund, P.S. You Are Here, and implementation of IMAGINE 2020: Denver's Cultural Plan. Denver Arts & Venues is committed to diversity, equity, and inclusiveness in all our programs, initiatives, and decision-making processes.

“

Denver Arts & Venues is proud to produce the Five Points Jazz festival, celebrating the rich history of jazz music in the historic Five Points neighborhood. Looking back to 2004 when the festival launched in the parking lot of the Blair Caldwell African American Research Library with a few hundred attendees, today's immense success is a testament of how the festival brings our community together through the art, culture and history of music in our city.

**Brooke Dilling**

*Strategic Partnerships and Community Program Specialist,  
Five Points Jazz Festival*

”

About the Five Points Jazz Festival:



**1 DAY FESTIVAL**

**3 BLOCK FOOTPRINT**

**10 STAGES**

**11 HOURS OF MUSIC**

**MORE THAN 40 BANDS**

**\$48,700.00**

invested in musicians and music production

**50,000**

estimated attendees

**\$160,000**

invested in the festival



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Part I:

## The *Denver Music Strategy*



# From Music Scene to Music City

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Across the globe, cities are increasingly amplifying music as a means of creating strong and vibrant communities. In Nashville, music strategically drives economic development and the industry contributes a total economic impact of \$9.7 billion.<sup>1</sup> Music tourism in Austin accounts for almost half of its \$1.6 billion economic output and contributes \$38 million in tax revenue.<sup>1</sup> In other cities, music is being leveraged to engage marginalized populations. For example, in Providence, Rhode Island hip-hop has been used to inspire at-risk youth and introduce them to careers in the performing arts through a program hosted by the non-profit community arts center, AS220.<sup>2</sup> Music can also transform the urban landscape with redevelopment projects, anchoring downtown landscapes, such as Slowdown in Omaha, Nebraska which houses two music venues, residential and retail space, an independent cinema, and the headquarters of indie rock record label, Saddle Creek Records, a driving force behind the project.<sup>3</sup> Cities across the country are also increasingly looking to music festivals for the intangible benefits occurring when people are drawn together by music.<sup>4</sup>

Thriving music scenes help brand cities as attractive locations for the educated, highly-skilled workforce city leaders seek to drive their economies.<sup>5</sup> In addition, it is not uncommon for those employed in the music scene to also contribute to a city's creative economy in a host of multi-faceted occupations such as design, education, IT, and others.<sup>6</sup> No longer merely an art form found throughout a city in packed venues, schools, rehearsal spaces, basements, living rooms, concert halls, and on street corners, music is now embraced by municipal leaders as an element vital to a city's community and economy.

“  
My role as a singer and actress is to share the passion, dedication and love I have for performing throughout our great city, state and beyond.

My hope is that all performing artists would be able to share their gifts with our community and visitors, by activating our open spaces and promoting live performances.

**Mary Louise Lee,**  
*First Lady of Denver, Musician*

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# Denver as a Music City

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Denver has a rich musical past and is flush with talent and assets, from artists and venues to festivals and promoters – many nationally recognized. Statewide, the music industry is responsible for 16,076 jobs and just over \$1.4 billion in revenue and Denver's music industry represents a significant portion of those totals.<sup>7</sup> The region's music industry is responsible for 8,569 jobs and \$842 million in revenue. Growth in Denver's music industry is equally impressive, with more than 1,900 jobs added between 2010 and 2016 representing a 30% increase in employment. It should be noted that this growth outpaced music industry employment growth statewide which was 24% in the same time period.<sup>8</sup>

“

We need to make major investments in the health of the artistic community. We have one of the best markets in the world for concerts and live experiences. In turn we need to be mindful of investing in youth development and supporting our current artists. I run a Denver-based music management company and I cannot think of anywhere I would rather be. The Denver artist community consistently supports all its members and continues to push the boundaries.

”

**Chris Tetzeli** *Co-Founder, 75 Management,  
Manager, Nathaniel Rateliff and the Night Sweats*

Employment growth in the Denver music industry is led by its core strengths. Promoting, staging, and hosting live events, an industry subsector, experienced a 52% growth in employment between 2010 and 2016. Musician, manager and agent ranks swelled by 31% in the same time period. These core strengths will continue to grow as the demography of the city, state, and nation continues to favor the millennial generation, a generation eager to travel and engage with live music. When considered holistically, Denver's music industry is the economic driver of a broader music scene or *ecosystem*. This ecosystem is comprised of the musicians, fans, recording engineers,



# Denver as a Music City

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promoters, graphic designers, filmmakers, managers, publicists, venue owners, web developers, government representatives, nonprofit leaders, educators, and others actively shaping Denver as a music city.

In 2008, the City of Denver's Office of Cultural Affairs embarked on a path to help Denver become an exemplary music city by conducting a study investigating the economic vibrancy of music in Denver. *Listen Local: Music in the Mile High City* called for citywide advancement of music through new programs, partnerships, and music-friendly policies. This study fostered a partnership between the City of Denver and the Western States Arts Federation (WESTAF) resulting in the Denver Music Task Force and the Denver Music Summit. Over several years, the Denver Music Task Force and Denver Music Summit convened local, national, and global industry leaders, musicians, music enthusiasts, and government leaders around professional development, creative collaborations, and music policy. Both the Denver Music Task Force and the Denver Music Summit provided a platform for inspiring and developing new models of music-driven economic development and community building.

The Denver Office of Cultural Affairs and the City's Division of Theatres & Arenas officially merged to become Denver Arts & Venues in 2011. Denver Arts & Venues thrives as a special revenue

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A thing about music is that it's such a beating heart of culture. It instigates gathering like none other. What's really important is that local musicians need to be able to live in their city. Part of this is living costs, sure, but a strengthened and supported creative and music economy allows for sustainability to be possible.

**Vince Kadlubek** *Co-Founder and CEO, Meow Wolf*

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# Creating the Strategy

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Established in 1979, Artspace is now a national leader in the field of developing permanently affordable housing and mixed-use space that meets the needs of artists and the creative sector. We manage a national portfolio of 50 development projects across the country - and are currently looking across multiple Colorado communities, including Denver. Through our partnership with Denver Arts & Venues, we have engaged the community to understand the market demand for affordable arts space and started pre-development of a mixed-use, affordable project that will provide live/work units, studios and flexible community spaces including music-centric spaces.

**Shannon Joern,**  
*Vice President, Advancement,*  
Artspace

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The *Denver Music Strategy* is a forward-thinking, community-led platform rooted in collective leadership which leverages resources and influence. The strategy is designed to further amplify Denver as a global music city and draws upon insights from participants in the region's music ecosystem. The *Denver Music Strategy* was developed through extensive stakeholder engagement, examination of best practices, nearly a decade of music development partnerships, and more than 90 interviews with members of the Denver music ecosystem. Stakeholder conversations included opportunities to address the strengths and perceived needs of Denver's music infrastructure.

Some highlights include:

**Building industry, retaining talent, and supporting community:** Denver stakeholders overwhelmingly expressed a need for the city to invest in the growth of Denver's music ecosystem. Whether discussing firsthand accounts of displacement or suggesting opportunities for professional development and music business advancement, stakeholders expressed a pressing demand for resources. Strategies for advancing arts and culture through grants and other investments nationwide rarely target music, *particularly its more popular forms*. Music is rarely explicitly excluded from such funding initiatives, but neither is it specifically prioritized. Additionally, the common practice of only funding nonprofit organizations structurally excludes music, which is often organized commercially. The result, which similarly plays out in Denver, is a creative music ecosystem inspired by organic growth but stunted by systematic and varied investments. Stakeholders expressed a need for funding, indicating the challenges and opportunities characteristic of participating in Denver's music ecosystem.



# Denver as a Music City

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fund that is not supported by or dependent upon the City's General Fund. Denver Arts & Venues is a leader in Denver's music economy through its efforts to foster citywide initiatives supporting cultural programming and facilitating creative industry research, advocacy, and policy. With Red Rocks Amphitheatre, an internationally-known concert venue in Denver Arts & Venues portfolio of event spaces, it's not surprising that music performances make up a large portion of the public events that Denver Arts & Venues hosts. Music events also make up the bulk of the performances at Denver Arts & Venues' three largest theaters in the Denver Performing Arts Complex (Ellie Caulkins Opera House, Buell Theatre, and Boettcher Concert Hall), with 70% of the public performances in these venues falling under the categories of opera, Broadway musical, popular music concert, and classical music concert. If one includes Colorado Ballet's performances (which are performed with a live orchestra), the percentage of music-related events at those three venues jumps to 80%. Music events also make up an important subcategory of events at the other Denver Arts & Venues operated facilities: Denver Coliseum, McNichols Civic Center Building, and Bellco Theatre.

In 2015, Create Denver (an initiative of Denver Arts & Venues) revisited *Listen Local* to formalize a sustainable, long-term plan for advancing music as a key driver of the city's economic, cultural, and social vibrancy. The *Denver Music Strategy* is a result of these efforts.



“

I spent a lot of time observing and taking part in the implementation of nightlife policies in my former positions as a music organizer, a project manager, and a policy advisor for city governments in France and European organizations. It was great for me to witness the Denver Music Advancement Fund initiative and exemplary public concertation and organizing work around the *Denver Music Strategy*. While the European Union has advanced policy and programing ideas, the Denver Music Advisory Panel is an exemplary model of diversity and democracy in contrast to a top-down model that is more common in my experience.

**Tiffany Fukuma** *Cultural Attaché, Culture Services, Consulat général de France à Toronto*

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# Creating the Strategy

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**Advocating for safe long-term, affordable live, work, and mixed-use creative space opportunities:** A strong sentiment among stakeholders was that space where musicians might live and work in Denver is now largely unaffordable due to Denver's shifting economic landscape and influx of new residents. As a result, two major concerns are emerging. First, musicians are increasingly forced out of the city center, pushing them further from the public places where music is found in the daytime and at night. At the same time, many musicians are choosing to remain in the city center, but are living, rehearsing, and hosting concerts in non-traditional spaces not designed for such activities potentially placing them and audience members at risk. The regulation of these non-traditional spaces in Denver is often handled by a myriad of City offices which sometimes poses significant challenges due to stretched resources and communication hurdles. Finding ways to streamline processes from zoning requirements to meeting building codes will help ensure the safety and sustainability of the spaces where musicians live, work, and perform.

## **Encouraging creative collaborations that transcend discipline boundaries and engage diverse communities:**

One way in which this spatial reorganization of Denver's musicians is affecting the city's music community is that collaborative opportunities are becoming less apparent as the density of musicians is dispersing. Interviews with stakeholders highlighted the collaborative and cross-sector nature of Denver's music ecosystem as a core strength. However, stakeholders also revealed an important nuance to this finding: collaboration is often high within a genre but is rarely seen cross-genre or involving members of different communities and neighborhoods. The geographic displacement of

All-ages DIY and community-oriented spaces that provide a home for all genres of music are incredibly crucial to the fabric of any city and community. Our young people are the future leaders of our communities, and they're currently the creators of vibrant and thought-provoking art as seen through the very important lens of youth. I cannot overstate the level of importance of having safe spaces in which people of all ages and backgrounds can be free to explore their creativity without boundaries and practice their craft in an organically encouraging environment, and willfully contribute back to.

**Aaron Saye,** Owner  
Seventh Circle Music Collective



# Creating the Strategy

(cont.)

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musicians is intensifying this disconnect. Fostering the development of additional all-ages DIY, alternative, or mixed-use venues may provide opportunities for collaboration across music genres, creative sectors, and communities during a time of geographic displacement. These venues are generally driven by volunteers, are often drug and alcohol free, open to all age groups, and operate as incubation spaces embracing music and creativity alongside diversity, equity, inclusiveness, and accessibility. Venues such as these complement traditional venues in a music ecosystem by helping bands, artists, and other creative participants to collaborate while developing the skills and networks needed for sustainable careers.

## **Incorporating music at the city level to support economic vitality:**

Denver's music community has grown organically without sustained intervention from either the public or private sectors. This growth has resulted in musical vibrancy, but one that is stunted by a lack of connectivity, investment, and shared vision. Formally addressing music advancement and incorporating it into city policy may yield a significant number of new jobs and business start-ups and contribute to the holistic growth of Denver's economy. Such action could also foster the creative energy that helps attract and grow a highly-skilled workforce necessary for other sectors such as high tech, health care, energy, and education.

“

The incredible spirit, selflessness, and open-mindedness of the arts community in Denver is unparalleled, and drew me away from my coastal home with its solid warmth and support. I truly believe that one's mission as an artist and art activist is to draw out the spark of creativity in those around them, and it's my life's work to ignite as many as I can.

**Elysha Zaide**

*Musician, ill-esha; music producer, community educator*

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# Creating the Strategy

(cont.)

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**Establishing new and maintaining existing local, national, and global music partnerships:** Along with creating a strong channel of communication between Denver's music ecosystem and the City of Denver, music-centric relationships and partnerships with national and international entities should be established and maintained.

**Enhancing research and policy development:** Understanding how a city's music economy functions from a data-driven perspective is vital to developing effective advancement strategies. Additionally, the story of any economic sector is driven by a qualitative understanding of the people, networks, programs, and initiatives behind those numbers. A genuine comprehension of the music ecosystem's dynamics and the policy implications therein requires routine and rigorous research that includes spending time with the community to understand how members interact. Only by knowing the entire story can effective policy measures be drafted.

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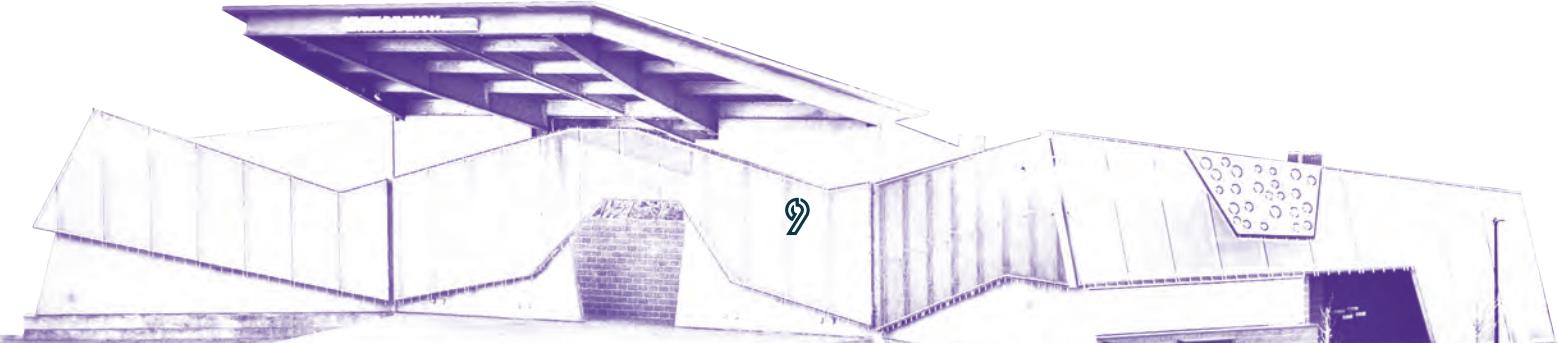
Increasing access to the arts is vital to the long-term success of our community. It helps activate neighborhoods, provides children with a better understanding of the world we live in, fosters creativity, and creates opportunities that allow artists to keep and/or make Denver their home.

**Chris Zacher**

*Executive Director, Levitt Pavilion Denver*

Levitt Pavilion Denver is a non-profit established with the purpose of building community through music, providing 50 free concerts annually with local, regional, national, and international acts.

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# Activating the Strategy

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The following action items are informed by an extensive research process and comprise a five-point platform from which Denver Arts & Venues will facilitate long-term, sustainable development of Denver's music ecosystem, strategically amplifying Denver as a global music city in the process:

## **1. Continue research, policy development, and advocacy:**

Through global, regional, and local partnerships, including alignment with Colorado Creative Industries' *Music Strategy for the State of Colorado*, Denver Arts & Venues can provide more systematic research to inform and shape collective policies and initiatives. By partnering with the University of Colorado Denver College of Arts & Media, Denver Arts & Venues is working to develop research strategies that continue to measure the dynamics and multiple impacts music has on Denver's industry and economy through both qualitative and quantitative exploration.

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The College of Arts & Media at CU Denver is a national leader in advancing the creative economy through developing the artistic workforce helping to drive it. We are proud to have initiated the first Music Cities course in the nation in 2016 to further support students who are emerging, not only as cultural producers, but also as leaders in the creative economy. Dual citizen (U.S. and Canada) and Music Cities student, Chloe Tang stands out amongst an amazing cadre of students who are making their mark at home and abroad. These students have the requisite technical and artistic skills of other arts students - but they also have the “package” of professional skills needed to build sustainable careers.

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**Laurence Kaptain**  
*Dean, College of Arts & Media,  
University of Colorado Denver*



# Activating the Strategy

(cont.)

**2. Convene the Denver Music Advisory Panel:** Led by Denver Arts & Venues, this advisory panel is comprised of musicians and business, government, nonprofit, and educational leaders who represent diverse geographies, communities, and musical genres in Denver's music ecosystem. The panel will support the development and implementation of the *Denver Music Strategy* and the *Denver Music Advancement Fund* to achieve long-term, sustainable strategies amplifying Denver as a global music city. This panel will also serve as Denver's regional advisory group in partnership with Colorado Creative Industries' *Music Strategy for the State of Colorado*.

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Cultivating local and emerging talent is the key to ensuring that Denver's culture scene is equitable. Music transcends boxes and barriers – and our musicians follow suit. They represent the diverse cultural make-up of our city, and as such, they accurately tell necessary stories about race, class, gender, and identity through their music. Taking this one step further, providing our young people and emerging artists with access to mentorship with local musicians opens the door for our youth to see themselves as artists, and as contributors to our music scene and city.

**Jami Duffy**, Executive Director, Youth on Record  
**Stephen Brackett**, Co-Founder, Youth on Record; Musician, FLOBOTS

Youth on Record is committed to ensuring that the youth they serve graduate from high school and are ready to enter the workforce, transition to college, or enter advanced technical training and careers. Their programs empower 1,000 teens in some of Denver's most vulnerable communities

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**3. Launch the Denver Music Advancement Fund:** With collective investment from Denver Arts & Venues and partners at Illegal Pete's and LivWell Enlightened Health, the *Denver Music Advancement Fund* will provide \$80,000 in 2018 to support initiatives that advance the *Denver Music Strategy* and *IMAGINE 2020* cultural plan. This fund will be piloted over the next three years

# Activating the Strategy

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We are incredibly proud of this music community and excited to be contributing partners over the next few years to help pilot the Denver Music Advancement Fund. We believe our goals and mission as a business in Colorado directly align with the initiatives Denver Arts & Venues has developed through this strategy and fund. Together, we can continue to advance cultural opportunities and inspire collective leadership by investing in the community together.

**Pete Turner,** *Founder and CEO*  
Illegal Pete's



with investment from Arts & Venues to demonstrate long-term financial and partnership opportunities to ensure that music continues to drive economic vibrancy, create a more resilient and connected city, and catalyze reinvestment in the community. The fund will advance music-centric initiatives that support one or more of the following core areas:

**Integration:** Increasing arts, culture, and creativity in daily life

**Amplification:** Amplifying arts, culture, and creativity while supporting musical talent through the export of Denver music beyond the region and Colorado

**Accessibility:** Achieving access and inclusivity of arts, culture, and creativity for all

**Lifelong Learning:** Increasing lifelong exposure, appreciation and participation in creativity and learning

**Nurturing Local Talent:** Cultivating and building Denver's diverse and flourishing creative professionals

**Economic Vitality:** Fueling creatives as an essential component of Denver's thriving economy

**Collective Leadership:** Leading cultural development through shared commitment, resources, and cross-sector partnerships

**4. Support safe and affordable creative spaces:** By working directly with city agencies and the community, and building strong partnerships with businesses and organizations, Denver Arts & Venues can continue to explore short- and long-term opportunities for more sustainable and safe living and working spaces in Denver that protect and support creative production, youth engagement, artistic growth, and collaboration across musical genres, creative sectors, and communities.

**5. Support emergency preparedness initiatives:** By networking with a spectrum of performing arts and mixed-use, creative spaces and venues, Denver Arts & Venues will continue developing partnerships and best practices that improve the spectrum of emergency preparedness models for arts and cultural communities.

# Conclusion

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The time is right for progressive action regarding Denver's need for a more cohesive and systematic music strategy. In 2014, the City of Denver released a new cultural plan, *IMAGINE 2020*, providing a framework for innovation and advancement, perfect for fostering a music strategy.<sup>9</sup> Denver Mayor Michael B. Hancock supports music as a driver of social, cultural, and economic growth while Governor John Hickenlooper, an avid music supporter, began the *Take Note Colorado* initiative to provide every student K-12 access to musical instruments and instruction.<sup>10</sup>

By aligning the *Denver Music Strategy* with Colorado Creative Industries' *Music Strategy for the State of Colorado*, the music ecosystems of both the city and the state can be cultivated in tandem for maximum impact.<sup>11</sup> Music can be embraced in ways beneficial to professionals in the industry and community members facing challenges concerning education, safe and affordable live and work environments, or other social and socioeconomic issues. At the same time, live music will continue to be a tourist attraction and lifestyle amenity throughout the entire Denver metropolitan region. The *Denver Music Strategy* is a tool by which to accomplish those and other tasks that will undoubtedly emerge as Denver continues to develop as a *music city* and Colorado as a *music state*.

“

We want to give every student in the state the chance to pick up an instrument and learn how to play. Music can remind us who we really are, who we can be, maybe even for the first time. It is the language of spirit. Making it and hearing it speaks to that part of us we can't always find on our own.

**Isaac Slade,** *musician, The Fray;*  
*Co-Chair with Governor Hickenlooper, Take Note Colorado*

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Part II:

## An Analysis of Denver's Music Industry



# The Visible and Invisible

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A helpful step in assessing the size of any industry is to compile data of employment numbers, business numbers and composition, and wages. However, when analyzing the music industry solely through numbers compiled by city, state, and federal agencies, the underlying community connections and ecosystem are often rendered invisible, obscuring the full spectrum of the industry's employment and financial influence. In any city, there is a long list of musicians, recording engineers, promoters, graphic designers, filmmakers, managers, publicists, web developers, and others who actively participate in the local music *scene* or *ecosystem*, but don't officially document their activities through formal channels such as the Census Bureau or the IRS, or self-identify as working in industries unrelated to music such as film production, business management, or computer programming. This data-driven myopia results in the oversight of contributions by many who create songs, recordings, t-shirts, music videos, artist websites, touring routes, and more: those who sustain the music ecosystem but are undercounted or entirely absent from an examination of a city's music *industry*.

## By the Numbers

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When one does count the *visible* in Denver's music industry, the results are substantial. In the Denver metropolitan region, 8,569 music industry jobs are spread across six subsectors. Live music and performers leads the other five subsectors by a wide margin. The division of revenues mirrors the distribution of jobs. More than \$842 million is attributable to the six subsectors with "Live Events" and "Musicians, Managers, and Agents" once again dominating the other subsectors (Table 1).

# By the Numbers

(cont.)

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Table 1. Denver Music Industry by Estimated Employment and Revenue, 2016

Music Industry Subsector	Emp	%	Music Industry Subsector	Revenue	%
Musicians, Mngrs, & Agents	4,034	47%	Live Events	\$328,109,703	39%
Live Events	2,848	34%	Musicians, Mngrs, & Agents	\$289,019,125	34%
Education	523	6%	Radio	\$124,816,045	15%
Instruments	446	5%	Recording and Product	\$38,676,360	5%
Radio	419	5%	Instruments	\$37,283,109	4%
Recording and Product	299	3%	Education	\$24,583,714	3%
<b>Total</b>	<b>8,569</b>		<b>Total</b>	<b>\$842,488,056</b>	

Sources: EMSI, Infogroup, the U.S. Census, Bureau of Labor Statistics, Pollstar, audited financial statements, media reports, and information gained from industry representatives.

Growth in Denver's music industry is strong with more than 1,900 jobs added between 2010 and 2016, an employment growth of 30% (Table 2). Employment growth in Denver's music industry is not spread evenly, however, and these trends mirror overall shifts in the music industry. Digital technology has fundamentally altered the production and consumption of music, disrupting some aspects of the industry, e.g., large recording studios losing a competitive edge to artists recording in their homes, or the precipitous decline in sales of music in physical formats triggering record stores across the country to close their doors.

Despite these challenges, digital technology has made it easier to produce and consume music, which has led to a growing number of bands, artists and fans, and an increasing desire for music experiences – whether streaming online or at live events. This shift favors Denver's music industry as illustrated in the dramatic employment growth in its core strengths – the promoting, staging, and hosting of live events, a segment which realized a 52% growth in employment between 2010 and 2016. The musicians who drive the industry, along with those who help foster their careers (managers and agents) experienced a 31% growth in the same time period (Table 2).

# By the Numbers

(cont.)

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Table 2. Denver Music Industry Estimated Employment Growth, 2010 – 2016

Music Industry Subsector	% Employment Growth 2010 - 2016
Live Events	52%
Musicians, Managers, and Agents	31%
Education	26%
Instruments	2%
Recording and Product	-9%
Radio	-12%
<b>Overall Employment Growth</b>	<b>30%</b>

Sources: EMSI, Infogroup, the U.S. Census, Bureau of Labor Statistics, Pollstar, audited financial statements, media reports, and information gained from industry representatives.

It is helpful to compare the Denver music industry to other industrial clusters in the Denver region to give perspective on its size and capacity for growth. The Metro Denver Economic Development Corporation (Metro Denver EDC) tracks several industry clusters within the Denver region.<sup>1</sup> When placed alongside these clusters, Denver's music industry is substantially smaller in terms of employment, but still ranks an impressive 10th, only a few hundred jobs behind the next closest cluster, “Beverage Production” (Table 3).

Table 3. Denver Regional Industry Clusters by Employment Size, 2016

Industry	Employment 2016	% Employment Growth 2011 - 2016
Healthcare & Wellness	214,430	22.8%
Financial Services	98,880	11.9%
IT & Software	54,580	27.5%
Energy	52,850	20.5%
Broadcasting & Telecommunications	42,400	0.2%
Aerospace	20,020	2.3%
Aviation	18,470	22.4%
Bioscience	15,860	4.2%
Beverage Production	9,400	28.1%
<b>Music</b>	<b>8,569</b>	<b>24.2%</b>

Source: Metro Denver Economic Development Corporation (except “Music”)

<sup>1</sup> It is important to note that the Metro Denver EDC uses nine counties to define the Denver metropolitan region. The counties in question are slightly different than the ten counties included in the “Denver-Aurora-Lakewood Metropolitan Statistical Area” as defined by the U.S. Office of Management and Budget and used to examine Denver’s music industry. Despite this difference in how the Denver region is defined, the Metro Denver EDC data is appropriate for comparative purposes.

# By the Numbers

(cont.)

The Denver music industry's overall growth between 2011 and 2016 is even more impressive. Once again compared to the industry clusters tracked by Metro Denver EDC, the region's music industry comes in third, with an employment growth of 24.2%, only 3.9% less than the growth leader, "Beverage Production" (Table 4).

Table 4. Denver Regional Industry Clusters by Employment Growth, 2011 – 2016

Industry	Employment 2016	% Employment Growth 2011 -2016
Beverage Production	9,400	28.1%
IT & Software	54,580	27.5%
<b>Music</b>	<b>8,569</b>	<b>24.2%</b>
Healthcare & Wellness	214,430	22.8%
Aviation	18,470	22.4%
Energy	52,850	20.5%
Financial Services	98,880	11.9%
Bioscience	15,860	4.2%
Aerospace	20,020	2.3%
Broadcasting & Telecommunications	42,400	0.2%

Source: Metro Denver Economic Development Corporation (except "Music")

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Denver's Five Points neighborhood hosted the stars of jazz and was called the "Harlem of the West," but the music had to burst from its venues to the airwaves. KUVO went on the air in 1985 with Latino roots and became Denver's jazz radio station. What's next? KUVO's addition of a new radio stream where we will curate music playlists that connect and reflect our communities' up-and-coming generations. For KUVO, taking it to the streets means meeting our community where they are.

**Tina Cartagena, KUVO**



”

# The Live Music Experience in Denver

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In 2016, Pollstar, the international leader in live music industry analysis, collected box office data for 1,288 live music events in Denver. More than 2.8 million tickets were sold for these events resulting in gross box office receipts of over \$142 million, a conservative figure considering that Pollstar only publishes results based on data reported by venue owners and promoters. Like other parts of the music industry that remain invisible when gathering data, there are presumably a substantial number of performances at clubs, venues, theaters, festivals, houses, art galleries, and coffeehouses in Denver that go unreported (Table 5).

*Table 5. Box Office Summary of Live Music Events, 2016*

	<b>Number of Events</b>	<b>Tickets Sold</b>	<b>Gross Revenues</b>
Denver	1,288	2,833,702	\$142,839,963

*Source: Pollstar, 2017*

Of this \$142 million, just over \$42 million is attributed to one venue, the Red Rocks Amphitheatre – an internationally-known 10,000 seat outdoor musical venue owned and operated by the City and County of Denver, located 20 minutes from downtown Denver. When one considers all of the live music events that take place at Red Rocks – both reported to Pollstar and not – the totals for the venue increase significantly. Live music events at Red Rocks which span multiple genres of music resulted in 1,111,990 tickets sold and over \$65 million in revenue in 2016 (Table 6).

# The Live Music Experience in Denver

(cont.)

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Table 6. Red Rocks Amphitheatre Ticket Sales and Revenue by Genre, 2016

Genre	Tickets Sold	Ticket Revenue
Folk / Acoustic	222,839	\$13,047,956
Dance / DJ	222,238	\$12,397,920
Rock / Metal	201,728	\$13,076,107
Other	150,910	\$8,987,566
Country	72,461	\$4,892,389
Electronica	71,775	\$3,548,088
Hip-Hop / Rap	63,708	\$3,051,311
Pop / Top 40	45,445	\$2,720,686
Indie / Emo	19,657	\$1,115,081
Alternative / Punk	19,102	\$1,106,592
Reggae	9,533	\$579,814
Christian / Gospel	6,796	\$280,816
Classic Rock	5,798	\$419,708
<b>Totals</b>	<b>1,111,990</b>	<b>\$65,224,034</b>

Source: Denver Arts & Venues

While the venue is a top draw for those who live throughout the Denver region and the state, it is also a tourist destination for people across the country and internationally. Denver Arts & Venues estimates that a sizeable portion of the tickets purchased for music events at Red Rocks in 2016 were purchased by people visiting Colorado. Much like Austin's South-by-Southwest festival, Red Rocks is a revenue-generating magnet for music-lovers both within the state and well beyond its borders.

## Leveraging the Future

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Denver's music industry, like that of the nation's, is shifting from the production and consumption of physical products to the production and consumption of products in both digital and live environments. This shift is demonstrated by the declining employment and comparatively weak revenue associated with studios and the manufacturing of physical recordings (the "Recording and Product" music industry subsector) while significant increases in employment and revenue are observed for musicians, and people who facilitate

# Leveraging the Future

(cont.)

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One of our major goals at the Newman Center for the Performing Arts is to broaden our reach in the community through programming that represents the rich diversity in the Denver area. World music, classical, jazz, hip hop, family programming and everything in between - we want to welcome the community to the Newman Center and University of Denver campus, with performances that inspire and entertain.

**Kendra Ingram,** Executive Director  
Robert and Judi Newman Center for the Performing Arts.

”

musicians' career development, and the live events which offer an opportunity to experience music. At the same time as the music industry shifts from the physical to the experiential, the section of the population that is a prized demographic for the music industry is embracing that shift.

The millennial generation (those approximately 20 to 36 years of age in 2016) is the biggest generation in the United States since the baby boomers, representing just over a quarter of the nation's total population.<sup>12</sup> The millennials' preference for the experiential over the physical is a defining trait of the generation, so much so that the retail industry is in a state of disruption while ticket sales for concerts, music festivals, and events often offering live music (such as craft beer festivals and themed runs like the "Rock 'n' Roll Denver Marathon") are rising substantially.<sup>13 14</sup> This trend of millennials spending more on events and travel than on physical items is fueling an *experience economy* still in its infancy. As the millennial generation enters their prime earning years, an estimated 72% of them are looking to increase their spending on new events and additional ways to collectively share life experiences.<sup>15</sup>

Denver is positioned well on two fronts regarding the millennial-driven experience economy. The region is already a prime tourism destination with the infrastructure to support it. Between 2005 to 2016, the number of tourists visiting Denver increased annually at a rate almost three times the national average. The 31.5 million visitors to Denver in 2016 represents another record-breaking year for tourism.<sup>16</sup> In addition to tourism, the Denver region and Colorado are also home to a robust millennial population. More than 1.3 million millennials call Colorado home: 24% of the state's entire population; there are also more than

# Leveraging the Future

(cont.)

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1.4 million members of Generation Z (approximately 0 to 19 years of age) following close behind.<sup>17</sup> In the Denver metropolitan region, millennials comprise 24% of the population and 32.5% of its workforce, and more than half of the newcomers to the area fit the millennial definition.<sup>18</sup> As millennials nationwide continue to search for new ways and places to experience life, exploring Denver will continue to be an attractive option.

## Conclusion

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Denver has unparalleled dynamics which set it apart from many other cities also leveraging music as a tool for growth and development – a robust millennial population, increasing tourism, a packed yearly schedule of live music events throughout the region, one of the preeminent live music venues in the world, and strong employment growth of music industry professionals. Implementing the *Denver Music Strategy* will benefit both the visible and invisible players in Denver’s music industry, as well as the communities in which they live. The *Denver Music Strategy* will also help propel Denver beyond the numbers towards globally-recognized music city status.

## Appendix: Industry Analysis Methodology

The first step in measuring Denver's music industry was to establish a geographic area for examination. As in many similar studies, a regional approach was taken to accurately examine and assess music industry dynamics in Denver as the venues, studios, musicians, festivals, and other ingredients that propel its music industry are located throughout the entire metropolitan region, while the city of Denver remains the hub and focal point for all associated activities. The U.S. Office of Management and Budget-defined "Denver-Aurora-Lakewood Metropolitan Statistical Area" (Denver MSA) was used as the geographic parameter for gathering all associated data.

After establishing the area of study, the next step was to develop a framework for who should be included. For the purpose of this study, an industrial approach was taken to estimate the scale and scope of Denver's music industry. The music industry is similar to many other industries such as aerospace or biotech in that clusters of like-minded individuals and firms within a region contribute to the production of a set of goods sharing a common theme, in this case the production and consumption of music. However, taking an industrial approach in analyzing Denver's music industry unfortunately overlooks some participants as well as some revenue. For example, those who are still developing their skills in basements, living rooms, and garages as band members, promoters, or sound engineers are not captured in the data – nor is any money that may be associated with their efforts. The same is true for the successful freelance graphic designer who counts her friends' bands as clients because they pay her to design posters, websites, and album covers or the filmmaker who shoots music videos in his free time to develop his portfolio. The choir leader who is employed full-time at a church or the composer who is an employee of an advertising agency and their respective salaries are also not counted. However, an industrial approach offers a fair consideration of what comprises Denver's music industry since it includes not only the primary drivers who have experienced a measurable, economic level of success (musicians, sound engineers, managers, etc.), but also those who may work at music industry-related firms and organizations who are not directly involved in the production or consumption of music, e.g., the office manager working at a booking agency responsible for promoting festivals or the administrative assistant employed by the music department of a university. Despite this detail, it is important to remember that the results contained within this study are still most likely underestimating the size of Denver's music industry.

This study uses the North American Industry Classification System (NAICS) to define which industrial subsectors should comprise Denver's music industry (Table A1). Once the NAICS-defined framework was established, EMSI, an industry-standard economic analyst tool, was used to gather data provided by the Bureau of Labor Statistics, Bureau of Economic Analysis, U.S. Census, and other city, state and federal organizations. The data represents people who work full-time at music industry-related firms and organizations, in addition to those who work either part-time in a freelance capacity or are sole proprietorships.

In some cases, all the firms in a NAICS code subsector are directly involved with the production and consumption of music. In other cases, a NAICS code subsector includes firms that provide similar goods and services, but for entirely different industries. In those cases, it was necessary to adjust results provided by EMSI for the Denver MSA by using complimentary data sources to estimate how much of the subsector in question is dedicated solely to music – a methodology used previously in an analysis of Seattle's music industry.<sup>19</sup> Of the eighteen NAICS subsectors examined in this study, eight are considered "direct," needing no additional analysis before inclusion, while ten are categorized as "estimated," with results representing adjustments made to the EMSI-supplied numbers.

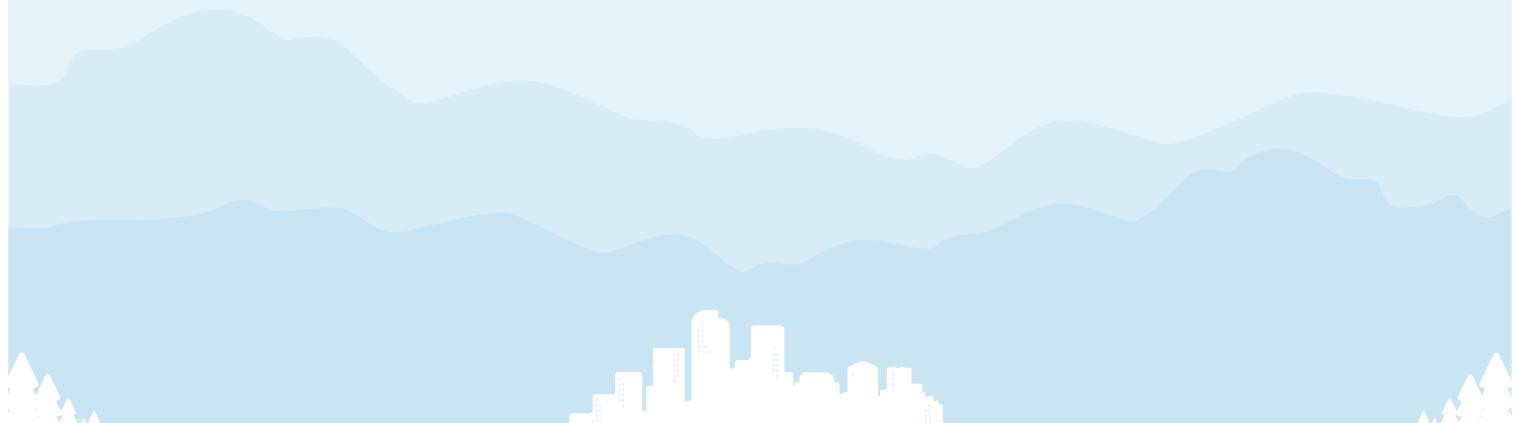


## Appendix: Industry Analysis Methodology (cont.)

*Table A1. NAICS Subsectors Included in Analysis*

<b>NAICS Code</b>	<b>Description</b>
<b>Musicians, Managers, and Agents</b>	
711130	Musical Groups and Artists
711410	Agents and Managers for Public Figures*
711510	Independent Artists, Writers, and Performers*
<b>Instruments</b>	
339992	Musical Instrument Manufacturing
451140	Musical Instrument and Supply Stores
<b>Recording and Product</b>	
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
<b>Live Events</b>	
532229	All Other Consumer Goods Rental*
711110	Theater Companies and Dinner Theaters*
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities*
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities*
722410	Drinking Places (Alcoholic Beverages)*
<b>Radio</b>	
515112	Radio Stations*
<b>Education</b>	
611310	Colleges, Universities, and Professional Schools*
611610	Fine Arts Schools*

\* Estimated subsector

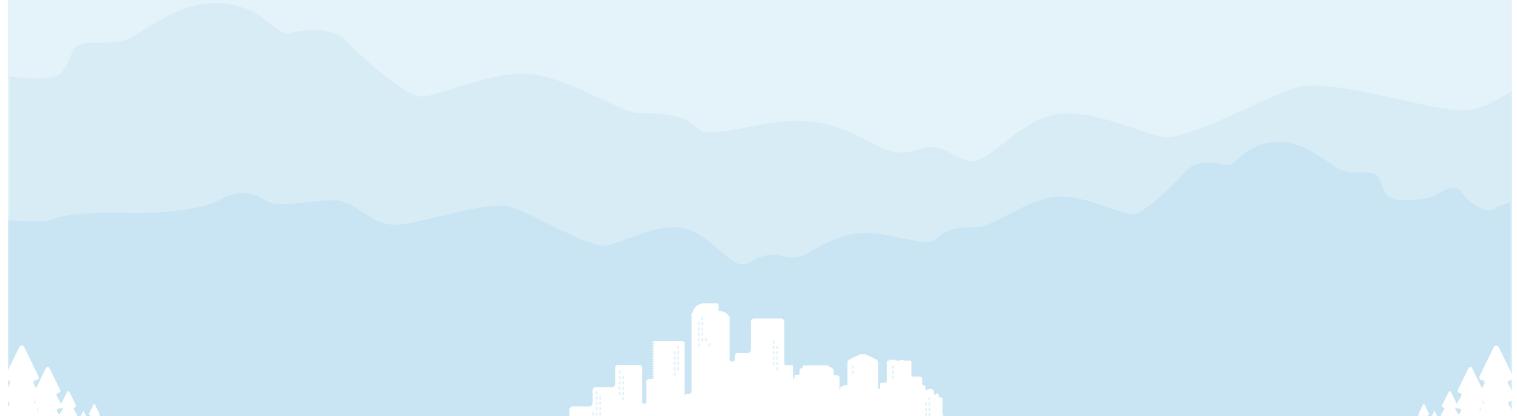


## **Appendix: Industry Analysis Methodology (cont.)**

To develop estimates of music-related activity for identified subsectors, a database compiled by Infogroup detailing all businesses within Denver County by NAICS code, number of employees, and revenue was used as a guide. Once a baseline estimate for Denver County was established, extrapolating it to represent the subsector's music-related employment, earnings, and sales for the Denver MSA included referencing a number of other data sources including, but not limited to, the U.S. Census, the Bureau of Labor Statistics, Pollstar, audited financial statements, media reports, and information gained from industry representatives.

Another crucial element to examine concerning a region's music industry is the vitality of its live performances. For this study, data regarding the number of shows, ticket sales, and revenue generated in the Denver MSA were obtained from Pollstar, the industry-leader for data collection regarding live music performances. Pollstar does not report data in terms of official Metropolitan Statistical Areas, so data requests were made for the city of Denver and a twenty-mile buffer zone surrounding it. Results were checked for accuracy and any venues included outside of the Denver MSA eliminated. It is important to note that data supplied by Pollstar are likely under representative as Pollstar only publishes results based on data reported by venue owners and promoters. Like other parts of the music industry that remain invisible when gathering data, there are presumably a substantial number of performances at clubs, venues, theaters, festivals, houses, art galleries, and coffeehouses that go unreported.

Data concerning live performances at the Red Rocks Amphitheatre were provided by the City of Denver agency, Denver Arts & Venues. Red Rocks Amphitheatre is owned and operated by the City and County of Denver, and Denver Arts & Venues contracts with AXS Digital, LLC (AXS) to ticket all events at the venue. The agency obtains comprehensive sales records regarding those events and the data regarding Red Rocks contained within this study reflect the data presented in those sales records.



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# 2018 DENVER MUSIC STRATEGY

