



dmmc
GREATER DES MOINES MUSIC COALITION

SOUND
DIPLOMACY

DES MOINES

MUSIC ECONOMY ASSESSMENT & STRATEGY

EXECUTIVE SUMMARY

August 2022

FOREWORD DES MOINES

In 2008, the Greater Des Moines Music Coalition (DMMC) introduced a new festival called 80/35. The name was, to some extent, tongue in cheek: Interstate 80, running from San Francisco to New York, and Interstate 35, running from Minneapolis to Austin, are two of the biggest arteries for touring bands in the U.S., and they converge in Des Moines.

What the festival realized was that the larger music industry often drove right through Des Moines, more often stopping for a hotel or rest stop than to perform in our city. The festival sought to change that.

Fast forward to 2022, and the mission has arguably succeeded – the concert and festival calendar in Des Moines is robust, and major events such as Hinterland Music Festival and venues like Hoyt Sherman Place along with an expanded Iowa Public Radio and many other venues and music outlets have helped establish Des Moines as a nascent Music City.

Simultaneously, the local music scene has grown considerably. The COVID-19 pandemic, as evidenced in this report, had an outsized effect on the local music community (as well as the music industry nationwide), and as the larger music industry continues to stabilize, the Des Moines music ecosystem stands at an important moment of recovery, resilience, and growth.

DMMC and the Des Moines Music Task Force believe music is an integral part of what makes Des Moines a vibrant cultural hub in Iowa. Our hope is this report – and the recommendations included here – will galvanize all of the relevant stakeholders to take action in supporting and championing the music ecosystem in Des Moines, from large scale venues and festivals to fiercely DIY acts performing at house shows along with the music industry professionals who fill important roles in the ecosystem.

What makes Des Moines a Music City is difficult to quantify – we may not have a lightswitch moment where we now realize the identity of Des Moines is fully intertwined with the music ecosystem. However, this report – and the work to now be done – will continue to build upon the work that many venues, promoters, bands, funders, industry professionals, entrepreneurs, nonprofits, and audiences have been doing for many years. As the DMMC, we invite feedback, conversation, and collaboration as we continue to champion a strong music ecosystem in Des Moines.

**Mickey Davis,
Executive Director of
Des Moines Music Coalition**

Cover Image © Dronography Iowa

INTRODUCTION SOUND DIPLOMACY

Des Moines is bursting with creative energy, from musicians who bring the city color and vibrancy to a supportive and resourceful ecosystem that values musical expression and contributions.

While researching and compiling this report, we could not help but be impressed by Des Moines’ philanthropic infrastructure; with funding from a wide array of organizations like the Greater Des Moines Community Foundation and Bravo Greater Des Moines, the city out-paces many of its peers in terms of access to tangible and financial resources. These resources have helped cultivate fertile ground by supporting and expanding the capacity of organizations that provide educational and professional opportunities to local artists and organizations.

Des Moines’ streamlined regulatory processes and attuned government leadership have helped cultivate an easily navigable system where businesses, artists, and professionals thrive, whether they are just starting or considered veterans with several years of experience. The city’s already robust music ecosystem, led by the Greater Des Moines Music Coalition, can only get stronger by working collaboratively towards a more integrated communal approach using the findings and recommendations of this report to continue their work.

It has been a great joy to work with such invested stakeholders throughout this journey and we look forward to what the future holds for music in Des Moines.

**Kate Durio,
CEO of North America
and the Caribbean,
Sound Diplomacy**



1.1 ABOUT THE PROJECT

PROJECT DESCRIPTION

Sound Diplomacy was engaged by the Greater Des Moines Music Coalition in 2021 to pursue a study that would provide the most accurate, far-reaching data and research to support the economic viability and value of Des Moines’ music ecosystem.

Together, we determined that the future of Des Moines’ music ecosystem not only depends on developing a comprehensive understanding of its economic value, but also on a clear outline that articulates the policies needed to better support music makers, businesses, and the supply chain.

Recognizing the impact of COVID-19 locally, nationally, and globally, this project was conceptualized as a way to help reinvigorate the music and creative sectors in the region as well as utilize the new perspectives gained to develop innovative approaches to highlighting and supporting the music ecosystem. In doing so, we worked collaboratively with the Greater Des Moines Music Coalition to determine the direct, indirect, and induced economic impact of Des Moines’ music industry as well as identify which local regulatory frameworks may help or impede the ecosystem’s progress. We found that while certain facets of the music ecosystem thrive, such as the level of local talent, availability of venues, and capacity-building opportunities for non-profit organizations, other

aspects like noise regulations, marketing, communications, and professional development require more attention to reach their full potential. Additionally, the intentional cultivation of an audience, through strategic programming and educational opportunities for adults, is one of the missing pieces that could unlock Des Moines’ already emerging identity as a musical destination.

Our research found that, while some helpful resources exist, an integrated approach, where music and culture are considered at several levels of city governance and local policy, is needed for Des Moines’ reputation to grow. From sustainability considerations to raising awareness about the current and potential economic contributions of the music ecosystem, we hope this report is recognized as a first step towards the preservation of the creative industries that can be molded to fit Des Moines’ specific wants and needs and act as a guide for future ideations regarding what Des Moines’ music ecosystem can and will become.



Image © Dronography Iowa

1.2 METHODOLOGY

REGULATORY ASSESSMENT AND COMPARATIVE ANALYSIS

Analysis of local and national literature and policies relevant to the music industry in Des Moines, and best practices found in other US and international cities and with a comparison to Des Moines.

ECONOMIC IMPACT ASSESSMENT

An assessment of the direct, indirect and induced economic value of Des Moines’s music industry.

SWOT ANALYSIS

A full analysis of all findings (mapping, literature review and regulatory assessment, and economic impact) to identify all strengths, weaknesses and potential opportunities for, and threats to the Des Moines music ecosystem.

MUSIC ASSETS MAPPING

Identification of music-related assets in Des Moines, Iowa. The geographical area included four wards in which 141 music assets were mapped.

STAKEHOLDER ENGAGEMENT

The Greater Des Moines Music Coalition (DMMC) conducted roundtables and a survey with stakeholders of the Des Moines music ecosystem.

STRATEGIC PLAN AND RECOMMENDATIONS

A comprehensive plan for the development of Des Moines’s music ecosystem based on the analytical work previously completed.



Image © Alyssa Leicht

2. REGULATORY ASSESSMENT

The City of Des Moines is Iowa’s capital city and the county seat of Polk County. The local government serves more than 215,000 residents throughout 52 neighborhoods with more than 4,000 acres of parkland and 81 miles of trails. The City of Des Moines stands to be a financially strong city with exceptional city services, fostering an involved community in a customer-friendly atmosphere. Des Moines is the core of one of the fastest-growing metro areas (DSM USA) in the Midwest and is beaming with community pride and accolades.¹

TOPIC	IN PLACE?	CITY’S POLICY	BEST CASE
MUSIC EDUCATION	Yes	<p>Des Moines Public Schools (DMPS) has a Fine and Performing Arts Department which offers music, visual art, and drama programs for students in grades K-12.² The music section of the department aims to “ensure that all students have an opportunity to have a strong musical education and have access to programs that enriches their school experience”.³</p> <p>The Greater Des Moines Music Coalition,⁴ Des Moines Music Symphony,⁵ School of Rock West Des Moines,⁶ Girls Rock! Des Moines,⁷ Des Moines Performing Arts,⁸ Central Iowa Music Lab,⁹ Des Moines Heartland Youth Choir,¹⁰ and Des Moines Civic Music Association¹¹ offer after-school music programs.</p> <p>Drake University,¹² Grand View University,¹³ and Des Moines Area Community College¹⁴ offer music degree programs.</p> <p>The Greater Des Moines Music Coalition,¹⁵ Des Moines Performing Arts,¹⁶ Des Moines Teachers Association,¹⁷ and Des Moines Musicians Association¹⁸ offer professional development.</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.¹⁹</p>
FUNDING SUPPORT	Yes/No	<p>There are several different types of grants available through the Iowa Department of Cultural Affairs²⁰ as well as organizations like Bravo Greater Des Moines,²¹ and the Greater Des Moines Community Foundation.²²</p> <p>Des Moines has incentive programs for high-quality job creation, new jobs training, infrastructure, and apprenticeships and internships, but there are no programs directly related to music specifically for the arts in general.²³</p>	<p>While there are several best-case examples of arts and culture grants, Creative Victoria, in Australia, has created a music-specific funding program which issues grants to music venues to help them in making structural changes to contain sound and prevent complaints that could lead to closures. The fund is aimed at helping with minor soundproofing changes that will prevent venues from having to make major structural adjustments. 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.²⁴</p> <p>Because the mapping assessment shows that Des Moines has a lack of dedicated music venues, a program like this could help to optimize performance opportunities.</p>

TOPIC	IN PLACE?	CITY’S POLICY	BEST CASE
LIQUOR LICENSING	Yes	Liquor licenses are processed by the City Clerk’s Office. In order to apply for a liquor license in the City of Des Moines, all application materials must be submitted with consideration for processing time which could take up to 30 days. ²⁵ While information is readily available on the website, the process could be more streamlined.	The Department of Liquor and Lottery, Division of Liquor Control (DLC) in Vermont has on its website a plain-language guide and description of the liquor licenses available for applicants, including the necessary steps to obtain one. ²⁶ A certified employee in a business with a First Class License is able to train employees on the rules and regulations related to selling/ serving alcohol by using the DLC in-house training kit, which eliminates the additional training expenses and requirements on workers of licensed premises. ²⁷
SPECIAL EVENTS PERMIT	Yes	The Special Events Coordinator, who reports to the City Manager, is responsible for handling special events permits. The process is handled through a self-service website, which allows users to apply and pay online. ²⁸	<p>Des Moines’s special events permit process could be considered a best case in and of itself given accessibility and ease of use.</p> <p>The City of Des Moines could consider developing a mobile app, like New Orleans’ One-Stop App, to make the process all the more simple.²⁹</p>
NOISE AND CURFEWS	Yes	Mixed use and commercial zones have a sound level limit of 65 dBA for unamplified sound and 65 dBC for amplified sound; however, an exception is allotted for parades or processions which have the necessary city permit approval. ³⁰	Nashville has separate codes for businesses operating within their Downtown Code district (DTC) . Instead of restricting sound amplification by the time of day, Nashville’s DTC is restricted by their business operating hours. While commercialized use of sound-emitting machinery is restricted to 70 decibels for businesses operating outside of the DTC from 9 p.m. to 6 a.m., businesses within this district are allotted up to 85 decibels for prerecorded interior amplified sound during their business hours. ³¹
HEALTH AND SAFETY REGULATIONS	Yes	<p>The Mask Up DSM website also includes “Industry Forward Playbooks,” which provide sector-specific guidance on how to safely operate businesses and organizations; the Events, Arts, and Culture Playbook “provides guidance to organizations in Greater Des Moines (DSM) working in arts, culture, heritage, entertainment, event planning and related industries.”³²</p> <p>The Playbook includes a sample risk profile for concerts, which determines the level of risk by frequency or number of people in a day, duration or the length of a typical interaction, and variety or the number of different people attending each day. The Playbook also includes information pertaining to current impact, future trends, recommended practices, community practices, and additional resources.</p>	Mask Up DSM’s Events, Arts, and Culture Playbook could be considered a best case in and of itself given its direct relation to the entertainment community and the depth of its analysis and resources.
ENVIRONMENTAL SUSTAINABILITY AND RECYCLING	Not specific to the arts sector	Des Moines’s Sustainability Program organizes all of the City’s sustainability initiatives into one accessible website. While these initiatives include goals related to energy use, city walkability, neighborhood improvements, and transportation, none of the initiatives are directly related to the arts and culture sectors. ³³	Melbourne, Australia’s Planning and Environment Act encourages decision makers to consider the environmental impact of proposed development projects. Environmental considerations include music noise and the social and economic benefits of live music and cultural events. ³⁴

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
BUSKING	No	In 2006 the Des Moines City Council approved a three-month exception to part of the municipal code to allow street performers without attaining an Entertainment District License. However, there are currently no relevant links to this program on the Clerk's Office website or guidance for street performers. ³⁵	The Asheville Busking Guide was created by Asheville Buskers Collective to provide buskers and potential buskers with the dos and don'ts of the practice. It includes specific definitions for noise disturbances and includes city rules and laws. ³⁶
REGULATIONS FOR OUTDOOR ADVERTISING	Yes	Unless excepted, outdoor signs and advertisements cannot be erected without submission of an application and all accompanying forms to the zoning enforcement officer. ³⁷	The City of Vancouver's Transit Shelter Advertising Program offers free access to transit shelter advertising space for non-profit arts and culture organizations. The organizations pay for and arrange the posters and the City of Vancouver's Cultural Services Department provides them with space at transit shelters allotted by Outfront Media. ³⁸
AUDIENCE DEVELOPMENT	No	While there are several opportunities to consume music and culture throughout the Des Moines region, there are not many audience development programs targeted towards community engagement and participation in the arts.	Night Out ³⁹ is an Arts Council of Wales (ACW) initiative that helps local organizations to bring professional performances into community buildings at subsidized prices. This initiative helps hundreds of community groups across Wales to 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).
MUSIC OFFICE	Yes	The Des Moines Music Task Force is led by the Greater Des Moines Music Coalition (DMMC) with representation from Bravo Greater Des Moines, the Greater Des Moines Partnership, Iowa Public Radio, Hoyt Sherman Place, and Capital Crossroads. ⁴⁰ DMMC is a non-profit organization and collaborative movement that is "committed to building a stronger and more diverse music community in greater Des Moines" ⁴¹ and supporting Des Moines in its efforts to grow as a nationally recognized music city.	While the Des Moines Music Task Force is not a government-led music organization, the representation of local government officials, businesses, and non-profit entities all collaborating to develop the City's music brand makes it a best practice. However, having a government-led music office would greatly improve access to and with local government to maximize impact for the music community, such as the full-time Music Officer position funded by the City of Huntsville, Alabama , through the Mayor's Office. ⁴²

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
ENTERTAINMENT DISTRICTS	Yes	The Historic Court District is considered to be the main entertainment district in downtown Des Moines with its abundance of restaurants, bars, markets, and murals. ⁴³ In Summer 2021, Historic Court was home to the Court Avenue 'Entertainment Zone' which was in place from 9 p.m. to 2 a.m. on Fridays and Saturdays all summer through September.	Austin has six official entertainment districts, each distinct in aesthetic and offer. Downtown Austin is the main commercial area, divided into three sub-areas (2nd Street, Warehouse District, and West Sixth Street) and concentrating a higher profile of entertainment and dining options compared to the rest of the districts. East Austin is the fastest growing neighborhood, famous for its eclectic and alternative offer of entertainment, food options, and bars. ⁴⁴
AGENT OF CHANGE	No	Agent of Change is not in place in Des Moines. The Agent of Change Principle holds the entity that creates a change in an area responsible for the impact this change can have in that area. In the case of music, the Agent of Change usually either requires the building that arrives the latest (be it the music venue or the residential development) to be adequately soundproofed to avoid nuisances and complaints and/or to inform the new residents that they are moving next to a music venue or within an entertainment area which permeates noise.	San Francisco Mayor London Breed's amendment to Chapter 116 of the local ordinances states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built nearby. ⁴⁵
PARKING REGULATIONS	Yes	Downtown Des Moines offers more than 30,000 public parking spaces, with seven public parking ramps and approximately 3,000 street parking meters. All City-owned parking garages charge \$1 per hour with a daily max of \$10 (excluding special events). The implementation of the ParkDSM mobile application and a new parking kiosk system is due soon. ⁴⁶	In Nashville , a deal was brokered between Premier Parking and the local musicians' union, in which special \$5 nightly rates will be offered for musicians. Additionally, the Renaissance Hotel in the city center has started offering \$9 valet parking services for musicians. Parking vouchers for the hotel are handed out in local music venues, intended to be given to musicians to access those prices. ⁴⁷
TRANSPORTATION	Yes	The Des Moines Area Regional Transit Authority (DART) is Iowa's largest public transit agency. It provides bus services throughout the Des Moines metro area. ⁴⁸ The Des Moines region has multiple airports including the Des Moines International Airport, and taxis, Uber and Lyft ride-sharing services are available throughout the area. B-cycle is a public bicycle sharing program with 27 stations and 200 classic and E-bikes throughout Downtown Des Moines, Clive and Windsor Heights. The system has a BCycle app where users can buy online passes. ⁴⁹ There does not appear to be any additional night transportation services outside of rideshare.	Toronto's Blue Night Network is the most extensive nighttime transportation service in North America, with routes picking up after trains cease service between 1 a.m. to 2 a.m. Routes run approximately every 30 minutes until morning service resumes, and are spaced to keep 99% of the city within a 15 minute walk of a stop. ⁵⁰ The network consists of buses, trains, and streetcars.

3. ECONOMIC IMPACT

DES MOINES ECONOMIC IMPACT OVERVIEW

The two segments of the Des Moines music ecosystem – Artistic & Creative and Professional & Supporting – delivered a total economic impact of 1,555 jobs, a total output of \$178 million, a total gross value added (GVA) of \$121 million and a total workers compensation of \$62 million.

The total employment created and supported by the Des Moines music ecosystem generates 1.38% of the city's employment, a figure slightly below the contribution of music employment in New York City (1.4%), but above the average employment contribution of the music ecosystem registered at the national level (1.3%).

For every \$1,000 of output generated by the music ecosystem in Des Moines, there is an indirect effect of \$93 in the output of other industries locally, and an induced effect of \$190 on different industries as well.

DEFINITIONS

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

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

Induced impact is created when the workers of the whole music ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (MILLION \$)	GROSS VALUE ADDED (MILLION \$)	EARNINGS OR COMPENSATION (MILLION \$)
Direct	1,226	139	96	49
Indirect	110	13	9	5
Induced	219	26	16	8
Total Impact	1,555	178	121	62

Developed by: Sound Diplomacy

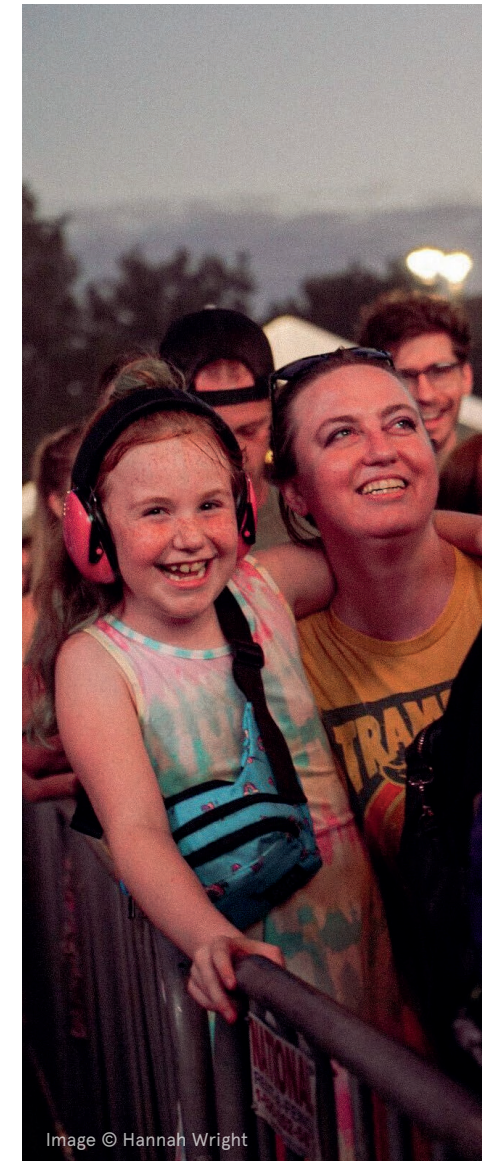
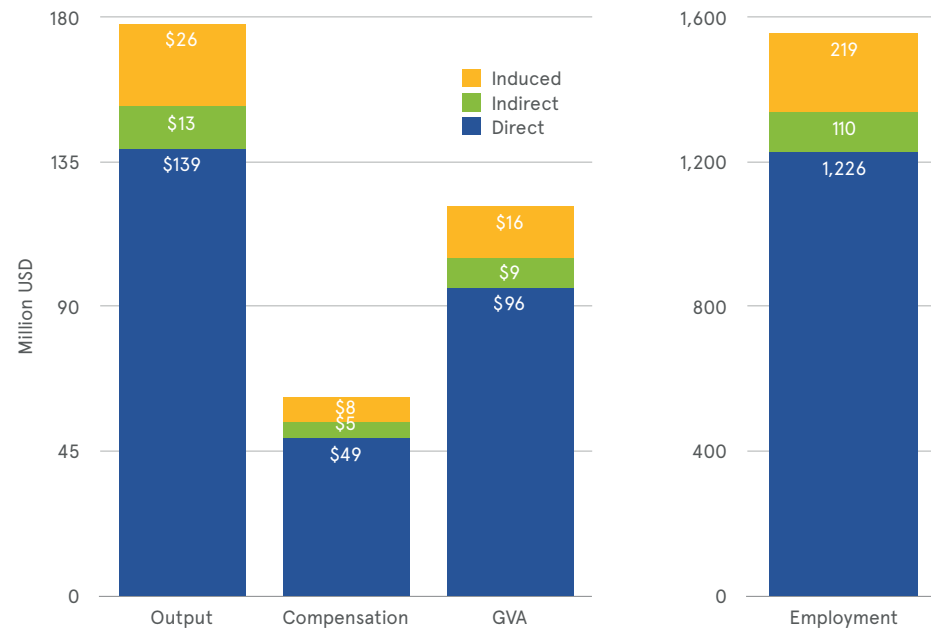


Image © Hannah Wright

DIRECT IMPACT

Des Moines music ecosystem generated **1,226 direct jobs**, **\$49 million in earnings**, **\$139 million in economic direct output** and **\$96 million in GVA** in 2019.

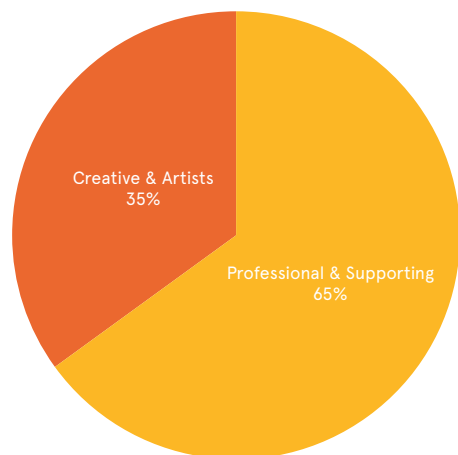
DES MOINES, IA MUSIC ECOSYSTEM ECONOMIC IMPACT, OUTPUT, COMPENSATION, GVA (MILLION USD) AND EMPLOYMENT



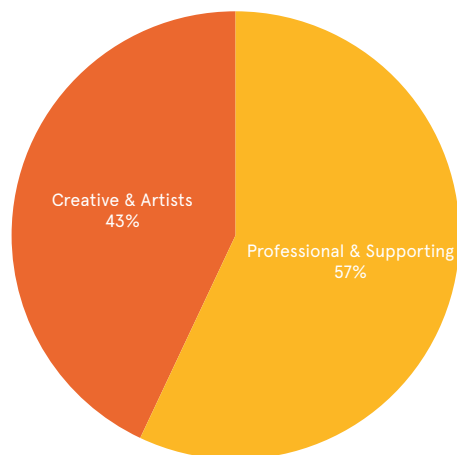
Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research
Developed by: Sound Diplomacy

MUSIC ECOSYSTEM DIRECT EMPLOYMENT & OUTPUT BY SEGMENT

Direct Employment



Direct Output



The majority of the direct economic value of the sector is created by the **Professional and Supporting Segment**. The segment contributes **57% of the direct output** and **65% of the direct employment**.

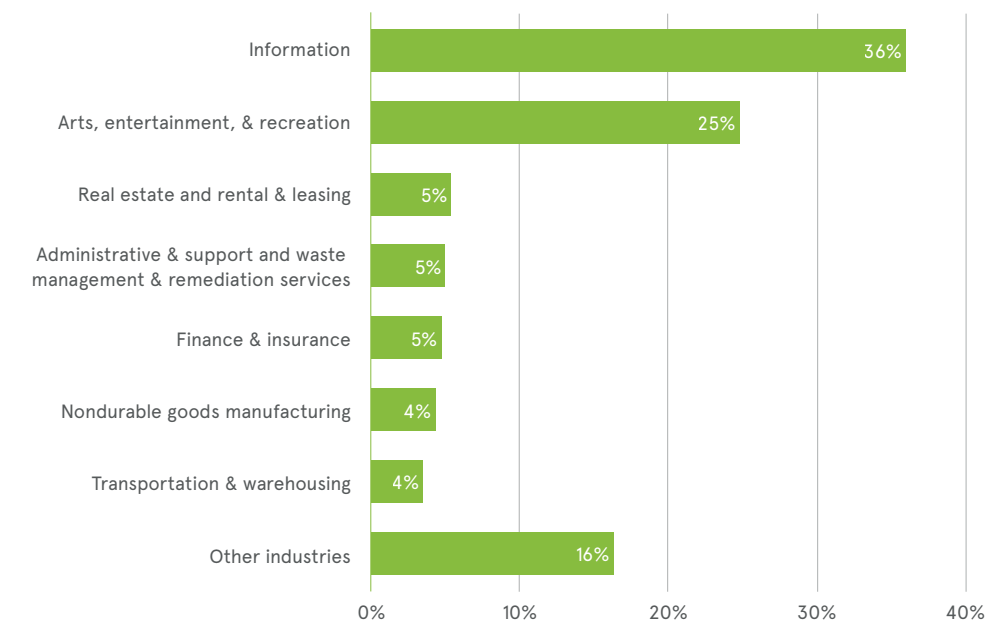
Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research. Developed by: Sound Diplomacy

INDIRECT IMPACT

The indirect economic impact of the music ecosystem in Des Moines, IA reached an output of **\$13 million**, a **GVA of \$9 million**, and it is estimated that **110 jobs** in Des Moines were **indirectly supported** by the music ecosystem in 2019.

It was estimated that **36% (\$4.9 million)** of the indirect output effect of the Des Moines music ecosystem impacted the **information sector**, **25% (\$3.3 million)** impacted the **arts and entertainment sector**, **5.4% (\$0.7 million)** impacted **real estate and rental and leasing industries**, **5.0% (\$0.7 million)** impacted the **administrative and support and waste management and remediation services sector**, among other industries.

INDIRECT IMPACT OUTPUT BREAKDOWN



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

INDUCED IMPACT

The **induced output** of the music ecosystem in the region reached **\$26 million**, a **GVA of \$16 million** in 2019, and supported **219 jobs**, with a **compensation of \$8 million**. This effect is derived from the spending of workers whose wages are supported directly and indirectly by the Des Moines music ecosystem.



4. MAPPING

ASSET MAPPING IN DES MOINES

Of the 141 music assets that were mapped, the category of Venues had the most representation with 51 (36.2%). The second category with the most presence is Music Business with a total of 21 (14.9%) assets.

In addition to Music Business, other categories with some participation are Music Festivals with 15 (10.6%) assets, Music Radio Stations with 15 (10.6%) assets and Record & Equipment Stores with 13 (9.2%) assets.

This composition of the music assets in the area shows the high availability of spaces for the exhibition of live music (Venues), but a lower availability of other types of music-related assets in the local value chain. In particular, the availability of Music Education (4.3%) and Recording Studios (5.0%), that represent the Professional & Supporting segment of the music ecosystem, have a low participation in the whole ecosystem.

MUSIC ASSETS BY CATEGORY IN DES MOINES

51
VENUES

21
MUSIC BUSINESS

15
MUSIC RADIO STATIONS

15
MUSIC FESTIVALS

13
RECORD & EQUIPMENT STORES

12
ORCHESTRAS & CHOIRS

7
RECORDING STUDIOS

6
MUSIC EDUCATION

1
INSTRUMENT MANUFACTURERS

Development by Sound Diplomacy

SPATIAL DISTRIBUTION OF MUSIC ASSETS IN DES MOINES

The key findings from the geolocation exercise indicate that:

Ward 3 has the highest concentration of music assets in Des Moines with 89 assets (63%).

The highest concentration of music assets, with a number of 51 (36.2%), can be found in Downtown Des Moines.

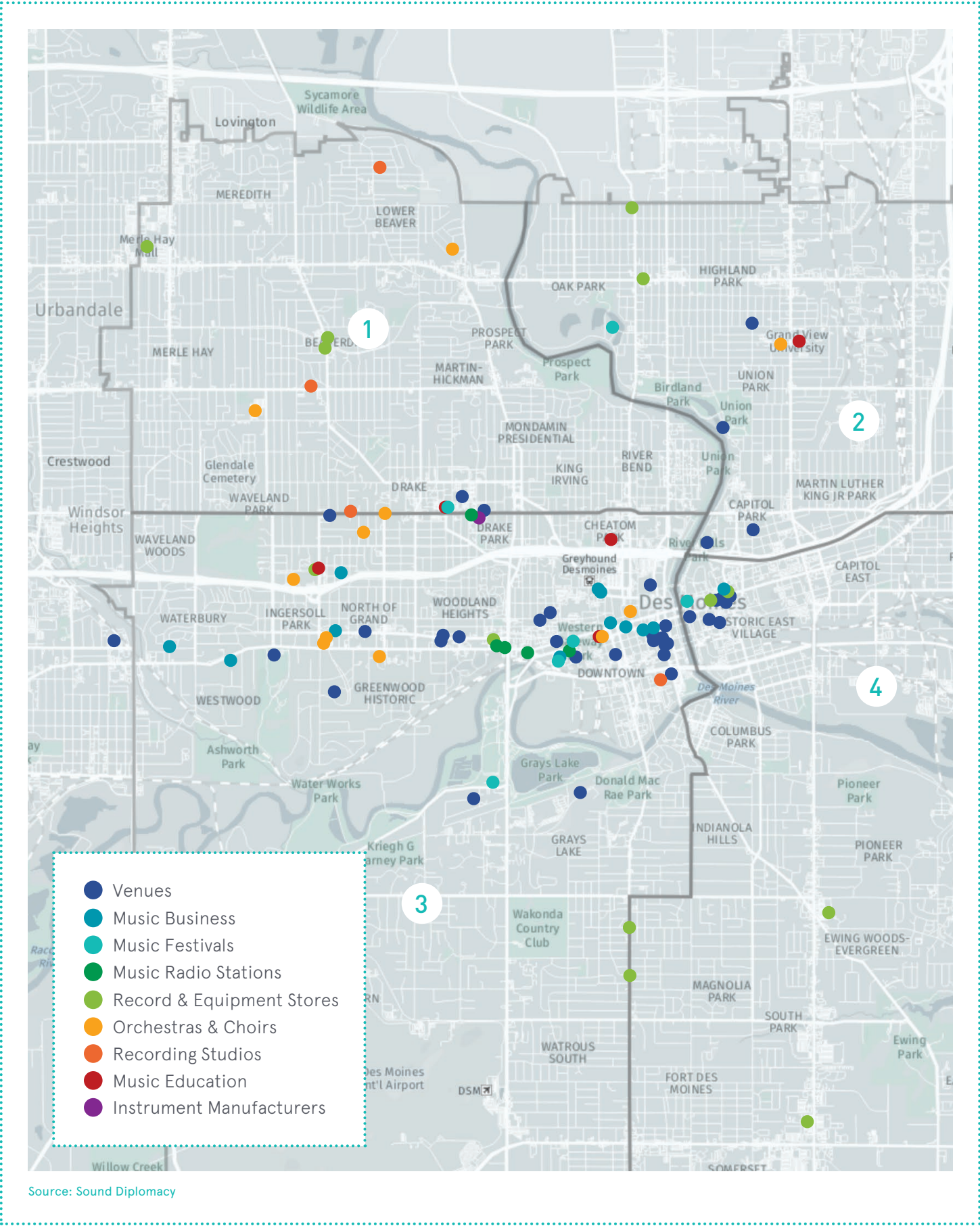


Most of the music assets from Ward 1 and Ward 4 are located near the border to Ward 3, indicating a spatial relationship between assets.

Ward 3 and Ward 4 together host 110 music assets of Des Moines, amounting to a combined share of 78% of music assets.

Ward 3 hosts the majority of Venues in Des Moines with 31 (61% of all venues), and also the majority of all other music assets outside of the category Venues with 58 (64% of all music assets excluding Venues).

The spatial distribution of music assets, a result of our geolocation exercise, is shown in the [interactive map](#).



5. SWOT ANALYSIS

The strengths, weaknesses, opportunities, and threats (SWOT) of the Des Moines music ecosystem have been compiled with the findings from the regulatory assessment, asset mapping, online survey, roundtables and interviews, and economic impact assessment to create a comprehensive SWOT Analysis as outlined below.

STRENGTHS

MUSIC SCENE

- There is a significant number of talented artists in the music scene
- The music scene is also inclusive in terms of age, gender and genre as every artist gets a chance
- The city has been attracting new high-level artists who do not see the city as a fly-over city but are rather interested in staying.

PROFESSIONAL DEVELOPMENT & OPPORTUNITIES

- The music sector in the city is more collaborative than competitive and experienced musicians are open to share knowledge and experiences with upcoming artists
- There are various events and festivals for artists to perform, and lots of paid opportunities
- Des Moines experiences a high availability in venues with a total number of 50, which equals 36% of all mapped assets. There are more venues to perform in comparison to past years.

MUSIC EDUCATION

- There is a large ecosystem of music education, considering the population size
- Music education for children and teenagers is robust and diverse.

FUNDING

- There are a multitude of grants and funding mechanisms through the Iowa Department of Cultural Affairs and the Iowa Arts Council.

PERMITTING, POLICIES & REGULATIONS

- The special event permitting process is easy to navigate and all information, including applications and payments, can be submitted online
- Easy Access to political leaders and policy makers.

HEALTH & SAFETY

- There are health and safety regulations in place that are specifically geared towards the arts and cultural community.

BUSINESS DEVELOPMENT

- The Des Moines Music Coalition’s Music Task Force encourages collaboration between public, private, and nonprofit sectors.

MUSIC ECOSYSTEM

- Out of the 67 counties in Iowa with available data, Polk county (where Des Moines is located) ranks number 1, having 21.4% of the total music ecosystem establishments in the state
- The music sector in Des Moines supports 1.38% of the local employment which ranks slightly above the national average of 1.30%
- The music output per capita equals \$832 which is considerably above the national average of \$444
- Most of the artists and professionals in the industry (58%) have a high-level of education, understanding it as having obtained at least one university diploma.

TRANSPORTATION

- Music assets in Des Moines are easily accessible via public transportation with an average of 9.77 Metro/bus stops within a five minute radius per music asset, exceeding the connectivity observed in comparable cities.

WEAKNESSES

MUSIC INDUSTRY

- There is a city-wide music scene, but there is not a strong presence of all roles in the music industry in Des Moines
- The way of doing business in the industry is highly inconsistent and unarticulated.

MUSIC EDUCATION & PROFESSIONAL DEVELOPMENT

- There are few educational and professional development opportunities available for non-performance based music professionals
- The mapping assessment shows a low availability of important segments of the Professional & Supporting segment such as Music Education with six assets or Recording Studios with seven assets.

PLANNING, POLICIES & REGULATIONS

- Noise regulations are limited and noise exceedance permits are usually only available for special, or single, events
- There is no busking policy in place
- City coding makes it hard for venue developers to progress in their development projects.

MARKETING & COMMUNICATION

- Audience development programs are few and far between
- Media does not cover the local music scene enough
- Communication between rehearsal venues and artists is not strong as it could and should be
- The city is missing an online resource with up-to-date and centralized information on the local music scene.

TRANSPORTATION

- There is limited public night transport services
- Larger audiences are hard to find, mostly because there are not enough transportation solutions for suburban residents – “Hard to get them to come down”.

SPACES, PLACES & INFRASTRUCTURE

- There are not enough practice or rehearsal spaces in the city
- A large capacity venue is missing from the city
- Within the Venues category, Bars, Cafés and Restaurants with Music are the subcategory with the most representation, where some of the venues might be suboptimal for live music events and the number of Dedicated Live Music Venues is rather low
- City is missing family-friendly listening venues, as all of the venues involve alcohol.



Image © Hannah Wright

MARKETING & COMMUNICATION

- Advertisement in the airport does not show Des Moines as a music destination.

DEMOGRAPHICS

- The Des Moines’ music scene does not reflect the diversity in the city in race, nor gender
- 60-70% of the public school population is people of color, but that is not represented in the music scene
- There are not enough women-led music groups or bands
- Managerial roles in the music ecosystem are disproportionately being occupied by men, with men holding 83% of the managerial roles, vs. 58% in other sectors which is also true for race disparities, since 100% of the managerial roles in the industry are occupied by individuals who classify themselves as ‘white’
- There is a significant difference in matters of income: within the music ecosystem, on average men earn 88% more than women (\$42,000 vs \$23,000) and this gap is drastically higher than that of the rest of the economy, with men earning 40% more than women (\$56,000 vs. \$40,000 respectively)

- In matters of race, White-identified workers earn 42% more than Asian workers, 95% more than Black / African Americans, and 335% more than workers from other races while In the rest of the economy White workers earn 19% more than Asian workers, 61% more than Black / African Americans, and 46% more than workers from other races.

MUSIC ECOSYSTEM

- The Economic Impact Assessment shows a comparably low indirect effect possibly caused by a relatively low interaction between the local agents within the music value chain and, in turn, a lower level of sectoral professionalization
- There is an Income gap between the music ecosystem and the rest of the economy, where on average the rest of the economy earns an annual income which is 36% higher than that of the music ecosystem
- The ‘artistic activities’ segment within the music ecosystem may be more vulnerable than the ‘supporting activities’ segment because there is a higher proportion of workers within the ‘artistic activities segment’ that work as self-employed (42%) compared to the majority of workers in ‘supporting activities’ who work as employees of a private for-profit business (62%).

OPPORTUNITIES

MUSIC ECOSYSTEM

- The analysis on the music ecosystem output per segment shows a wide participation of artists and creatives in the city, which could excel with the right supporting system locally
- The music sector in the city is highly connected and synergies can emerge easily thanks to this connection between artists
- The city has been sparking interest from outside artists in the past months and the city is transforming from a fly-over city to a destination.

POLICIES

- The existence of the Des Moines Music Coalition provides a pathway toward advocating for more music-friendly policies.

MUSIC EDUCATION

- There’s an increasing interest for music education, with both offer and demand increasing in the city.

SPACES, PLACES, INFRASTRUCTURE & TRANSPORTATION

- The city has a lot of office spaces which are vacant, and a lot of artists who need private spaces for work
- Downtown, Des Moines, with its central location in the city hosts 51 music assets or 36% of all music assets which is possibly because of its central location and good connectivity via public transportation that makes this area interesting for other music businesses as well as for music consumers.



THREATS

CITY PLANNING

- Some gaps in city planning can be evidenced, mostly in the frequency of unused spaces
- City-coding can present serious challenges for upcoming artists and investors interested in venue development
- There’s no connection between city-planning and music industry development
- Even though the city’s policy-makers are easy to access, there is a perception that they do not take comments seriously.

MARKETING & COMMUNICATION

- Local music media is not receptive, nor in sync with the evolution of the music sector in the city.

PROFESSIONAL DEVELOPMENT

- There are serious income gaps that are not being addressed that affect access to music.

MUSIC ECOSYSTEM

- The indirect economic effects of the music sector could be an indicator of a lower degree of professionalization compared to other areas or cities
- The average age of ‘artistic’ workers in the music ecosystem is 50.6 years old, which could point to an aging artistic workforce with no generational transition
- Self-employment in the industry represents up to 20%, vs. 5% in the rest of Des Moines’ economy which can be translated

to a higher vulnerability from professionals in the music industry, specially those who are involved in ‘artistic activities’, who are mostly self-employed in contrast with those who are involved in ‘supporting activities’.

- Income after the pandemic has decreased for 60% of the artists in the music sector and 58% on average
- The Des Moines music ecosystem is unevenly located geographically with 78% of all music assets located either in Ward 3 or Ward 4, which could be a sign of lack of supply in other parts of the city while these vital parts of the music ecosystem such as Recording Studios are only located in either Ward 1 or Ward 3 which could contribute to the difficulty of access for local musicians.

6. KEY FINDINGS



Image © Jo Allen

DES MOINES HAS A VIBRANT MUSIC SCENE THAT REQUIRES SUPPORT TO ENSURE THE FLOW OF THE PRODUCTS OF CREATIVES

The wealth of talent and strength of the creative community were highlighted throughout all research stages and many stakeholders acknowledged that to be a great offer of Des Moines. Both musicians and organizers alike recognized the resiliency of the creative sector by the new activities that were developed as a reaction to COVID-19 such as front porch concerts and digital streaming at shows. Ongoing support for these activities is needed to progress the output of this diverse music community as well as additional exposure such as marketing and communication initiatives to highlight the vibrant music scene already existing in Des Moines.

MUSIC EDUCATION INITIATIVES CAN BE THE MAIN RESOURCE IN EFFORTS TOWARDS STRENGTHENING THE MUSIC SCENE OF DES MOINES

Most stakeholders concur in affirming that music education alternatives are varied and robust inside Des Moines. Alternatives for youngsters with a focus on inclusion and diversity are

resources that can prove to be key in developing the music scene in the future. It is important that these music education initiatives are accompanied by complementary strategies that ensure the professionalization of upcoming artists, as well as strategies that educate them not only in artistic performance but also in music business formation and music industry development.

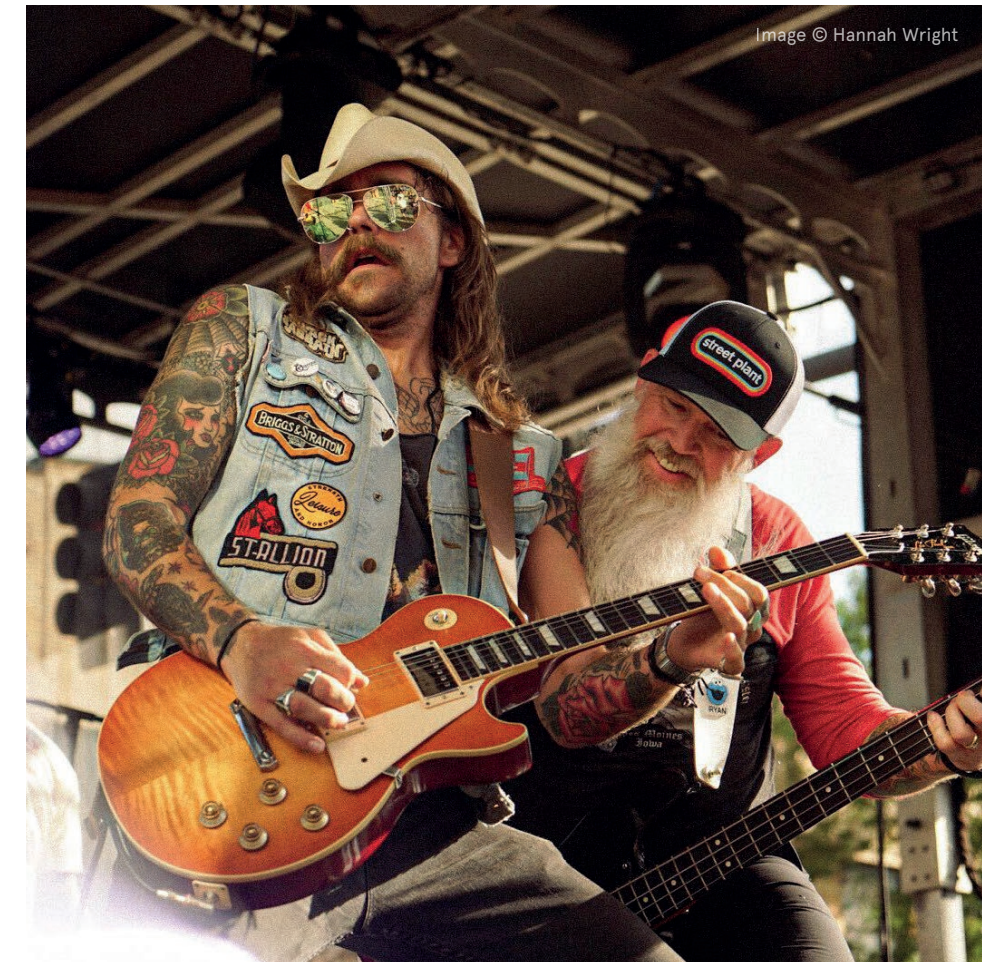


Image © Hannah Wright

DIVERSITY AND INCOME GAPS ARE ISSUES THAT IMPACT THE DES MOINES MUSIC SCENE SIGNIFICANTLY

Stakeholder findings and economic analysis show significant gaps between Des Moines demographics, and representation in the music industry of the city, particularly in matters of gender and race. Also, both pieces of the analysis show the existence of significant income gaps that jeopardize access to the music scene and thus affect its development. Managerial roles in the music industry of Des Moines are disproportionately occupied by men who represent 83% of the managers in the industry and exclusively occupied by individuals who identify themselves as 'white'. Income gaps replicate this scenario with men earning over 88% more than women, and 'white' individuals earning 42% more than Asian workers, 95% more than Black / African Americans, and 335% more than workers from other races. Disparities are not only evident through an economic analysis, but are also perceived by stakeholders who think that the racial demographics of Des Moines are not represented in the music scene, and who believe that the city does not have enough women-led music groups.

NAVIGATING PROCEDURES AND ACCESSING FUNDING ARE SOME OF THE MAIN CHALLENGES FOR THE SUCCESS OF THE MUSIC ECOSYSTEM

To cultivate any thriving ecosystem, navigation of the rules and regulations that govern it must be clear. Respondents of the survey analysis stated that the greatest challenge in terms of management is the lack of clarity on procedures to obtain licenses and permits required to perform various activities. This was also reported by stakeholders to be a major roadblock in trying to develop and grow the music ecosystem in Des Moines. Another component that needed to progress as shown in our engagement with the Des Moines music community was access to available funding and investment into music. Many stated the gap between the demand and supply of funding is a result of the shortcomings in communication between funders and requestors. There is overall support for music and the arts in Des Moines which opens up the potential for local investments or tax funds that could be directed to support music-related activities contributing to the cultural vibrancy of the area.

A PRIORITY FOR IMPROVEMENT WITHIN THE MUSIC ECOSYSTEM VALUE CHAIN SHOULD BE SUPPORTING INFRASTRUCTURE SUCH AS MUSIC VENUES

The two most influential links in the music value chain are Creation (e.g. Musicians & Artists) and Exhibition (e.g. Music Venues). Both are needed and work in tandem to successfully demonstrate the offerings of the Des Moines music community. As a result of the Survey Analysis, it was found that infrastructure such as rehearsal spaces, music distributors, and managers and bookers were rated with the lowest level of quality and/or availability. Throughout our Stakeholder Engagement, participants cited the lack of venues and dedicated practice or rehearsal spaces which are key assets in supporting the music ecosystem.

7. RECOMMENDATIONS AND ACTION PLAN



Image © Madison Kim

7. RECOMMENDATIONS AND ACTION PLAN

The action plan outlined below will help define Des Moines as a global music city.

This will be achieved through the following objectives:

- Develop Des Moines’s brand as a place for music, entertainment, and culture
- Facilitate inter- and cross-sectoral connections and collaboration
- Attract new music businesses (and connected industries) to the area as a result of greater policy support for the sector
- Increase the economic viability of the music ecosystem and creative sectors, and view arts sectors and the music ecosystem as valuable assets to the City’s economy

- Attract broad demographics of people to Des Moines through increased diversification of workers and employment opportunities
- Create opportunities for professional, educational, and audience development
- Galvanize audience engagement in the local arts and music scene
- Promote the sustainability of the music sector and support the retention and development of music businesses in the city
- Diversify the City’s cultural offer through placemaking and cultural leadership initiatives.

ZONING AND PLANNING
LICENSING AND REGULATIONS
ECONOMIC DEVELOPMENT
MUSIC EDUCATION
MUSIC MARKETING AND ADVERTISING

The feasibility of each recommendation has been determined by phases, as seen in the following table.

SHORT-TERM (0-12 MONTHS)	MEDIUM-TERM (1-2 YEARS)	LONG-TERM (2+ YEARS)
RECOMMENDATION #1 Advocate for the Appointment of a Music Officer		
RECOMMENDATION #2 Consider the Music Sector in Sustainability Plans, Strategies and Policies		
RECOMMENDATION #3 Implement a Program Designed to Utilize Non-Traditional Music Spaces in Support of Local Artists and Professionals		
RECOMMENDATION #4 Advocate for a Multi-Use Performance Venue with Space Allocated for Rehearsals, Education, and Professional Development Spaces in Support of Local Artists and Professionals		

SHORT-TERM (0-12 MONTHS)MEDIUM-TERM (1-2 YEARS)LONG-TERM (2+ YEARS)

RECOMMENDATION #5 Implement an Agent of Change Policy		
RECOMMENDATION #6 Reconfigure Type “A” Sound Permits for Annual Use		
RECOMMENDATION #7 Revive the Street Performers Exception to the Municipal Code and Create a Busking Guide		
RECOMMENDATION #8 Raise Awareness for Existing Grant Programs		
RECOMMENDATION #9 Advocate for a Fair Pay Policy for Musicians and Music Professionals		
RECOMMENDATION #10 Advocate for Music-Specific Business Incentives		
RECOMMENDATION #11 Create Pathways to Leadership for Marginalized Populations		
RECOMMENDATION #12 Explore Educational and Professional Development Opportunities that Cater to Non-Performance Related Careers		
RECOMMENDATION #13 Create Audience Development Programs		
RECOMMENDATION #14 Develop Networking Events so that Professionals in Different Segments of the Music Ecosystem can Meet, Interact, and Collaborate		
RECOMMENDATION #15 Develop a Music Tourism Strategy		
RECOMMENDATION #16 Connect with Media to Promote Local Acts		

8. CONCLUSION

The City of Des Moines is leagues ahead of its peers when it comes to maintaining a supportive infrastructure for its music ecosystem. The presence of the Greater Des Moines Music Coalition is a testament to the local music community's commitment to growing and supporting the industry as a whole.

In addition, the City provides a multitude of educational and professional development opportunities through the Des Moines Public School system, the Greater Des Moines Music Coalition, Des Moines Performing Arts, and more. Organizations like Bravo Greater Des Moines and the Greater Des Moines Community Foundation promote several innovative grants tailored towards sustaining current and building new organizations.

Des Moines's special events permitting process is a best-case in and of itself. The website supplies comprehensive guides to lead applicants through the process and an online portal where applications and payments can be submitted. The City's health and safety protocols which are directly targeted toward venues that center on arts and culture and the Des Moines Music Coalition's Music Task Force that brings together people from public, private, and nonprofit sectors indicate that Des Moines is a place that cares about the health and well-being of its creatives.

However, as with most cities, there is still work to be done. Making noise ordinances more amenable to venues through permitting structures that are not only for single-use; developing music-focused sustainability procedures; re-activating busking policies, and exploring night transportation availability are but a few ways that the City of Des Moines could improve their already phenomenal music ecosystem to create a better environment for musical artists and music professionals.



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ABOUT SOUND DIPLOMACY



Sound Diplomacy is a global research and strategy consultancy with expertise in music, the night-time economy, and wider creative industries. It 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 researchers, data analysts, economists, and consultants are based across Europe, North America, and Latin America. The company also runs 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.

www.sounddiplomacy.com

ABOUT THE DES MOINES MUSIC COALITION



The DMMC is a 501(c)(3) non-profit organization and collaborative movement committed to building a stronger and more diverse music community in greater Des Moines.

Through their mission to support and cultivate Iowa’s music economy, their vision is to establish and maintain Des Moines as a nationally recognized music city.

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