NORTHEAST TENNESSEE MUSIC CENSUS

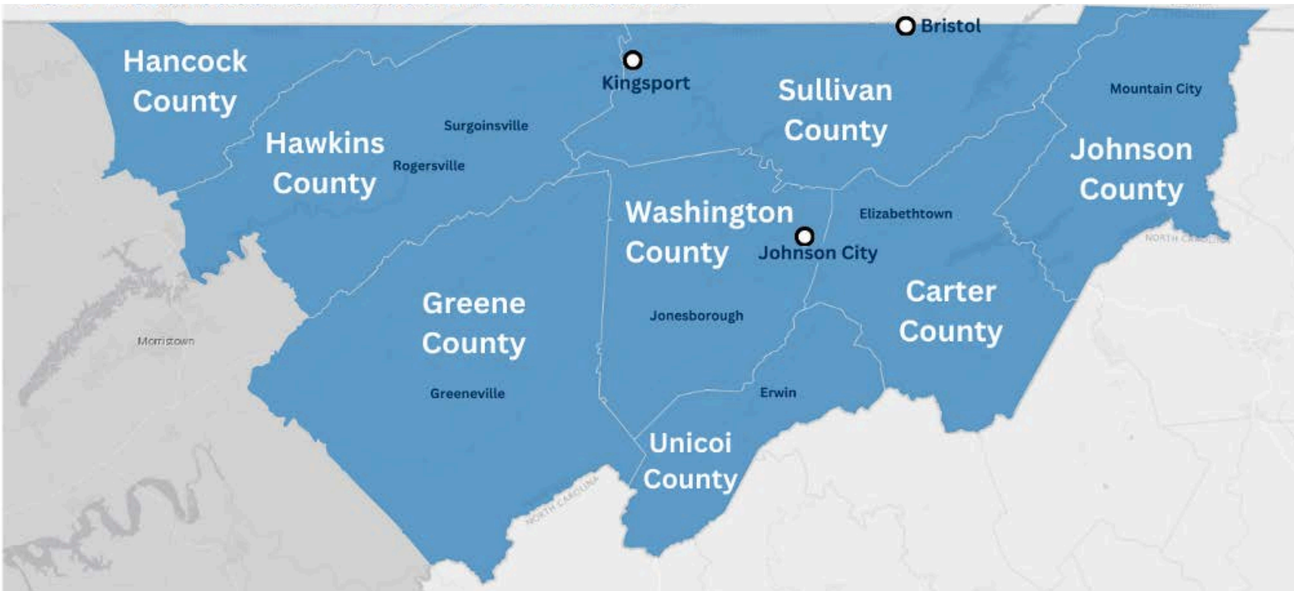

Photo Courtesy of Birthplace of Country Music, Dobyns-Bennett High School

MUSIC CENSUS SUMMARY REPORT
January 2025

SOUND MUSIC CITIES

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Executive Summary

The 2024 Northeast Tennessee Music Census was a community-led initiative to gain a better understanding of the current needs of the Northeast Tennessee music community. The music census launched on May 8-July 2, 2024 and collected 1,213 responses from people working in music in any capacity who are 18 years or older and living in the Northeast Tennessee Region.

The Northeast Tennessee music ecosystem is predominantly composed of individuals in the Music Creative sector (78.5%), with 11% Venue/Presenter and 10.5% Industry respondents. The Industry sector is lower than recommended for a healthy ecosystem. Northeast Tennessee Creative respondents are highly experienced, with 88% having over 10 years in their field. The top career concerns include increasing costs of living and stagnant pay rates. Income is mostly generated from local live performances.

The Venue/Presenter landscape in Northeast Tennessee is diverse, with live music venues making up 20% of the respondents and festivals 11%. Several unconventional venues exist, such as community spaces, and church or religious organizations, each representing 9%. Venue capacity is dominated by small venues under 100, and on average, venues host 32 live events annually, totaling 1,590 live events per year across the region. Notably, people who identify as female dominate the Venue/Presenter sector at 59%.

Key regulatory challenges for Venue/Presenters include confusion around regulatory processes (32%), permit costs (42%), and special event specifics (37%). Venues and Presenters frequently encounter regulatory processes such as street/parking (45%), music performance licenses (36%), and public safety requirements (34%). Preferred financial support options are micro-grants (45%) and tax breaks (41%), highlighting a need for flexible assistance. Respondents also favor tools like an online regulatory portal (58%) and tax discounts or incentives to host live music (56%).

The earnings associated with Northeast Tennessee music make a meaningful contribution to the regional economy generating a total annual economic impact of $75.9M. The value-added annual economic impact is measured at $45.5M. Music generates a total of $19.5M annually across all music professional respondents, with 20% of their annual income coming from music, and the total earnings impact is estimated at approximately $22.8M. The majority of respondents are freelancers and sole proprietors (52%), primarily earning money independently (43%). Many also work in bands (35%), registered businesses (15%), or as music educators (24%). Despite this, 61% of respondents work outside the music industry, with 89% of them relying on these jobs as their primary income. The average pay per local show is $205, while touring pay is slightly higher at $245. Venues host an average of 32 live events per year, with 37% of headliner slots and 39% of supporting act slots featuring local talent.

In terms of developing the music ecosystem, (51%) are seeking a place to connect and collaborate musically, highlighting a strong desire for communal spaces. In addition, 42% want to connect with music services such as agencies, record labels, and artist management. The most significant need for Venue and Presenter business resources is for audience development tools (68%) such as local media, gig calendars, and publicity. The majority of respondents (59%) favor a community-based collaborative approach to organizing and advocating for the local music scene. Professional development interests focus on specialized skills, particularly in recording, marketing, licensing, and notably, in music localism/community advocacy.

The Northeast Tennessee music ecosystem offers primarily positive experiences with the greatest strengths being that it is safe (90%), inclusive (74%), and non-sexist (73%). The Northeast Tennessee music ecosystem challenge is homogeneity (52%), and to a lesser extent ageism (38%) and elitism (36%).

This report and the online dashboard available at **NETNmusic.com** offer more in-depth data, insights, and opportunities to understand, support, and grow Northeast Tennessee's unique regional music ecosystem and all the benefits it offers culturally and economically.

Introduction

The Northeast Tennessee Music Census was a community-led initiative to gain a better understanding of the current needs of our music community. This Music Census survey captures key information about the Northeast Tennessee music economy to help the community make more informed, data-driven decisions to support the music ecosystem.

The Northesast Tennesseee Music Census launched on May 8, 2024 and ran for eight weeks. The study was open to all people working in the music industry in any capacity who are 18 years or older and living in the Northeast Tennessee Region which includes: Carter County, Unicoi County, Washington County, Hawkins County, Sullivan County, Greene County, Johnson County, Hancock County, and Bristol Independent City in both TN and VA. The census was administered by Sound Music Cities, a leading Austin-based provider of music ecosystem studies and music census work, in conjunction with Tennessee Economic and Community Development and the Northeast Tennessee Music Initiative.

This summary report has been prepared by Sound Music Cities and includes an overview of the Music Ecosystem Health Assessment based on 10 key indicator areas. The report includes key findings and recommendations. Alongside this report, Sound Music Cities has provided access to an online dashboard where you can find more data at **NETNmusic.com**.

INTRODUCTION TO A MUSIC CENSUS

Any strategy to support and grow a music ecosystem begins with a basic understanding of its population. Professional music communities are not easily discoverable using traditional methods (such as through labor statistics or economic data). A music census collects key data points to better understand music people and their economic activity within a specific geography. It provides a baseline for policymakers and the larger community to understand and take action.

The value of a music census goes well beyond the data itself. Such initiatives ignite a range of activities that are conducive to more strategic and sustainable support for local music scenes over the long term, beginning with validating this economically marginalized group, sharing new learning, activating civic and community resources, and ultimately empowering music people to take ownership of change initiatives.

1,213 responses
May 8-July 2, 2024

11% venue/presenter
10% industry
78% music creatives

Photo Courtesy of Birthplace of Country Music, Dobyns-Bennett High School

A Community Effort

The 2024 study was led by a group of Lead Partners. This study took a grassroots approach that engaged local partners who hold the relationships with music people. Community Partners served as the primary means of outreach to music people and these organizations were instrumental in gathering responses to the Census.

Thank you to our amazing Lead Partners and Community Partners

LEAD PARTNERS

- **Stephen Marshall, ETSU Research Corporation**
- **Leah Ross, Birthplace of Country Music Museum**
- **Alicia Phelps, Northeast TN Tourism**
- **Heath Guinn, Sync Space**
- **Lafe Cook, Dobyns-Bennett Director of Bands, TN Music Educators Association**
- **Ron Roach, ETSU Appalachian Studies**
- **Bob Raines, TN Entertainment Commission**
- **Jimmy Wheeler, TN Entertainment Commission**

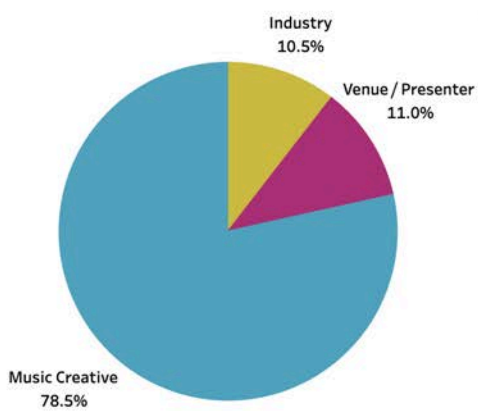
COMMUNITY PARTNERS

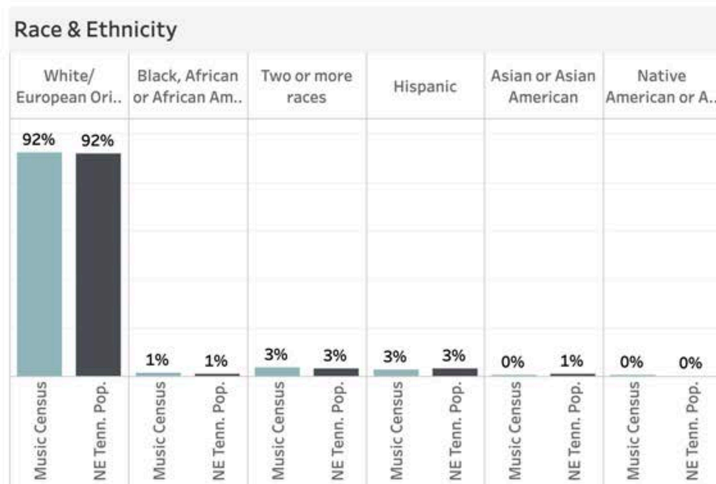
4thirTEEN
Appalachian Auditorium
Appalachian Highlanders Pipes and Drums
Appalachian Voices
Aroundtoit llc
Believe in Bristol
Birdsong Sanctuary
Birthplace of Country Music
Boone's Creek Museum and Opry
Boones Creek Historical Trust
BoxDrop Mattress & Furniture
Brent Billheimer
Brian K. Rieck Music Studio
Bristol Motor Speedway
Carolyn Blevins
Charles Kestner
Charlie Maples (band)
City of Bristol, Virginia
City of Bristol, Tennessee
City of Elizabethton
City of Johnson City
City of Kingsport
Clayton Potter Music
Create Appalachia
Creative Energy
Damon Heath
Dan Ableton
Danger Enterprises LLC
Dave Yates
Debbie Price
Delta Blues
Downtown Kingsport Association
DW Productions
East Tennessee State University
Elizabethton/Carter County Tourism
ETSU Bluegrass, Old-Time, and Roots Music Studies
ETSU College of Business and Technology
ETSU Department of Appalachian Studies
ETSU Innovation Lab
ETSU RC
Explore Bristol
Fiddling Leona & JP Band
First Tennessee Development District
Founders Forge
Friends of Southwest Virginia
Goodman Jewelers
Greene County Government
Greene County Partnership
Hands On! Discovery Center
Hard Rock Hotel and Casino Bristol
Highlands Fellowship Church
Holston Valley Broadcasting Corporation
It Says What It Says Music
Jace Smith productions
JAM of Upper East Tennessee
Johnson City Chamber of Commerce
Johnson County Center for the Arts
Joyce Crosswhite
Kaifa Events
Katheryn Heath
Liesa Jenkins
Main Street Elizabethton
Main Street: Greeneville
Maria Cerniauskas
Matt Garland
Maurice's Music
Maverick Summie
Meadowview Marriott
Megan McKamey
Mountain Empire Children's Choral Academy
My New Favorites
Niswonger Performing Arts Center
Northeast State Community College
ONE Tennessee
Paramount Bristol
Paramount Center for the Arts
Philip Dishner
Plan A Films
Portland Community College
Privette Family Bluegrass Gospel Music
Ralph Blizard Museum and TAMHA
Randall Ward
Retail Service Systems
Rosser & Rosser Luthiers and Woodworking
Rugged American Spirits
Sapphire Sleep
Sigean
Sims Venture Capital
Symphony of the Mountains
Tennessee Entertainment Commission
Tennessee Entertainment Office
Tennessee High School
Tennessee Hills
Tetherball Peterson Jazz
Theatre Bristol
Town of Bulls Gap
Town of Jonesborough
Town of Unicoi
Tracey Edwards
Tri-Cities Airport Authority
Virginia Highlands Community College
Visit Johnson City
Visit Kingsport
Visit Mountain City TN
Volume Interactive
Well Made Music

Music Ecosystem Health Assessment

Ecosystem Composition

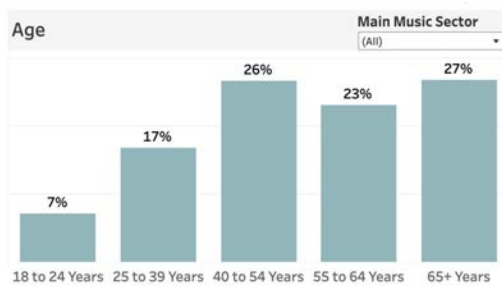
The Northeast Tennessee music ecosystem is predominantly composed of individuals in the Music Creative sector (78.5%), with 11% Venue/Presenter and 10.5% Industry respondents. The Industry sector is lower than recommended for a healthy ecosystem. Based on respondents, the music ecosystem for Northeast Tennessee is primarily located in Sullivan and Washington Counties with Carter, Greene, and Johnson Counties showing moderate concentrations as well.



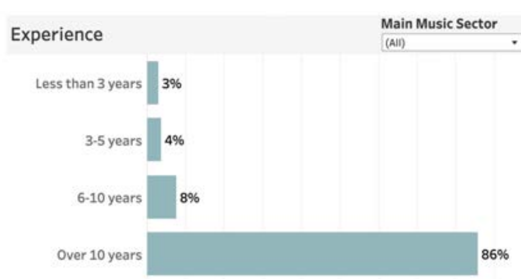


- **Race & Ethnicity** - The racial and ethnic composition of respondents reflects the broader population of Northeast Tennessee. White/European American individuals account for 92% of the census respondents, which mirrors the region's general population. Black/African American respondents make up 1%, Hispanic 3%, and Asian 1%, with a small representation (3%) from those identifying as two or more races.

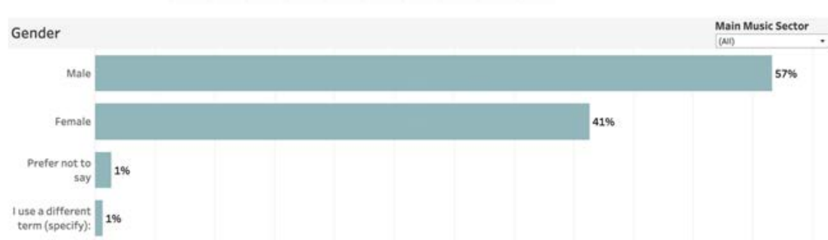
- **Age** - The age distribution shows that the largest groups are those aged 40 to 54 years (26%) and 65+ years (27%). The 55 to 64-year group makes up 23%, while younger respondents aged 18 to 24 years constitute just 7%.



- **Experience** – A significant majority of respondents (86%) have over 10 years of experience in the music industry, with smaller groups having 6 to 10 years (8%) and 3 to 5 years (4%). Only 3% have been involved for less than 3 years.



- **Gender** - 57% of respondents are male, while 41% are female, with 1% preferring not to say or identify with another term. However, for Venue/Presenters, females dominate at 59% with 36% male, 4% prefer not to say, and 1% use a different term.

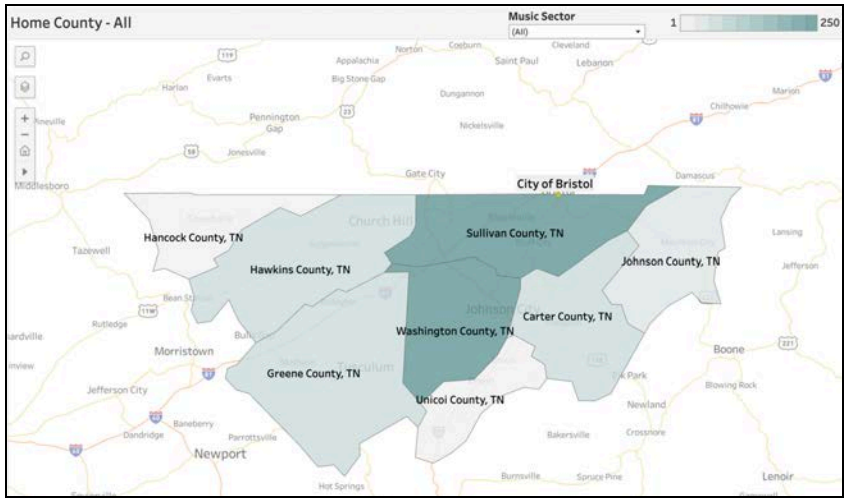


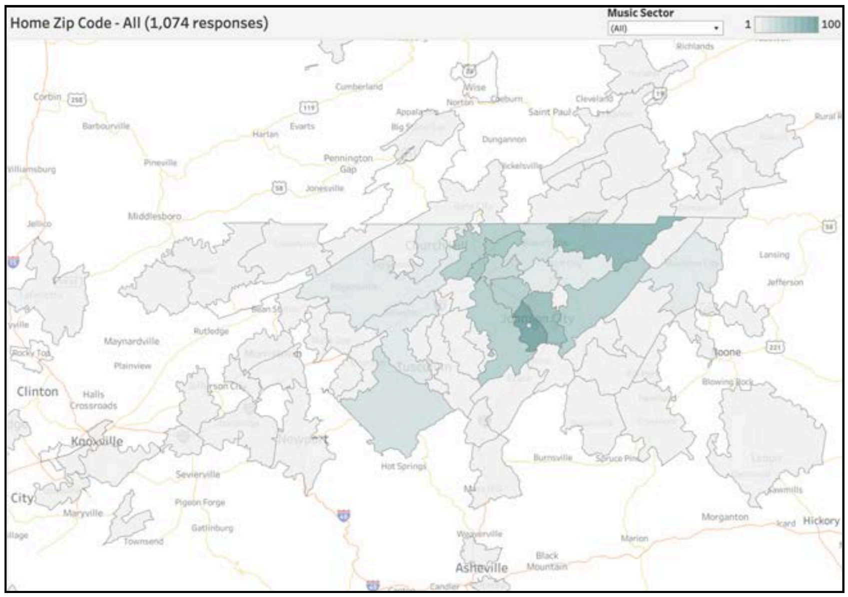
Music Ecosystem Health Assessment

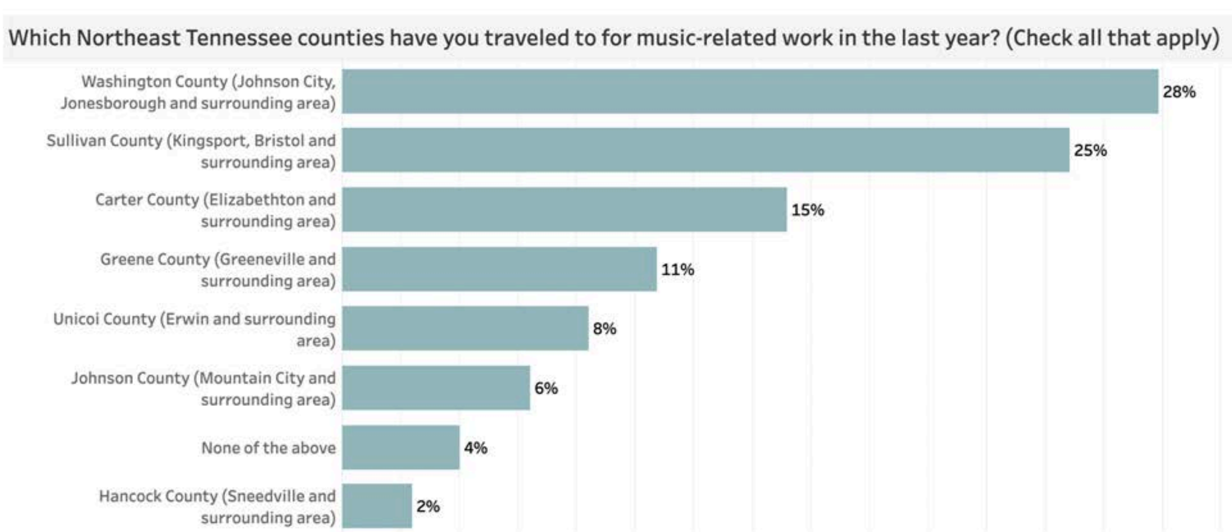
Ecosystem Composition (continued 2/3)

- **Geography** - Based on respondents, the music ecosystem for Northeast Tennessee is primarily located in Sullivan and Washington Counties with Carter, Greene, and Johnson Counties showing moderate concentrations as well. Unicoi and Hancock Counties had fewer respondents. Beyond the eight county region, there are people reaching as far as Asheville, Knoxville, and into southern Virginia who consider themselves part of the Northeast Tennessee ecosystem and responded to the survey.

- **Travel for Music Work** - Places that people traveled for music related work correlate to the same concentrations with people going to Washington County (28%), Sullivan County (25%), and to a lesser extent Carter County (15%), Greene County (11%), and Unicoi County (8%).







Music Ecosystem Health Assessment

Ecosystem Composition (continued3/3)

Plans to Stay in Music and in NE Tennessee

- **Creatives** - The majority of Creative respondents in Northeast Tennessee, 69%, definitely plan to continue working in the music industry over the next three years, with an additional 27% either probably or possibly continuing. However, their commitment to staying in Northeast Tennessee is slightly lower, with 60% definitely planning to remain in the region and 34% either probably or possibly staying. A notable 6% are uncertain or considering leaving Northeast Tennessee.

- **Venue/Presenter** - The majority of Venue/Presenter respondents in Northeast Tennessee, 44%, definitely plan to continue working in the music industry over the next three years, with an additional 47% either probably or possibly continuing, a notable 9% are uncertain if they will keep working in music. However, their commitment to staying in Northeast Tennessee is also slightly lower, with 61% definitely planning to remain in the region and 30% either probably or possibly staying. A notable 9% are uncertain or considering leaving Northeast Tennessee.

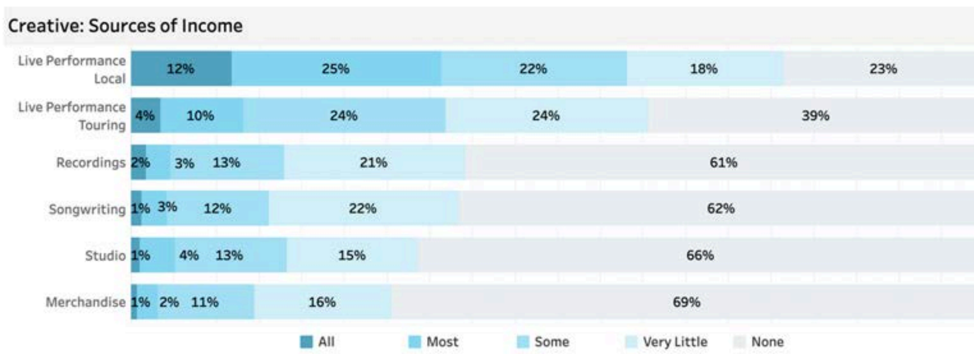
- **Industry** - The majority of Industry respondents in Northeast Tennessee, 45%, definitely plan to continue working in the music industry over the next three years, with an additional 49% either probably or possibly continuing. Their commitment to staying in Northeast Tennessee is slightly lower, with 53% definitely planning to remain in the region and 39% either probably or possibly staying. A notable 8% are uncertain or considering leaving Northeast Tennessee.

Music Ecosystem Health Assessment

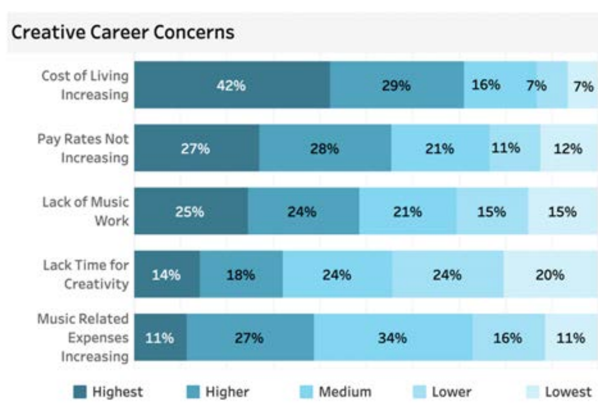
Creative Profile

Northeast Tennessee Creative respondents are highly experienced, with 88% having over 10 years in their field. The top career concerns include increasing costs of living and stagnant pay rates. Income is mostly generated from local live performances. Annually, Creatives spend an average of $4,750 on career-related expenses, contributing $4 million to the regional economy, with 41% of that spent locally.

- **Sources of Income** - Income for creative respondents in Northeast Tennessee comes from multiple sources, with local live performances being the most significant (25% earning "most" of their income and 22% earning "some"). Touring live performances account for additional income, with 24% of respondents earning "some" from touring. Recordings, songwriting, and studio work each provide "very little" income for the majority of respondents, indicating limited diversification of income sources.



- **Career Concerns** - The top career concerns for creatives in Northeast Tennessee include the increasing cost of living (42% highest concern) and pay rates not increasing (27% highest concern). Other significant concerns are the lack of music work (25% highest concern), the lack of time for creativity (14% highest concern), and increasing music-related expenses (11% highest concern). These concerns highlight the economic pressures faced by the creative community in the region.

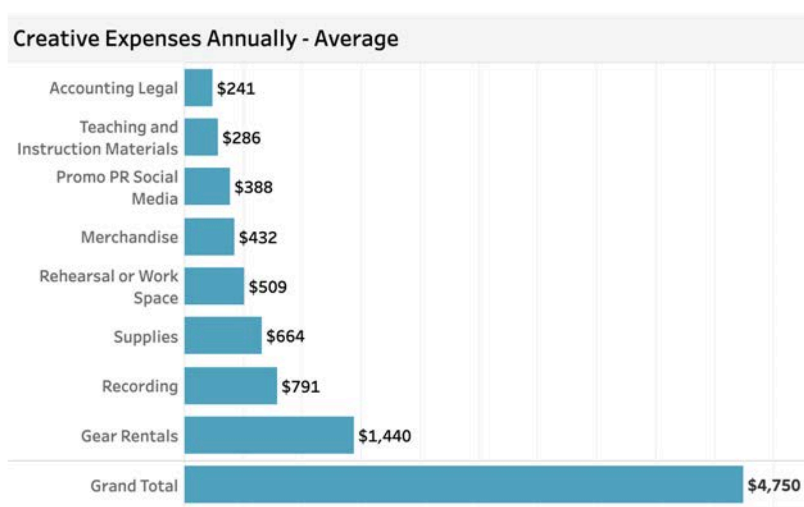


$4,750
Average Creative Spend

$4M
Total Creative Respondents Spend Annually

41%
Spent Locally

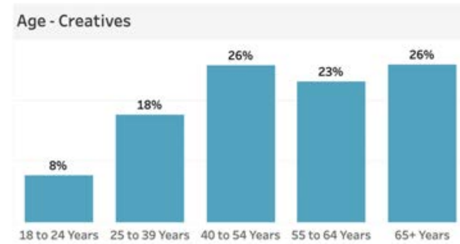
- **Spend** - On average, creatives in Northeast Tennessee incur annual expenses totaling $4,750. Major expense categories include gear rentals ($1,440), recording costs ($791), and supplies ($664). Additional expenses include promo/PR/social media ($388), merchandise ($432), and accounting/legal services ($241). Creatives respondents collectively spend an estimated $4 million annually, with 41% of this expenditure occurring locally.



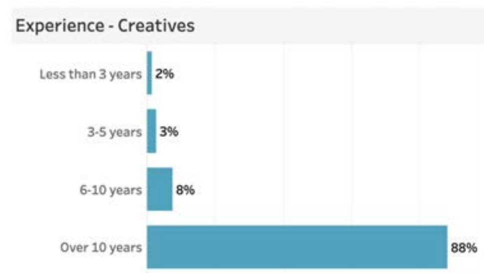
Music Ecosystem Health Assessment

Creative Profile (continued)

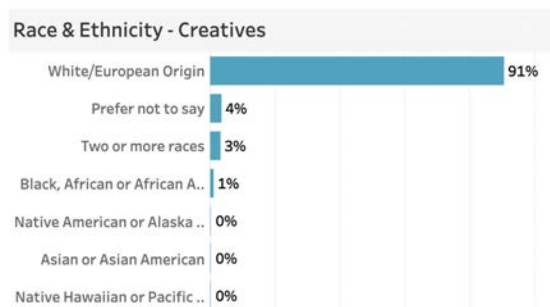
- **Age:** The majority of creatives in Northeast Tennessee are older, with 26% of respondents in the 40-54 age group and another 26% aged 65 years or older. Creatives aged 55 to 64 make up 23%, while only 8% are between 18-24 years, suggesting limited engagement from younger creatives.



- **Experience:** Among the creative respondents, 88% have over 10 years of experience in their field. Those with 6 to 10 years account for 8%, while those with 3 to 5 years and less than 3 years make up only 3% and 2%, respectively. This indicates a highly experienced workforce with minimal new entrants.



- **Race & Ethnicity:** The creative sector in Northeast Tennessee is predominantly White/European American, with 91% of respondents identifying as such. A small percentage (1%) of respondents identify as Black/African American, with 3% identifying as two or more races. This highlights a lack of racial diversity in the region's creative community.



- **Geography:** Creative respondents are primarily concentrated in Sullivan and Washington Counties, with moderate concentrations in Carter, Greene, Hawkins County, and to a lesser degree Johnson County and Hancock County.

> There are too few venues or opportunities for genres outside Americana and country.

> Without a network, it's really hard to find people who play similar styles or have compatible goals.

> More events or open sessions where musicians can network and share ideas would help.

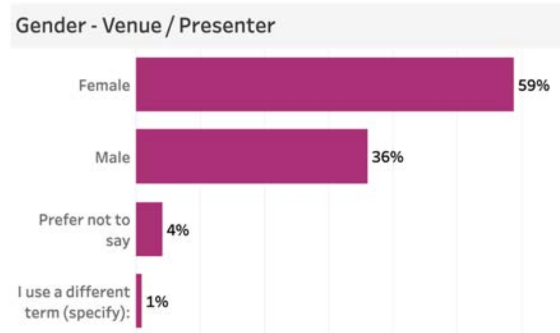
> Classical and other 'non-mainstream' genres need more support and visibility.

> It's tough for hip-hop or electronic artists; there's no infrastructure for those genres.

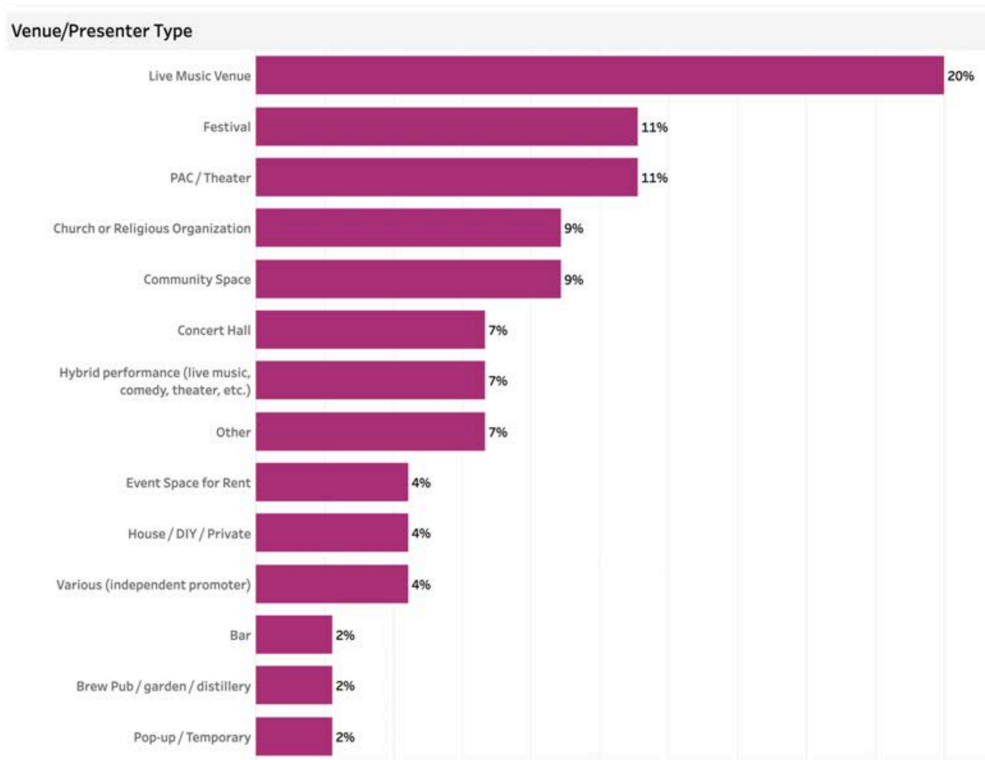
> It would be great to see more diversity in festival lineups, not just the same type of acts each year.

Venue/Presenter Profile

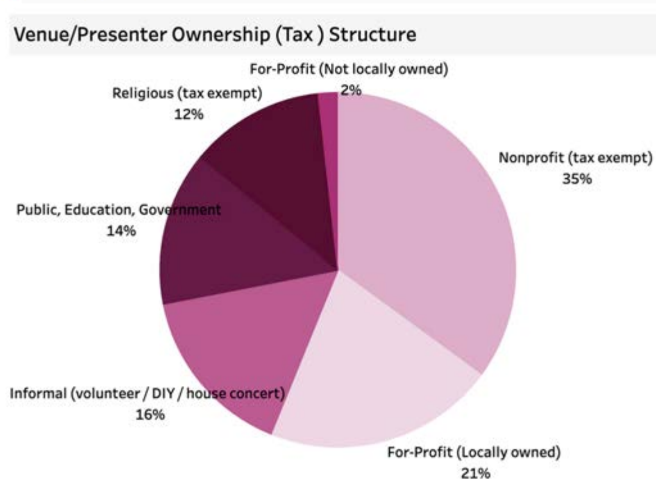
The Venue/Presenter landscape in Northeast Tennessee is diverse, with live music venues making up 20% of the respondents and festivals 11%. A variety of unconventional venues also exist, such as community spaces, and church or religious organizations, each representing 9%. Venue capacity is dominated by small venues under 100, and on average, venues host 32 live events annually, totaling 1,590 live events per year across the region. Notably, people who identify as female dominate the Venue/Presenter sector at 59%. Hancock and Unicoi Counties had no Venue/Presenter respondents.



- **Venue/Presenter Type:** Live music venues are the most represented venue type, making up 20% of the respondents. Festivals and PAC/Theater venues each account for 11%. Informal venues, such as DIY house concerts and community spaces, make up 9%, with additional respondents representing concert halls, hybrid performance spaces (7%), and event spaces for rent (4%). Brew pubs and bars make up a smaller portion of the venue types.



- **Venue Ownership/Tax Structure:** The majority of venues in Northeast Tennessee operate as nonprofits (35%) or for-profit, locally owned businesses (21%). Informal venues, including volunteer-run and DIY house concerts, make up 16%, and public, education, and government-owned venues account for 14%. Religious (tax-exempt) venues comprise 12%, while only 2% of venues are for-profit but not locally owned. This distribution highlights the region's blend of commercial, nonprofit, and informal venue structures.

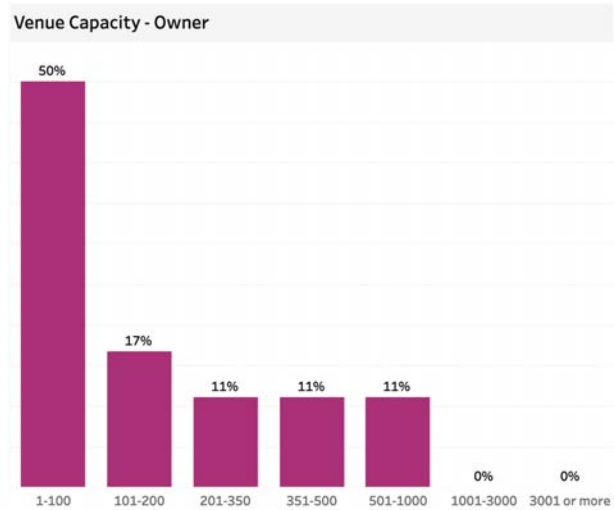


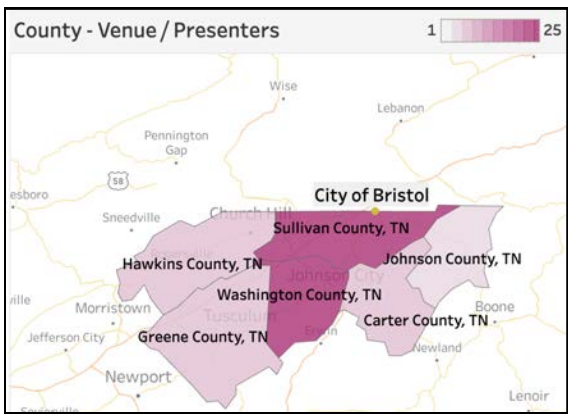
Music Ecosystem Health Assessment

Venue/Presenter Profile (continued)

- **Venue Live Events, Capacity, and Outdoor Capabilities:** On average, venues in Northeast Tennessee host 32 live events annually, contributing to a total of 1,590 events per year. Additionally, 76% of venues have outdoor capabilities, which supports a versatile event hosting environment. This flexibility is critical for accommodating different event types and expanding the potential for live performances across various settings. Most venues are small, serving under 100, with some venues offering capacity up to 1000.

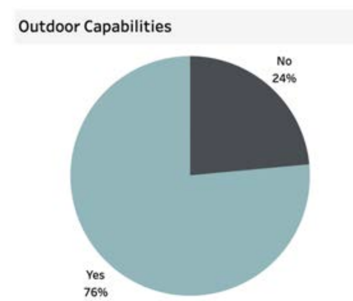
- **Geography:** Venue/Presenter respondents are primarily concentrated in Sullivan and Washington Counties, with moderate concentrations in Carter, Greene, Hawkins County, and to a lesser degree Johnson County.





Venues average
32
live events/year

1,590
total live events/year



> We need a community space dedicated to live music, not a bar or restaurant that just has a stage.

> There's a severe lack of all-ages or family-friendly venues; everything here revolves around alcohol.

> I've seen so many good small-to-medium venues close over the years, and nothing has replaced them.

> For national acts, the Tri-Cities are a black hole... there's no place for touring acts to play, which affects us too.

> The younger generation isn't as interested in live performances; they're more into nightlife without live music.

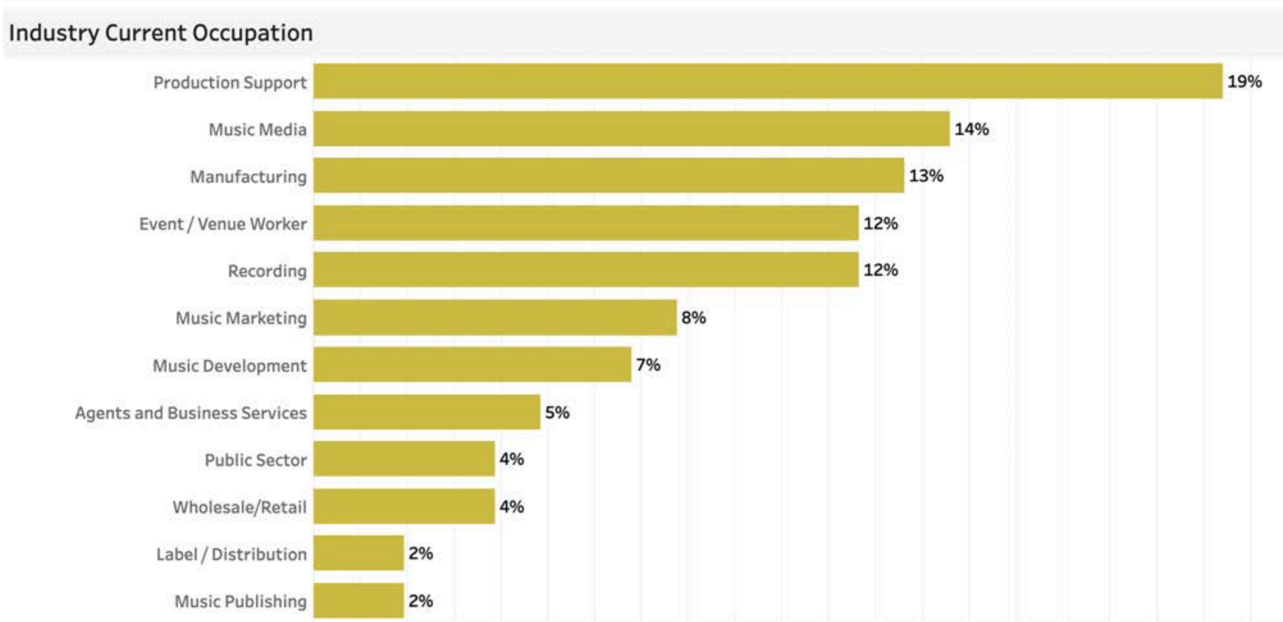
> The local bars that host music often don't invest in good sound equipment, which affects the quality.

Music Ecosystem Health Assessment

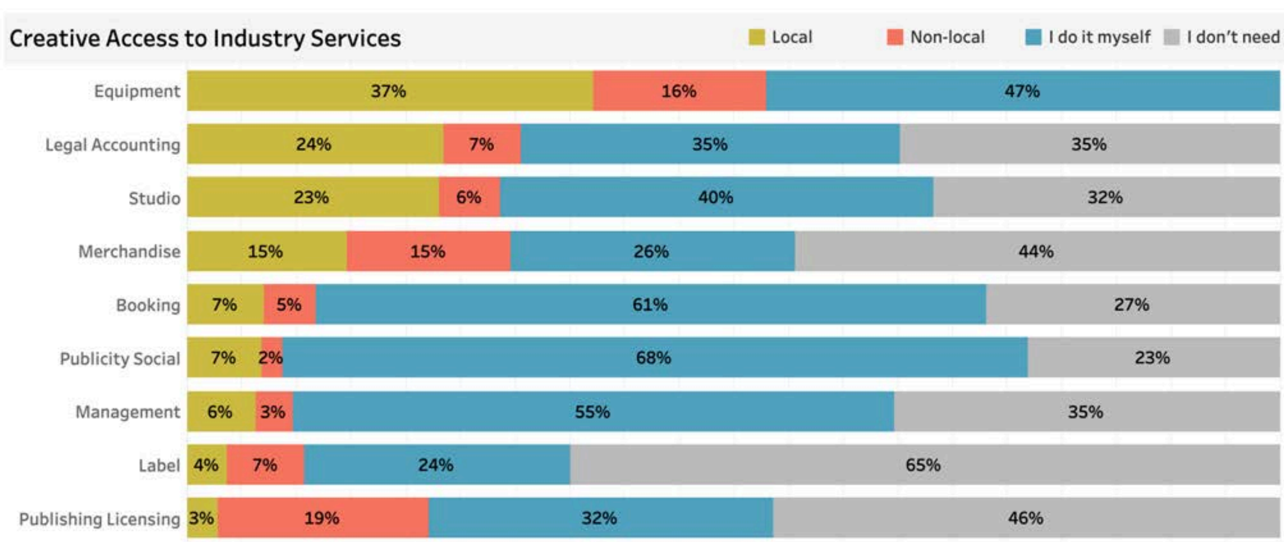
Industry Profile

Industry respondents in Northeast Tennessee are a seasoned workforce with occupations spanning production support (19%), music media (14%), and manufacturing (13%). Local services are vital to Creatives, with significant use of local industry services like equipment (37%) and legal/accounting (24%), though many also choose to handle tasks themselves. Hancock County had no Industry respondents.

- **Industry Occupation:** The largest group of respondents work in production support (19%), followed by music media (14%) and manufacturing (13%). Event/venue workers and recording also each account for 12% of respondents, while other key roles include music marketing (8%), music development (7%), and agents/business services (5%).



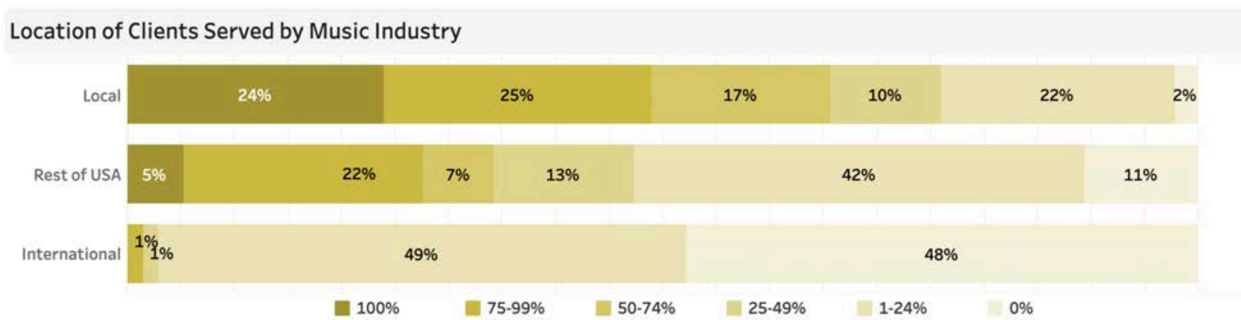
- **Creative Access to Industry** - Creative respondents in Northeast Tennessee opt to handle most industry services themselves. Equipment (37% local) and legal/accounting services (24% local) are the most accessed locally. Non-local services are less common but are still utilized for certain roles, such as publishing/licensing (19% non-local) and labels (7% non-local).



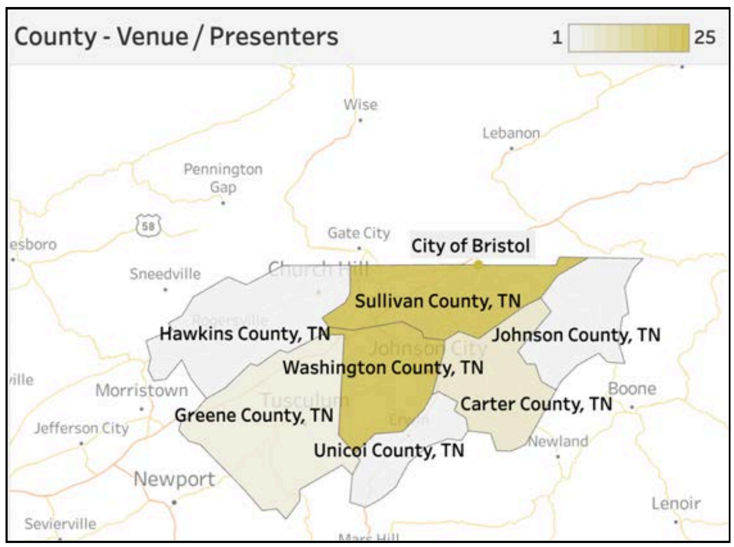
Music Ecosystem Health Assessment

Industry Profile (continued)

- **Location of Clients:** Northeast Tennessee's Industry focuses on a mix of local and national markets. Across the majority of the Industry client base, 66% are local, 34% are national, and 1% are international.



- **Geography:** Industry respondents are primarily concentrated in Sullivan and Washington Counties, with moderate concentrations in Carter and Greene Counties, and to a lesser degree Hawkins, Johnson, and Unicoi Counties.



> There's a shortage of industry professionals and networking events locally. This makes it challenging for those looking to advance professionally in music

> Would like greater ease contacting industry gatekeepers and professionals/decision makers.

> A lack of infrastructure to support diverse music genres means that the scene becomes homogenized and limits creative expression.

Music Ecosystem Health Assessment

Economic Activity

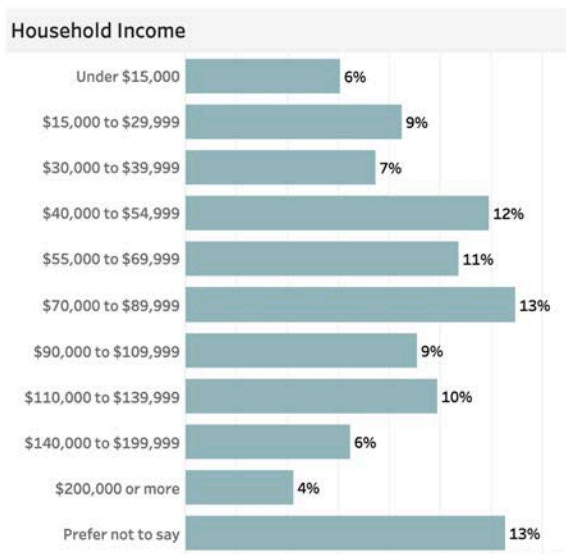
Music contributes to the income of Northeast Tennessee music professionals, generating a total of $19.5M annually across all respondents, with 20% of their annual income coming from music. The majority of respondents are freelancers and sole proprietors (52%), primarily earning money independently (43%). Many also work in bands (35%), registered businesses (15%), or as music educators (24%). Despite this, 61% of respondents work outside the music industry, with 89% of them relying on these jobs as their primary income. Among respondents, 29% are IP rights-holders, with 41% using no royalty collection method. Performance frequency varies, with 21% performing 2-3 local shows per month, and 10% performing 4-6 shows per month. Touring performances are less common, with 68% performing no touring shows per month and 16% performing just one. The average pay per local show is $205, while touring pay is slightly higher at $245. Venues host an average of 32 live events per year, with 37% of headliner slots and 39% of supporting act slots featuring local talent.

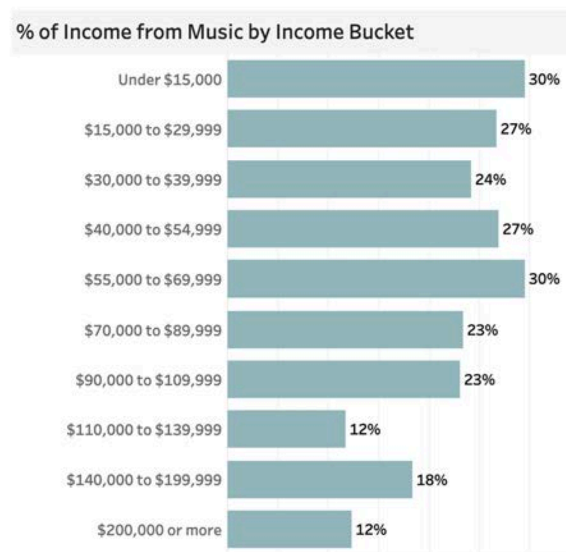
Music generates a total of **$19.5M** in income annually across all respondents

20% of respondent annual income comes from music

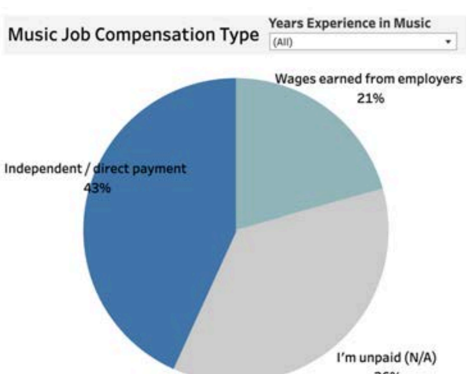
Average household income for respondents is **$80K**

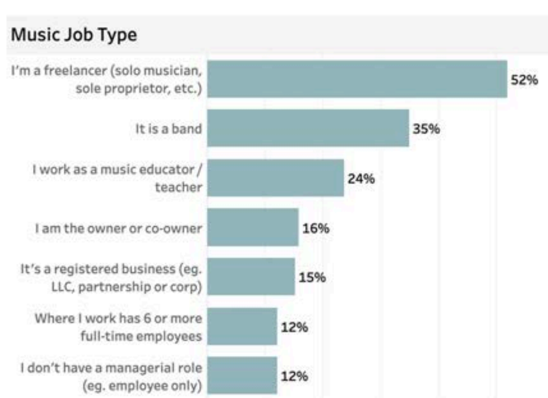
Average annual income from music is **$16K**/respondent





- **Creative Job Compensation & Job Type:** The majority of respondents in Northeast Tennessee are freelancers or sole proprietors, making up 52% of the music job types. Independent earnings from music (via 1099s, direct payment) account for 43% of compensation, while 21% of respondents earn wages from one or more employers (through payroll or W-2s). However, 36% of respondents reported that they are unpaid for their music-related work (volunteer work, students, etc.), highlighting the economic challenges faced by many in the region's music industry.



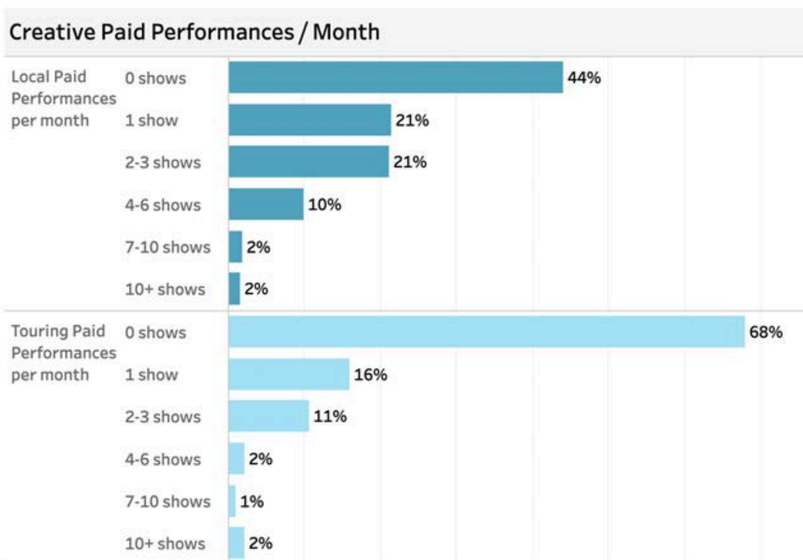


"It's nearly impossible to balance a job and music because neither pays well enough on its own."

Music Ecosystem Health Assessment

Economic Activity (continued 2/4)

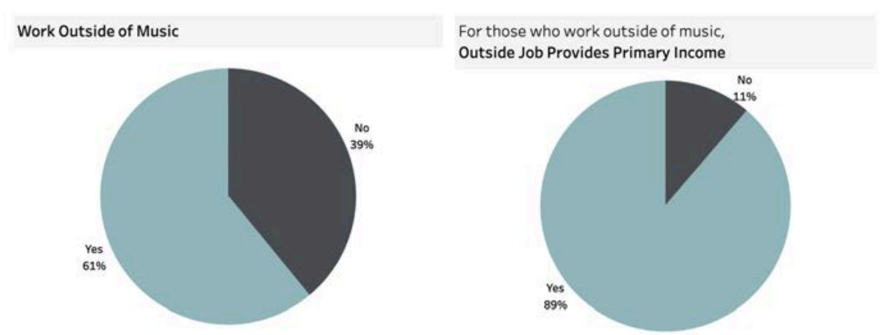
- **Creative Performance Frequency & Pay:** Among music respondents, 44% do not perform any local paid shows per month, while 21% perform 1 show, and another 21% perform 2-3 shows per month. Only 10% of respondents perform 4-6 shows per month, with a small group (2%) performing 7-10 shows or more than 10 shows per month.Touring performances are even less frequent, with 68% of respondents reporting no touring shows in a typical month. Among those who do tour, 16% perform 1 touring show per month, and 11% perform 2-3 touring shows. A very small group (2%) reports performing 4-10+ touring shows monthly. The average gross pay per local performance is $205, which is lower compared to touring performances, where the average gross pay is $245. The median pay for both is $100. This relatively low pay, combined with infrequent performances, highlights the challenges musicians face in earning a stable income from live performances in Northeast Tennessee.



$205 average pay/local gig	**$100** median pay/local gig
$245 average pay/touring gig	**$100** median pay/touring gig

> A lot of musicians undercut others by accepting lower wages, which makes it hard to ask for fair pay.

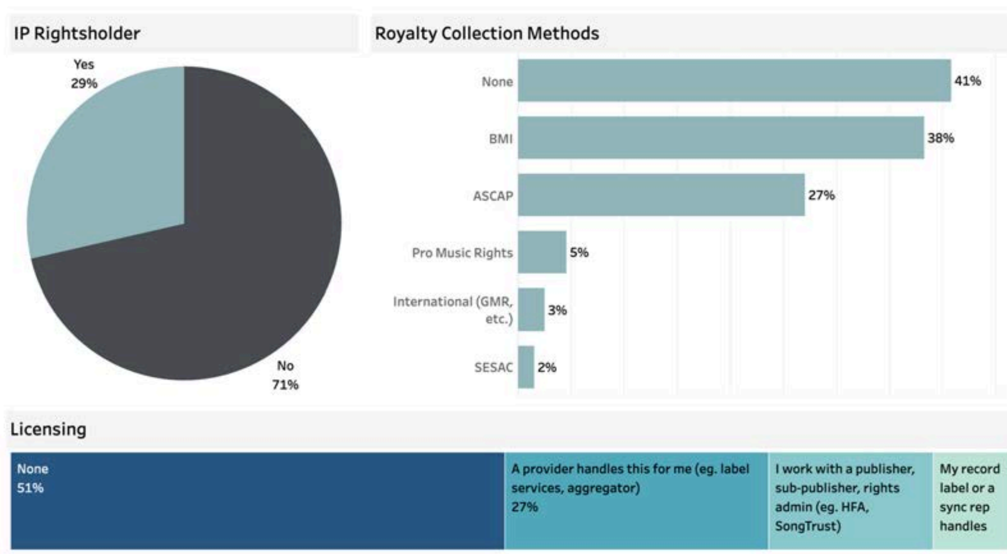
- **Work Outside Music** - In the Northeast Tennessee ecosystem, 61% of respondents work outside of music, with 89% of these individuals indicating that their outside job provides their primary income. This highlights that a significant majority of music professionals rely on external employment to sustain their livelihoods, underscoring the challenges of making a full-time living within the music sector alone.



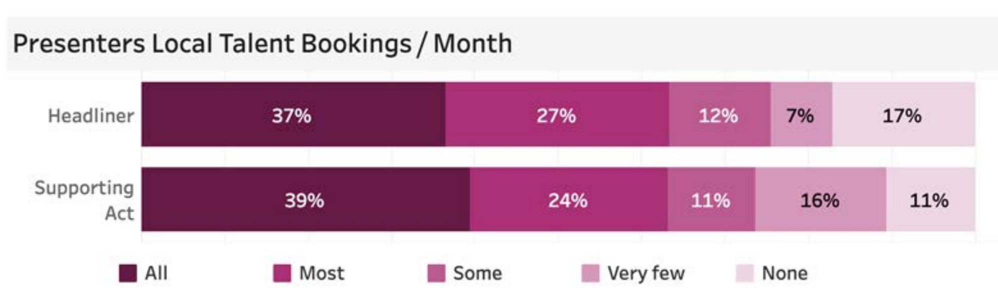
Music Ecosystem Health Assessment

Economic Activity (continued 3/4)

- **Royalty Collection & IP Rights:** Only 29% of respondents are IP rights-holders, with 41% not using any royalty collection methods. Among those who collect royalties, 38% use BMI and 27% use ASCAP, indicating a reliance on established organizations to handle royalty collection.
  - 51% of respondents do not engage in licensing for their music.
  - Of those who do, 27% work with a publisher, label, or aggregator to handle licensing or rights management.



- **Venue Live Events & Talent Booking**: Venues in Northeast Tennessee host an average of 32 live events per year, contributing to a total of 1,590 live events across all respondents. In terms of supporting local talent, 37% of headliner slots feature local artists at all events, while 39% of supporting act slots feature local talent at all events. However, 17% of headliner slots and 11% of supporting act slots feature no local talent at any events. Intent to Increase Local Bookings: When asked about their future plans, 43% of venue and presenter respondents said they definitely intend to increase local bookings, while 22% indicated they would probably do so. However, 28% remain uncertain, and a small percentage (6%) are unlikely to increase local bookings.



Venues average
32
live events/year

1,590
total live events/year

> “The gig economy is killing us. We need a union or at least some guidelines on fair wages.”

> “People expect you to play for free or for tips... no one considers the effort, time, and practice that goes into a performance.”

> “There are too many events that ask us to play for ‘exposure,’ as if that’s enough. It’s demeaning.”

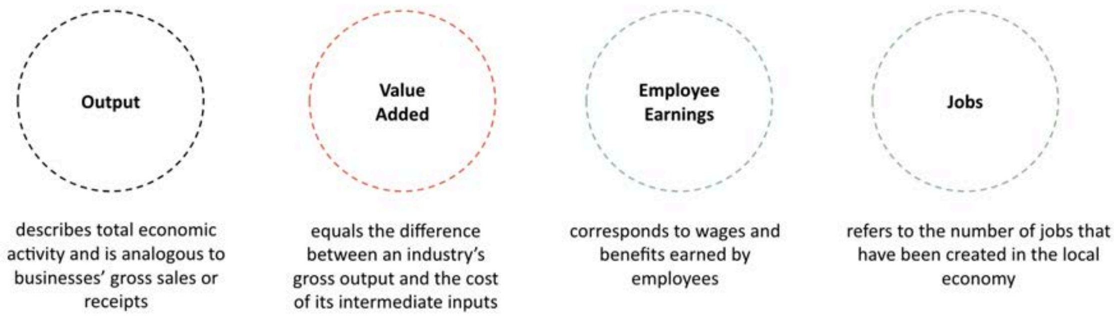
SPECIAL ANALYSIS:

ECONOMIC IMPACT OF Northeast Tennessee Music

Using the economic activity data derived from the respondents of the NETN Music Census, Sound Music Cities contracted with TXP, Inc. an economic analysis and public policy firm to measure the economic impact of the northeast Tennessee Music Ecosystem. TXP measured the total economic impacts of musician earnings in NE Tennessee using a system of regional input-output multipliers developed by the U.S. Bureau of Economic Analysis called RIMS II to measure the total impact of musician earnings on the NE Tennessee regional economy. The study input relies on data on direct musician earnings derived from the music census and extrapolated across the entire regional musician population. The analysis takes into consideration three types of expenditure effects:

- DIRECT - Purchases, expenditures, investments, and wages paid by firm/organization
- INDIRECT - Downstream purchases by vendors, suppliers, and contractors
- INDUCED - Changes in regional household spending patterns as a result of increased wages

The study results are grouped by four of the variables typically used to measure and describe economic activity:



RESULTS: Northeast Tennessee Music Economic Impact

$75.9 million

Total Output

Total (direct, indirect, and induced in NE Tennessee) annual economic activity (top-line revenue) attributable to music earnings is $75.9 million.

$45.5 million

Value-Added

Total value-added (top-line revenue minus cost of goods sold) is measured at $45.5 million.

$22.8 million

Earnings

Total earnings impact is estimated at approximately $22.8 million.

503 jobs

Jobs

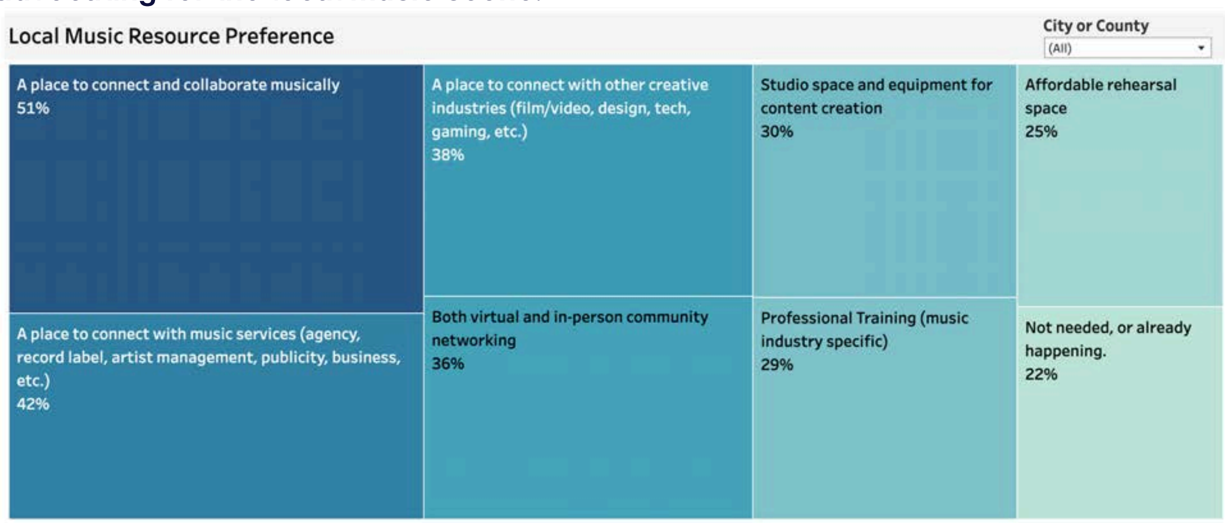
Total employment impact is 503 full-time equivalent positions.

- Most of the impact is felt in consumer-related sectors, e.g., retail trade and healthcare. However, every major industry in the region see some benefit.
- Beyond the impacts measured through input-output analysis, music and music-related activity contribute significantly to the economic development environment in the region. For many communities, music is an important component of their brand, which in turn serves to attract and retain visitors, new residents, and firms to the area.

Music Ecosystem Health Assessment

Ecosystem Development

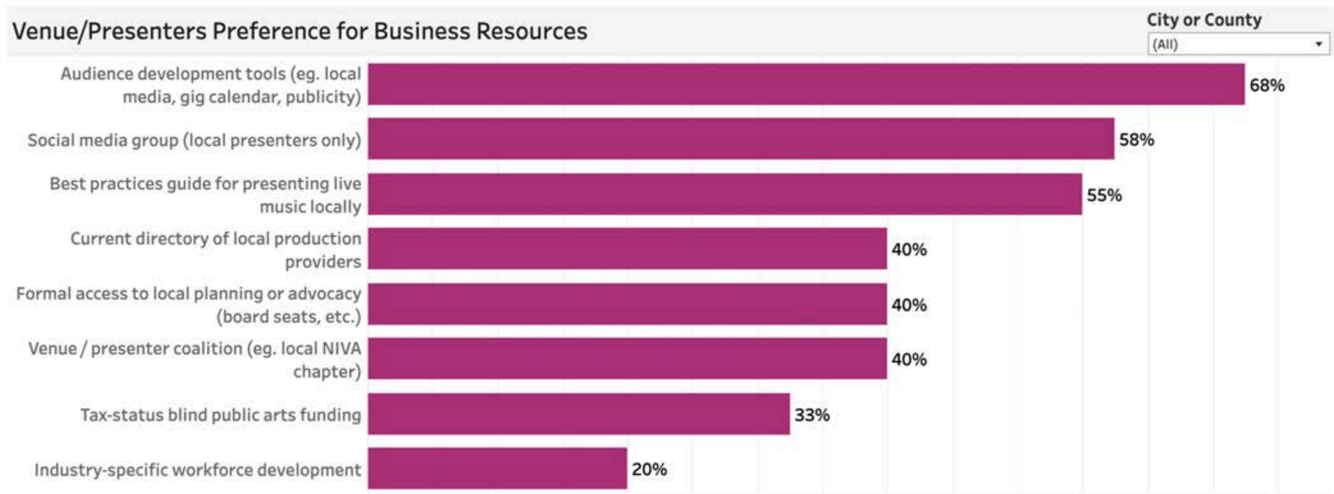
Across Northeast Tennessee, a majority of respondents (51%) are seeking a place to connect and collaborate musically, highlighting a strong desire for communal spaces. In addition, 42% want to connect with music services such as agencies, record labels, and artist management. The most significant need for Venue and Presenter business resources is for audience development tools such as local media, gig calendars, and publicity, with 68% of respondents indicating this as a priority. Additionally, 58% of respondents seek a social media group for local presenters, while 55% would benefit from a best practices guide for presenting live music locally. Across all 8 counties and the City of Bristol, 79% of respondents reported that they have not received financial assistance for their music work. Word of mouth (35%) and social media (31%) are the most common ways people find out about music opportunities such as gigs or collaborations. For the Northeast Tennessee region as a whole, the majority of respondents (59%) favor a community-based collaborative approach to organizing and advocating for the local music scene.



- **Local Music Resource Preference:** Across Northeast Tennessee, a majority of respondents (51%) are seeking a place to connect and collaborate musically, highlighting a strong desire for communal spaces. In addition, 42% want to connect with music services such as agencies, record labels, and artist management. Networking with other creative industries such as film, video, and tech is a priority for 38% of respondents, and both virtual and in-person community networking options are desired by 36%. The need for studio space and equipment for content creation was noted by 30% of respondents, while 25% expressed a need for affordable rehearsal space. Professional training specific to the music industry is important to 29% of respondents, while 22% feel that additional resources are not needed or are already available. Regional patterns include:
  - For all respondents except those in Hancock County, the demand for a place to connect and collaborate musically is ranked the highest priority with percentages ranging from 44% to 68%.
  - Johnson County respondents show the highest demand across all areas for connecting with music services (72%) and for a place to connect and collaborate (68%).
  - Unicoi County places higher importance on studio space and equipment (50%), while others, like the City of Bristol (15%) and Sullivan County (23%), show less demand in this area.
  - Johnson and Hawkins Counties show the highest demand for professional training (38-40%), while Greene County shows lower interest (15%).
  - Hancock County reflects a unique case where 100% of the respondents (Creatives, no respondents from Industry or Venue/Presenter) feel no additional resources are needed.

Music Ecosystem Health Assessment

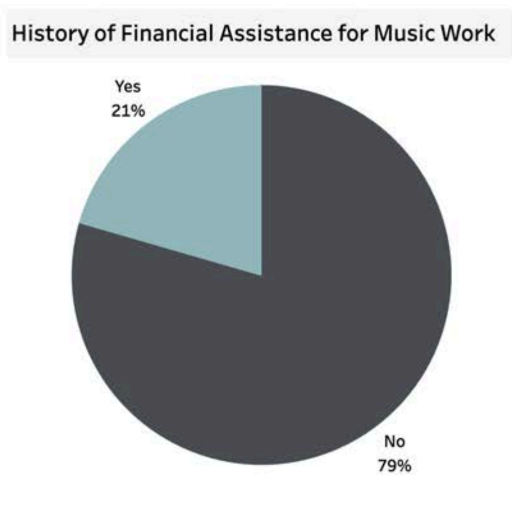
Ecosystem Development (continued 2/5)

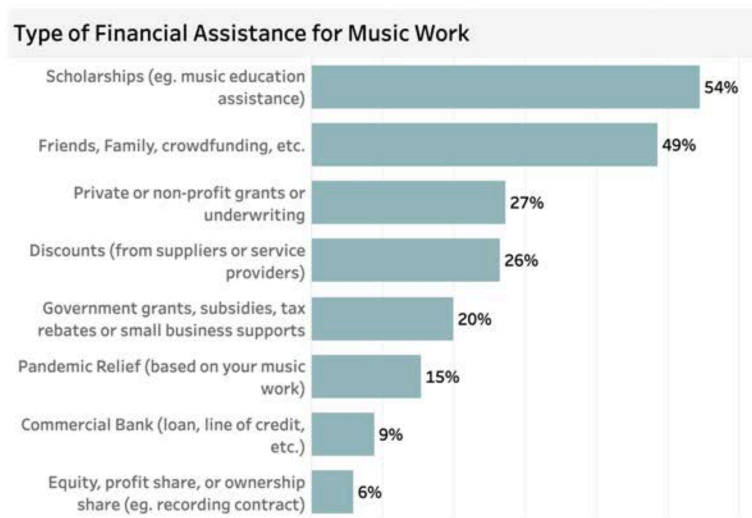


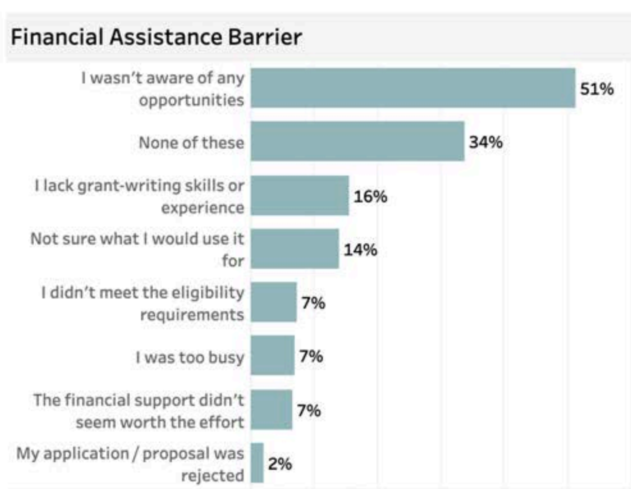
- **Venue/Presenter Business Resources:** Across all counties in Northeast Tennessee, the most significant need for Venue and Presenter business resources is for audience development tools such as local media, gig calendars, and publicity, with 68% of respondents indicating this as a priority. Additionally, 58% of respondents seek a social media group for local presenters, while 55% would benefit from a best practices guide for presenting live music locally. Access to a current directory of local production providers, formal local planning/advocacy access (e.g., board seats), and a venue/presenter coalition all had 40% of respondents indicating a need for each. Public arts funding that is blind to tax status is desired by 33% of respondents, while 20% feel that industry-specific workforce development is a priority. Hancock and Unicoi Counties had no Venue/Presenter respondents. Regional patterns include:
  - Audience Development Tools - In Carter, Greene, and Johnson Counties 100% of Venue/Presenter respondents rank this as a priority.
  - Social Media Groups for Local Presenters - Sullivan and Washington Counties, and the City of Bristol indicate a desire to connect digitally within their local music communities.
  - Best Practices Guides for Presenting Live Music Locally - Carter, Greene, Hawkins Counties, and the City of Bristol all have significant interest with Carter and Hawkins Counties showing 100% interest.
  - Current Directory of Local Production Providers - Johnson, Carter, and Greene Counties, and the City of Bristol respondents want this type of directory.
  - Formal Access to Local Planning/Advocacy is highly valued in Carter and Greene counties (67-75%), but only moderately important in areas like Sullivan and Washington, where 13-30% of respondents indicated a need for this type of resource.
  - Venue/Presenter Coalition Formation (e.g., local NIVA chapters) is important in some areas like Carter and City of Bristol (75%), but less so in counties like Sullivan and Washington, where only 25-40% of respondents expressed interest.
  - Tax-Status Blind Public Arts Funding shows varying interest levels across the counties. In Johnson County, 100% of respondents identified this as a need, while in counties like Greene and Hawkins, interest drops to 17-33%.
  - Industry-Specific Workforce Development is a lower priority overall, but demand fluctuates, with Carter and City of Bristol showing 50% interest, while Washington and Sullivan counties are much lower at 10-13%.

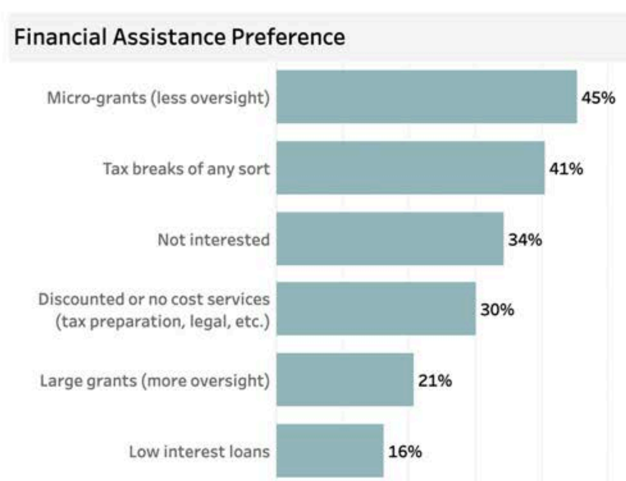
Ecosystem Development (continued 3/5)

- **Financial Support:** Across all 8 counties and the City of Bristol, 79% of respondents reported that they have not received financial assistance for their music work, with only 21% having benefited from such support. Among those who did, scholarships for music education (54%) and crowdfunding or help from friends and family (49%) were the most common forms of aid. The main barrier to accessing financial assistance was a lack of awareness, with 51% of respondents indicating they were unaware of available opportunities, while 16% cited a lack of grant-writing skills. In terms of preferred support, 45% of respondents favored micro-grants with less oversight, and 41% expressed interest in tax breaks. Discounted or no-cost services (30%) and large grants (21%) were also viewed as helpful options.







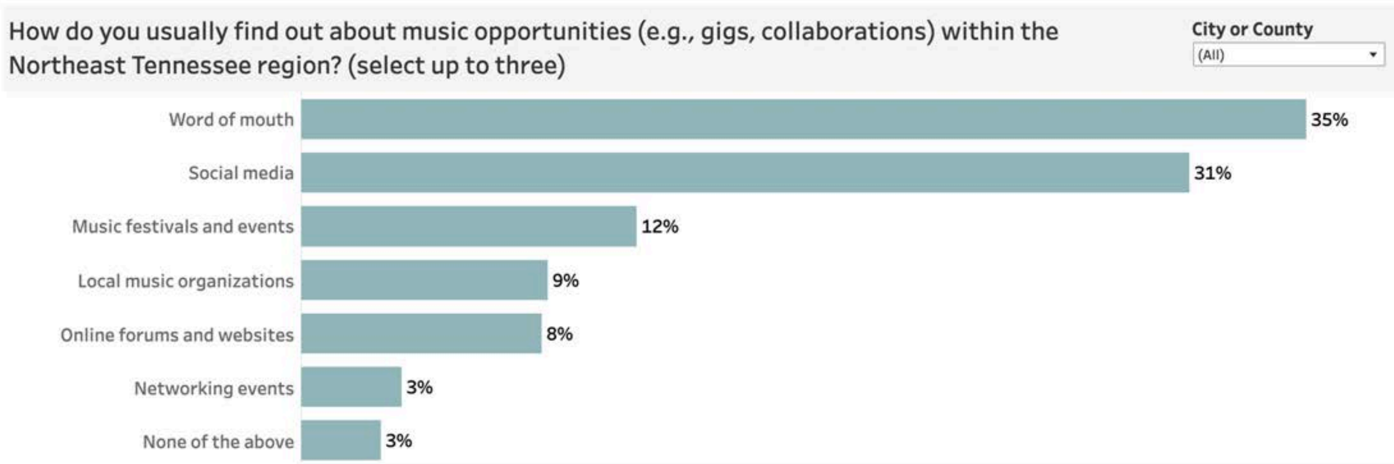


> "The city promotes tourism, but they don't support the music scene that could attract visitors."

> "Local government seems unaware of how much potential the music industry has for economic growth."

> "Local leaders could do more to recognize and support music as an essential part of our community."

Ecosystem Development (continued 4/5)



- **Top Ways to Discover Music Opportunities in Northeast Tennessee:** Across all counties in Northeast Tennessee, word of mouth (35%) and social media (31%) are the most common ways people find out about music opportunities such as gigs or collaborations. Other methods, such as music festivals and events (12%), local music organizations (9%), and online forums/websites (8%), play a smaller role. Networking events and "none of the above" each garnered 3%, indicating that more traditional or community-driven discovery methods remain the most effective. Regional patterns include:
  - Heavy Reliance on Word of Mouth in City of Bristol and Johnson County: In the City of Bristol and Johnson County, word of mouth significantly outpaces social media by a margin of over 10%, showing a stronger emphasis on direct community communication in these areas.
  - Music Festivals and Events in Hancock County: Hancock County has an equal reliance on music festivals/events (33%) as word of mouth and social media, showing that live events play a bigger role in music discovery here compared to other counties like Washington or Sullivan, where festivals account for only 9-11%.
  - Higher Social Media Usage in Hawkins County: In Hawkins County, social media (30%) overtakes word of mouth slightly, showing a more digital approach in this region compared to others like Johnson County, where word of mouth is significantly more prominent.
  - Lower Usage of Networking Events: Networking events consistently show up at the lower end of discovery methods, often below 5%, except in a few cases like Johnson County where it reaches 5%. This trend suggests that more formal industry events are not as widely used in these counties.

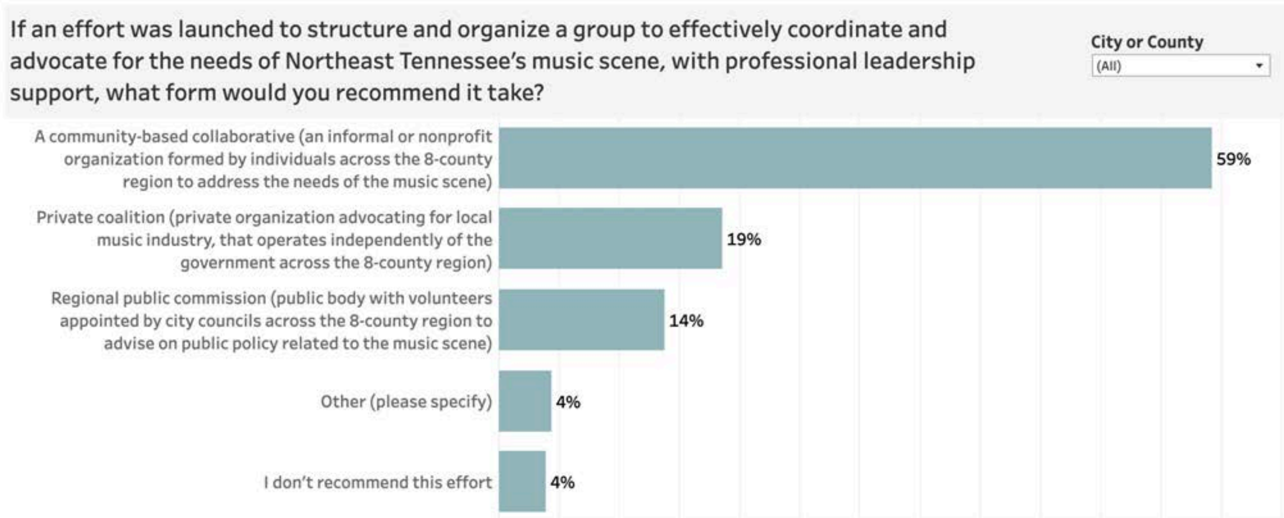
> Good intentions aren't enough; we need experienced organizers who understand what it takes.

> Networking is mostly word-of-mouth or random, which makes it hard to get established here.

> We need more visibility for opportunities to collaborate and connect, especially for less-established artists.

Music Ecosystem Health Assessment

Ecosystem Development (continued 5/5)



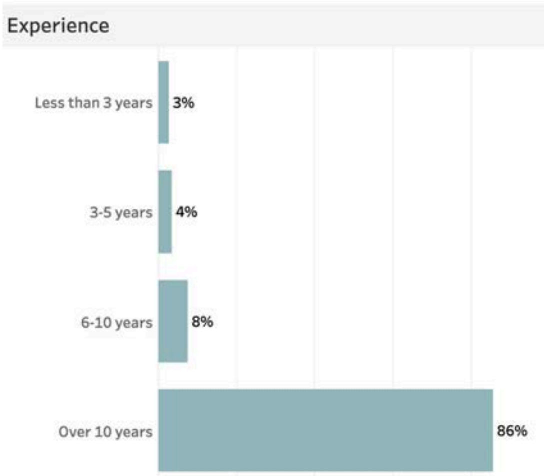
- **Organizational Preferences for Coordinating Northeast Tennessee's Music Scene:** For the Northeast Tennessee region as a whole, the majority of respondents (59%) favor a community-based collaborative approach to organizing and advocating for the local music scene. This model suggests an informal or nonprofit structure formed by individuals within the 8-county region. The next most popular option is a private coalition (19%), followed by a regional public commission (14%). A small minority of respondents either had other preferences (4%) or did not recommend this effort (4%). Regional patterns include:

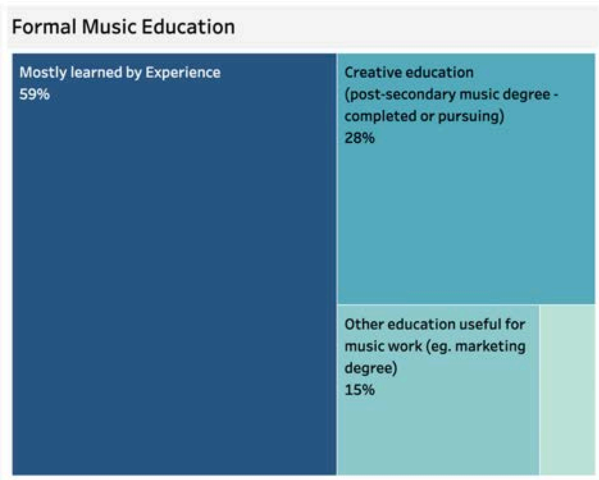
- Preference for Community-Based Collaborative: Across all counties, the majority of respondents prefer a community-based collaborative as the organizational structure to coordinate and advocate for the local music scene. This ranges from 48% in Greene County to 70% in Hawkins and Unicoi counties, with the City of Bristol slightly lower at 40%. This suggests a broad regional desire for informal or nonprofit efforts led by local individuals to meet the music scene's needs.
- Low Interest in Public Commissions: A regional public commission, involving a formal body appointed by city councils, consistently ranks low across most counties, ranging from 9% in Hawkins County to 27% in the City of Bristol. This reflects a general disinterest in formal government-driven initiatives to manage music-related efforts.
- Stronger Support for Private Coalitions in Bristol: In the City of Bristol, there is a notably higher preference (33%) for a private coalition, which is more than 10% higher than the overall region's 19%. This suggests that Bristol's music community may prefer a more business-focused approach to organizing the local music ecosystem.
- Equal Support for Regional Public Commission and Private Coalition in Washington County: In Washington County, 18% of respondents support a regional public commission, and 12% favor a private coalition, slightly higher than the regional averages. This suggests that respondents in this county might be more open to both formal and private organizational structures compared to other areas.
- Diverse Organizational Preferences in Bristol: In the City of Bristol, the preferences are more evenly distributed across the three main options (community-based collaborative, private coalition, and public commission). This shows a broader range of opinions within the Bristol music community, indicating that different segments of the community may have varying ideas about how the local music ecosystem should be organized.

Music Ecosystem Health Assessment

Workforce Development

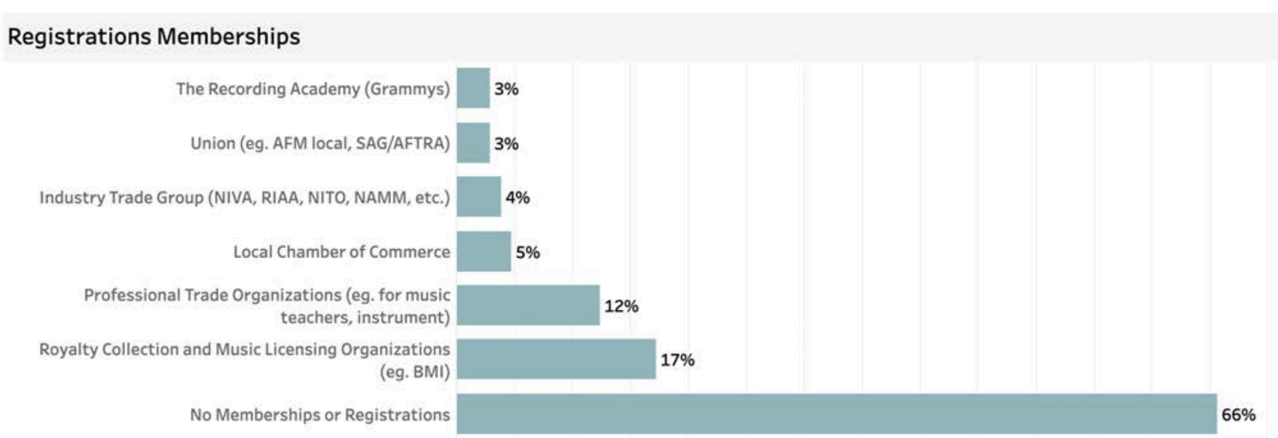
The Northeast Tennessee music ecosystem is composed of a highly experienced workforce, with 86% boasting over a decade in the industry. While practical experience is the primary form of training, a significant portion has formal or related education. Despite the talent depth, two-thirds of respondents lack membership in professional organizations, hinting at opportunities for enhanced industry support. Professional development interests focus on specialized skills, particularly in recording, marketing, licensing, and notably, in music localism/community advocacy.





- **Experience and Formal Music Education:** A majority of respondents (86%) have over 10 years of experience in the music industry, showing a seasoned workforce. Most (59%) learned their skills through experience, while 28% hold or are pursuing a post-secondary music degree. An additional 15% have other relevant education, such as marketing, that supports their music work.

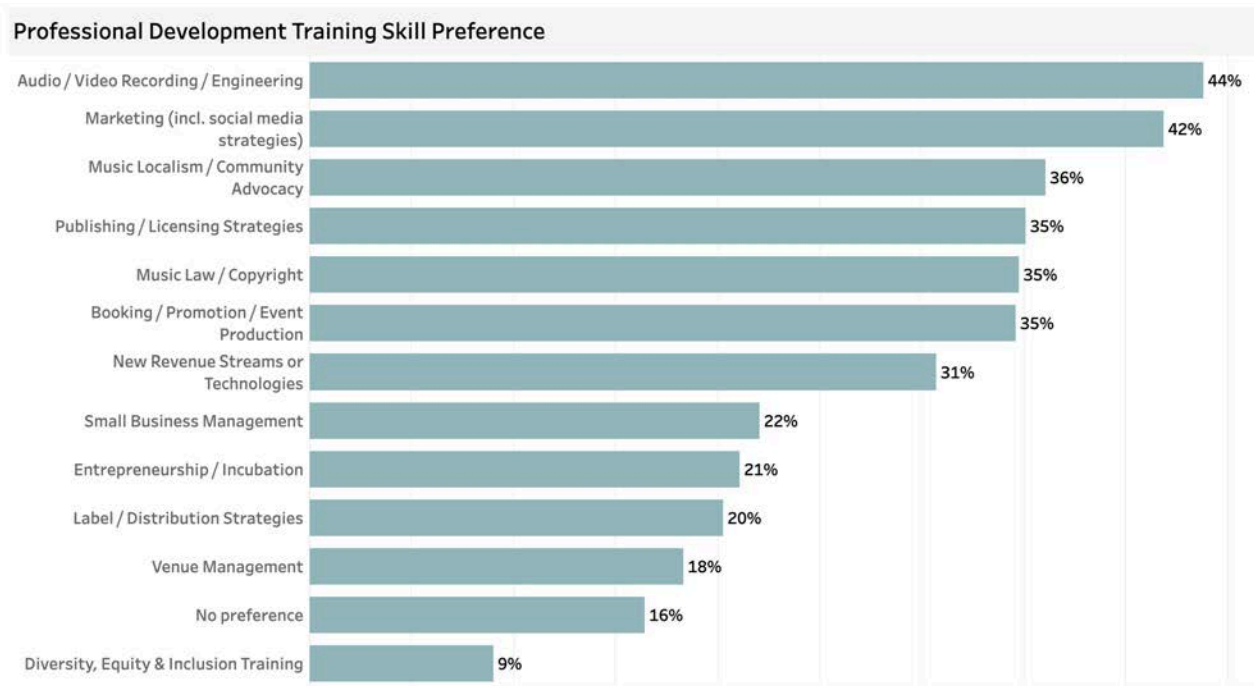
- **Professional Industry Associations -** A significant majority, 66%, of respondents have no memberships or registrations in any organizations. Among those who do, 17% are registered with royalty collection and music licensing organizations, making it the most common affiliation. Professional trade organizations and unions each account for 12%, while 3% are members of The Recording Academy (Grammys). These data indicate a relatively low engagement with industry organizations overall.



Music Ecosystem Health Assessment

Workforce Development (continued)

- **Professional Development** - There's a strong demand for advanced professional development, with 40% interested in continuing education on topics like licensing. In terms of skills, respondents prioritize audio/video recording (44%) and marketing (42%), followed closely by music localism/community advocacy (36%) and then publishing/licensing strategies (35%), music law/copyright (35%), and booking/promotion/event production (35%). Music localism ranking third is significant, as we don't see this in the top three often when compared to other Music Census done across the United States.



> We also need things like a sound system, so we don't have to rent one. Training on how to generate more community support would be very helpful to us.

> The music educators profession in East Tennessee is extremely elitist. Much of the decisions being made and the opportunities of music education benefit the larger schools that are well funded, leaving smaller schools behind.

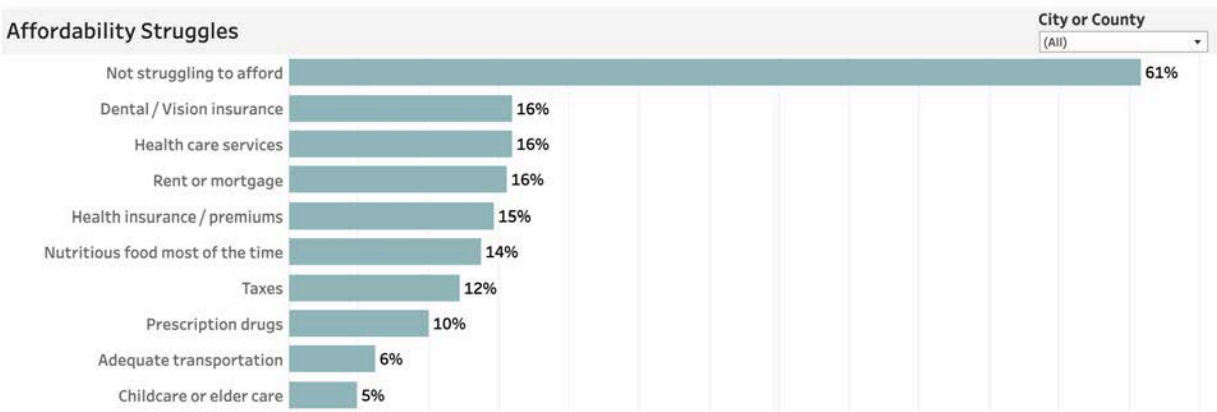
> One thing that would be nice to see change and be taught is what certain perspectives to have and how to make it in the music business as a musician and/or a band.

> Music educators need more funding and support from school districts and local school administrators/guidance departments.

> I also have had zero formal music training and have just struggled along and taught myself everything I know or picked it up from people I've met on that journey. We have zero real music education or interest, zero prospects and reward for being a musician.

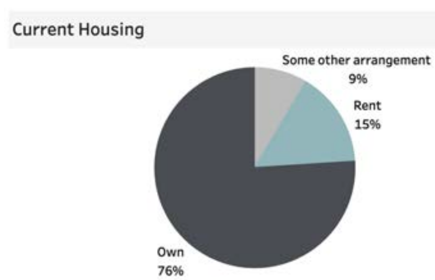
Livability

With cost of living, stagnant pay rates, and affordability struggles pressing on music professionals, the Northeast Tennessee music ecosystem faces economic sustainability challenges. While most own homes and experience stable housing, and many (61%) report they are not struggling with affordability, issues like healthcare/dental/vision and housing costs affect 48% of respondents. For Venues, top challenges include talent and marketing costs, alongside operational concerns like insurance and post-COVID fan behavior. Renting remains prevalent for live performance spaces, reflecting flexibility needs, whereas owned studios and storage indicate more permanent investments. Overall, economic pressures and high operational costs highlight areas for potential support and resilience-building.

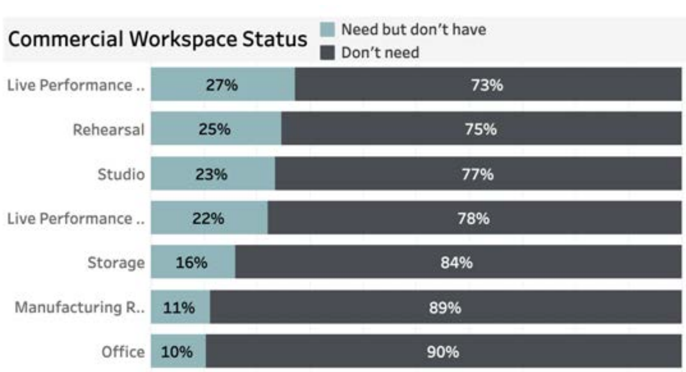


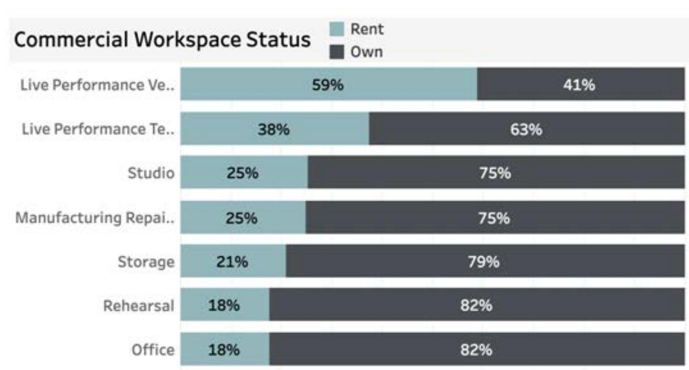
- **Affordability** - While 61% of respondents report no struggles with affordability, the remaining 39% experience challenges with essentials like dental/vision insurance, healthcare, and housing costs. These affordability issues reveal areas where support could alleviate financial pressures for music professionals.

- **Housing** - Most respondents (76%) own their homes, with only 15% renting and a small portion (9%) in other arrangements. This suggests a relatively stable housing situation among music professionals in the region.



- **Commercial Workspace Status:** Renting is common for live performance venues (59%) and other creative spaces, though ownership is prevalent in studios, manufacturing, and storage spaces. This mix reflects both investment in permanent spaces and flexibility in performance venues.



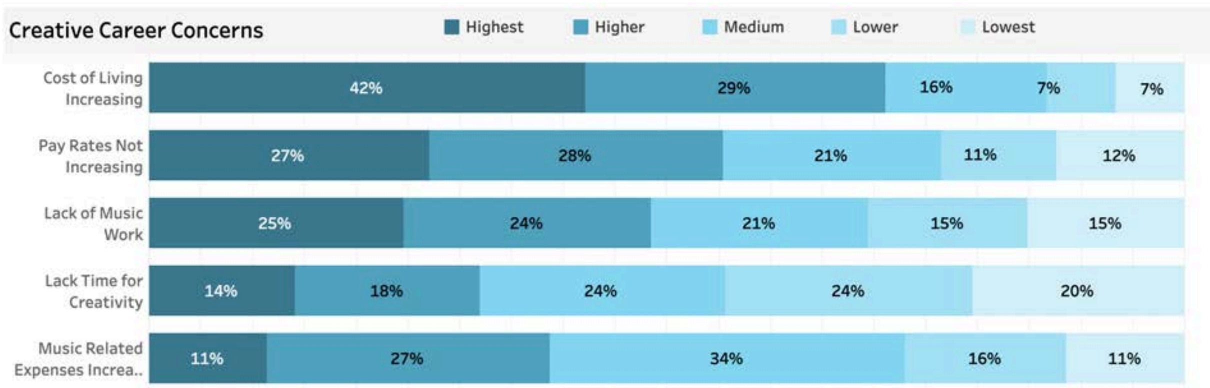


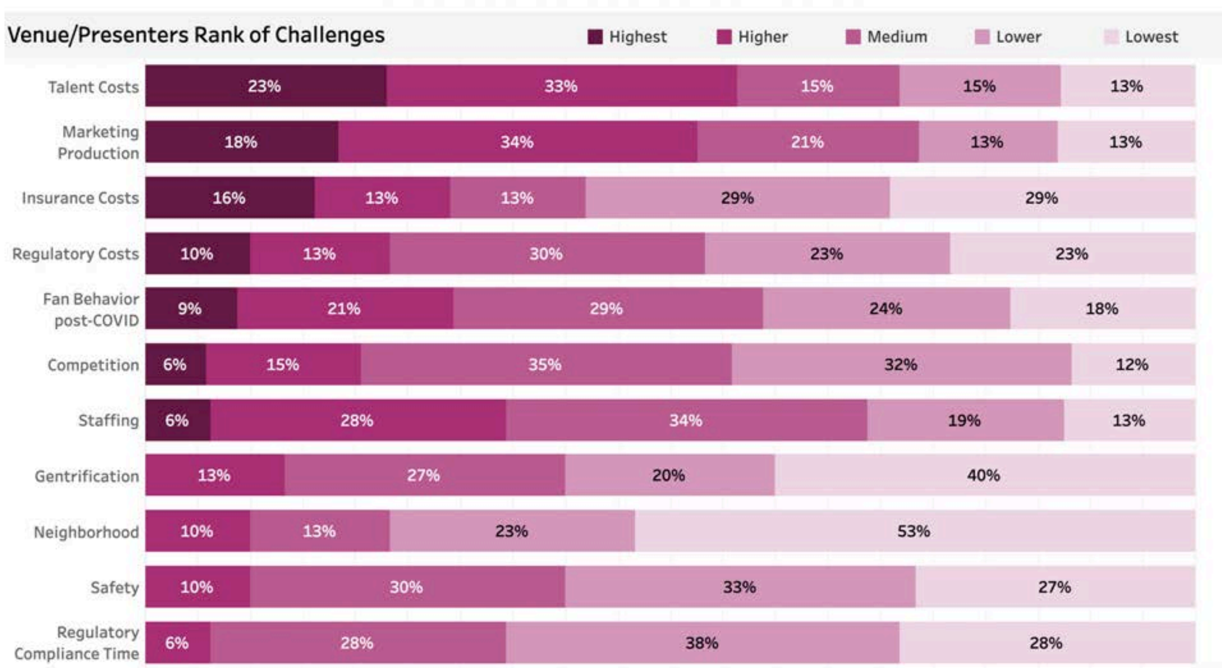
Music Ecosystem Health Assessment

Livability (continued)

- **Creative Career Concerns** - The rising cost of living is the top concern for Creative respondents, with 42% ranking it as their highest issue. Other prominent concerns include stagnant pay rates (27% as highest) and lack of music work (25% as highest), highlighting the economic pressures affecting sustainability in music careers.

- **Venue/Presenters Rank of Challenges** - Talent costs, marketing, and insurance are top challenges for venues, with fan behavior post-COVID and regulatory compliance time also posing issues. Safety and neighborhood-related concerns are ranked lower, indicating that financial and operational challenges take priority as the top challenges facing Venue/Presenters.





“The cost of licenses and permits can be a barrier for smaller venues or for artists trying to organize their own shows.”

“Freelance musicians aren’t getting a living wage; we’re struggling to sustain our careers.”

““It’s nearly impossible to balance a job and music because neither pays well enough on its own.”

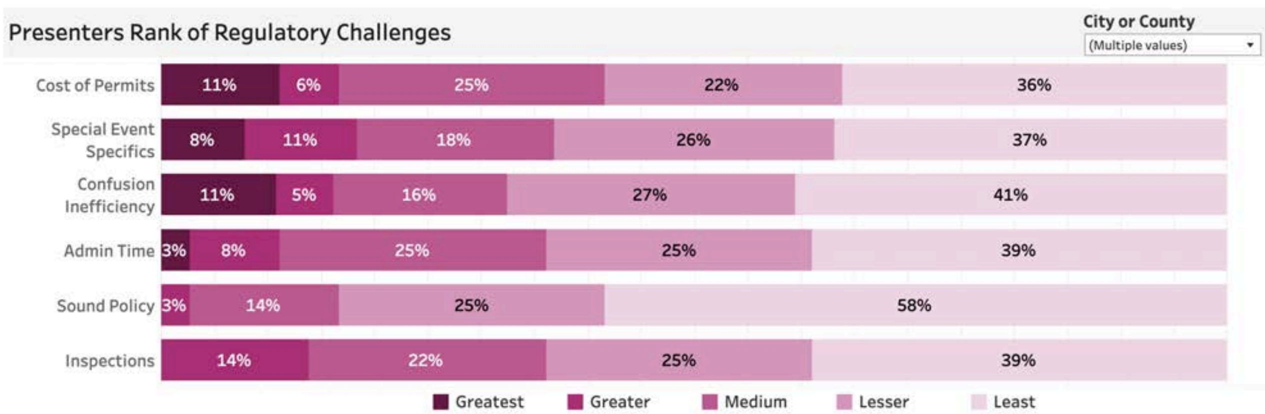
“Our community is low income, so we price low to create greater access, but we cannot afford to pay more staff as a consequence.”

“The low profit margins of restaurants/venues due to huge taxes and rising costs make it hard to support live music fairly.”

Music Ecosystem Health Assessment

Music-Friendly Policies

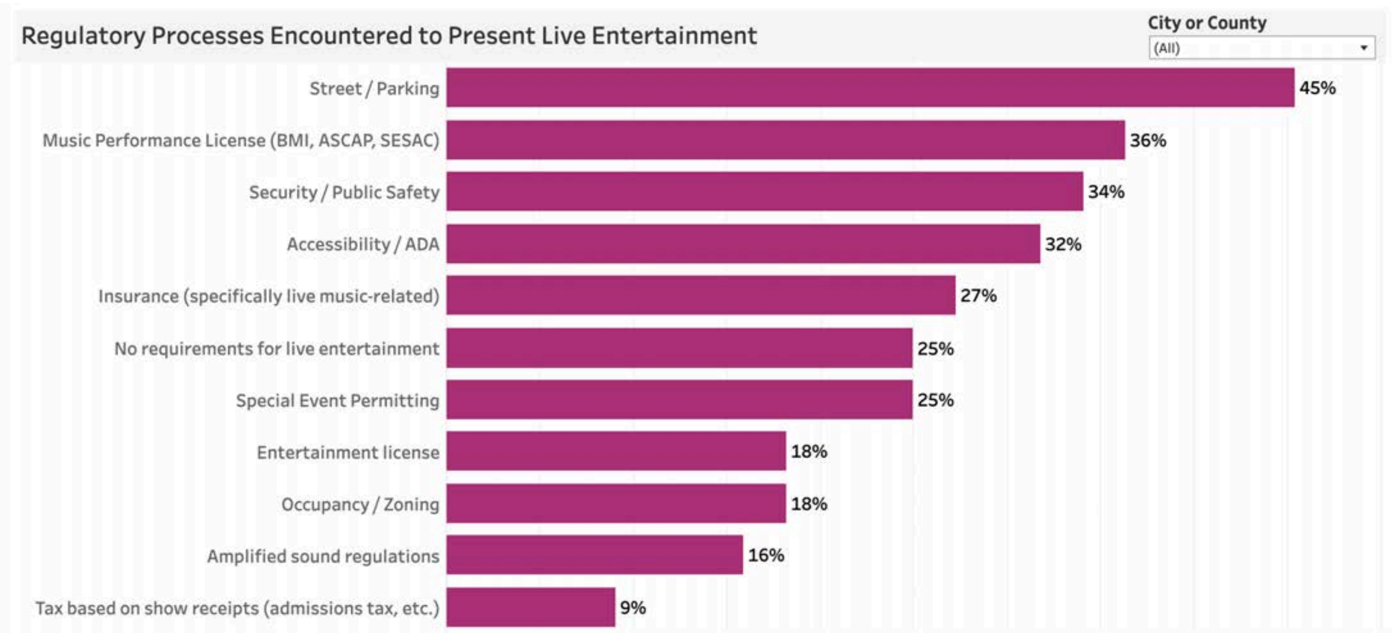
Key regulatory challenges for Venue/Presenters include permit costs (42%), special event specifics (37%), and confusion around regulatory processes (32%). Venues and Presenters frequently encounter regulatory processes such as street/parking (45%), music performance licenses (36%), and public safety requirements (34%). Preferred financial support options are micro-grants (45%) and tax breaks (41%), highlighting a need for flexible assistance. Respondents also favor tools like an online regulatory portal (58%) and tax discounts or incentives to host live music (56%). Hancock and Unicoi Counties had no Venue/Presenter respondents.



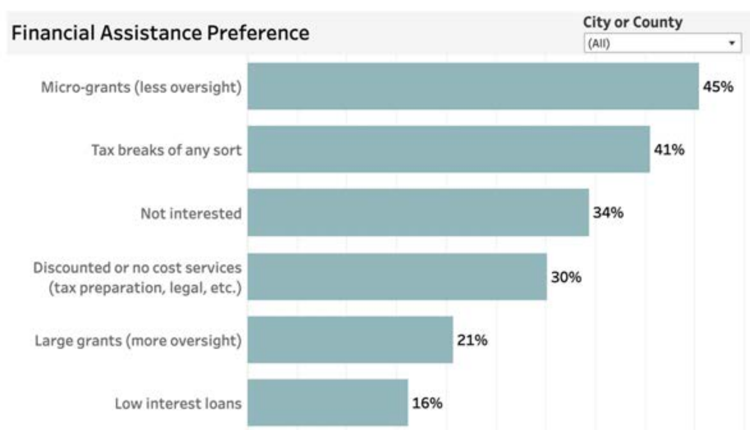
- **Regulatory Challenges** - Venue/Presenters find "Confusion/Inefficiency" and "Cost of Permits" to be the greatest challenges, with 32% and 42% ranking these as major issues. "Sound Policy" and "Inspections" are seen as the least challenging, indicating that these aspects may be easier to navigate or less restrictive. Regulatory challenges vary regionally as follows:
  - Carter County: Carter County presents a fairly even spread across all categories, with no single challenge overwhelmingly dominating, suggesting a broad range of moderate regulatory challenges without a specific pressure point.
  - City of Bristol: Lacks any great challenges, but identifies cost of permits, admin time and inspections as moderate challenges.
  - Greene County: Confusion inefficiency, cost of permits, special event specifics, and to a lesser extent inspections are the greatest challenges.
  - Hawkins County: Special event specifics is the greatest challenge, with confusion inefficiency, cost of permits, and inspections following closely.
  - Johnson County: Special event specifics are ranked as 100% the greatest challenge.
  - Sullivan County: Cost of permits is the greatest challenge followed by admin time and confusion inefficiency.
  - Washington County: Cost of permits is the greatest challenge, following by confusion inefficiency and admin time.

Music-Friendly Policies (continued 2/3)

- **Regulatory Fluency** - Street/parking and music performance licensing (BMI, ASCAP, SESAC) are the top regulatory hurdles, encountered by 45% and 36% of Venue/Presenters, respectively. Security/public safety and ADA accessibility also present frequent requirements, while taxes on show receipts rank lowest.



- **Financial Assistance Preferences** Micro-grants with minimal oversight are the top choice for financial support (45%), followed by tax breaks (41%). There is relatively low interest in low-interest loans and large grants that require more oversight, pointing to a preference for flexible financial aid options.



> We need more funding from the local government for arts and music projects.

> For all the talk about supporting culture, there's no real investment in the music community.

> Music education is declining because it's not prioritized, and we need the government to step up.

Music Ecosystem Health Assessment

Music-Friendly Policies (continued 3/3)

- **Regulatory Tool Preference:** Venue/Presenter respondents most value a webpage of current regulations (specifically for live music) (58%) and tax discounts to incentivize hosting live music (56%). An advocate inside government (50%) and one point of contact for permitting (42%) are also preferred, reflecting a need for streamlined processes and support structures. Venue/Presenter preferences for regulatory tools vary regionally as follows:
  - <u>Carter County, TN:</u> Unanimous support (100% each) for government advocacy, tiered compliance, and tax incentives. Moderate preferences (67% each) include annual training and updates from regulatory body, one point of contact for permitting, and an online portal for permitting and communication.
  - <u>City of Bristol:</u> There is high support (75% each) for an advocate inside government, tax incentives, and a webpage of current regulations. One point of contact for permitting is moderately favored (50%).
  - <u>Greene County:</u> One point of contact for permitting is strongly preferred (80%), followed by annual training and updates from regulatory body (60%) and a webpage of current regulations (60%). Moderate interest is shown for an advocate inside government (40%), tax incentives (40%), and tiered compliance, fees based on scale or type of presentation (40%).
  - <u>Hawkins County:</u> Each regulatory tool is rated equally (33%), indicating balanced but relatively low interest in an advocate inside government, annual training and updates from regulatory body, an online portal for permitting and communication, and tax incentives.
  - <u>Sullivan County:</u> The most favored option is one point of contact for permitting (71%), with strong interest in an online portal for permitting and communication (57%), tax incentives (57%), and a webpage of current regulations (57%). Moderate support exists for tiered compliance, fees based on scale or type of presentation (43%).
  - <u>Washington County:</u> Preferences lean toward a webpage of current regulations (75%), an advocate inside government (63%). Moderate support is shown for and tax incentives (50%) and for tiered compliance, fees based on scale or type of presentation (50%).

> “The permitting process is so confusing and expensive. Small venues and local organizers can’t afford to jump through all these hoops just to put on a show.”

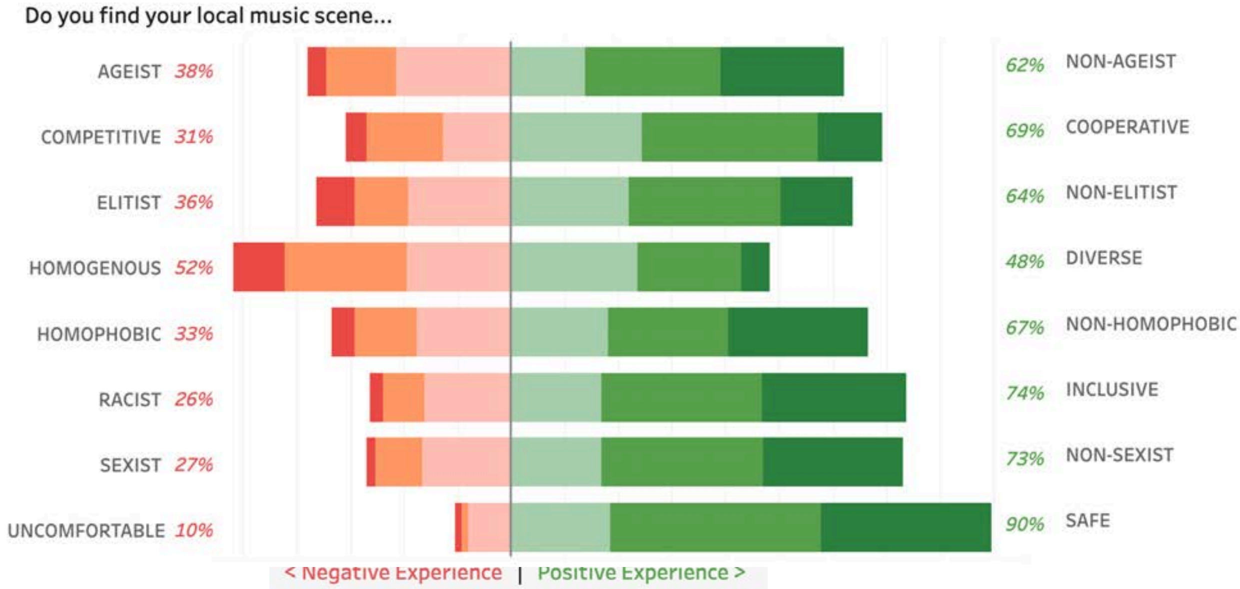
> “It feels like no one in local government really understands what goes into organizing music events. We need people who know the scene and the challenges.”

> “Venues are struggling to handle all the sound regulations. Many just don’t have the money to comply and pay artists fairly at the same time.”

Music Ecosystem Health Assessment

Culture & Belonging

Respondents find that the Northeast Tennessee music ecosystem offers primarily positive experiences. The northeast Tennessee music ecosystem's greatest strengths are that it is safe (90%), inclusive (74%), and non-sexist (73%). The Northeast Tennessee music ecosystem challenge is homogeneity (52%), and to a lesser extent ageism (38%) and elitism (36%), highlighting areas for potential improvement despite the overall positive sentiment.



Subgroup Insights

Please see the online dashboard at **NETNmusic.com** for full data on each indicator by subgroup. Some overarching themes to the subgroups are:

- **Negative experiences** - Respondents who experience the most negative (red) side of the Northeast Tennessee ecosystem are people who identify as Black, African, or African American.

"It's frustrating to see lineups dominated by men while talented women are left out. We need more balance on stage."

"Once you hit a certain age, it's like you're invisible. Opportunities dry up, and younger artists get all the attention, no matter your experience."

"If you're not playing country or bluegrass, it's hard to get booked around here."

"It would be great to see more diversity in festival lineups, not just the same type of acts each year."

"This region's music is very genre-segmented; crossover opportunities would be refreshing."

"As a jazz musician, I feel excluded—there's just not much room for diversity in our local scene."

Key Insights

Dominance of Music Creatives: The ecosystem is predominantly made up of Music Creatives (78.5%), with smaller industry sector in particular, which creates a lack of balance necessary for a fully functional music ecosystem.

Aging Population of Music Professionals: The majority of participants are older, with limited engagement from younger creatives, which may threaten the long-term sustainability of the ecosystem.

Limited Racial and Genre Diversity: The ecosystem is overwhelmingly White (92%) and often described as homogenous, with limited support for genres outside of Americana and Country.

High Levels of Experience but Low Entry of New Talent: A large proportion of respondents have over 10 years of experience, indicating a highly seasoned community with few new entrants into the industry.

Economic Challenges: Rising costs of living, stagnant pay rates, and heavy reliance on non-music jobs for primary income are pressing issues, highlighting the economic instability faced by local music professionals.

Regulatory and Permitting Barriers: Confusing regulatory processes and high permit costs create barriers for smaller venues and independent organizers, hindering the growth of live music.

Preference for DIY Industry Services: Many Music Creatives manage their own booking, publicity, and merchandise, indicating a lack of accessible industry services in the area.

High Demand for Community Collaboration: There is a strong preference for a community-based, collaborative approach to organize and advocate for the local music scene, rather than a government-led structure.

Lack of Industry Infrastructure for Diverse Genres: There is a shortage of venues and infrastructure to support diverse genres, which limits opportunities for artists outside the dominant genres in the region. This lack of genre diversity could be one of the reasons for lack of engagement with younger audiences.

Desire for Training and Professional Development: There is significant interest in professional development, especially in areas like recording, marketing, and licensing, indicating a need for targeted skill-building resources.

Photo Courtesy of Birthplace of Country Music, ETSU Appalachian Studies

SWOT Analysis

S Strengths

- **Strong Creative Presence:** Music Creatives (78%) dominate; the vibrant and engaged community of artists are innovative and entrepreneurial, developing DIY solutions to mitigate the lack of Industry.
- **Experienced Workforce:** The majority of music professionals (86%) have over a decade of experience, contributing deep expertise and skill to the region's music ecosystem.
- **Community-Driven:** Respondents show a strong preference for a community-based, collaborative model for organizing and advocating for the local music scene.
- **Safe and Inclusive Environment:** The music scene is largely seen as safe (90%), inclusive (74%), and cooperative (69%), fostering a supportive environment for musicians.Venue/Presenters are female-led (59%), exhibiting gender equality and non-sexist culture (73%)
- **Affordable Housing Stability:** A high rate of homeownership (76%) among music professionals suggests housing stability in the region.

W Weaknesses

- **Lack of Diversity:** The scene is racially homogeneous (92% White) and genre-limited, with few opportunities for artists outside the dominant genres of Americana, Bluegrass, and Country.
- **Limited Venue Capacity and Performances:** 50% of Venues are under 100 capacity, and Venues average 2.6 performances/month, limiting the opportunity for genres and audiences.
- **Lack of Diversification of Revenue Sources for Creatives**: Dependence on local performances and some touring are the primary form of income for the 39% who do not work an outside job.
- **Limited Industry and Professional Development:** With limited Industry (10%) and few skill-building resources for learning industry trades like booking, publicity, management, this part of the ecosystem is weak and lacks infrastructure to support Music Creators effectively

O Opportunities

- **Regional Strength:** Community-based collaborative to pull together the region and collectively advocate for and develop music as an economic and cultural force.
- **Professional Collaboration and Growth:** Spaces for collaboration, training, and networking across the region, especially developing industry services like recording, marketing, licensing to retain local Creative spend.
- **Youth Engagement and Mentorship:** Establish programs to leverage the region’s robust experience to attract, develop, and retain young music talent, ensuring a steady flow of new talent in the region.
- **Simplify Regulatory Processes:** Streamline permitting and regulatory requirements to make it easier for small venues and organizers.
- **Increase Performances:** Increase the number of performances at existing Venues to create more opportunity and broaden experiences.

T Threats

- **Localism over Regionalism:** Differences across the 8-Counties may divide efforts that could make the region as a whole stronger.
- **Economic Instability:** Continued reliance on non-music jobs, low wages/stagnant pay, and rising living costs could drive music professionals out of the business, risking a decline in the local music ecosystem.
- **Aging Population and Limited Youth Engagement:** The music community is predominantly older, with limited participation from younger creatives, threatening future talent pool of the region.
- **Homogeneity:** A lack of diversity across genres and people could stifle innovation and limit the appeal of the local scene to broader audiences.
- **Regulatory Burdens on Small Venues:** Complex and costly regulatory requirements could deter small venues and independent organizers, further limiting live music opportunities.

10 Community Actions

Below are 10 Community Actions to consider, prioritize, and sequence based on input and additions from the regional community and leadership.

1. **Create a Regional Music Advocacy Organization** - Form a community-based collaborative organization that advocates for the music ecosystem's needs, enabling local stakeholders to collectively address challenges, drive growth, and develop the regional brand of the music community. This may take the form of an informal or nonprofit organization formed by individuals across the 8-county region to address the needs of the music scene, and/or a private organization advocating for the local music sector that operates independently of the government across the 8-county region.

2. **Develop the Leaders in Northeast Tennessee Music Program:**
   - Create a leadership program to empower advocates from across the music ecosystem.
   - Build cross-sector connections to unify efforts and foster trusted leaders to drive long-term growth and policy change.
   - Develop the skillset and interest in music localism training and community advocacy.

3. **Launch a Regional Music Journalism Initiative:**
   - Partner with local media outlets and university journalism programs to increase coverage of local artists, events, and industry news.
   - Focus on storytelling to elevate the visibility of underrepresented genres and voices.

4. **Build Infrastructure for Genre Diversity** - Invest in creating mid-sized, all-ages, and family-friendly venues to support a variety of music genres, broadening the cultural offerings available to the community. Host events or festivals that celebrate diverse genres and underrepresented groups, providing platforms for non-mainstream genres and artists of color to encourage a more inclusive music scene. Tap into the unique aspects of the Venue and Presenter category being predominantly led by people who identify as females as well as the high number of religious venues playing a role in presenting performances to open up the diversity and identity of the region's music.

5. **Increase Performance Opportunity -** Support initiatives to grow the Venue/Presenter sectors by increasing the number of performances at existing Venues. Aim to at least double the average number of shows/Venue to offer at least one show/week..

Photo Courtesy of Birthplace of Country Music, Dobyns-Bennett High School

Community Actions, continued

6

Expand Industry Sectors - Support initiatives to grow the industry including:

- **Develop Local Professional Services -** Incubate new music-related businesses and encourage the establishment of local booking, publicity, and management to reduce the DIY burden on musicians, possibly through incentives for small business creation in these areas.
- **Increase Professional Development Opportunities -** Offer training programs focused on industry-specific skills like audio engineering, marketing, music localism, licensing, legal, and booking/promotion/event production providing musicians with resources to advance their careers.

7

Youth Engagement Programs - Develop programs that engage younger musicians and creatives, possibly through partnerships with schools and community organizations, to ensure a steady influx of new talent.

8

Economic Sustainability Models - Support initiatives to improve financial stability including:

- **Flexible Financial Assistance Options -** Introduce accessible micro-grants, tax breaks, or subsidies for Creatives and Venues to alleviate economic pressures and support sustainable careers in music.
- **Diversify Revenue Streams:** Educate artists to tap into a spectrum of potential revenue streams, including digital content creation, merchandise sales, licensing/royalties, teaching, and more to build a more resilient financial base.

9

Streamline Regulatory Processes - Simplify permitting and regulatory processes by creating a centralized online portal, providing clear guidelines, and offering direct support for small venue owners and independent organizers. A City/County government-led Venue/Presenter summit would enhance communication and develop fluency and proficiency with regulatory requirements and processes.

10

Enhance Networking and Community Spaces - Develop dedicated spaces for collaboration and networking, such as a community music center, to facilitate connections, skill-sharing, and resource access within the local music community.

Photos Courtesy of ETSU Appalachian Studies, Dobyns-Bennett High School, Birthplace of Country Music, Northeast TN Toursim Association