

# **Music Strategy**

# City of Huntsville

MUSIC ECOSYSTEM STUDY AND STRATEGIC RECOMMENDATIONS

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# 1. Introduction

The following document sets forth the recommendations determined by Sound Diplomacy, based on a previously submitted compilation of the qualitative and quantitative research conducted over several months as part of the Huntsville Music Audit.

#### The document includes:

- A summarized refresher of the Literature Review and Regulatory Assessment section, comprised of general information on Huntsville and an analysis of different sources on the arts and creative sectors in Huntsville and Alabama, as well as some neighbouring sectors, such as tourism. It also includes an analysis of the licenses and regulations that apply to the music sector.
- 2. The table formed from the **Comparative Analysis** section, comparing Huntsville to five other US cities (Austin, TX; Nashville, TN; Durham, NC; Boulder, CO; and Chattanooga, TN) and giving an overview of Huntsville's policies as well as best case examples.
- 3. A summary of the results derived from the **Survey Analysis**.
- 4. The final **Recommendations** for Huntsville to move forward with their music strategy.

These deliverables serve as the final element of the strategy design that Sound Diplomacy will carry out during the next months. Most of the information that is presented here can be found in more detail in previous reports.

By taking into consideration the information presented herein for both immediate and long-term decisions, as well as adopting and striving to meet the standards presented by the recommendations outlined, Huntsville will be sure to reach its goal of becoming a vibrant, innovative and sustainable Music City in which artists, businesses, tourists and locals can thrive.

# 1.1 About the Project

In April 2018, Sound Diplomacy began work on an extensive music strategy to help kickstart Huntsville's journey to becoming Alabama's first Music City. The project, lasting just over a

year, is tied with a music audit of the Muscle Shoals region to create the most extensive music ecosystem survey in the nation. The project was carried out in several phases, launching with visits to Huntsville to speak to key stakeholders and participants in the local music industry. These interview findings were followed by a survey and mapping of the current industry to identify the challenges and opportunities in the city, which were further analyzed in order to present a series of recommendations to help propel Huntsville towards its objectives. This project will mark Huntsville as a competitor in the global music industry, particularly through galvanizing its local engineers to spurn music tech innovation and boosting the economic drive of the Alabama music tourism industry and the MidCity development. Alongside the work being carried out simultaneously in the Shoals Region, the findings and recommended steps will place Alabama at the forefront of music creation, innovation and tourism.

# 1.2 About Sound Diplomacy

Sound Diplomacy is the leader of the global music cities movement. As strategists for cities, developers, large private sector organizations and governments, Sound Diplomacy provide cutting edge research and market expertise in placing music and night time economy strategy in city, urban and development plans. Sound Diplomacy works in over 20 countries and counts the Mayor of London, City of San Francisco, Lendlease, Walton Family Foundation and City of Brisbane as clients. They also run the global leading series of conferences of music and public policy, called Music Cities Events.

# 2. Context

Globally, the music industry is in its third consecutive year of growth. This is primarily led by digital platforms, which now account for 54% of recorded revenues. The United States was 2017's largest music market, worth \$8.7 billion. This title was supported by higher growth figures, with a 59.6% growth in subscription streaming revenue, making the sector worth 3 times what it was only two years ago.

Huntsville has been growing too, and at an even faster rate than the global music industry. On the path toward becoming Alabama's largest city in the near future<sup>3</sup>, it features on influential lifestyle and travel lists such as NY Times Travel's '52 Places to go in 2019', where it ranks 22nd<sup>4</sup>.

Due to the presence of NASA, as well as the Aviation and Missile Research, Development and Engineering Command, among others, Huntsville is globally associated with space exploration and engineering before it is associated with music. Much of the local music scene is grassroots, but it is very diverse in terms of genres represented, and has birthed some key professionals in musical history, such as touring crew members for Queen. With the construction of the MidCity development (which will be home to an 8,500-capacity amphitheatre) and the conversion of the Lowe Mill ARTS & Entertainment Complex (the textile-mill-turned-creative-studio-mecca), the Rocket City, as it is known, is looking to make an addition to its reputation and shift toward being known as a Music City as well. This ambition was prominently voiced by Mayor Battle's "State of the City" address in December 2018. In it, the mayor highlighted Huntsville's music vitality as a key feature in attracting workforce and improving the quality of life. However, perhaps its biggest asset can be found in innovation, something which comes naturally to the engineers and researchers who call the city home, and can put Huntsville at the forefront of music tech in an increasingly digital world. This is strengthened by the city's proximity to prominent music cities such as Nashville (110 miles), Atlanta (180 miles) and smaller pockets such as The Shoals (80 miles) and Athens (35 miles).

<sup>&</sup>lt;sup>1</sup> IFPI (2018)

<sup>&</sup>lt;sup>2</sup> RIAA (2017)

<sup>&</sup>lt;sup>3</sup> Gattis (2018)

<sup>&</sup>lt;sup>4</sup> Michal (2019)

# 2.1 SWOT Analysis

# Strengths:

- Vibrant live music scene with good venue and festival offering
- Good support for emerging artists
- Great sense of pride
- Relative proximity to major cities on international touring circuits is incentive for artists to add Huntsville to regional touring circuit
- Young professionals moving in
- Big companies represented in town

#### Weaknesses:

- Inadequate live music venues for big, national touring acts
- Scarce music industry education
- Lack of adequate promotional channels
- Local media not as involved as it could be
- Existing image of the city as a science & engineering hub, but not music or culture as a whole.
- Lack of certain professional roles, such as record labels and artist managers
- Lack of genre & artistic diversity in bookings

# Opportunities:

- Growing the international composition of audiences with an integrated music tourism offer
- Tapping into the Shoals area collaborations between artists, industry & music tourism
- Collaborating with STEM industry
- Creating a vibrant network of artists and using Huntsville as the main hub
- Giving incentives to companies to foster salaried employment in the sector

# Threats:5

 Proximity to music industry hubs such as Nashville can pull away artists that reach a certain point in their careers

<sup>&</sup>lt;sup>5</sup> While term 'threat' carries a negative connotation, it can also be seen as an opportunity which has direct outside competition.

Huntsville has many strengths which will be vital in creating a supportive music ecosystem. Some of these are more forward-facing, such as the city's affordability for musicians, the availability of music and cultural organizations such as Arts Huntsville and the variety of local music venues, from the pavilions at Ditto Landing to Sidetracks. There is also a wide variety of formal music education available within magnet school and tertiary curriculums (UAH and Maitland Conservatory). Huntsville's economy is also on the rise, with over 5,000 new STEM positions added to the Metro Area between 2011 and 2015. Things that might not be so obvious to the naked eye, but are also incredibly important, are the city's strong sense of community and the municipal support for and engagement with initiatives like this, which raise Huntsville's profile as a 'music city'. Finally, Huntsville is home to a number of best practice examples (detailed in Section 4.6 Huntsville Best Practices), including its aforementioned variety of venues and the arts and entertainment districts.

However, there are also weaknesses which are currently holding Huntsville back from realising its vision as a music city. One of these is a lack of diversity, from genres to audience members. The downtown areas especially tend to cater to limited demographics. Audience members also cite an imbalance in the programming of original vs. cover bands, as well as poor sound quality in local venues. Some weaknesses are regulatory or infrastructural, including inadequate public and night transport and the ongoing implementation of outdated regulations which affect live music programming. The music industry itself has room for improvement, as there is a lack of music business education, which can lead to DIY artists making poor career decisions. The lack of local music business professionals, such as labels and managers, means many artists have no choice but to go this DIY route as a next step in their career. The local industry that does operate does so in silos, rather than collaborating, creating a fragmented industry. Other issues are promotional, including a lack of marketing channels and initiatives toward promoting music tourism, and minimal involvement from local media channels. Finally, music is not generally valued as a service or product that should be paid for.

### DIY Music Community

The common trait among DIY artists and scenes is the commitment to do-it-yourself creative practice and skills development, its resistance and community-first politics, and its separation from the consumerist culture of the mainstream or indie music industry, their spaces and distribution channels.

The wide availability of affordable digital production and recording tools has also expanded the definition and number of DIY artists and scenes to include myriad musical creations and DIY scenes of their own (e.g. techno/house/club, hip hop/rap/trap, punk/hardcore, experimental, etc.) that exist both in the online and the physical space.

DIY music venues and communities transform unused spaces in the peripheries or "less desired" areas to develop creative hubs, as well as living and working spaces for artists. Such community-run spaces use informal or squatted venues, are self-regulated (sometimes with hands-off security), and maintain regular cultural programming while providing affordably priced tickets, food and drinks.

Because DIY music communities willingly exist at the margins of city licensing, regulations and the mainstream music economy, music strategies policies should avoid excessive regulation and policing that may threaten the sustainability of DIY communities, so long as the lack of regulations does not compromise their safety. Policies such as the 'Agent of Change' help protect community-run venues without overburdening the DIY scene as the city expands.

Many of the attributes which make Huntsville unique are double-edged swords, and must be carefully addressed in order to harvest the opportunities instead of threats. For example, the city's proximity to Nashville means artists might make the move north once they reach a certain level in their careers. However, Huntsville also lies perfectly in between towns and cities such as Nashville, Atlanta, Muscle Shoals and Memphis, and can appeal to artists looking to have access to each of those markets while having a more affordable and better quality of life. This can be enhanced through city-led collaboration between such markets. This also helps put Huntsville on the map as a standard tour stop for mid-size artists travelling through the region.

The presence of the STEM industry has led to Huntsville being known as the "Rocket City" or as a "Smart City". While this immediate perception may clash with Huntsville's desire to be branded by tourists and the music industry as a "Music City", it also puts the city in a unique and extremely desirable position for cross-collaboration. The amount of engineers and researchers in Huntsville can put the city at the forefront of music tech innovation if fostered at every stage, from university education to inter-company workshops. The selection of universities and presence of STEM industries also creates a young population of both individuals and families, which are potential audiences for artists to tap into.

<sup>&</sup>lt;sup>6</sup> University of Alabama in Huntsville (2019)

Finally, U.S. education budget cuts are a threat not only to Huntsville, but the entire nation, and arts programmes are almost always the first to be affected. Placing focus on a well-rounded, integrated music education as early as possible reaps benefits in both the short and long term. Thus, programmes such as Huntsville's magnet schools are an asset not many cities possess and need to be celebrated. Magnet schools offer specialized pathways of learning and focused themes that attract a diverse population of students throughout 7 Huntsville city schools. Apart from creative and performing arts, of which music is a part, magnet schools provide focus in subjects such as foreign languages, biomedical science, computer science, technology, engineering and math. Two of Huntsville's magnet schools offer music focuses for accepted students: The Academy for Academics and Arts gives K-8 students daily access to arts education and state-of-the-art facilities, while Lee High School offers a Vocal Performance program for grades 9-12.<sup>7</sup>

<sup>&</sup>lt;sup>7</sup> Lee High School (2018)

# 3. Literature Review and Regulatory Assessment

# 3.1 Literature Review

Population (City of Huntsville): 194,5858 Population (Metro Area): 449,7209

Median Age: 38.8<sup>10</sup> Sex ratio: 51% female<sup>11</sup>

Per Capita Income: \$32,374<sup>12</sup> Median Household Income: \$61,331<sup>13</sup>

Number of Companies: 16,838 (2012)<sup>14</sup> Unemployment: 3.4%<sup>15</sup>

Ethnicity: White (62.5%), Black (30.7%), Hispanic (5.5%), Asian (2.5%), biracial (2.5%)<sup>16</sup>

Top 3 Employers: US Army (36,500), NASA (6,500), Huntsville Hospital (6,350)<sup>17</sup>

Cost of Living Ranking, via Numbeo™: 289th out of 535 cities in the world¹8

Huntsville is the third-largest city in Alabama, but is set to become the largest by 2025. 19

Although no study has been conducted until now to directly measure the local commercial music industry, the Arts and Economic Prosperity 5 report discovered that Huntsville's nonprofit arts industry is worth \$89.9 million and supports 3,073 full time-equivalent jobs. This placed the city well above the national average in categories such as industry expenditure (\$1 million above average), industry-reliant FTE jobs (270% of the national average) and total resident household income from sector organisation spending (150% the average of similar-sized cities). 6,000 volunteers donated \$4.46 million dollars worth of time. The study found that 80.1% of audience members were local, but tourists spent 51% more. Gastronomy was the secondary sector which benefited the most from cultural tourism. The

<sup>&</sup>lt;sup>8</sup> U.S. Census Bureau (2018a)

<sup>&</sup>lt;sup>9</sup> Census Reporter (2018a)

<sup>&</sup>lt;sup>10</sup> Íbid.

<sup>&</sup>lt;sup>11</sup> U.S. Census Bureau (2018a)

<sup>&</sup>lt;sup>12</sup> Íbid.

<sup>&</sup>lt;sup>13</sup> Census Reporter (2018a)

<sup>&</sup>lt;sup>14</sup> U.S. Census Bureau (2018b)

<sup>&</sup>lt;sup>15</sup> U.S. Bureau of Labor Statistics (2018)

<sup>&</sup>lt;sup>16</sup> U.S. Census Bureau (2018a)

<sup>&</sup>lt;sup>17</sup> Huntsville/Madison County Chamber (2018)

<sup>&</sup>lt;sup>18</sup> Numbeo (2018)

<sup>&</sup>lt;sup>19</sup> Gattis (2017)

<sup>&</sup>lt;sup>20</sup> Americans for the Arts (2017)

most common traits of patrons both local and visiting were that they were 65 or older and held a 4-year degree, but those aged 18-34 were most likely to travel for cultural events.

The Alabama Tourism Department Economic Impact 2017 report discovered tourism was worth \$14.3 billion to the entire state in 2017, and Madison County was one of the most visited during that period. Tourism from over 26.6 million people supported a total of 186,906 jobs across Alabama, primarily benefiting the gastronomy, lodging and entertainment sectors both in terms of spending and FTE jobs. The lodging taxes derived from tourism are funneled into a General Fund for the state, which has so far saved each household \$467. Madison County alone saw 3.15 million tourists in 2017 and had the most overnight visitors out of all the counties in the state. Travel-related spending in Madison County was at \$3.1 billion in 2017, up almost 10% from the year before.

# 3.2. Music Ecosystem

According to Music Huntsville's online directory,<sup>22</sup> there are over 350 musicians calling Huntsville home. Representing genres from blues to jazz, they create a network of songwriters<sup>23</sup> hoping to foster a dynamic music scene and position Huntsville as a key part of the Memphis-Nashville-Atlanta music triangle.<sup>24</sup> There are also over 30 venues which host live music, as well as several markets and festivals which strengthen the offer during warmer seasons.<sup>25</sup> It is also home to several pre-existing and planned music venues, such as the Von Braun Center, due for a \$42 million expansion,<sup>26</sup> and MidCity, which will have its own amphitheatre surrounded by recreational opportunities.<sup>27</sup> Finally, the upcoming Sandra Moon Community Complex in South Huntsville, expected to be finished in 2020, will contain a performance and fine arts unit within its many-faceted walls.<sup>28</sup>

<sup>&</sup>lt;sup>21</sup> Alabama Tourism Department (2018)

<sup>&</sup>lt;sup>22</sup> HuntsvilleMusic.com (2018a)

<sup>&</sup>lt;sup>23</sup> Listen Local Huntsville (2018)

<sup>&</sup>lt;sup>24</sup> Schrimsher (2018)

<sup>&</sup>lt;sup>25</sup> HuntsvilleMusic.com (2018b)

<sup>&</sup>lt;sup>26</sup> Van der Bijl (2017)

<sup>&</sup>lt;sup>27</sup> Thornton (2017)

<sup>&</sup>lt;sup>28</sup> Di Gregorio (2018)

#### 3.2.1 Music Education

#### Formal Education

Alabama's 2019 education budget, coming in at \$6.63 billion, is the largest it's been in a decade,<sup>29</sup> but the plan does not outline music education requirements.<sup>30</sup> Huntsville is ahead of the curve in its offerings, with two magnet schools offering music tracks for K-12 students. The **Academy for Academics and Arts** gives K-8 students opportunities to participate in choirs, instrumental instruction and stagecraft.<sup>31</sup> **Lee High School** has a vocal programme for students in grades 9-12, which offers AP courses in music theory, as well as several performance opportunities.<sup>32</sup>

Post-secondary music education is offered by Alabama A&M University<sup>33</sup> (tracks in music business, performance, piano or secondary education), Oakwood University<sup>34</sup> (tracks in music, composition, education, or vocal performance), and the University of Alabama in Huntsville<sup>35</sup> (Bachelor of Arts in Music with focuses in performance, technology, business, church music, education, piano or jazz). Although each of these universities also gives students the option of minoring in a musical study, there are no post-graduate courses on offer in the city.

# Professional Development

There are many opportunities for students not in formal education to hone their craft. The Huntsville Symphony Orchestra operates several outreach programmes,<sup>36</sup> and music schools such as Musicology offer both private and group lessons. There are also some more grassroots-learning initiatives, including monthly meetups and showcases such as the Tangled String Studios Young Performers Open Mic.

<sup>&</sup>lt;sup>29</sup> Crain (2018)

<sup>&</sup>lt;sup>30</sup> Alabama State Department of Education (2018)

<sup>&</sup>lt;sup>31</sup> Academy for Academics and Arts (2018)

<sup>&</sup>lt;sup>32</sup> Lee High School (2018)

<sup>&</sup>lt;sup>33</sup> Alabama A&M University (2018)

<sup>&</sup>lt;sup>34</sup> Oakwood University (2018)

<sup>&</sup>lt;sup>35</sup> University of Alabama in Huntsville (2018)

<sup>&</sup>lt;sup>36</sup> Huntsville Symphony Orchestra (2018)

Arts Huntsville is the main organization driving engagement with and advancement of arts in the greater Huntsville area.<sup>37</sup>

# 3.2.2. Grant System

The Huntsville Arts & Cultural Grant Program distributed \$100,000 to nonprofit members of Arts Huntsville in 2018. The programme, launched in 2013, is supported through the greater city budget and has grown to support over 116,000 participants.<sup>38</sup> Previous beneficiaries include the Huntsville Chamber Music Guild and the Huntsville Community Drumline.

The Alabama State Council of the Arts also grants up to \$5,000 to individuals across all arts disciplines.<sup>39</sup>

# 3.3 Regulatory Ecosystem

# 3.3.1 Licensing and Regulations

#### **Events**

Special event permits are available through the city and are reviewed by key authoritative divisions such as the Police, Fire & Rescue, Natural Resources and Transportation. The Chief of Police finalizes all approvals, but there are different departments responsible for each step and criterion of the application process.<sup>40</sup> Events wishing to sell alcohol must obtain permits through both the state alcohol board and the City of Huntsville.

It is recommended that the City of Huntsville simplify the application process and initiate a 'one-stop-shop' for all matters concerning special event permits. This will help streamline the process and promote transparency on all expected standards and final, tax-added costs.

<sup>&</sup>lt;sup>37</sup> Arts Huntsville (2018a)

<sup>&</sup>lt;sup>38</sup> Arts Huntsville (2018b)

<sup>&</sup>lt;sup>39</sup> Alabama State Council on the Arts (2018)

<sup>&</sup>lt;sup>40</sup> City of Huntsville (2018a)

# **Liquor Licensing**

Alcohol can be served 7 days per week, although times vary. Stores may sell between 7am-1am, and bars and restaurants may serve between 10am-2am.<sup>41</sup>

#### Noise

RECEIVING LAND USE CATEGORY	TIME	SOUND LEVEL LIMIT DB(A)
Residential, public space open space, agricultural, institutional property	7am-10pm 10pm-7am	<ul><li>55</li><li>50</li></ul>
Commercial or business	At all times	62
Industrial	At all times	70

# Health & Safety Regulations

Any enquiries or dealings with Public Safety in Huntsville are controlled by the Emergency Management Agency, the Fire & Rescue Department and the Police Department.<sup>42</sup>

# **Environmental Sustainability**

The City of Huntsville has a Green Team, which leads initiatives toward litter reduction, recycling, and youth education.<sup>43</sup> They also have a Neighbourhood Pride program, which encourages areas of the city to take responsibility as a community.<sup>44</sup>

<sup>&</sup>lt;sup>41</sup> LocalAlcoholLaws.com (2018)

<sup>&</sup>lt;sup>42</sup> City of Huntsville (2018b)

<sup>&</sup>lt;sup>43</sup> City of Huntsville (2018c)

<sup>&</sup>lt;sup>44</sup> City of Huntsville (2018d)

# **Busking Regulations**

In Huntsville, it is legal to play on public property and collect tips or donations.<sup>45</sup> However, any merchandise sales require a permit.

There are a few dedicated programmes in place to encourage busking. Arts Huntsville sponsors street performances in the Quigley Arts & Entertainment District, Huntsville's first open container area. Downtown Huntsville also plays host to Busker Fridays, last held during the summer of 2018. 46 Downtown Huntsville, Inc. and Arts Huntsville also work together to run Buskerfest, a three-day event featuring 25 artists with the chance to receive prizes. 47 Finally, The Bridge Street Town Centre has held its Pavement Performers programme, where musicians are welcome to busk after passing screening and orientation. 48

# 3.3.2 Operations and Zoning

# Agent of Change

Agent of Change is not in place in Huntsville. 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, usually the Agent of Change either requires the building that arrives the latest (be it the music venue or the residential development) to soundproof adequately 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.

The Victoria state government in Australia was the pioneer in passing the 'Agent of Change' planning policy in 2014. This Agent of Change integration does not change the legal noise limits, but rather ensures new developers pay to soundproof against the legal limits if needed. Toronto and San Francisco are among the other major cities who have adopted the principle.

### **Parking Regulations**

There are 5 parking garages and 15 public parking lots available throughout downtown

<sup>&</sup>lt;sup>45</sup> Ammons (2013)

<sup>&</sup>lt;sup>46</sup> Busker Fridays (2018)

<sup>&</sup>lt;sup>47</sup> Arts Huntsville (2018c)

<sup>&</sup>lt;sup>48</sup> Bridge Street Town Centre (2018)

Huntsville<sup>49</sup> with prices ranging from \$0.50 per hour (meter rates) to a \$56 monthly rate at the downtown garages.

#### Music Office

There is no Music Office or similar entity to champion the music industry/ecosystem in Huntsville. A Music Office is a department within the City that works to assist the music ecosystem with the objective of growing and developing the local music sector further, internally and externally. One of the main purposes of such offices is to guarantee and lead the development of the city's music strategy.

A city's Music Office acts as a link between the city and the music ecosystem and, in this capacity, coordinates the different departments within the City for music-related issues. It is also a mediator between the music sector and other sectors (be it health, safety, environmental, or other economic sectors like tourism, tech, the overall creative industries, etc.), and also with the community.

Cities all over the world have music offices. They are placed within diverse government departments, and even some are autonomous entities: the Berlin Musicboard is an autonomous entity that receives funds from the Ministry of Culture; Nashville's Music City Music Council is a partnership between the Nashville Mayor's Office, the Nashville Area Chamber of Commerce and the Nashville Convention & Visitors Corp<sup>50</sup>; in cities like New York, London or Melbourne, the music offices sit within the Mayor's Office, while in other cities like Austin it sits within the Economic Department; and in many cities like Toronto, Chicago or Munich it falls within creative industries departments.

#### **Entertainment District**

Huntsville's latest downtown master plan was published in 2017 and envisions mixed-use development.<sup>51</sup> There are currently four designated Arts & Entertainment Districts, within which open containers of alcohol are permitted during certain times of the day. They are:

DISTRICT	OPEN CONTAINER HOURS
Quigley	Thursdays 5pm-11pm Friday-Sunday 12pm-11pm

<sup>&</sup>lt;sup>49</sup> City of Huntsville (2016)

<sup>&</sup>lt;sup>50</sup> Metro Government of Nashville and Davidson County, Tennessee (2019)

<sup>&</sup>lt;sup>51</sup> City of Huntsville (2017)

Meridian	Thursdays 5pm-11pm Friday-Sunday 12pm-11pm
Village of Providence	Wednesdays, Thursdays and Sundays 5pm-11pm Fridays 4pm-11pm Saturdays 11am-11pm
S.R. Butler Green	Thursdays 5pm-11pm Friday-Sunday 12pm-11pm

Beyond this, there are a few informal areas which act as cultural hubs. The Lincoln Mill historic district, recently added to the National Register of Historic Places, boasts a variety of startups and entrepreneurial enterprises, as well as several shops and restaurants.<sup>52</sup> The aforementioned Sandra Moon Community Complex will be home to a performing arts centre managed by Arts Huntsville, as well as several other cultural establishments.<sup>53</sup>

# 3.3.3 Transport

# **Airports**

Huntsville International Airport is the largest commercial airport in North Alabama, serving more than 1.2 million passengers annually. It offers nonstop service to destinations such as Atlanta, Charlotte, Chicago, Dallas, Denver, Detroit, Houston, Orlando and Washington D.C.<sup>54</sup>

### **Public Transport**

There is a shuttle bus system, as well as a few ridesharing services operating on the city territory from 6am till 6pm daily, following 9 designated routes.<sup>55</sup> A one-way ride costs \$1. Huntsville is undergoing an extensive service expansion in July 2019 which will see updated routes, improved headways on high-demand corridors, added evening and Saturday services, a ride-tracking app and a new transfer station at the Richard Showers Center.

# Night Time transport

On Friday and Saturday nights there is a free Downtown Trolley. Another shuttle runs from the

<sup>&</sup>lt;sup>52</sup> Downtown Huntsville (2018)

<sup>&</sup>lt;sup>53</sup> City of Huntsville (2018e)

<sup>&</sup>lt;sup>54</sup> Huntsville International Airport (2018)

<sup>&</sup>lt;sup>55</sup> City of Huntsville (2018)

University of Alabama Huntsville campus from 5pm till 10pm on Fridays only.

# 3.4 Music Tourism

There are many local activities and establishments which integrate music into their offer year-round, including 13 markets, 11 craft breweries<sup>56</sup> and 5 regular concert series.<sup>57</sup> These include the Drive Thru concert series, Buskerfest, City Lights and Stars and Concerts on the Dock at Lowe Mill.<sup>58</sup> The Lowe Mill Arts & Entertainment complex is the largest privately-owned arts facility in the US.<sup>59</sup> The Huntsville Music website summarizes events into a daily calendar which can be filtered by day or genre.<sup>60</sup> The Huntsville Visitors Bureau website also lists a few musical offerings (under Things to Do > Arts & Culture, as well as music events under All Events). While the website offers specific information regarding hosting Sports, Film and Weddings, there is no discernible focus on music.

There is no formal music tourism policy, but Huntsville's tourism industry as a whole is thriving. The Huntsville Metropolitan Statistical Area accounts for almost 10% of the state lodging tax, second only to Birmingham Hoover. While the City continues its efforts to promote the music scene to its residents, it also seeks to boost music tourism through initiatives such as the creation of a connection to the Americana Music Triangle and increased links to the regional music network anchored by cities like Memphis, Nashville and Atlanta. Some other initiatives in place are the sample marketing partnership between the Huntsville Tourism Department and IntelliQuest, as well as the hiring of Sound Diplomacy to help the city reach its goal of becoming a Music City.

# 3.5 Incentive Schemes

The Alabama Governor's office-created Entertainment Industry Incentive Act has been in place since 2009. The law entitles qualified production companies to a rebate of 25% for all state certified expenditures. The law also entitles 35% of payroll paid to residents of Alabama for any state certified production. Expenditures are capped at \$20m and must at least cost

<sup>&</sup>lt;sup>56</sup> Huntsville/Madison County Convention & Visitors Bureau (2018a)

<sup>&</sup>lt;sup>57</sup> Ibid.

<sup>&</sup>lt;sup>58</sup> Huntsvillemusic.com (2018c)

<sup>&</sup>lt;sup>59</sup> Huntsville/Madison County Convention & Visitors Bureau (2018b)

<sup>&</sup>lt;sup>60</sup> Huntsvillemusic.com (2018d)

<sup>&</sup>lt;sup>61</sup> Schrimsher (2018)

\$500,000<sup>62</sup>. The incentive has doubled film production in the state, and areas such as Birmingham have witnessed their local film industry thrive, with films being produced throughout the year, including during periods that would normally be quiet<sup>63</sup>. Montgomery is another city that has set up a Film Office to provide expert advice, recommendations for filming locations, and to promote its local workforce for visiting production companies to use.

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<sup>62</sup> Alabama Film (2019)

<sup>63</sup> This is Alabama (2018)

# 3. Comparative Analysis

# 3.1 Huntsville at a Glance

As part of the scope of this work, Huntsville's policies and offers were highlighted and compared to a series of five cities to help establish best practice, highlight opportunities to better coordinate efforts and establish what makes Huntsville a leader. The five cities chosen were Austin, Nashville, Durham, Boulder and Chattanooga. Austin and Nashville were chosen as two leaders for music industry support and music tourism marketing, and are often benchmarks for cities around the world despite their relatively small populations. Durham, Boulder and Chattanooga were chosen as cities close in size to Huntsville which face similar problems of losing artists to larger hubs at certain career stages while trying to attract and support local business. They have made considerable efforts to retain and help talent and some example can be taken by them of both what to do and what won't work so well.

TOPIC	IN PLACE?	HUNTSVILLE'S POLICY	BEST CASE
Night transport	No	Shuttle bus system stops service at 6pm. Free Downtown Trolley on Fridays and Saturdays, stops at 10pm.	Philadelphia has 24-hour bus lines. Small cities like Copenhagen, the smallest of cities with 24-hour transport, has 24-hour metro lines
Agent of Change	No	n/a	San Francisco - 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.
Music Office	No	n/a	Austin, TX - office situated under Economic Development Department and acts as intermediary, promoter, and political activist concerning housing, licensing, etc.

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City-led grants	Yes	Huntsville Arts & Cultural Grant Program is funded by the city's budget and provides up to \$100,000 per year	Colorado - Colorado Music Strategy is a combination funding and tourism body, with \$200,000 to give to Colorado-based artists or music businesses that will help raise the state's profile.
Event permitting	Yes	Permits must be reviewed by city's emergency services	
Liquor permitting	Yes	By the drink sales between 10am-2am	
Noise laws	Yes	62 dB(A) in commercial zones at all time 55 dB(A) in residential from 7am-10pm, 50 dB(A) from 10pm-7am	Chattanooga - Special occasion permits are available for business expecting to exceed sound limits along the main road.
Busking	No	No formal laws in place, but many programmes initiated throughout the city, particular during the summer, to encourage activity	Huntsville has a smaller (or at least, less discernible) track record of issuing citations or restrictions against buskers, accompanied by a plethora of initiatives. Boulder may be the most comparable city here, as it has a specific area, Pearl Street Mall, which is known for its street performers.
Entertainment district	Yes	Four districts with open container laws during certain daytime hours: Quigley, Meridian, Village of Providence and S.R. Butler Green	Austin, TX - six entertainment districts, each with unique laws regarding extended curfews for live music outdoors.
Music workspace/hub	Yes	Not music specific, but Lowe Mill offers arts	Austin, TX - Mosaic Sound Collective is a non-profit 25,000ft <sup>2</sup> space with

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		studios, venues and other creative spaces	production/studio space, backline rental, vinyl manufacturing, office space, incubator, performance space and gallery.
Music tourism policy	No	Not as of yet, but music is mentioned in the full tourism policy	Nashville, TN - branded itself as 'The Music City', with everything from guitar-shaped infrastructure to live performances in the airport, an app of gig listings and international media spots

Table 2. Huntsville at a glance

# 3.2 Austin, TX

# 3.2.1 Overview

Austin is the capital of Texas, boasting a population of 950,000 people. In 2016, it was the fastest growing large city in the United States and the second most populous state capital after Phoenix, Arizona. The average age of its citizens is 32.7<sup>64</sup> and the average income per capita is \$34,015<sup>65</sup>. Despite an increase in median family income, rising housing values and rents continue to outpace wages.<sup>66</sup> However, Texas features no personal or corporate income tax, and overall the state has one of the lowest state and local tax burdens in the nation.

With approximately 200 live music venues and 2,000 musicians, Austin is considered the live music capital of the world.<sup>67</sup> In 2010, the music industry generated an economic impact of USD \$1.6 billion. Today, the total impact is often quoted as \$2 billion.

<sup>&</sup>lt;sup>64</sup> Census Reporter (2018b)

<sup>65</sup> Ibid.

<sup>&</sup>lt;sup>66</sup> Austin Chamber of Commerce (2018)

<sup>&</sup>lt;sup>67</sup> Buchele (2016)

In 2015, the City of Austin commissioned a census on its commercial music industry. 27 genres were highlighted in the results, the most common of which were rock, Americana, alternative, folk/acoustic, pop rock, jazz, R&B/soul, country & western, swing and blues.<sup>68</sup>

# 3.2.2 Governance and Leadership

#### Music Office

Austin's music office is situated under the Economic Development Department's Music and Entertainment Division and liaises with the Texas Music Office (under the Office of the Texas Governor). The Austin Music Office also acts as a resource center and booking intermediary, liaising between interested parties and a database of 2,000 Austin musicians,<sup>69</sup> providing touring artists with contacts to local performing venues,<sup>70</sup> and hosting links to local music organizations and venues.

In 2016, Mayor Steve Adler introduced the Austin Music & Creative Ecosystem Omnibus Resolution, which sought to help the local music industry and arts sector by recommending priority steps regarding affordability of spaces, land use regulations, entertainment licenses, and other concerns.<sup>71</sup>

### Case Study: Toronto-Austin Music City Alliance

The alliance between Toronto and Austin<sup>72</sup> has pushed each city to progress its policies and infrastructure, leading to new music offices and tourism campaigns. The Music City Alliance collaboratively works to increase investment, tourism, insight, and industry growth. Beginning with 14 members in 2013, Toronto and Austin have worked to export talent between the two cities. In 2017, this led to Canadian Music Week providing the platform for the first Austin-Toronto showcase, displaying musical talent from both cities. For 4 years running, the Austin music export and documentary film project, ATX6, has chosen artists to travel to Toronto to perform and film in partnership with the alliance.

#### Lessons to Take

• Forming a partnership with a comparatively resourced city ensures accountability.

<sup>&</sup>lt;sup>68</sup> Titan Music Group, LLC (2015)

<sup>&</sup>lt;sup>69</sup> City of Austin (2018a)

<sup>&</sup>lt;sup>70</sup> City of Austin (2018b)

<sup>71</sup> City of Austin Economic Development Department (2016)

<sup>&</sup>lt;sup>72</sup> Gonshor (2017)

• The export of Huntsville's artists is not only great for professional development, but it can also act as a marketing platform to boost music tourism.

#### Grants

In 2018, the City of Austin gave over USD \$11 million to arts programs in the city, including art, dance, education, and music.<sup>73</sup> Grants are not available for musicians on an individual basis.

### Case Study: Black Fret

Black Fret is a community-supported initiative in Austin, TX that aids local musicians. The initiative is set up as a 501(c)3 tax exempt public charity and operates via private membership fees that are allocated to specific artists via the initiative's 'Artist Selection Process'. Members pay an annual fee of \$1,500, which goes towards artist grants and performance fees. They nominate the bands they like, attend their live performances within Austin, and vote to allocate grants at the end of each year.

The amount of an individual grant is set annually by the Board of Directors based on feedback from local artists on their incurred operational costs. The Board aims to increase the average grant to \$25,000, after which they aim to increase the amount of grants awarded each year. In 2017, 20 artists were aided, and since its inception, the initiative has granted over USD \$1 million to local artists.

Awards are allocated in steps in order to ensure sustainability, and winners are required to achieve specific milestones, such as writing and recording new songs, touring, or providing community service with their performances, before they can collect their funding. Winners are also given mentorship opportunities with Black Fret advisors and the local music community. This provides a professional network for the musicians and education on the industry while presenting career opportunities they might previously have not been aware of.

The initiative also provides social benefits by organizing 20+ performances for nominees

<sup>73</sup> City of Austin (2018c)

throughout the year, including focused listening sessions, festival-style events, the annual awards show, and the Black Fret Ball. These performances provide invaluable community exposure and earn them further support in the Austin community.

#### Lessons to Take

- Funding programs do not have to be strictly financial. They naturally attract like-minded individuals, either as applicants or board members, and should galvanize these connections.
- The sustainability steps that Black Fret takes to ensure grants are maximised are key. Other grant programs often require artists to submit project reports 6-12 months after receiving funds, as well.

# 3.2.3 Licensing and Regulations

#### **Events**

Licensing for events is run by the Austin Center for Events (ACE). Based on the event, applications must be submitted a certain amount of time before the desired date. Park events require 6 to 12 months to process, while most temporary permits require less than 1 month. Applications for event permits must include event plans as well as building overviews, including floor plans and the locations of fire extinguishers and exits. The ACE works closely with Austin Fire and Police, Parks and Recreation, and the Music and Entertainment divisions.

Fees for event permits range depending on the location, the event's effect on street traffic and the activities featured on site. Additional costs can incur from policing (required for certain events), food and drink permits, amplified sound permits, etc. All fees are set out in the appendices of the Austin Center for Events' Guidebook. Application fees start at \$250, and the final permit costs start at \$200 per city block per day. Park events also have fees, determined separately by the local Parks & Recreation division, which start at \$1,200 per day

<sup>&</sup>lt;sup>74</sup> City of Austin (2017a)

for large-scale commercial use of certain facilities.<sup>75</sup> These fees also do not include sound, food, or other permits.

#### Liquor

Statewide licensing is run by the Texas Alcoholic Beverage Commision. There are 70 different licenses available, including permanent and temporary licensing of venues, breweries, etc. An alcohol permit cannot be approved if the holder is within 300 feet of a church, public school, or public hospital, unless waived by Austin City Council. Daily temporary mixed-beverage liquor permits are \$251 per day, while permanent licenses can run to \$6,602. State law gives local authorities the power to limit public drinking to Central Business District areas. Austin has a ban on public drinking in specific areas of the city, including Downtown, an area east of I-35, the Drag, a zone that snakes from Lady Bird Lake down to Bouldin Creek, an area around East Riverside Drive and another around Montopolis.

Austin allows alcohol to be served at bars until 2am all days of the week. Alcohol can be sold at liquor stores until midnight on Sunday-Friday and until 1am on Saturday.<sup>80</sup>

### Noise

Outdoor amplified music requires a permit.<sup>81</sup> There is a maximum level of 85 dBA, though individual permits may further restrict this dependent on the sound impact plans submitted alongside applications. Other factors include the time of day/night, the proximity of the sound source to residential areas, the type of business license held by the establishment and special considerations for festival season. The Austin Center for Events (ACE) approves outdoor events such as festivals. It works alongside event organisers to evaluate the site management plan in conjunction with local safety departments such as the Fire Department, Police and Health and Human Services.

<sup>&</sup>lt;sup>75</sup> Austin Parks & Recreation (2017)

<sup>&</sup>lt;sup>76</sup> Texas Alcoholic Beverage Commission (2018a)

<sup>&</sup>lt;sup>77</sup> City of Austin (2018d)

<sup>&</sup>lt;sup>78</sup> Texas Alcoholic Beverage Commission (2018b)

<sup>&</sup>lt;sup>79</sup> Lopez (2018)

<sup>80</sup> City of Austin (2018d)

<sup>81</sup> Ibid.

# Busking

Historically, busking has happened in the grey area of the law, where sometimes police look the other way and sometimes they treat musicians as panhandlers. Buskers using amplification or performing outside of designated areas can be fined or cited misdemeanor charges. Although permitting is available, many musicians have claimed that procedures are unclear. In 2017, the city launched the ATX Busking Program Pilot as a way of promoting tourism to new public spaces and developments, although musicians could only perform in designated spots in certain developments. The programme was supported by \$150,000,84 specifically put aside to compensate performers at \$150 per musician per hour. The pilot programme ended on September 29, 2018, and as of yet, no reports have been published on its impact or the potential expansion of the programme across other areas of the city. However, the ATX Music website mentions a 2019 phase of the programme, not yet open to applications.

# 3.2.4 Planning

# Zoning

Austin has six official entertainment districts, each distinct in aesthetic and offer. <sup>87</sup> **Downtown Austin** is the main commercial area, divided into sub-areas (2ND Street, Warehouse District, West Sixth Street) and concentrating a higher profile of entertainment and dining options compared to the rest of districts. **East Austin** is the fastest growing neighbourhood, famous for its eclectic and alternative offer of entertainment, food options and bars. **Sixth Street** is a popular nightlife district among younger demographics, with licenses operating until 2am and traffic closed on Thursday-Saturday nights. **Rainey Street** is known for its former housing transformed into bungalow bars and restaurants. **South Austin** boasts a variety of music venues and restaurants. The **Red River** district is the main music hub, with different venues showcasing a distinct music programming every day of the week.

The Sixth District Entertainment District and the Warehouse District are the only areas in

<sup>82</sup> Friedman (2015)

<sup>&</sup>lt;sup>83</sup> Reeves (2018)

<sup>84</sup> City of Austin (2017b)

<sup>85</sup> Tith (2017)

<sup>86</sup> ATX Music (2018)

<sup>87</sup> Visit Austin (2018a)

Austin that permit outdoor music until bars close at 2am, any day of the week. A six-month pilot program launched in May 2017 extended the curfew for outdoor music in Red River Street, allowing sound until midnight on Thursdays and 1am on weekends. The pilot was extended to a year, and in April 2018, extended curfews were officially approved for five outdoor music venues in Red River.<sup>88</sup>

#### **Transport**

Commercial areas have both metered and permit-based parking spaces. Establishments can apply to have a Musician Loading/Unloading zone in locations predetermined by Transportation Department Engineers.<sup>89</sup> These are operated through Musician Loading Permits <sup>90</sup> that allow 30 minutes to load and unload in approved zones. Venues are responsible of requesting and paying the \$25 fee for each permit.

Austin-Bergstrom International Airport (ABIA) is the largest airport in the greater Austin area, serving almost 14 million passengers in 2017. It is accessible from downtown Austin by a 40-minute bus ride.

Austin Station, located downtown, is part of the Amtrak Texas Eagle route, which also stops in San Antonio, Fort Worth and Dallas on its route between Los Angeles and Chicago.

Austin's public bus, paratransit, and commuter rail is operated by the Capital Metropolitan Transportation Authority. 130,000 passengers are transported daily on 82 bus routes and a single 32-mile commuter rail service. Austin boasts a well-connected night transit network, including extended 1am curfews for Metro services on weekends. Five Night Owl bus routes operate Mon-Sat from midnight until 3am, connecting nightlife hubs and local neighbourhoods every 20 to 30 minutes. The E-Bus (Entertainment Bus) network brings students back from downtown to student housing areas between 8.30pm and 3am from Thursday to Saturday. 91

# Agent of Change

Agent of Change policies have been discussed by Austin's Art and Music Commission and other city government officials, but as of April 2018, no official proposal has been passed. However, a legal dispute between the Westin Austin Downtown and the open-air music venue Nook

89 City of Austin (2018e)

<sup>88</sup> Findell (2018)

<sup>&</sup>lt;sup>90</sup> City of Austin (2018f)

<sup>&</sup>lt;sup>91</sup> Capital Metropolitan Transportation Authority (2018)

Amphitheater resolved in favor of the venue, which opened in 2011 and existed for four years previous to the development of the hotel. The resolution will make the Westin pay up to \$145,000 to install a high-tech sound mitigation system in the club. 92

### 3.2.5 Education

#### Formal

Most of Austin is served by the Austin Independent School District (AISD). The 2017-2018 school year saw 81,391 students in K-12.<sup>93</sup> The AISD outlines and emphasizes the importance of music education in helping students grow intellectually and to become more creative thinkers,<sup>94</sup> and in May 2018, the NAMM Foundation designated the city as one of the Best Communities for Music Education.<sup>95</sup> In fact, one of the most outstanding high schools in the state, the Liberal Arts and Science Academy (LASA), is located in Austin. LASA is a selective public magnet school, which boasts a number of music ensembles and classes, such as basic music theory and AP Music Theory, which provides college credit.<sup>96</sup>

Austin is also home to a vast number of private (including parochial), part-time learning, and specialized learning centers that offer fine arts and music instruction. The majority of these schools charge tuition, but they also offer scholarships. Many of the private boarding schools, such as St. Stephen's Episcopal School, offer a dedicated department of Fine Arts, which includes private music lessons.<sup>97</sup>

Austin is also home to a number of post-secondary institutions. The University of Texas at Austin is the flagship school of the UT System and has over 50,000 undergraduate and graduate students. The Butler School of Music at UT Austin, established in 1914, has undergraduate and graduate programs in Music, as well as a number of ensembles. The approximately 650 music majors on campus have access to a faculty of about 100, performing

<sup>&</sup>lt;sup>92</sup> Theis (2017)

<sup>93</sup> Austin Independent School District (2018a)

<sup>&</sup>lt;sup>94</sup> Austin Independent School District (2018b)

<sup>&</sup>lt;sup>95</sup> Austin Independent School District (2018c)

<sup>&</sup>lt;sup>96</sup> Liberal Arts and Science Academy (2018)

<sup>&</sup>lt;sup>97</sup> St. Stephen's Episcopal School (2018)

<sup>98</sup> The University of Texas at Austin (2018)

<sup>&</sup>lt;sup>99</sup> The University of Texas at Austin, Butler School of Music (2018)

arts venues such as the Texas Performing Arts and several festivals in Austin every year.

# Professional Development

Austin coordinates ATX Music Talks, a series of live-streamed panels accompanied by an online forum for industry members to engage in real time. For secondary school and university-aged students, they host ScoreMore Shows, another series of panel-style events specifically focused on entry-level skills and education.

#### Case Study: ATX Music

The Music & Entertainment Division is an economic development accelerator and resource for the local music industry, responsible for accelerating the growth of the music industry infrastructure by focusing on job creation, talent export, trade development, and industry revenue growth. It has spearhead initiatives such as The ATX Musician Compensation Initiative, The Music Commission Liaison, Love ATX Music Month, ATX Nightlife Initiative, and Music Industry Development, which includes projects such as the Austin-Toronto Music City Alliance and ATX Live! Youth Program.

This office also includes subsidiary entities such as the Music Venue Assistance Program (MVAP), which actively protects and supports of local venues to reducing sound complaints, and The Music & Entertainment Division's Entertainment Services Group (ESG), which assists outdoor music venues with the City permit process, and works closely with festivals on issues related to special event permits.<sup>100</sup>

#### Lessons to Take

- A music office should cover multiple facets of protecting and supporting the local music industry
- Involvement in permitting and regulatory procedures helps support transparency and lines of communication between applicants and lawmakers, proactively preventing problems in the future.

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<sup>&</sup>lt;sup>100</sup> City of Austin (2018g)

# **Music Workspaces**

The Mosaic Sound Collective is a not-for-profit hub of musicians, artists, resources and services under one roof, created through partnerships between the music community, business leaders and the local and state governments. The 25,000 square foot facility hosts production and studio facilities, backline rental, vinyl manufacturing, office space (including a music tech incubator), a live music and performance space, an art studio & gallery and screenprinting facilities.

Austin's co-working spaces primarily service the growing tech/digital startup community, although any creative startup is welcome to join. Many spaces, such as Urban Co-Lab, Createscape and Vessel Coworking, offer everything ranging from day passes to monthly memberships. There is also a coworking scheme for digital nomads, SWAP Loft Austin, which offers coworking space within an Airbnb accommodation site. The apartment-style units feature desks and office spaces, and guests are invited to attend presentations and networking events with other Austin-based co-workers, some of which are held in the apartments. <sup>102</sup>

### 3.2.6 Music Tourism

Austin has successfully created its brand as the "Live Music Capital of the World", built around the popular South by SouthWest festival and conference, the availability of live music performances every week, and its popular underground music scene. The title was created by Austin, but is effective branding, as it is known by this name globally. It is often used as a positive example of how to self-brand and as a platform for other cities to aspire to. The source of the world", built around the world", built around the popular South by SouthWest festival and conference, the availability of live music performances every week, and its popular underground music scene. The availability of live music performances every week, and its popular underground music scene. The availability of live music performances every week, and its popular underground music scene.

Between 2014 and 2016, annual revenue from music tourism grew to \$1.8 billion. Much of this can be attributed to events such as South by Southwest, which generated USD \$349 million for the local economy, and Austin City Limits, which generated over USD \$277 million in 2016 (up 24% from 2015). By 2010, tourism had far surpassed year-round industry in terms

<sup>&</sup>lt;sup>101</sup> Mosaic Sound Collective (2018)

<sup>&</sup>lt;sup>102</sup> SWAP Loft Austin (2018)

<sup>&</sup>lt;sup>103</sup> NME (2018)

<sup>&</sup>lt;sup>104</sup> Frank (2017)

<sup>&</sup>lt;sup>105</sup> Mutert (2016)

of both money generated and jobs available.<sup>106</sup> This has caused concern over the state of the local industry, the foundation for visitors and large industry events, which is facing similar infrastructure and policy challenges to many other cities.

#### **Policies**

Austin's Economic Development Department has created a Cultural Tourism plan, in which musicians are recognized for their role in boosting the local economy and the current music scene is acknowledged for attracting a high number of visitors. The plan highlights the importance of aligning with the musical roots of the city, rather than creating one general cultural entertainment offer. The main ways in which the City plans to expand and develop cultural and music tourism are: encouraging artist exchanges, creating cultural ambassadors, increasing press and promotion around the cultural offer, creating partnerships between other sectors (namely the hospitality industry) and increasing visitor attractions so that it's not a seasonal city. <sup>107</sup>

#### **Activities**

The Visit Austin website has pages dedicated to promoting partnerships with the city, organised by the Vice President of Strategic Alliances. Opportunities range from event sponsorship to brand marketing initiatives. All ATX is the official music sponsor of Visit Austin, but partners include Mega Broadcast & Cinema, Freeman, Tito's Handmade Vodka, and Austin City Limits Live. The Cultural Tourism plan aims to create further partnerships (in line with the aforementioned Austin-Toronto alliance) in the form of Sister Cities.

American Airlines has recently announced a new partnership with Austin City Limits. The partnership will make episodes of Austin City Limits available for passengers in-flight via a special channel on the airlines screens.<sup>109</sup> This will promote international musicians, as well local talent and venues.

<sup>106</sup> Ibid.

<sup>&</sup>lt;sup>107</sup> City of Austin (2015)

<sup>&</sup>lt;sup>108</sup> Visit Austin (2018b)

<sup>&</sup>lt;sup>109</sup> Spafax (2018)

# 3.2.7 Comparison to Huntsville

Austin is a leader in music tourism, if only because they decided they were the 'Live Music Capital of the World' and marketed themselves as such. Their work in support of this decision is what really define them as a best practice example, including the creation of a cultural strategy integrating music and the investment in marketing campaigns to boost tourism. Night transport is more extensive in Austin, compared to Huntsville, which makes it more tourist-friendly and helps serve the night time industries more by ensuring people have safe, reliable means of getting home.

Austin is ahead of the curve in terms of professional support, particularly through operating its fully-integrated music office and global network, such as its alliance with Toronto. There are also a few more local grants (either through the city government or private entities, but still local to Austin). There are dedicated music hubs or workspaces in the city, which are invaluable in fostering network and collaborations between industry players, something that is definitely on Huntsville's radar, with facilities such as Lowe Mill.

Austin's regulations are slightly more supportive of a thriving music scene. Alcohol laws are similar, with serving curfews set at 2am. However, noise laws are much more lenient, with maximum decibel levels set at 85 dba (Huntsville's are set at 62 in commercial areas), although permits are required. Austin also has extended noise curfews in certain designated entertainment districts, something not found in Huntsville, which allows for more activity in a more welcoming environment.

Something unique to Austin is the integration of dedicated Musician Loading/Unloading Zones for venues, which is extremely beneficial to artists bringing their own gear and backline. This does not necessarily require new parking spaces to be built, but rather signage restricting existing spaces during short periods.

# 3.3 Nashville, TN

## 3.3.1 Overview

A 2013 study of Nashville's music industry highlighted its economic impact, supporting 56,000 jobs worth \$3.2 billion in annual labor income. In total, the industry has a \$5.5 billion direct economic impact, expanding to \$9.7 billion indirectly. An accompanying cluster study measuring the presence of music industries in the top metropolitan areas in the US show Nashville far exceeding it competitors. Where a score of 1.00 translates to the average presence of the music industry within a city, Nashville came out with a 4.19 in terms of music jobs, ahead of the next-highest concentration (Los Angeles) by 260%. It placed second-highest in the nation in terms of earnings, and once again led by miles in terms of industry establishment, with a density 20-30 times that of New York or LA.

The relative Standing of Selected Metropolitan Areas and a music industry cluster showcases the high density of activity in Nashville, in which 1.00 equals the U.S. average of presence of music industry.

Metropolitan Statistical Area	Jobs LQ	% Earnings of US	Establishment LQ
Atlanta	1.02	85%	1.02
Austin	1.39	94%	1.38
Charlotte	1.12	99%	1.14
Chicago	0.92	113%	0.93
Los Angeles	1.61	175%	1.61
Memphis	0.99	79%	1.00
Nashville	4.19	156%	4.30
New Orleans	0.93	73%	0.95
New York	1.13	147%	1.13
Seattle	0.96	105%	0.96
US	1.00	100%	1.00

Table 3. Music Industry Economic Activity in U.S. metropolitan areas <sup>111</sup>

Nashville's scene is rooted in its country music history, serving as the hub for many of the genre's artists, labels and media companies. This includes legendary institutions and hotspots

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<sup>&</sup>lt;sup>110</sup> Nashville Area Chamber of Commerce and Music City Music Council (2013)

<sup>&</sup>lt;sup>111</sup> Ibid.

such as the Grand Ole Opry, CMA Music Festival, and Music Row, as well as the plethora of live music along Broadway downtown and at open mic nights throughout the suburbs.

Today, the city's artists represent a broad range of genres, as the concentration of the music industry, combined with the comparatively affordable cost of living, makes Nashville a more viable option than New York or LA for many budding acts.

# 3.3.2 Governance and Leadership

#### Music Office

## Nashville's Music City Music Council

The Music City Music Council (MC2) is an association of business directors aiming to develop strategies to increase the awareness and development of Nashville's reputation as a Music City. Formed in 2009 as a partnership between the Mayor's Office, the Nashville Area Chamber of Commerce and the Nashville Convention & Visitors Corp, the Music Council's formation achieved the symbolic accomplishment of bridging the communication gap between Music Row and the courthouse.

The organization focuses on expanding music-related businesses or facilitating their relocation to Nashville. It is working to bring televised music shows, music-related award shows across all genres, conventions and other music-related events to Nashville. Since its inception, the all-volunteer body has assisted in multiple economic development successes to attract entertainment-related jobs to the city, including Sony/ATV's expansion to downtown and Eventbrite's expansion into Nashville.<sup>112</sup>

#### Lessons to Take

- A music council or office bridges the gap between industry players and policy makers
- The council has the opportunity to look at the music industry from a collective,

<sup>&</sup>lt;sup>112</sup> Metro Government of Nashville and Davidson County, Tennessee (2019)

city-focused standpoint and see how it can support tourism goals and the local economy.

### **Grants**

The Tennessee Arts Commission provides help to over 700 non-profit arts entities each year, providing \$30 million. Eligibility requirements include engaging the community and offering educational programming.<sup>113</sup>

The **Academy of Country Music** runs ACM Lifting Lives,<sup>114</sup> which distributes funds to arts organisations across the nation (although a majority operate programmes in Tennessee or the surrounding states). Many of the recipients are community-focused, ensuring veterans, children, women, elementary students and differently abled people have access to music and music education. In 2017, the organisation distributed over \$260,000 worth of grants.

The **State of Tennessee** is offering three-year grants to 8 school districts offering their students high-quality music education. The grants will range from \$50,000-\$200,000 and will be applicable to the 2018-2019 school year, with qualifying candidates proposing programmes which give equal, structured access to music education to their student bodies.<sup>115</sup>

**Metro Arts** is a Nashville-based organization which provides grants to community arts initiatives. The 2019 fiscal year is expected to issue \$2.4 million to local nonprofits under four categories: Creation, Catalyst, Arts Access and Youth Arts.<sup>116</sup>

# 3.3.3 Licensing and Regulations

#### **Events**

Event permits are issued through the Metro Nashville website, where an online form is

<sup>&</sup>lt;sup>113</sup> Tennessee Arts Commission (2018)

<sup>&</sup>lt;sup>114</sup> Academy of Country Music (2017)

<sup>&</sup>lt;sup>115</sup> Tennessee Department of Education (2018a)

<sup>&</sup>lt;sup>116</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018a)

available to declare all plans and event elements. A permit must be obtained if the event closes a street, restricts access to public property, offers sales, has a tent over 400 square feet, any type of stage or dedicated seating structure, trailers or portable public toilets. 117

Application fees are \$330, (an additional \$100 for parades), and must be submitted between 45 days-1 year prior to the event. Applicants must work closely with city officials to organize routes and street closures, and must list details on their application from amount of stages and vendors to their environmental impact plan (all events must recycle). Events must also ensure they get a street, lane or sidewalk closure application, available separately.

A special occasion liquor license is available for by-the-drink sales. Applicants must be a charity, nonprofit or political organization, and must submit their applications at least two weeks before the proposed event (or they incur a \$100 late fee). 118 The license is good for 24 hours, and applicants are limited to 12 licenses per calendar year. Stipulations of the license states that alcohol cannot be sold or consumed between the hours of 3am-8am on weekdays and 3am-10am on Sundays.

Full permitting costs and procedures have historically been difficult to navigate by applicants. <sup>119</sup> The committee which processes applications does not formally convene or keep meetings, and recurring events can be processed without question, while new applications may be forwarded to each necessary city service for direct approval. There is also no formal appeals process set in place, were a denied applicants to do so.

## Liquor

In bars and restaurants, beer and wine may be sold between 6am-3am on Monday-Saturday and 10am-3am on Sundays. 120 Liquor may be sold between 8am-3am on Monday-Saturday and 10am-3am on Sundays.

Liquor-By-the-Drink (LBD) licenses are issued to clubs and events for on-premises consumption sales of alcohols 8% or more. The licenses are issued by the Tennessee Alcoholic Beverage Commission. The application fee is \$300, and the actual license can cost up to \$4,000,

<sup>&</sup>lt;sup>117</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018b)

<sup>&</sup>lt;sup>118</sup> Tennessee Alcoholic Beverage Commission (2018a)

<sup>&</sup>lt;sup>119</sup> Boucher, Wadhwani and Reicher (2018)

<sup>&</sup>lt;sup>120</sup> Local Alcohol Laws (2018)

depending on the terms. 121

Beer, or alcohol less than 8% by weight, requires a separate license, issued by local beer boards. In Nashville, the application fee for this permit is \$250.<sup>122</sup> There is a privilege tax charged at \$100, due on the first day of each year.<sup>123</sup> Payment of this tax marks an automatic permit renewal.<sup>124</sup> Applicants are permitted to obtain a temporary beer permit, at a cost of \$8.33 per month, while waiting for the next Metro Beer Board meeting to convene and approve a full permit.<sup>125</sup>

#### Noise

Noise laws have been proven to be subject to interpretation. Currently, the law states that noise violations occur when it is clearly audible on residential property lines, but this has not stopped venues from having to cease activity throughout the evening (as early as 6.30pm) due to various modes of measurement: specific decibel levels, audibility or even the direction of the business's speakers. 126

Local noise ordinance changes according to the zoning district. Most districts, excluding the downtown area and core frame zones (parking/commercial area directly surrounding a core business area), are prohibited from making noise clearly audible on surrounding property lines. 127

For those buildings located within a downtown or commercial district, noise levels are limited to 85 decibels, and speakers may not be mounted outside the building or pointed towards a building entrance. Decibel measurements are taken at 50 feet from the property line. Special events; purpose-built, state-owned property; and religious facilities are exempt from these laws.

Music and other entertainment is permitted outside between 7am-11pm. Outdoor events are still restricted to 85 decibels, but this is measured at the street level of the nearest

<sup>&</sup>lt;sup>121</sup> Cheek (2013)

<sup>&</sup>lt;sup>122</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018c)

<sup>&</sup>lt;sup>123</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018d)

<sup>&</sup>lt;sup>124</sup> Schaffer Law Firm PLLC (2018)

<sup>&</sup>lt;sup>125</sup> Cheek (2018)

<sup>&</sup>lt;sup>126</sup> Gugala (2017)

<sup>127</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018e)

<sup>128</sup> Ibid

residential property line, rather than 50 feet.

## Busking

Buskers in Nashville are not categorized as panhandlers, but they are not allowed to ask for money, either (they can, however, accept donations offered voluntarily). If they plan to sell merchandise, they need a vendor permit.<sup>129</sup> Such a permit can cost up to \$57.<sup>130</sup>

Buskers congregate around Lower Broadway, the strip of bars and venues downtown which act as the nightlife centre of the city. However, Metro police have been known issue citations against buskers, claiming the need to clear the street for pedestrians in order to better serve tourists. The Mayor's Office issued a statement saying that only performers using illegal amplification or disruptively large musical instruments should be affected by the law enforcement.<sup>131</sup> Some examples included drums, amps, saxophones and stools.<sup>132</sup>

## 3.3.4 Planning

## Zoning

The primary zoning classifications within which venues would operate are DTC, CF and CA.<sup>133</sup> The DTC is the Downtown Code, and is subject to some changes in ordinances. CF (Core Frame) districts are those surrounding central business areas, primarily consisting of parking and some supportive commercial industry, while CA (Commercial Attraction) is reserved for amusement and recreational venues frequented by tourists.

In 2015, the Metro Planning Commission put a 16-month hold on all developments near Music Row, in an effort to save the district from gentrification. There were plans to turn it into a UNESCO Heritage Site in order to protect the buildings moving forward.

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<sup>&</sup>lt;sup>129</sup> Jackson (2018)

<sup>&</sup>lt;sup>130</sup> Hedenskoog (2017)

<sup>&</sup>lt;sup>131</sup> Simmons (2018)

<sup>&</sup>lt;sup>132</sup> Hedenskoog (2017)

<sup>133</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018f)

<sup>&</sup>lt;sup>134</sup> IFPI (2015)

## **Transport**

There is a bus system connecting downtown Nashville to the city's suburban districts, branching out of the Music City Central bus terminal downtown. Operation hours vary, but the more heavily used routes (those servicing major pikes towards commuter towns and university districts) generally run from 5am-11pm on weekdays and and 6am-9pm on weekends, as often as every 10-15 minutes during peak times. Most other services run anywhere between every 20 minutes to once every hour, and some do not operate on Sundays. A day pass costs \$3.25, while a month pass costs \$55.135

There is also a free Music City Circuit, carrying passengers from park-and-ride sites along two separate downtown routes. The Blue Circuit, which runs between the Riverfront and Tennessee State University, operates between 6am-11pm. The Green Circuit, running between The Gulch and the Bicentennial Mall, operates between 7am-11pm. <sup>136</sup>

Nashville International Airport is located east of the city and services over 500 daily flights to locations in the US, Canada, Mexico, Caribbean and Europe. Recently expanded services include direct flights to Calgary, Minneapolis, Raleigh, San Francisco, Seattle and London, and passenger flow increased 11.2% in 2016, making the airport the fastest-growing in the nation. A recently-announced \$1.2billion expansion will better equip the airport to serve its expanding flight menu.

## Agent of Change

Agent of Change is not currently written into city law.

## 3.3.5 Education

#### **Formal**

Nashville's K-12 education is encompasses in the Music Makes Us programme. This initiative is a public/private partnership with Metro Nashville Public Schools, the Mayor's Office, and the

<sup>135</sup> Nashville MTA (2018a)

<sup>&</sup>lt;sup>136</sup> Nashville MTA (2018b)

<sup>&</sup>lt;sup>137</sup> Nashville International Airport (2018)

<sup>&</sup>lt;sup>138</sup> Garrison (2017)

Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation. The program, which is both privately and publicly funded, offers music in all zoned K-12 Metro Nashville Public Schools. Elementary music is standards-based and provided during the school day to all students by certified music specialists. At the middle school level, music instruction is offered at all schools as an elective. High school music courses are co-curricular electives and may fulfill fine arts graduation requirements.

Courses vary by school and offer diverse programming such as Production/Recording, Mariachi, Hip-Hop, Bluegrass, Music Theory, Songwriting, and Wind Percussion. 139

### Case Study: Words & Music Programme

In 1979, the Country Music Hall of Fame and Museum launched its Words & Music programme. The initiative connects young students in Nashville with the city's established songwriters through a series of hour-long workshops and classes which help bring songs to life. As suggested by the programme title, the emphasis of the programme is lyrical songwriting.

Additionally, the programme emphasizes the importance of music education within school curriculum by working alongside teachers to ensure they have the resources and guides available to effectively and consistently bring music into their classrooms. The teachers essentially have their lesson plan written for them, which they will teach through a series of Powerpoints and a ten-lesson curriculum guide, available through the Museum. Each teacher must attend a training programme, during which they are taught how to administer the lessons and are given the chance to participate in a co-writing workshop themselves. There are two teacher's guides (available to download online, free of charge), one covering grades 3-6 and one covering grades 7-12, and the curriculum adheres to ELA Common Core Standards, as well as national and state music standards.<sup>140</sup>

The programme is generally free for schools to participate in, although some expenses may be occured if the schools choose to conduct a field trip to the Hall of Fame for a guided tour and workshops. The project is funded jointly through the Country Music Association, Metro Arts, the Tennessee Arts Commission, Art Works and several national organizations including Wells Fargo, BlueCross BlueShield and Southwest Airlines.

#### Lessons to Take

<sup>&</sup>lt;sup>139</sup> Music Makes Us (2017)

<sup>&</sup>lt;sup>140</sup> Country Music Hall of Fame and Museum (2018)

- Providing teachers with the curriculum and resources helps streamline music education programmes in schools and allows easier tracking of how the lessons are being conducted and received.
- The emphasis on songwriting and creative craft over the more common theory or sample instrument curriculum is refreshing and can appeal to students from an entirely different direction, as well as translating into English and comprehensive reading skills.

Tertiary music programmes are also available through two schools at Belmont University's. School of Music (offering nine undergraduate majors including Music Education, Composition, Music Therapy and Church Music; as well as a Master of Music Degree with six focus areas)<sup>141</sup> and The Mike Curb College of Entertainment and Music Business (offering undergraduate programmes in engineering, entertainment industry studies, music business and songwriting; as well as a Master of Science in Audio Engineering).<sup>142</sup> Vanderbilt also offers music degrees with a conservatory-style course offering degrees in performance, composition and education. <sup>143</sup> Finally, Tennessee State University offers Bachelors of Science programmes to students in areas including music education, music business, performance and music technology.<sup>144</sup>

As of 2018, students who graduate from a Tennessee high school are eligible to receive two years' free tuition at a Tennessee community college or technical institute. The move, announced by Governor Bill Haslam, hopes to encourage more students to pursue tertiary education and Tennessee-based jobs. Funding for the initiative, which is estimated to cost \$300,000, is pulled from the state lottery fund. Nashville State Community College is one participation institution offering an eligible associate's degree in music. 146

Beyond state and private universities, some of Nashville's recording studios also offer courses in music technology or audio engineering. Blackbird Academy offers courses in both studio or live settings, while the Dark Horse Institute offers courses in engineering and music business. Musicians Institute has a Nashville branch dedicated to Guitar Craft. SAE also has a Nashville campus offering courses in Music Business and Audio.

<sup>&</sup>lt;sup>141</sup> Belmont University (2018a)

<sup>&</sup>lt;sup>142</sup> Belmont University (2018b)

<sup>&</sup>lt;sup>143</sup> Vanderbilt University (2018)

<sup>&</sup>lt;sup>144</sup> Tennessee State University (2018)

<sup>&</sup>lt;sup>145</sup> Office of the Governor (2018)

<sup>&</sup>lt;sup>146</sup> Tennessee Reconnect (2018)

## Professional Development

Most professional development and networking opportunities cater to songwriters, rather than budding business professionals. Many songwriter organisations, including BMI, ASCAP and the Nashville Songwriters Association International (NSAI), host workshops for members (some are open to the public). These provide musicians with opportunities to receive feedback on their songs, network, pitch their work to publishers or listen to panels. NSAI also coordinates a summer camp, open to all ages as well as non-members, which offers songwriting workshops and a mentorship system with some of Nashville's most revered songwriters, producers and industry professionals. 147

Music Expo launched its inaugural Nashville version in 2018, offering workshops, masterclasses, panels and exhibitions catering to everyone from music writers, business professionals and technology lovers. Music Biz 2018 is another Nashville conference bringing together both performers and business professionals for a series of workshops, gigs, presentations, panels and private meetings. 149

## Case Study: Nashville Entrepreneur Center's Project Music Portfolio<sup>150</sup>

The City of Nashville has grown its credibility and reputation as a music city over the decades, but it has been in the recent years that it is targeting the growth of its tech sector to develop a strong music tech sector. One of its initiatives in this area has been the Project Music Accelerator, developed by the Nashville Entrepreneur Center. The startup accelerator began in 2015 and its program model evolved into the Project Music Portfolio, supported by the Country Music Association (CMA). The Center also has an 'Entrepreneur-in-Residence' to work hand-in-hand with participants as they validate and mature their businesses.<sup>151</sup>

This year's program brings music, tech and business leaders together to nurture thirteen growth-oriented startups in the music industry. It is intentionally focused in developing innovation through 'connections, curriculum & community' tailored to each entrepreneur's needs. Although participants do not need to be based in Nashville, the program involves at least 4 curated events over the course of the year and provides access

<sup>&</sup>lt;sup>147</sup> Nashville Songwriters Association International (2018)

<sup>&</sup>lt;sup>148</sup> Music Expo (2018)

<sup>&</sup>lt;sup>149</sup> Music Business Association (2018)

<sup>&</sup>lt;sup>150</sup> Project Music (2018)

<sup>&</sup>lt;sup>151</sup> Project Music (2017)

and connections to advisors and music industry leaders, in exchange of a yearly payment fee of USD 3,900 per year, per company.

#### Lessons to Take

- With the digital era in full swing, it's important to focus on new, innovative ways to tap into music and keep it at the world's fingertips.
- As Huntsville has an incredibly advanced tech center, and its space industry is attracting engineers and digital experts from near and far, this presents a unique opportunity to connect the two industries.

## **Music Workspaces**

There are no dedicated music hubs or workspaces, although there are several coworking spaces around the city which offer the opportunity to network with other creative startups in the tech and digital industries.

Ryman Lofts are the city's first affordable housing scheme for creative industry professionals. 1-bedroom apartments start at \$658/month. Income restrictions apply. 152

## 3.3.6 Music Tourism

#### **Policies**

In 2014, Nashville welcomed 13 million visitors, a number that continues to rise. <sup>153</sup> It has adopted its brand not as 'a' music city but as 'The' Music City. Around town, guitar pick-shaped signage marks venues around town, colour-coordinated by genre. The airport features several performance areas and pre-recorded welcome announcements by some of Nashville's most famous country music artists. and the city launched an international campaign inviting people to tour the Music City, with online ads, media spots and ads on

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<sup>152</sup> Ryman Lofts (2018)

<sup>&</sup>lt;sup>153</sup> IFPI (2015)

public transport in places such as London. 154

The campaigns are led by the Nashville Convention & Visitors Corp., which actively markets Nashville as a music city where 'music is inspired, created, recorded and performed."<sup>155</sup> Their 2003 goal to grow the industry from \$3 billion to \$5 billion was reached in ten years, and today the city's tourism industry is worth \$6 billion. <sup>156</sup> Their Board of Directors consists of 22 local business leaders and stakeholders, and they oversee everything from international tourism marketing to research and education initiatives.

#### **Activities**

Nashville's music tourism is largely centred around its correlation with country music, with museums such as the Country Music Hall of Fame, Johnny Cash Museum, Musicians Hall of Fame, Patsy Cline Museum and the upcoming National Museum of African American Music.<sup>157</sup>

Nashville Music City launched an app to serve as a live music calendar and venue guide to visitors. The app features a gig and event listings page as well as a map of venues, catering to a variety of genres. There is also a publication, *Nashville Scene*, which features events listings for all major and local favourite venues, alongside artist spotlight pieces and other current events. The paper has an estimated circulation of 48,000 and can be found in most hotels and locally-owned businesses.

Some of the biggest events of the year include CMA Festival, which features free and ticketed music throughout the downtown area and along the riverfront, and Bonnaroo Music & Arts Festival, one of the biggest music festivals in the nation.

# 3.3.7 Comparison to Huntsville

Nashville has a music council actively working to attract business and promotional opportunities. The presence of global music businesses naturally creates a network for anyone

<sup>155</sup> Nashville Convention & Visitors Corp. (2018a)

<sup>154</sup> Ibid.

<sup>156</sup> Ibid

<sup>&</sup>lt;sup>157</sup> Nashville Convention & Visitors Corp. (2018b)

<sup>&</sup>lt;sup>158</sup> Nashville Convention & Visitors Corp. (2018c)

hoping to break into the business and can result in many professional development opportunities through workshops and conferences, something which Huntsville will find difficult to compete with in the early stages of building their local industry, but can leverage to get new opportunities.

Nashville allows alcohol to be served until 3am, one hour past Huntsville's curfew, and offers a wider variety of liquor licenses to suit each need. Although decibel levels are officially set higher than Huntsville's at 85 dba, much of the enforcement is subject to interpretation.

Nashville's schools have more integrated music programs, focusing on skills such as songwriting and production over the standard instrumentation and theory classes, and has a wider variety of private post-secondary education tracks through academy such as SAE or recording studio courses.

Nashville's tourism is led by large-scale events, museums and user-friendly products such as events calendars and local publications, all achievable things not unique to the music city. Although Nashville's transport is on par with Huntsville in terms of accessibility and timestables, it does have a free shuttle serving the downtown area, which is useful for tourists or locals on a night out.

One thing Huntsville leads on, which is incredibly important, is affordability. Even Nashville's single subsidized housing entity, Ryman Lofts (which is highly competitive and has a waitlist) is comparable to monthly rent in Huntsville. This is a key attraction point for artists wanting the freedom to focus on their craft over spending their hours at a day job, and can be the make-or-break point for artists deciding where to base themselves out of.

# 3.4 Durham, NC

#### 3.4.1 Overview

While a music economic audit has not been conducted in the Research Triangle, the Arts & Economic Prosperity 5 study weighs the nonprofit cultural sector. The most developed sector in the Triangle is in Durham County, with \$125,534,858 in industry expenditures and

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<sup>&</sup>lt;sup>159</sup> Triangle Art Works (2018a)

4,550 fte jobs supported in 2016. Wake County comes second, at \$166,228,401 in expenditures and 6,601 fte jobs. Orange County has expenditures of \$85,406,375 and 3,352 fte jobs supported by nonprofit arts and culture.

Although they can appear as functioning like one city, each of these cities has a distinct music personality. Chapel Hill/Carrboro led the music scene about 50 years, and although both artists and business (inc. Merge Records) moved to Durham as it became too expensive, it still has an experimental and liberal scene. Durham's vibrancy is centered around Americana, while Raleigh is home to a substantial scene of rock, punk and metal, as well as a recognized food scene and well-known music venues past and present.

It is common for tours to hit all three cities in the Triangle, as its audiences are capable of sustaining the amount of dates. Overall, the region features a dynamic and diverse music sector focused around live music events and affordable recording spaces. This is largely in part due to the collaborative nature of all musicians and artists in the region.

# 3.4.2 Governance and Leadership

#### Music Office

There is no Music Office or similar entity in the Research Triangle.

#### Grants

Grants for the arts are issued through several bodies. One source is the North Carolina Arts Council, which offers project funding as well as artist-in-residence programming. There are also paths for non-profit organizations to receive operational costs help depending on the sectors of community they serve (veterans, grassroots, educational, etc.).

United Arts Council of Raleigh and Wake County issues funding for schools, arts organizations and local artists. Several grants are available which specifically support projects by minorities, projects aimed to enhance the community (public events or city artwork), funds supporting cultural field trips for young students, and more. 160 In 2016, the Council issued

<sup>&</sup>lt;sup>160</sup> United Arts Council (2018)

over \$1 million in grants, distributed across 140 schools, 30 organizations and 20 artists.

Durham Arts Council also offers a small collection of grants for new projects, artist development and nonprofit organizations, as well as offering the use of their facility to successful applicants.<sup>161</sup>

# 3.4.3 Licensing and Regulations

#### **Events**

Outdoor events resulting in any closures of public pathways must apply for an event permit. New events, multi-day events, ticketed events, and anything with over 2,000 attendees expected will be subject to special review. Standard applications must be submitted 60 days prior to the proposed date. Smaller, simplified events may apply two weeks before the proposed date. Additional fees are issued to reserve parking spaces (\$1.50 per space per hour), hire police (\$25-35 per officer/hour), waste management, and vendor licenses (\$75 per vendor). Alcohol permits are issued by the ABC Commission. Daytime noise (8am-11pm) is limited to 60dB(A), and nighttime noise is limited to 50 dB(A). Any events with an alcohol license must be insured with Commercial General Liability no less than \$1,000,000 and Liquor Liability no less than \$2,000,000.

No permit application fees or base fees are listed.

## Liquor

Alcohol permits for events cost \$50 and are obtainable through the ABC Commission. Wake County allows alcohol sales from 7am-2am Monday-Saturday and 12pm-2am on Sundays. However, North Carolina Law states all ABC stores must close by 9pm Monday-Saturday and are forbidden from opening on Sundays.

All permits for alcohol sales are obtained from the North Carolina ABC Commission. Permit fees vary based on the nature of sales, but generally start at \$400 per year for sales, rising up

<sup>&</sup>lt;sup>161</sup> Durham Arts Council (2018)

<sup>162</sup> City of Durham (2018)

<sup>&</sup>lt;sup>163</sup> City of Durham (2018)

to \$1,000 per year for mixed beverages. 164

#### Noise

Amplified music exceeding 55 dB(A) on city streets is unlawful, and amplified music in general requires a license from the City. Acceptable decibel levels are determined based on the nature of the zoning district, and are as follows:

ZONING TYPE	DAYTIME HOURS (7AM-11PM)	NIGHTTIME HOURS (11PM-7AM)
Residential	55	50
Office/institutional	60	55
Industrial/Commercial	70	65

Table 4. Day and nighttime noise level by zone type

## Busking

There are no busking regulations written into Durham City law. The greater Research Triangle does, however, have restrictions. In 2007, in an effort to regulate the quality of street performances throughout the city, Raleigh introduced a permitting scheme which holds artists accountable for noise levels. An annual permit costs \$40, obtainable through the Development Services Customer Service Center. In August 2018, Raleigh also introduced two pianos for public use, placed in separate downtown locations.

<sup>&</sup>lt;sup>164</sup> North Carolina Alcoholic Beverage Control Commission (2018)

<sup>&</sup>lt;sup>165</sup> Buscher (2007)

<sup>166</sup> City of Raleigh (2018)

<sup>&</sup>lt;sup>167</sup> Johnson (2018)

# 3.4.4 Planning

## Zoning

The best area for live music in Durham is in the Downtown Durham district. With shops, restaurants, bars and clubs, this is a busy area with plenty of live music performances to choose from - particularly of the jazz and blues genres<sup>168</sup>.

## **Transport**

Each of the three towns has their own public transport systems of buses: Capital Area Transit (Raleigh), Durham Area Transit Authority, and Chapel Hill Transit. These routes work together under a greater Triangle Transit flag, which offers connections between existing routes to easily get around the entire Research Triangle. Route connections are primarily made at the main train stations: UNC Hospital, Durham Station, Regional Transit Center, Cary Train Station and GoRaleigh Station. Regional routes run during peak traffic hours on weekdays, but core routes stemming from the Regional Transit Center run 7 days per week. The Durham Area Transit Authority operates buses from approximately 6am-12.30am.

The Triangle is served by the Raleigh-Durham International Airport (RDU), which served over 5,600,000 passengers in 2016/2017. It is accessible by taxi, ride sharing and transfers. The Go Triangle Route connects the airport to the Regional Transit Center, where riders can connect to bus routes throughout the region. The area is also serviced by Amtrak, which connects to Charlotte and New York, through Washington D.C.

## Agent of Change

Agent of Change is not in place in the Research Triangle.

<sup>&</sup>lt;sup>168</sup> Durham Convention & Visitors Bureau (2018)

#### 3.4.5 Education

#### **Formal**

Primary and secondary education in the Research Triangle is under the jurisdiction of the Wake County Public School System (Raleigh), Durham Public Schools (Durham and Chapel Hill), or Chapel Hill-Carrboro City Schools (Chapel Hill). Wake County, the largest public system in North Carolina, 169 believes in the importance of arts education and stresses that both students and parents should be involved in arts education classes and programs within the elementary, middle, high, and magnet schools. 170 A number of Durham schools offer music education, including Durham School of the Arts, a secondary, specialized magnet school. 171 Finally, music education in the Chapel Hill-Carrboro City Schools is dependent on the individual school, as there is no music education requirement. A number of high schools in Chapel Hill have strong arts programs, such as the Chapel Hill High School and the high school program at the University of North Carolina School of the Arts.

The area is home to some of the nation's highest performing secondary schools and universities, including includes three major research universities: North Carolina State University, Duke University, and the University of North Carolina at Chapel Hill. All three provide post-secondary music education. North Carolina State University (NCSU) and University of North Carolina at Chapel Hill (UNC) are both public research universities that offer numerous music education and performance opportunities. NCSU also offers a minor in Music, a minor in Arts Entrepreneurship, and the opportunity for students to participate in a number of music ensembles.<sup>172</sup> UNC is home to a vibrant music department, which offers the B.A., MA., and Ph.D. in Music as well as the chance to perform in music ensembles.<sup>173</sup> Duke University, ranked as one of the nation's best universities, is also home to a Music department that offers undergraduate and graduate degrees in Music, and boasts nine music ensembles.<sup>174</sup> The University of North Carolina has community partnerships with music organisations in Chapel Hill. These partnerships work to increase community education and outreach through

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<sup>&</sup>lt;sup>169</sup> Wake County Public School System (2018a)

<sup>&</sup>lt;sup>170</sup> Wake County Public School System (2018b)

<sup>&</sup>lt;sup>171</sup> Wake County Public School System (2018c)

<sup>&</sup>lt;sup>172</sup> NC State University (2018)

<sup>&</sup>lt;sup>173</sup> The Department of Music at UNC Chapel Hill (2018a)

<sup>&</sup>lt;sup>174</sup> Duke University (2018)

music. 175

## Professional Development

Triangle Art Works, a non-profit, developed an Arts Directory for the region. Although the list is not exhaustive, it is informative of music organisations based in the area, including recording studios and other music businesses. There are a few independent labels in the Triangle Area, including Merge Records (created to release the music of Superchunk, but has since expanded services), Cardigan Records, Paradise of Bachelors, and Small Town Records (Duke University's student label), among others. These are primarily indie/alt and hip-hop/R&B labels. Reverbnation, the online platform for music management, is headquartered in Raleigh, although there are other offices in NYC and LA. To date, it has 3.8 million users and boasts clients such as Eminem and Rihanna.

## **Music Workspaces**

Although there are coworking spaces with emphasis on creativity and tech entrepreneurship, there are no specific music workspaces or hubs within the Research Triangle.

### 3.4.6 Music Tourism

#### **Policies**

There is no dedicated music or cultural tourism policy in the Research Triangle.

#### **Activities**

Chapel Hill began developing a folk scene in the 60s, from which came James Taylor, who now has his own exhibit at the Chapel Hill Museum. The 70s saw a large punk movement, led by local students, which eventually evolved into a metal scene. Alternative music also has its place in the area, with the likes of Ryan Adams and Ben Folds calling the Triangle home. Much of the local music scene is marked by a 'cult following', meaning local bands can make a name for themselves around town and have a loyal following, but will not progress much

<sup>&</sup>lt;sup>175</sup> The Department of Music at UNC Chapel Hill (2018b)

<sup>&</sup>lt;sup>176</sup> Triangle Art Works (2018b)

unless they make connections in a larger city with more industry.

The Triangle features several large-scale venues and popular events such as Hopscotch Music Festival (Raleigh), MoogFest, and Apex Music Festival. There are a few amphitheatres, including Red Hat and Koka Booth, as well as the PNC Arena, which hosts internationally touring acts. There are a few summer concert series, such as Oak City 7 and Pickin' in the Plaza in Raleigh.

Nightlife in the area is very student-oriented, and there are many bars, clubs and four craft breweries. Some of the most popular places to catch live music are Nightlight and Cat's Cradle in Chapel Hill, Pinhook and Motorco in Durham and Kings and Lincoln Theatre in Raleigh.

# 3.4.7 Comparison to Huntsville

Professional development support is about equal between the two. Local grant bodies service a slightly broader demographic, not limiting recipients to being non-profits. However, overall, the amount of local funding (not competing at a state or national level) is equal. Music education in schools at all levels is approximately equal, with minimal state requirements set in primary schools and opportunities limited to band and choral activities in secondary schools. The Research Triangle has a few more independent labels and music companies than Huntsville, but similarly to Huntsville, the Triangle loses many of its musicians to nearby hubs such as Nashville once they reach a certain level.

Huntsville is more strategic in determining and planning for its entertainment districts, which supports local industry more effectively, although neither area has a dedicated music or cultural tourism strategy. Noise decibels are more lenient, at 70 dB(A) in commercial districts, and curfew is at 11pm, rather than Huntsville's 10pm. Liquor curfews are set equally.

# 3.5 Boulder, CO

## 3.5.1 Overview

Colorado's music industry is estimated to generate \$1.1 billion annually, mostly powered by a growth in live events.<sup>177</sup> Although the music industry is very important to Boulder's personality, it only has a modest economic impact. Sales for the city's music industry account for around \$6.7 million, including adjacent cohorts such as recording studios and engineering.

The most important sector in Boulder is the classical music market. Despite this, it has not been measured separately from the other creative industries. Although small in population, Boulder sustains three symphonies, an opera, a youth orchestra, several choirs, chamber music societies, a ballet company and several major classical festivals. The Boulder music scene and its venues have built a good reputation as a touring stop and place for musicians to live and work. Among its operative music venues of historic importance are the Boulder Theater (est. 1906), the Chautauqua Auditorium (est. 1899), and the Fox Theatre (est. 1926).

# 3.5.2 Governance and Leadership

#### Music Office

Boulder does not have a music office or officer.

#### Grants

Boulder's Community, Culture and Safety (CCS) Tax for Capital Improvements was extended in 2017 for four additional years after successfully funding important city facilities and infrastructure projects since 2014, although no music-specific project has been approved with this funding. The Boulder County Arts Alliance carries out part of its mission by providing

<sup>&</sup>lt;sup>177</sup> Koehler (2018)

funding for individual artists and organizations across disciplines, including performance and music education projects. 178

Statewide, the Colorado Music Strategy<sup>179</sup> is a comprehensive plan developed in 2016 as a public-private initiative from the Bohemian Foundation and Colorado Creative Industries (CCI). Initially dedicating \$200,000 to funding and grants,<sup>180</sup> it aims to increase revenues for Colorado-based musicians and music businesses while raising the state's profile nationally and internationally. Two of seven projects have been launched as of 2017.

## 3.5.3 Licensing and Regulations

#### **Events**

A Special Event Permit<sup>181</sup> is required for all public activities conducted on public property. The City has developed a guide<sup>182</sup> to help event producers navigate the application requirements and processes. There is no cost to obtain a Special Events License, but associated costs such as Boulder Police Department requirements, noise officers, etc. must be taken into account. Applications are reviewed by the Special Event Review Team, with members from various city departments, and accepted on a first-come, first served basis. Events with amplified sound require a complete description of sound use including a site map.

Applicants for a Special Event Permit must adhere to the Public Right of Way if the event is happening in public spaces. The applicant is responsible for obtaining approval for all permits. Certain documentation must be provided at least 120 days in advance. Consideration and approval of events is determined by the City Manager. Event occupancy is set by the Fire Department, although some requirements are preset for public venues available for hire.<sup>183</sup>

#### Liquor

Liquor may be served in bars and restaurants between 7am and 2am, any day of the week.

<sup>&</sup>lt;sup>178</sup> Boulder County Arts Alliance (2018)

<sup>&</sup>lt;sup>179</sup> Colorado Creative Industries (2018)

<sup>&</sup>lt;sup>180</sup> Vaccarelli (2016)

<sup>&</sup>lt;sup>181</sup> City of Boulder (2018a)

<sup>&</sup>lt;sup>182</sup> City of Boulder (2018b)

<sup>&</sup>lt;sup>183</sup> City of Boulder (2018a)

Under Colorado state law, packaged liquor may be sold in supermarkets between 8am and midnight, any day of the week.

Colorado is a dual licensing authority for the state's licensed retailers and special event permittees. Liquor licensing in Colorado requires retailers to first obtain license approval at the local government level. For new license applicants, this typically requires showing the neighborhood needs and desires for each new liquor license. Local government will typically conduct an initial background investigation of the individuals involved with a retail liquor license application. The City of Boulder Beverage Licensing Authority is the local government body hearing and ruling upon applications for licenses for the sale of fermented malt beverages and liquor.

A Special Event Liquor Application is also needed if alcohol is going to be served at an event. Each applicant has to submit their complete application at least 30 days prior to the event and pay a \$50-100 fee, depending on the capacity of the event. Each applicant is limited to 15 days per calendar year, with different procedures depending on the nature of the applicant and the event (private property, public city property, etc.).

#### Noise

Amplified sound associated with outdoor activities is limited to 7am - 11pm, with some venues exempted from this restriction based on their location and type of operation. Decibel limitations are defined as per Boulder Revised Code 5-9-3:184

ZONING DESIGNATION OF	DECIBEL MAX.	DECIBEL MAX.
RECEIVING PROPERTY	7AM-11PM	11PM-7AM
RR, RR1, ER, LR, MR, MXR, HR, MH, HZ	55 dBA	50 dBA
TB, RB, RB1, RB2, RB3, RMS, MU, BMS, CB, A, P	65 dBA	60 dBA
IG, IM, IS, IMS	80 dBA	75 dBA

<sup>&</sup>lt;sup>184</sup> Ibid.

## Busking

Busking is permitted in Boulder, and performers are not required to have a permit. However, no amplification is allowed on the Pearl Street Mall, and musicians planning to perform for longer than 30 minutes are asked to move spots at every 30 minute interval (at least one city block away). <sup>185</sup> If performers plan to vend merchandise such as recordings at their location, they must have an Entertainment Vending Permit, which runs \$16 per month. Vendors must also take sales tax rates into consideration. <sup>186</sup>

# 3.5.4 Planning

## Zoning

Boulder has three dedicated commercial districts: Downtown Boulder, University Hill and Boulder Junction. Downtown Boulder encompasses Pearl Street's East and West Ends and everything in between, including the Pearl Street Mall. On the National Register of Historic Districts, it is a hub of shopping, entertainment and restaurants that serves as a center of tourist and local activity for the city. University Hill also offers retail, gastronomy and entertainment, and is continuously growing and changing to service the local student population. Boulder Junction is a new development site, which the city aims to transform into a pedestrianized center of activity, to include residential space and nightlife.

## **Transport**

The Boulder/Denver area is served by commercial flights through the Denver International Airport, which is located 42 miles southeast of Boulder. About 58.3 million travellers use the Denver Airport every year<sup>187</sup>. To get to and from Denver International, the AB1 and AB2 buses run daily. On weekdays, the buses run from 4:25 am until 1am, and on weekends they run

<sup>&</sup>lt;sup>185</sup> City of Boulder (2018c)

<sup>&</sup>lt;sup>186</sup> City of Boulder (2018d)

<sup>&</sup>lt;sup>187</sup> Denver International Airport (2018)

from 5:20 am until 11:30pm<sup>188</sup>. Boulder Municipal Airport is also located in the city of Boulder, but it does not currently offer commercial airline services<sup>189</sup>.

The RTD bus network connects Boulder to Longmont, Golden and Denver, with extra attention given to university campus routes and Denver International Airport. Buses generally run from 5.30am until 1am. There is no intra city rail service, but a commuter rail connecting Boulder to Denver has been in the works for almost a decade, reliant upon funding and timing to be completed.<sup>190</sup>

The University of Colorado Boulder runs a student night bus from 10pm-3am on Thursdays, Fridays and Saturdays during each semester. The bus can be tracked via an app.<sup>191</sup> Certain bus routes in and around Boulder run throughout the night.

Cycling is strongly encouraged and supported through infrastructure, with dedicated cycling lanes and routes throughout the city, including alternative routes for both cyclists and pedestrians to safely travel across major intersections and highways. There are also bike sharing schemes operated by B-cycle. Private transportation and taxis are provided by Lyft and Uber.

## Agent of Change

Agent of Change is not in effect in Boulder.

## 3.5.5 Education

#### **Formal**

Although Colorado has a strong state music education program, approximately 170 schools statewide do not provide music education opportunities for its students. Not all students have access to instruments and instruction, particularly students in grades 6-12. To amend this, a

<sup>&</sup>lt;sup>188</sup> Regional Transportation District (2018)

<sup>&</sup>lt;sup>189</sup> City of Boulder (2018e)

<sup>&</sup>lt;sup>190</sup> Lewett (2017)

<sup>&</sup>lt;sup>191</sup> University of Colorado Boulder (2018)

new Colorado public-private pilot program named 'Take Note' was launched to provide access to musical instruments and instruction to K-12 students across the state.<sup>192</sup>

Despite the state music education shortcomings, Boulder itself maintains committed to music education. The Boulder Valley School District (BVSD) is in charge of all public schools in Boulder and received the 2018 Best Communities for Music Education award by the NAMM Foundation. The BVSD maintains a detailed music curriculum website, which includes an outline of academic standards in music and a list of all music books used in school courses.

The University of Colorado is the main tertiary institution in Boulder. Its students make up 30,265 of Boulder's 103,166 residents.<sup>195</sup> In 2016, UC Boulder developed a 10-year plan to expand its music program's reputation in five areas:<sup>196</sup> connect student success to professional achievement, realize music's interdisciplinary potential, expand national and international leadership, build a robust network of partners, and cultivate diversity and inclusion. Music programs at the University have substantial donor support, and therefore act as a major music education hub. There are career development opportunities through its Entrepreneurship Center for Music<sup>197</sup> and the student organisation Music Industry Club.<sup>198</sup> Boulder also features a handful of private music education options, particularly in music recording.

## Professional Development

Statewide, the Colorado's Music Ambassador program encourages companies to use Colorado music for television, film and advertising. In its first six months, the initiative resulted in four commercial placements, generating more than \$40,000 for Colorado musicians<sup>199</sup>.

#### Music Workspaces

While there is no dedicated music hub in the city, there are a few tech-led co-working spaces (including a WeWork), and several music startups.<sup>200</sup>

<sup>&</sup>lt;sup>192</sup> Take Note Colorado (2018)

<sup>&</sup>lt;sup>193</sup> Boulder Valley School District (2018a)

Boulder Valley School District (2018b); Boulder Valley School District (2018c); Boulder Valley School District (2018d)

<sup>&</sup>lt;sup>195</sup> Boulder Convention & Visitors Bureau (2015)

<sup>&</sup>lt;sup>196</sup> University of Colorado Boulder College of Music (2018a)

<sup>&</sup>lt;sup>197</sup> University of Colorado Boulder College of Music (2018b)

<sup>&</sup>lt;sup>198</sup> Ibid.

<sup>&</sup>lt;sup>199</sup> Colorado Office of Economic Development and International Trade (2017)

<sup>&</sup>lt;sup>200</sup> Built In Colorado (2018)

#### 3.5.6 Music Tourism

#### **Policies**

The Boulder Convention and Visitors Bureau utilises music as a promotional tool<sup>201</sup> although there is currently no specific brand or policy built around music tourism. Cultural tourists accounted for 300,000 verified visits in 2016. However, music tourism is not measured separately from other types of cultural attractions.<sup>202</sup>

#### Activities

Tourism is worth \$515.4 million to the local economy, attracting over 3 million visitors in a year from both the broader Colorado state and around the world. Popular attractions include Historic Downtown Boulder for shopping and entertainment, university sporting events and public races throughout the city (Boulder is home to the world's largest IRONMAN race) and, of course, the activities presented by the access to the Rocky Mountains and 200 miles of trails. During the summer months, Boulder also programmes many festivals, including several outdoor concerts series (Concerts in the Park, Bands on the Bricks) and a Fringe Festival.

# 3.5.7 Comparison to Huntsville

Regulations are approximately equal, although Boulder's infrastructure is slightly more supportive than Huntsville's. Liquor curfews are equal, although noise laws are more lenient, with decibel levels set at up to 80 dB(A). Transport is more accessible in Boulder. Although many buses stop running at 1am, there is a weekend night service connecting to the university campus. There is also extra consideration given to making the city accessible from university campuses and connecting to nearby cities through buses and regional rail transit.

Music education is more carefully curated in Boulder's primary schools, and the local university has created a strategic plan to enhance its own offer for music majors. There are

<sup>&</sup>lt;sup>201</sup> Boulder Convention & Visitors Bureau (2018)

<sup>&</sup>lt;sup>202</sup> Americans for the Arts (2017)

<sup>&</sup>lt;sup>203</sup> Boulder Economic Council (2018)

also a few more offers for non-instrumental education, such as at recording studios. Like Huntsville, many grants and funding opportunities are at state or national levels.

While there is no dedicated music strategy, it is used as a promotional tool for tourism and business development. Something Huntsville has over Boulder is location. Its proximity to the southern music hubs and the Americana Music Triangle give it a network with potential that isn't found in Boulder. It also brings music tourists closer to the area, where Boulder and its greater area is more known for its plethora of outdoor activities.

# 3.6 Chattanooga, TN

## 3.6.1 Overview

A 2017 study by Americans for the Arts calculated nonprofit arts and culture to be worth \$172.5 million to Hamilton County's local economy. This figure translated to \$145 million in resident household income (money that is earned by citizens and is used to pay their living expenses), \$7.2 million in local government revenue, and \$12.5 million in state government revenue. The sector also supports 6,345 fte jobs. Audience expenditures were estimated to bring in \$107.7 million to the county's economy, with visitors (27.1%) spending twice as much on their evenings as locals. In fact, 79.3% of visitors to Hamilton County come specifically for cultural events. Gastronomy is the largest sector receiving secondary income from music fans.

Chattanooga's small size and relatively short distance to the wider south make it an ideal place to build local relationships, get gigs, and tour an area known for being attentive to its music scene. However, it also plateaus at a certain point and artists struggle to find meaningful long-term connections, as there is no industry of music businesses in the town. Many often end up leaving for cities such as Nashville.

A basic music industry census, undertaken by the Chattanooga Tourism Bureau in 2017, showed 34 music venues, 45 restaurants with regular live music programming, 16 music festivals and an additional 16 festivals with music programming to accompany their main programming. Its most popular venues are the Tivoli Theatre and Soldiers and Sailors Memorial Auditorium, which receive internationally touring acts, as well as the Chattanooga Choo Choo. Venues cater to singer-songwriters looking to hone their crafts, those making names for themselves regionally, and those already established looking to play in more intimate settings. The largest scenes are for bluegrass, soul, punk, blues, jazz and indie. Although local attendance is on the rise, shows are not consistently well-attended, let alone sold out.

<sup>&</sup>lt;sup>204</sup> Americans for the Arts (2017)

<sup>&</sup>lt;sup>205</sup> Filbin (2015)

lbid.

<sup>&</sup>lt;sup>207</sup> SoundCorps (2018a); SoundCorps (2018b)

## 3.6.2 Governance and Leadership

#### Music Office

Although the city does not have a Music Office, the Chattanooga Convention & Visitors Bureau has a music marketing officer to oversee city marketing.

A nonprofit organization, SoundCorps, was established in 2015 to grow and champion Chattanooga's music economy. The startup's board of directors features representatives from local venues, law offices and the Chattanooga Area Chamber of Commerce. SoundCorps hosts educational workshops, panels and networking opportunities, runs an 8-week intensive music business course, and offers demo feedback and marketing through weekly newsletters. Beyond this, they have compiled a directory of local music industry players (publicly available on their website) and are gatekeepers of artist applications for both festivals (including Riverbend and Noontunes) and busking spots around the city, the latter being a partnership with the City of Chattanooga and other stakeholders. The nonprofit aims to grow Chattanooga into a welcoming and thriving centre for musicians, music businesses and fans. They aim to measure their success on the amount of music business established and live performances taking place in the city.

#### Grants

Most local grants come through The Benwood Foundation, a local organization which works to support initiatives that further the Chattanooga community through culture, education and leadership. The Foundation was created as the legacy of a previous president of the Coca-Cola Bottling Company, who left his company holdings in the Foundation's name. Although they don't accept unsolicited requests for awards, they issue grants to several large music organizations in the community. In 2016, Benwood allocated \$775,000 to various ArtsBuild schemes, most of which was issued as part of the Civic Innovation and Engagement Hub.<sup>208</sup> The Chattanooga Convention & Visitors Bureau also received \$65,000, given to its Music Marketing Director. Other music-focused grants included \$39,000 towards Jazzanooga for operations and \$50,000 to SoundCorps.

The Performing Arts League issues one scholarship each year to a young student studying performing arts in order to further their training and opportunities. The League also issues

<sup>&</sup>lt;sup>208</sup> The Benwood Foundation (2016)

grants of up to \$1,500 to organizations which support the arts through their own work. There is no official limit for amount of organizations which can receive grants, but each organization can only receive one award per year.<sup>209</sup>

# 3.6.3 Licensing and Regulations

#### **Events**

Outdoor special events, particularly if requiring street closures, are managed by the Chattanooga Transportation Department. Street closure applications must be submitted 90 days before the event, and cost \$100.\frac{210}{2} A permit must also be received from the City of Chattanooga Police Department Regulatory Bureau for Special Gatherings, obtainable when submitting security procedures for the gathering. Event capacity is determined by the Fire Marshall. Liquor permits to accompany the event run \$100 per day, while a beer license costs \$250 for the event.\frac{211}{2}

## Liquor

Liquor licensing regulations are determined under Tennessee state law. The Tennessee Alcoholic Beverage Commission (TABC) deals with applications for each type of licensing of to qualified applicants. There are 19 licenses to apply for, including Liquor-by-the-Drink, Non-Resident Seller and Retail.<sup>212</sup>

Liquor, beer and wine can be sold between 10am to 3am at bars and restaurants. Alcohol can be purchased in stores between 8am to 11pm, but Sunday laws are a bit more complicated. Previously, the sale of liquor and wine was prohibited on Sundays. A new state law was passed allowing for sales at dedicated liquor stores after 10am, <sup>213</sup> although some cities may set their own laws (Chattanooga has not updated their website to acknowledge any changes). Grocery stores must wait until 2019 to be permitted sales on Sundays.

To be able to sell alcohol at music events or other events, you need to apply for the special

<sup>&</sup>lt;sup>209</sup> Performing Arts League (2018)

<sup>&</sup>lt;sup>210</sup> City of Chattanooga (2018)

<sup>&</sup>lt;sup>211</sup> Ibid.

<sup>&</sup>lt;sup>212</sup> Tennessee Alcoholic Beverage Commission (2018b)

<sup>&</sup>lt;sup>213</sup> Sisk (2018)

occasions license. Applications for special occasions liquor permits need to be submitted to the Nashville office of the Tennessee Alcoholic Beverage Commission at least two weeks in prior to the event. A special occasion license is valid for one twenty-four hour period of time, and you can apply for up to 12 in a calendar year. <sup>214</sup>

#### Noise

Noise laws are determined based on the time of day the noise is being issued.<sup>215</sup>

TIME OF DAY	SOUND LEVEL LIMIT DB(A)	SOUND LEVEL LIMIT DB(C)
3:00 a.m 11: a.m.	55	n/a
11:00 a.m 11: p.m.	80	95
11:00 p.m 3:00 a.m.	65	80

Table 6. Noise limitations by time of day

There is a Controlled Sound Boundary (CSB) located along Broad Street and Market Street (in the Southside District) as well as along Main Street, essentially creating an 'L' shape of controlled area.<sup>216</sup> Anyone expected to exceed the noise limits in the CSB must apply for a permit from the Land Development Office, which will set the terms and fee, and must notify any establishments within 300 feet of the property.

## Busking

Soundcorps runs Sidewalk Stages, a busking initiative which brings 15-30 musicians to the public realm each weekend between April-October. The musicians are compensated at \$25 for two hours, but may also receive tips and donations from passersby. Performers are selected via audition, and may not perform two seasons in a row. Auditions are open to all performers living within 50 miles of the city, and some locations which they may play include the airport, Walnut Street Bridge and the Tennessee Aquarium.

A 2018 ordinance issued by the city increased the geographic range of regulations against panhandling. This caused concern among buskers, but city officials said the new laws were

<sup>&</sup>lt;sup>214</sup> Tennessee Alcoholic Beverage Commission (2018a)

<sup>&</sup>lt;sup>215</sup> City of Chattanooga (2014)

<sup>&</sup>lt;sup>216</sup> Ibid.

<sup>&</sup>lt;sup>217</sup> Soundcorps (2018c)

not intended for musicians and should not affect them.<sup>218</sup> Current regulations only prohibit selling merchandise, blocking the street, or actively soliciting tips.<sup>219</sup>

## 3.6.4 Planning

## Zoning

After a push for regeneration almost ten years ago, the Southside District is the main downtown area of Chattanooga, filled with venues, restaurants and other cultural offerings. Stretching from 12th Street to 20th Street, it is a mixed-use area, with both commercial and residential buildings in the zone. This neighbourhood, as well as other downtown areas, such as the riverfront and the CBD, are subject to Form-Based zoning codes. These codes seek to promote mixed-use urban development.<sup>220</sup>

Some zoning has created issues for entertainment. Sidewalk Stages, the program by which street performers are given places to busk across the city, has run into some trouble with laws, despite being created in partnership with the City of Chattanooga and the Chattanooga Convention & Visitors Bureau. Street performances, by legal definition, are often lumped into the category of 'panhandling', which threatens the future of their abilities to play peacefully. <sup>221</sup> SoundCorps is working to change this wording so the laws better accommodate buskers.

#### **Transportation**

Chattanooga Metropolitan Airport is located five miles east of the central business district of Chattanooga. The airport has about 400,000 passengers a year, offering domestic flights. Connecting flights to international locations are generally made through Atlanta, or another nearby international airport.

The Chattanooga Area Regional Transportation Authority (CARTA) is the provider for Chattanooga and Tennessee. They run 16 bus routes, and the urban areas are more covered than the suburbs. There are different schedules for weekdays, Saturdays and Sundays, but the most frequent lines depart every 15 minutes. Most buses start around 5am and finish at 1am,

<sup>&</sup>lt;sup>218</sup> Walton (2018)

<sup>&</sup>lt;sup>219</sup> Courter (2016)

<sup>&</sup>lt;sup>220</sup> City of Chattanooga (2017)

<sup>&</sup>lt;sup>221</sup> SoundCorps (2018b)

except a few business district buses, which only run until 7pm. A one-way ride costs \$1.50. There's currently no bus route that's available during night time.

There are also three shuttle routes servicing the downtown area, between the South Side and the North Shore, which are free to ride. Operation times vary based on the route and day of the week.

The city sets out parking allocation requirements for businesses in its bylaws, <sup>222</sup> detailing how many parking spaces must be provided for residential, commercial and institutional buildings in relation to their capacities. Restaurants must provide one space per 75 sq. feet of gross leasable area (GLA), and other commercial facilities follow a general rule of 5 spaces for 1,000 sq. feet. Stadiums and sports arenas must provide 1 space for every 5 seats.

## Agent of Change

There is no record of Agent of Change being utilized in Chattanooga.

## 3.6.5 Education

### **Formal**

Tennessee high school graduation requirements do not include any specific requirement for music education. However, there is a mandatory 1-credit in fine arts, which can be waived in order to take other classes. Investment in music education in Tennessee will soon greatly improve. In April 2018, the partnership Tennessee: State of the Arts was announced between the state and the Country Music Association (CMA). This initiative intends to form a unified model for arts and music education in Tennessee, with an initial \$1 million in seed funding for the first three years. Plans include competitive grants for school districts beginning in the 2018-2019 school year.

Chattanooga, TN is part of the Hamilton County Department of Education, which includes 76 public schools, roughly 2,800 teachers and 45,000 students in the Pre-K through grade twelve.

<sup>&</sup>lt;sup>222</sup> City of Chattanooga (n.d.)

<sup>&</sup>lt;sup>223</sup> Tennessee Department of Education (2018b)

<sup>&</sup>lt;sup>224</sup> Tennessee Department of Education (2018c); Country Music Association (2018)

The city already boasts a number of high performing arts high schools, such as the Chattanooga High Center for Creative Arts, and the Chattanooga School for the Arts and Sciences, which were recently listed in the annual U.S. News and World Report as some of the best high schools in the nation. <sup>226</sup>

The Hamilton County Department of Education understands the importance of arts education. The website of the Department of Education highlights three ways in which Hamilton County students engage in arts education: "Arts as curriculum; arts-enhanced curriculum; and arts-integrated curriculum." In an April 2017 meeting with Chattanooga educators, arts supporters, and local business leaders, the importance of art and music education in schools was underscored as essential in order to nurture "creativity and leadership skills."

Post-secondary opportunities to study music in Chattanooga include undergraduate and graduate degrees in Music at the University of Tennessee at Chattanooga (UTC).<sup>229</sup> The Southeast Center for Education in the Arts at UTC also provides future arts educators the opportunity to practice their craft outside of the classroom.<sup>230</sup> Chattanooga State Community College also provides the opportunity to receive an A.F.A. (Associate of Fine Arts) degree in Music, which allows students to subsequently transfer to a four-year university.<sup>231</sup>

## Professional Development

Chattanooga offers a number of ways one can study music outside of the traditional education system. For example, the Chattanooga Symphony and Opera provides regular musical outreach programs to the wider community.<sup>232</sup> A number of private music schools offer music instruction for a fee to the city's residents.<sup>233</sup>

### Music Workspaces

There is no dedicated music workspace, although there is a fine arts (painting and visual arts)

<sup>&</sup>lt;sup>225</sup> Hamilton County Department of Education (2018a)

<sup>&</sup>lt;sup>226</sup> Times Free Press (2018)

<sup>&</sup>lt;sup>227</sup> Hamilton County Department of Education (2018b)

<sup>&</sup>lt;sup>228</sup> Flessner (2017)

<sup>&</sup>lt;sup>229</sup> The University of Tennessee at Chattanooga (2018a)

<sup>&</sup>lt;sup>230</sup> The University of Tennessee at Chattanooga (2018b)

<sup>&</sup>lt;sup>231</sup> Chattanooga State Community College (2018)

<sup>&</sup>lt;sup>232</sup> Chattanooga Symphony & Opera (2018)

<sup>&</sup>lt;sup>233</sup> First Baptist Church Chattanooga (2018); Insane Rhythm Music Lessons (2018); Cadek Conservatory of Music (2018)

workspace with artist studios and event capabilities. 234

## 3.6.6 Music Tourism

#### **Policies**

The Chattanooga Convention & Visitors Bureau appointed an official music marketer, Mary Howard Ade, in 2016. Her role is to ensure the city's tourism website directs visitors to local events and nightlife programmes, whilst also coordinating partnerships between stakeholders to result in increased programming.<sup>235</sup>

There are plans to improve the local music and outdoor scene by turning the city into an entertainment hub, focusing on further developing local music offerings to increase visitors to the area<sup>236</sup>. The aim is to step out from under the spotlight of Nashville and be recognised as a music hub of its own.

#### **Activities**

The Downtown Chattanooga website lists several live music venues, although they are bundled into a greater 'activity' category with escape rooms, karaoke bars and the zoo, and are not shown any particularly priority.

The city's main music festivals are Riverbend, (2018 headliners include Hank Williams, Jr., Flo Rida and Third Eye Blind), 3 Sisters Bluegrass and Jazzanooga. There are also several summer series, including Nightfall and Riverfront Nights, plus live music at weekly offerings such as the Chattanooga Market. A guitar museum, SongBirds, opened in 2017, and details the history of guitars through various decades, guitar styles and musical genres.

Much of their cultural offering stems from the Southside district, although other hubs are cropping up around MLK Boulevard, popular with local students, and the riverfront. While some artists have expressed in the past how difficult it is to find young, attentive audiences

<sup>&</sup>lt;sup>234</sup> Chattanooga WorkSpace (2018)

<sup>&</sup>lt;sup>235</sup> SoundCorps (2018a)

<sup>&</sup>lt;sup>236</sup> Kennedy (2017)

to perform to<sup>237</sup>, the Chattanooga Convention & Visitors Bureau is working to broaden the appeal of the local music scene to both younger audiences and tourists.

2017 saw a renewed campaign by the Chattanooga Tourism Bureau to champion the local music industry as part of a greater campaign to increase tourism. The city looked to grow its own reputation as a hub of music in Tennessee, whose reputation as a historic musical state is led by Nashville and Memphis. The campaign was heightened alongside the 75th anniversary celebrations of the "Chattanooga Choo Choo", the first song ever to receive a "Gold" certification, which was awarded in 1942. The campaign featured a video<sup>238</sup> "Chattanooga, TN: Great American Music", which highlighted the city's cultural offer. To date, the video has about 25,000 views on YouTube.

There are also a few dedicated Spotify playlists, collected under the hashtag #CHAmusic, which are linked on the Chattanooga Convention & Visitors Bureau website, 239 as well as an official Lonely Planet Spotify playlist for Chattanooga.

# 3.6.7 Comparison to Huntsville

Like Huntsville, Chattanooga is led by an independent scene which can often lose artists to nearby Nashville once they reach a certain level. In terms of music strategy, Chattanooga is only slightly ahead of the curb, spurred on by competition with Nashville. There is a dedicated music officer within the Convention & Visitors Bureau, which has actively promoted music within its tourism campaigns. There are also plans to support the local music scene to make the city an appealing alternative to the Music City, however no specificities have been released.

Although there is no music office, Chattanooga does have two entities working on behalf of the industry: a music marketing officer situated within the Convention & Visitors Bureau for tourism, and Soundcorps, an organization which works on industry development and support at a more infrastructural level. Grant opportunities are similar, with few local grants. Those that exist are broader cultural grants, and music businesses/artists must compete.

<sup>&</sup>lt;sup>237</sup> Filbin (2015)

<sup>&</sup>lt;sup>238</sup> Chattanooga Fun (2016)

<sup>&</sup>lt;sup>239</sup> Chattanooga Fun (2018)

Licensing and infrastructure in Chattanooga are only slightly more lenient. Alcohol curfews are set at 3am, an hour later than in Huntsville. Decibel levels are also higher, with up to 80 dB(A) permitted between 11am-11pm. Transportation is more accessible than in Huntsville, but still not ideal, as Chattanooga's buses run until 7pm (an hour later than Huntsville), and there are a few free shuttles in the downtown area.

Although state education curriculum has no music requirement in public schools, Chattanooga does have a few nationally-ranked performing arts schools. Like Huntsville, there are limited educational opportunities for professional development or interests such as music business, engineering, etc.

# 3.7. Best Case Examples From Other Cities Worldwide

# 3.7.1 Governance and Leadership

#### Music Cities Network

Music Cities Network<sup>240</sup> is a public/private network dedicated to improving communication and cooperation, sharing research and knowledge, exploring policy and advocacy, and networking for policy makers, city leaders and all other music city stakeholders. The network is aimed at making cities wealthier, healthier, livable and more international through music. Its current members include the cities of Aarhus, Hamburg and Sydney.

Music Cities Network is a membership-based network, focused on the following four objectives:

- Improving cities and their local music scenes through music policies and collaborative projects
- Building greater networks and creating an actionable agenda for change
- Providing and sharing a one-stop repository of information and research surrounding global music cities activities & policies
- Curating a music player exchange/collaboration (business, artists, cultural institutions and education)

#### Lessons to Take

- This is a resources-built-in network, similar to the alliance between Austin and Toronto, and helps with accountability whilst providing best practice tips and opportunities for exchange.
- A community like this could immediately expand Huntsville's network to Europe and North America.

### London Music Board

The London Music Board<sup>241</sup> was created in response to a need for the development of grassroots venues, and the implementation of recommendations noted in the Mayor of

<sup>&</sup>lt;sup>240</sup> Music Cities Network (2018)

<sup>&</sup>lt;sup>241</sup> Greater London Authority (2018)

London's 2015 Rescue Plan for Grassroots Music Venues. The Board meets 4 times a year and is expected to: support and advize on research and guidance; network; attend events; host roundtables; and champion music as part of a drive for increased tourism in the city. Formed of 21 members, the expert board has a clear strategy and has set goals to work towards in order to benefit the local grassroots music scene.

#### Lesson to Take

 A board is a relatively inexpensive way to amalgamate key players to discuss the challenges and needs of the local music industry. They do not have to meet often, so long as their meetings are effective in fostering communicating inter-industry communication.

# Seattle City of Music Program

A committee of music advisors created a strategy for the city to use to propel Seattle into the forefront of the creative industries by 2020. The strategy and its following programs are all supported by the Seattle Music Commission and produced in partnership with many local public, nonprofit, and independent organizations. The three main initiatives for this program include: City of Musicians, City of Live Music, and City of Music Business.

The City of Musicians seeks to provide music learning opportunities to all sectors of the business economy in order to increase understanding and support for the creative industries. This chapter provides K through 12 music education programs in public schools, community centers, and independent initiatives as well as in local colleges. This branch also offers professional mentorship to musicians who who want to make a living-wage career playing music in Seattle. Finally, this sector also works to provide affordable housing and health care for these local musicians.

Seattle City of Live Music is another branch of the larger program and seeks to offer residents and visitors increased opportunities to experience live performance in a multitude of ways. This branch is working to make Seattle a premier site for performers. They promote music festivals, use unconventional and publicly spaces for live music performances, and encourage music as a means for community building.

Lastly there is the City of Music Business strategies which work to support the creative makers in the city with surrounding effective and sustainable local infrastructure. This branch works to ensure sustainable financial support from individuals, foundations, government and business to create a music economy.

Some of the main programs currently supported by this include City of Music Career Day, The Creative Advantage, Musicians Priority Load Zones, Sea-Tac Airport's Experience the Music Program, and Seattle Music Commission Community Outreach Events.<sup>242</sup>

#### Lessons to Take

- A published, dedicated music strategy sets clear, achievable goals and maintains accountability for reaching them.
- Strategies should focus on all facets of the industry, from education to tourism and business attraction, to ensure the city's work fosters a sustainable and continuously growing music industry for both residents and visitors.

### The Ohio Arts Council

As state budgets become restricted starting with the 2008 financial crisis, the arts are usually one of the first areas to notice the squeeze. As a result a large portion of these SAA's have been rebranding themselves with a focus on realigning their philosophy and programs to stress the public value of the arts as opposed to focusing solely on grants and arts organizations.

For example, the Ohio Arts Council, has undertaken a major restructuring of its grant programs, condensing 24 previous core areas to 5 built around a particular desired outcome: sustainability, innovation and access, arts learning, individual creativity, and building capacity. Previously, grant eligibility was based on organization type; now it's based on the public benefit of the grant. This public benefit is measured by the State of the Arts Report 2000 (SOAR). This three-year project offered one of the most comprehensive portraits of statewide and regional arts participation ever conducted by a state arts agency. It reached more than 8,000 people and organizations through phone surveys, mail questionnaires, informant interviews, and focus groups. The goal was to create a realistic picture of Ohio's arts and culture ecosystem, and the results are being used by the council to make fact-based policy decisions.

or scattle (2010)

<sup>&</sup>lt;sup>242</sup> City of Seattle (2018)

For example, from this survey the Council was able to determine that churches are the top gathering places for many Ohio communities, and so these churches are important venues for arts and cultural events. In response, they funded the Ohio Arts Council's Faith-Based Institution Performing Arts Touring Program, which brings international performing groups to churches and synagogues. This program allows for Ohioans to experience the art of other cultures in a setting where they feel comfortable. According to an evaluation of the 2001 tour, attendance at tour events was close to capacity, and holding the events at faith-based institutions influenced the decision to attend for nearly 50 percent of attendees. 243

In 2017 the Ohio Arts Council gave \$15.71 million dollars to various arts projects. 244

#### Lesson to Take

 The key here is the survey, which provides a more accurate, quantifiable view of the local industry, which then makes any supportive work more effective. Such a census is also a good means of tracking progress and the effects of steps taken by the city. Surveys should be regularly conducted.

## San Francisco Arts Commission (SFAC)

This agency was established in 1932. It is a city agency and all members of the commission are appointed by the mayor. This office oversees many functions that have relevance to the creative industries in the city but also work closely with local government and city planners.

One of its functions is to approve the design of any buildings built by the city. The SFAC oversees the selection of "art enrichment" in the forms of graphics, murals and sculpture for civic buildings and spaces. They also oversee the city-owned cultural centers, and fund arts programs and festivals across the town.

SFAC has an annual grantmaking budget of over \$4 million. The SFAC's Cultural Equity Grants program awards \$1.8 million each year to artists and arts organizations working

<sup>&</sup>lt;sup>243</sup> The Wallace Foundation (2004)

<sup>&</sup>lt;sup>244</sup> Collins and Rich (2016)

within the City and County of San Francisco. They also provide \$2.2 million in non-competitive operating grants to six Cultural Centers and support various community and education programs. Most recent data for the agency reports that SFAC made 131 grants, with an average of \$35,274 to non-profits and \$9,175 to individuals in 2013.<sup>245</sup>

#### Lesson to Take

• It is beneficial to have a single operating body to represent the music industry (for more streamlined communication between sectors), and should be integrated into the city government in some way so as to bridge the gap between industry and policymakers (even if it is few city members on the Board).

# **Artplace**

ArtPlace is a collaboration of 10 leading foundations (Barr Foundation, Bloomberg Philanthropies, M&M Foundation, etc.), federal institutions (NEA, USDA, Department of Transportation, etc.), and six of the US's largest banks (Morgan Stanley, Citi Bank, Chase Bank, etc.) who seek to encourage the development of projects in which art plays an integrated role in community planning and development. Successful creative placemaking projects are not measured by how many new arts centers, galleries, or cultural districts are built. Rather, their success is measured in the ways artists, formal and informal arts spaces, and creative interventions have contributed toward community outcomes.

As of 2018, the collaboration initiated 23 creative placemaking projects in 18 states and one US territory. The grants given by Artplace are highly competitive. In 2017 from 987 applications, 70 finalists were selected. ArtPlace also has a deep commitment to funding in rural America, and almost 52% of 2017's funded projects located in rural communities. Awards typically range from \$50,000-\$500,000.

## Lesson to Take

<sup>&</sup>lt;sup>245</sup> San Francisco Arts Commission (1970)

<sup>&</sup>lt;sup>246</sup> ArtPlace America (2018a)

<sup>&</sup>lt;sup>247</sup> ArtPlace America (2018b)

 ArtPlace acknowledges that music benefits in many ways other than economic turnover, enhancing quality of life and strengthening community ties, and could be a means of obtaining funding support for placemaking spaces such as Lowe Mill.

# World Business Chicago

This group brings business leaders from across sectors to define the long-term vision for the city, as set out in its "Plan for Economic Growth & Jobs." In addition, it offers a range of business advocacy services and collaborations to create jobs, cultivate talent, and put Chicago at the forefront of the global economy. This initiative launched Chicago Made.

Chicago Made is a program that was built off of the realization that creative "makers" are brand ambassadors and raise the city's profile as innovative and a desirable destination for business and tourism. This program has successfully hosted music showcases displaying local talent, and showcased at SXSW. They have also hosted markets, video series, and panels. For example, ChicagoMade Marketplace included 30 Chicago artisans and featured goods from chic clothing and custom jewelry to handmade arts & crafts and music. They are partnered with World Business Chicago, Choose Chicago, City of Chicago, and DCASE. <sup>248</sup>

### Lessons to Take

- Utilizing the city's creative force as a marketing team is a grassroots and authentic means of promoting a place.
- Promotion should be held across all platforms, utilizing any business networks, think tanks, or directly appealing to audiences through expositions.

<sup>&</sup>lt;sup>248</sup> World Business Chicago (2018)

# 3.7.2 Licensing and Regulations

#### Tax breaks to attract music businesses

Oregon has designed itself as a hub for small and medium businesses due to the tax considerations they make. The two major aspects of tax breaks for these businesses are with the Oregon Investment Advantage, and the Oregon New Market Tax Credit. Businesses that hire small numbers of employees are able to almost completely eliminate state business income tax liability for 8 years, allowing them to put money back into their company with the help of the Oregon Investment Advantage. In a bid to get businesses to invest in low-income communities, the Oregon New Market Tax Credit gives a 39% tax credit of the total amount invested across a 7 year period back to the company.

Similarly, there is a label support system in Hamburg.<sup>250</sup> Hamburg has become the first city in Germany to subsidize small, independent music labels. They are delegating €150,000 a year for 4 years to independent music labels, allowing them to put Hamburg on the music-making map and giving companies the chance not only to sign new artists, but also enabling some labels to remain in business.

#### Lesson to Take

• Take the first step: find a means of incentivising businesses to build in Huntsville, either through tax breaks or a startup fund. Once the ball is rolling, Huntsville's reputation as a creative business haven will spread and the network itself will attract businesses, as well.

## Proposed regulation for all ages venues in Brighton, UK (not confirmed)

The city of Brighton<sup>251</sup> in the UK is currently working on developing an all-ages strategy for its music ecosystem with the following measures being considered:

<sup>&</sup>lt;sup>249</sup> Claiborne (n.d.)

<sup>&</sup>lt;sup>250</sup> Schaefer (2009)

<sup>&</sup>lt;sup>251</sup> Information obtained via interview with Brighton Music Office

- 1. Those of drinking age provided with a tamper proof wristband to signify they are able to purchase alcohol.
- 2. Bags searched on entry.
- 3. Alcoholic beverages to be limited to one purchase per person, or two if both consumers of beverage are clearly visible at bar.
- 4. Vigilance from staff with ID'ing and keeping a close eye on who's in the venue and what they are drinking (Brighton has a Challenge 30 policy (ID anyone that looks under 30) in around 50% of pubs.)
- 5. 11pm curfew for all 14+ shows.
- 6. Provide a larger than usual selection of non alcoholic beverages.
- 7. Have a "Safe Space" or point of contact for people to contact if they are feeling unwell or unsafe (this can also work well for adults with learning difficulties and disabled access.)
- 8. Provide grants or funding to venues for the cost of extra security staff.
- 9. One unified plan put in place across all venues so young people and their parents are comfortable and familiar with the process.

#### Lessons to Take

- Opening shows to all ages broadens audience counts and creates a more welcoming environment at events, not to mention breeding an appreciation for live music at a younger age.
- Legalizing and encouraging all-ages shows also makes it easier to regulate aspects of said show as catered to younger audiences, including curfews, alcohol control and access to emergency services.

## 'Festival approach' of the Rembrandtplein, Amsterdam

At the Rembrandtplein, a bar-filled square in central Amsterdam, the mayor's office, together with the police and the hospitality industry at the square, has set up a 3-year pilot project to reduce violence and nightly noise<sup>252</sup>. As part of a series of 'experiments' in the area, facilities on the square have been adapted, new rules for behavior of patrons and appointed civil 'square hosts' have been implemented around the transport hubs in the busy nightlife hub. Ten 'square hosts' walk in couples around the area Friday and Saturday nights to provide information and increase patrons' feeling of safety, in close contact with the Police to stop confrontations before they start. The initiative's success has also to do with

achiburgermeester (m.d.)

<sup>&</sup>lt;sup>252</sup> Nachtburgermeester (n.d.)

the fact that these hosts are not police, thus not perceived as an aggressor by inebriated patrons, according to Amsterdam's Night Mayor Mirik Milan. The City of Amsterdam has also developed an app that allows people to report antisocial behaviour to nearby community officers. <sup>253</sup>

### Lesson to Take

• Utilizing trained civilians or volunteers can not only be more cost-effective than hiring emergency service such as police to patrol public areas, it creates a more welcoming environment for people such as families and tourists.

<sup>&</sup>lt;sup>253</sup> Clift (2016)

# 3.7.3 Education

# Beats By Girlz<sup>254</sup>

Beats by Girlz is a community-focused music technology curriculum designed to empower young women (girls, non-binary gender and/or trans youth aged 8-18) in music technology, namely music production, composition and engineering. The curriculum uses a non-traditional creative approach providing tools, guidance and role-support to empower young women in music technology, and it is available for licensing in schools and communities.

It has been successfully implemented in several cities in the US, developing the interests and ability of participants to pursue career opportunities in music industry technology fields where a female demographic is less represented. Participating educators on the local level connect the students to local and regional showcase opportunities and partnerships, such as music festivals, contests and competitions, and discounts for other educational workshops.

#### Lesson to Take

• Actively providing performance and education opportunities to minority demographics encourages a more diverse and passionate industry in the long-run.

# Creadors en Residència, Barcelona<sup>255</sup>

The public organisations Barcelona Institute of Culture (ICUB) and Barcelona Education Consortium (CEB) have been implementing the programme 'Creadors en Residència' (artists in residence) in public secondary schools of Barcelona every school year since 2009. The project aims to encourage teenage students into taking an active role in the area of arts and culture, linking an artist in residence to teaching curriculum subjects such as literature or music. Participating artists in residence must develop their own creative process/approach to the given subject while working towards creating a final artistic project in collaboration with the pupils. Students take lessons with the artist in residence

<sup>&</sup>lt;sup>254</sup> Beats by Girlz (2018)

<sup>&</sup>lt;sup>255</sup> En Residéncia (2018)

for 2 hours per week, October to May, while the school teacher follows up for an additional hour per week. The artist in residence also manages a blog detailing the processes undertaken in class and provides additional support for the students (e.g. providing lyrics websites after a rapping/rhyming lesson). Students publicly present at the end of the school year their artistic project, which can be a visual arts exhibition, a theatre play, a concert, etc.

'En Residència' caters to students in their 7th - 12th education year, depending on the school, with 15 to 18 pupils per class. Each participant school has an assigned mediator who is responsible for choosing the artist in residence for the school and being the point of contact for any matter related to the programme's implementation. The cost of each residency is EUR 10,000 per school and artist.

## Lesson to Take

• There are many great aspects of a project like this, including the fact that an artist gets to give back to the community, foster the next generation and perhaps even use this as a marketing tool to build younger audiences. The kids get one-on-one training from someone in the industry, catered to their interests and goals.

# 3.7.4 Professional Development

# Music Pool Berlin<sup>256</sup>

Music Pool Berlin is the central point of contact for Berlin-based musicians and music industry professionals. It offers consulting services and training by industry experts, serving as a hub for resources but also networking with other participants in the local music sector. The initiative is a cooperation project run by 2 organisations and receives funding from the City of Berlin and the European Union. Music Pool Berlin provides a free 45-minute orientation consultation for artists and music industry workers to explain basic concepts such as social security management or how to join a collection society.

In addition to this, expert consulting sessions and coaching appointments are available for booking at affordable rates (€10-20 per session), and the organisation develops several workshops during the year for specific topics (e.g. branding, social media strategies, songwriting...). Music Pool Berlin also has an email address to send questions to regarding the music business, and they organise monthly community evenings at different venues in the city to promote their activities.

### Lesson to Take

Making educational and business skills resources affordable and accessible for local
artists is key in ensuring their success down the line. Many artists are DIY,
self-taught musicians who may not understand the music industry beyond creating
sound in their bedrooms, and this gives them the tools they need to protect their
craft as a business.

#### Music Hubs (overview)

**Tileyard Studios** is a thriving creative ecosystem in the exciting King's Cross area of Central London. With over 105,000 sq ft of flexible studio and office facilities, the complex has more than 70 state-of-the-art music studios, as well as more than 100 office spaces that

<sup>&</sup>lt;sup>256</sup> Music Pool Berlin (2018)

provide a home to a wide spectrum of companies predominantly operating in the music, film & television, fashion, and creative tech sectors. With a mix of business startups, small to medium-sized businesses, emerging artists and established talent, Tileyard offers spaces to suit the specific needs of 150 businesses as well as the chance to be part of a community of 850 like-minded creative people<sup>257</sup>.

The Music District<sup>258</sup> in Fort Collins, Colorado is a "dynamic gathering hub, workspace, and creative playground" for the music community. For the novice or pro, it's a place where anyone can develop the art, learn the business, and share skills and passions with musicians and music lovers. Envisioned as a "living laboratory" to continuously evolve and meet the ever-changing needs of the region's (Northern Colorado) music community.

The Music District's organisational structure is composed of past or present working musicians, divided into the following roles:

Director
Community Manager
Business Manager
Communications Manager
Analysis Manager
Technical Manager
Utility Player (5 people)
Entrepreneurship Programs
Higher Education Liaison

### Lesson to Take

• Imagine the creative network of an arts complex such as Lowe Mill, but with an added incubation programme to help guide start-ups and foster growth. That's what a music hub would bring, providing a one-stop shop on the ground for creators, advisors and consumers to interact.

Canada's Emerging Artist Music Mentorship Program<sup>259</sup>

<sup>&</sup>lt;sup>257</sup> Tileyard Studios (2018)

<sup>&</sup>lt;sup>258</sup> The Music District (2018)

<sup>&</sup>lt;sup>259</sup> Canada's Walk of Fame (2018)

The RBC Emerging Musician Program (formerly the Emerging Artist Music Mentorship Program, Supported by RBC) is a yearly program developed by the Canada's Walk of Fame (CWOF) in 2012. The program invites aspiring Canadian musicians, aged 15-35, to submit a video or audio performance for a chance to win a Grand Prize consisting of industry mentorship opportunities, private studio recording time, and a CAD \$20,000 cash prize. In addition to the Grand Prize, four additional winners enjoy a CAD \$6,000 - 4,000 cash prize, a performing opportunity at a CWOF event and music industry mentorship sessions with A&R executives, an established recording artist and an experienced music industry agent or lawyer.

#### Lesson to Take

A programme like this can galvanize young and emerging artists to take their craft to
the next level. This is also an opportunity for Huntsville to work more closely with
the Americana Music Triangle, but offering winners trips to other cities, mentorship
programmes with some of the musicians along the route, or studio time at local
studios. It will build the community between industries in the region whilst
promoting local acts.

# Career Days, Seattle<sup>260</sup>

The City of Music Career Day<sup>261</sup> is an educational program developed by the Seattle Music Commission and produced in partnership with One Reel, Office of Film + Music, Office of Arts & Culture, MoPop, The Vera Project, and KEXP. It provides young people ages 16 - 24 direct access to music industry professionals through networking, experiential learning, engaging workshops, and performances.

The day program consists of a Keynote Conversation, one Breakout Session, the Meet & Eat Lunch Fair and Table Fair, plus a Networking Party and Mentor Sessions to finish out the day. 'Breakout Sessions' in specific areas are held during the Career Day in specific areas such as Technology, D.I.Y., Money, Knowledge, Cross-Disciplinary, and Artist. The sessions are free to attend thanks to partnerships with sponsors and speakers.

<sup>&</sup>lt;sup>260</sup> One Reel (2018a)

<sup>&</sup>lt;sup>261</sup> One Reel (2018b)

The purpose of the program is to expand attendees' ideas of the various career paths available within the Seattle music industry, which is so vibrant in our city and renowned nationwide. Participants are exposed to a wide range of career opportunities in music including performance, management, concert production, arts administration, record label operations, retail, licensing, journalism, broadcasting, and more.

#### Lessons to Take

- This could be part of a greater music industry conference, enticing Nashville/Memphis players to come down to Huntsville and encourage young people to get involved.
- Making Huntsville's young people aware of the different paths in the industry and opportunities available to them can help build a more rounded local industry in the future, capable of supporting every facet of an artist's career and enticing them to choose Huntsville over the bigger cities.

# Synthesizer, Tel Aviv

Synthesizer is an accelerator for musicians built off the traditional business accelerator model. This agency is a non-profit which subsidizes almost all of the selected artists' tuition costs through private donations (selected artists only have to pay \$300 out of pocket). The organization chooses 12 artists and use open community spaces for their workshops and mentor meetings. The program lasts 12 weeks and requires artists to participate fully in that time slot. Synthesizer offers lectures, professional consultations, personal mentors and workshops covering bureaucratic, managerial and artistic aspects.

In return, and as practice for live performance, Synthesizer participants give free public concerts each month. For the program's final production artists perform in two showcases hosted in the Bascula arts center.

The courses offered during this time period include:

- 1. The Musician as a Business
- 2. Defining Your Independent Identity
- 3. Production Fundamentals and Show Strategy
- 4. The Secrets of Booking

- 5. Traditional Media, PR, and Industry Norms
- 6. Digital Presence and Social Media
- 7. Community, Networking and Groundwork
- 8. Legal Rights, Distribution, Royalties, and Synch
- 9. The Big World: International Careers
- 10. Time, Team and Resource Management
- 11. Tips, Ideas and Inspiration
- 12. Live Sessions and Showcase

To be selected, artists must be independent, have recorded materials, and have performed in at least one live show. <sup>262</sup>

#### Lesson to Take

• The criteria for selection and attendance helps ensure the success of the programme and the sustainability of participating artists, while the subsidized tuition affordability makes it accessible to emerging acts. The curriculum is designed to give artists a rounded education and skill set to prepare them as business people as well as creators.

## FReeZA Push Start Battle of the Bands, Government of Victoria, Australia

To highlight local talent diversity, the regional Government of Victoria funds the FReeZA Push Start Battle of the Bands, that awards monetary and in-kind prizes and festival performing slots to finalists. <sup>263</sup> This showcase is open to any style of music, including bands, soloists, hip hop artists, electronic and acoustic acts, and so forth. Young event organisers and promoters also participate through local committees and Youth Councils that host FReeZA Push Start. Whilst this event does not attract large audiences, the performing value for young bands is noted by the participants.

"We've watched over 300 talented artists participate in the competition via their local FReeZA group over the past 12 months and it's really encouraging to see such impressive songwriting and performances from the nine artists who have progressed to the final." - Shane Wickens, Push's Artistic Director

<sup>&</sup>lt;sup>262</sup> Synthesizer (2018)

<sup>&</sup>lt;sup>263</sup> Beat (2016)

#### Lesson to Take

 A Battle of the Bands gives emerging artists performance opportunities while creating an event which the whole community can not only attend, but actively get involved in (through voting). Prizes can be catered to Huntsville scene, from time at local studios to slots at local festivals or even a small tour through the Americana Music Triangle (perhaps subsidizing fuel costs and arranging lodging and participating venues).

# 2112 Chicago<sup>264</sup>

Launched in 2015 and located within the 160,000 sq ft B2B creative industry ecosystem of Fort Knox Studios, 2112 is Chicago's first incubator focused on the development of entrepreneurs and disruption in music, film/video and creative technology. Through community, educational opportunities and access to capital, 2112 develops opportunities for the professional development and acceleration of its members. Its basic membership comprises a \$70/month 'Enrichment Program' that gives access to all educational programing, weekly networking events and 30 minutes of 1-on-1 mentoring with industry professionals. Those wanting to have active incubation and a physical working space in 2112 pay a monthly fee between \$250 for unreserved open workspace to +\$450 for private office space.

Fort Knox Studios is also home to The Hangar, a 7,200-square-foot film and video production space, which naturally brings together film-related businesses and music professionals in 2112<sup>265</sup>. The incubator has also an agreement since 2017 with the DePaul University's Coleman Entrepreneurship Center. All DePaul students and alumni are now able to access a small office and attend business development workshops at the incubator.

#### Lesson to Take

• Incubation hubs don't HAVE to be exclusive to music, and cherry-picking eligible industries can help encourage innovative collaborations. Huntsville's incredible

<sup>&</sup>lt;sup>264</sup> 2112 Incubator Chicago (2018a)

<sup>&</sup>lt;sup>265</sup> 2112 Incubator Chicago (2018b)

engineering and tech community can be integrated into a hub alongside music businesses, fostering a network between the two.

## 3.7.5 Music Tourism

# Quartier des spectacles, Montréal

The Quartier des spectacles is downtown Montreal's primary entertainment and arts district. It boasts over 30 performance venues in an area just over 1km², as well as public spaces for its over 40 events per year. The district was designed for music and cultural events, with several projectors bringing surrounding infrastructure to life, lamp posts designed for rigging, illuminated walkways and several other urban design features. Although originally intended to support the Montreal International Jazz Festival, it now serves other cultural events. During the summer, the area is pedestrian-only.

The district can host 50,000 people in its various spaces, and organizations can apply to hold events via the Quartier des spectacles website, which lists each public space alongside their respective specs. Proposed events must be free to the public and must not act as a sales or promotional platform for commercial entities.<sup>266</sup>

#### Lesson to Take

A dedicated arts and cultural district gives both locals (but particularly tourists) a
clear area to go to catch the best of what a city has to offer. Specialized zoning and
infrastructure makes it easier to regulate one area, catered with arts as a priority.
This, in turn, makes it easier to create a welcoming environment for both
visitors/audiences and event organizers.

# Santiago Week, Santiago de Chile

Santiago Week is an online and printed calendar of all events happening in Santiago de Chile created by PortalDisc, the largest Chilean music distribution platform, with the motto "Every week, Santiago is a big festival".



<sup>&</sup>lt;sup>266</sup> Quartier des spectacles Partnership (2018)

Every Monday, a poster with the 'line-up' of all artists performing across the capital is distributed through partner organizations, the official website of Santiago Week (<a href="https://www.santiagoweek.cl">www.santiagoweek.cl</a>), their social networks and e-mail newsletter.

Artists, promoters and venues can upload directly their events, which are reviewed by the Santiago Week staff and incorporated into the relevant week's poster and program.

#### Lesson to Take

• An event calendar is an easy way to market what's going on to visitors, and the layout of a festival-style poster attracts people's attention. If shared online and around town, it can become a recognizable brand that people look to for ideas on things to do.

# Night Out and Young Promoters Scheme, Wales

Night Out<sup>267</sup> is an Arts Council of Wales (ACW) scheme that helps local organisations to bring professional performances into community buildings at subsidised prices. This scheme 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 centres). Through the scheme small communities can access great art in a familiar, friendly space and artists can enjoy performing in small, informal spaces, with more intimate audiences. Night Out works throughout the year with local, national and international artists and covers a broad spectrum of the performing arts from theatre and circus to music and puppetry.

Community groups (known as Promoters) can choose from a huge range of great professional performers and book them into community or village halls and other non-traditional venues across the country. Working in conjunction with the local authorities of Wales, the Night Out team operates a guarantee against loss for events, where ACW pays the performer fee and the community promoter pays back ticket income made at the door. Usually, about 250-300 companies/performers get booked through the scheme each year

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<sup>&</sup>lt;sup>267</sup> Arts Council of Wales (2018a)

across all the art forms. ACW averages about 580 events a year, so many companies get only a couple of bookings through the scheme, though some can get longer tours.

Additionally, the award winning Young Promoters Scheme works with groups of children and young people taking them through the process of becoming the promoters for an event in their community.<sup>268</sup>

#### Lesson to Take

• A program like this gets the community involved, brings the economic and social benefit of the music industry to smaller centres and venues outside of the downtown area, can bring to life unused and underutilized spaces, and gives young people practice at organizing and promoting events. Because this is such a grassroots movement, it's an opportunity to let audiences decide the facets of the show as well, from what type of venue they'd like to see a show in to what type of show they'd like to see.

#### Detour

Detour is one of Colorado Music Strategy's projects which joins musicians with local communities across Colorado for live performances, workshops, field recordings, and creative education, and community celebrations. The basic idea is to move away from major touring towards a smaller local model that leaves a more lasting impression on the community. The program is state-funded by Colorado Creative Industries. This organization contributed \$11,000 to launch the initiative and gathered an additional \$20,000 from show revenues and local area support. The project is spearheaded by The Music District in Fort Collins.

During its first year the project The Flobots, the first band to participate, took three weeks and visited fifteen towns across Colorado. The band played at shows ranging from fundraisers to street parties, hosted workshops at museums and hosted a powwow with the Ute tribe.

For the second year the initiative is creating the 'Tiny Detour' featuring local folk-rock band Chimney Choir, musician and animator Laura Goldhamer, and Davey B. Gravey's Tiny

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<sup>&</sup>lt;sup>268</sup> Arts Council of Wales (2018b)

Cinema. The second Detour covered Buena Vista, Carbondale, and Colorado Springs and focused on "tiny" homes and sustainability.

The third is built on a partnership between Colorado and Wyoming, and will cover northern Colorado and southern Wyoming and the theme will be determined by the bands and selected communities. <sup>269</sup>

#### Lesson to Take

 Building the regional music network is very important, and Huntsville is in a unique location with access to big industry players such as Nashville and smaller, but still historically significant locales such as Muscle Shoals. A local touring circuit is a great way to tap into connections along the Americana Music Triangle.

# Uncommon People<sup>270</sup>

The project was created by the University of Sheffield (UK) and Sensoria Festival to launch a new innovative map of Sheffield's musical heritage.

Uncommon People is an online celebration of the great wealth of musical talent in Sheffield. It is a kind of 'family tree' that is regularly updated in an ongoing attempt to capture the sheer breadth and depth of musical activity that goes on in the steel city, and always has. The website offers the possibility to explore the city's rich musical heritage and discover its thriving current scene, as well as invites users to contribute with stories, anecdotes, footage, photos and music clips. It has a map of locations and venues, a timeline and a family tree, and the ultimate goal of the project is to connect the city streets with the sites where music was physically made, recorded and played. The presence of the map gives potential tourists useful material to build a customized music tour according to their interests and is therefore very relevant in terms of music tourism.

### Lesson to Take

<sup>&</sup>lt;sup>269</sup> State of Colorado (2018)

<sup>&</sup>lt;sup>270</sup> Uncommon People (2018)

 Maps are always useful in giving tourists directions (both practically and in terms of things to do), but interactive maps give a whole new depth to self-guided tours of a city, and the ability for locals to contribute gives it a really authentic and unique perspective that many tourists are looking for these days.

### Leeds Late Night

Organized by the Leeds City Council (UK), Light Night has been run annually for the last 13 years. Inspired by the Nuit Blanche, this event features a festival of light projections, exhibitions, installations, film, dance, music, theatre and street performances across several venues in the city centre. This festival receives funding from the Arts Council, Visit Leeds, and the Leeds Business Improvement District. These groups help provide the grants to the groups who wish to participate in the event. The city covers transportation, promotion, health and safety, and signposting.

The festival is a collection of independently organised events, arranged by charities, community groups and others which are featured within the 10 festival zones throughout the city. Some events include a string quartet playing on the top of the Town Hall clock tower, and a 'Treasure Hunt' from the Institute for Crazy Dancing.

Annually the festival attracts 70,000+ attendees including locals and tourists. The festival opens up the city centre to a diverse range of people, including children, who would usually not feel welcome in the evening. It attracts visitors from outside the region and increases Leeds' profile as a vibrant, cultural city.<sup>271</sup>

#### Lesson to Take

• The night time does not have to exclude children, families, or older demographics. Creating an event which promotes the city's offering at a later hour can introduce people to a plethora of opportunities. The more demographics come out at night, the more welcome everyone will feel.

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<sup>&</sup>lt;sup>271</sup> Leeds City Council (2018)

# 3.7.6 Funding

# Musikstadtfonds Hamburg - funding beyond Elbphilharmonie

The Elbphilharmonie represents a prestigious project for the city of Hamburg and its music infrastructure. In 2016, the Hamburg Senate and Bürgschaft dedicated €500,000 per year to the independent scene to strengthen the entire music scene from the bottom up.

An objective of the fund is to support artistically and programmatically valuable and innovative concepts that give Hamburg's music scene new impulses, strengthen the profile of certain genres and instigate new collaborations. Musicians are supported to develop and present new work to the public as part of concerts, concert series or small festivals (CD productions etc. are not covered as part of this fund). Other objectives include the internationalisation of Hamburg as a music city, accessibility to music shows and music offering tailored to youth and children.

In addition to the objectives, decisions are based notably on the following criteria:

- Complement the cultural offer and the importance for the music life of the city
- Under consideration of aspects of music education
- Originality of the work; a.o. neglected composers, premieres, readaptation, rarely played works
- Qualification of applicants
- Emphasis on Hamburg specific developments and infrastractures

Applications are evaluated by the Office for Culture and Media based on recommendations by a jury that includes representatives from classical music, new/contemporary music, pop and jazz. There is one application round a year for the year ahead. Out of 122 applications, 38 projects were recommended for 2018, where funding was between €5,000 and €50,000. Genres of funded projects range from medieval to jazz music, from solo artists to agencies and music associations.

6 months after the project, applicants need to submit a project report and a report on the expenditure of funds, including self and external (press) assessment, the accomplishment of goals and public acceptance. For perennial (up to 3 years) funding over €50,000 the Office for Culture and Media reserves the right to sign an objective and performance agreement.

### Lesson to Take

• This fund recognizes the need for niche projects and under-represented genres to create a rounded and diverse industry. Ensuring the projects have community impact and a dedicated artists/businesses behind them helps, in turn, ensure that the funds

aren't wasted and the projects are sustainable. Funding coordinators may also choose projects which help assist the city in reaching some of its strategic goals (perhaps boosting tourism or youth involvement schemes).

# Funding of Arts & Culture through tax income

In 2015 San Francisco enacted a 8% hotel tax, 2.9% of which is allocated to the city's Arts Commission. In 2016 over \$10m of revenue was distributed to arts and cultural organisations.

Berlin developed a similar measure in 2014. Its 'City Tax' amounts to 5% of hotel room prices and is used as a multi-sector fund for the arts. Projects from both individuals and institutions that correspond to Berlin's own self image as an "open, creative, history-conscious metropolis" are open to apply and €1.34m is distributed each year.<sup>272</sup>

#### Lesson to Take

 Taxing other industries with regular activity is a great means of generating money for under-funded industries, especially since state and federal budget allocation cannot be determined by Huntsville.

# Affordable Housing for Artists

# North America (Private Approach to Aid)

Montreal - Cercle Carré is a collective housing center that is composed of 60+ diverse artists and creative workers, 49 affordable housing units, and combines living space with creative space. This project was inaugurated in 2010 with the support of Technical Research Groups (TSGs). The collective are responsible for complete management of the cooperative, and operate democratically in all decisions which affect the operations of the unit. The housing is available to all varieties of artists whether Canadian natives or not. The only qualifications for application required are desire to contribute to the cooperative, to

<sup>&</sup>lt;sup>272</sup> Berlin Senate Department for Culture and Europe (2018)

be a full-time artist or cultural worker, and 75% of residents must earn less than \$ 25,000 per year. 273

Indianapolis - Artist and Public Life Residency (APLR) is a long-term, affordable and community-invested artist home ownership program. The houses were vacant prior to Big Car Collaborative, Riley Area Development, and INHP coming in which ensured no residents were displaced. The artists who participate in this housing project are those who wish to actively improve and give back to the surrounding community in the various ways including, opening their homes for public engagement such as during the monthly art walk, allocate 16+ hours per month to work with the public in the community. Artists are selected by a panel of experts on "community-focused art", and current residents. Those selected must commit to building the community around them via art as this maintains their housing as affordable long-term.<sup>274</sup>

Brooklyn - The Schermerhorn<sup>275</sup> is a development created in 2008 as a partnership between the nonprofit organisation Breaking Ground and The Actors Fund for both the formerly homeless and for lovers of the arts. In addition to providing 216 units of supportive housing, the building is home to the Brooklyn Ballet's performance studio and a state-of-the-art black box theater. With a low-income tenant population dominated by people working in the performing arts, such as actors, dancers, singers and filmmakers, the building helps to ensure that the creative work of local artists will continue to enrich the city. Units are for households earning under 60% of the area's median income, and half are reserved for the homeless or people with special needs.

# North America (Private/Public Approach to Aid)

Various Locations - Artspace was founded in 1979 and since then has worked to address the various needs for artists in communities around the US. The initiative's first projects were live/work spaces in Saint Paul but have since grown to become international. All of their development projects typically involve the adaptive reuse of older buildings but occasionally mean building a new construction. So far they are responsible for 35 major projects. The funding for these projects come from public funding sources and private sector funding such as bank financing, and individual and community philanthropic support. Anyone can live in an Artspace development, but preference is given to those who participate in the arts. The rent for these units is determined by a formula based on the

<sup>&</sup>lt;sup>273</sup> Circle Square (2018)

<sup>&</sup>lt;sup>274</sup> Big Car (2018)

<sup>&</sup>lt;sup>275</sup> Breaking Ground (2018)

local AMI, the degree of affordability of any given unit, the number of bedrooms in the unit, and the number of people in the household. This varies by community, but ultimately according to their sustainability model, Artspace buildings remain affordable in perpetuity.

# Europe (Public Approach to Aid)

**Berlin** - Subsidy programmes of the Federal State of Berlin benefit workers in the fine arts via rent-control, rent reduction, and occasionally housing benefits. The criteria for application require an individual to have a professional status and "an urgent work-related and social need". Preference is given to artists most affected by modernisation measures and applicants with a WBS. The selection process for these units is determined by the studio committee. This committee is nine members with voting power and nine representatives.<sup>277</sup>

## Lesson to Take

• Rent is one of the biggest challenges for artists, either by being slowly priced out of a city, or having to work a day job to pay their bills, which detracts time that could be spent perfecting their art. Providing housing that is not only subsidised/affordable but can also give access to resources such as studio space or a creative residential network is invaluable to artists. This gives local artists the freedom to stay in town and can attract other artists to choose Huntsville over nearby cities such as Nashville due to its affordability.

# Independent label funding by Office of Culture and Media, City of Hamburg<sup>278</sup>

Since 2010, the city of Hamburg funds independent labels, in an effort to recognize the work of many small, independent music labels. The programme, which was developed in close coordination with the local music industry, aims to preserve and develop jobs, support the development of musicians and increase the attractiveness of Hamburg as a music city. One specificity of the funding is that 50% of the project costs must be spent on businesses based in Hamburg.

<sup>&</sup>lt;sup>276</sup> Artspace (2018)

<sup>&</sup>lt;sup>277</sup> Berlin Senate Department of Culture (2018)

<sup>&</sup>lt;sup>278</sup> City of Hamburg (2018)

# Funding details:

- €3.000 10.000, 50% own contribution
- Music releases: production costs (e.g. recording, mixing, mastering) or marketing/promotion (e.g. artwork/design, photos/video, print/radio/TV/flyer), reasonable personnel costs, labels can submit more than one project.
- 7-person jury consisting of representatives from distribution, media, labels and live sector
- Two funding calls a year. There is flexibility, if there is demand.
- Applications are rated based on overall concept, economic plausibility, significance for artist development and music city Hamburg, expertise and background of applicant and employment effects (direct/indirect).
- Labels need to have released at least two albums, have a distribution network, show the ability of appropriately using public funding and the project must not have started.

The funding programme has created substantial support for emerging musicians and the local music economy. The German independent label association identified the funding tool as a central wish.

#### Lesson to Take

Any sort of stipulated funding is beneficial to growing the local music industry at a
grassroots level, which lays the foundation for all other activity. Requirements such
as cost distribution keeps the money local and helps out local businesses, as well,
while the presence of such a scheme can help attract labels to build in Huntsville or
encourage locals to start their own labels.

# 5. Survey Analysis

# 5.1 Huntsville's Music Audience

Huntsville's music audience is comprised of 4 categories: artists, professionals, companies and audience members. 250 artists answered the survey, predominantly male (77%). Most identified as singer/musician/songwriters, with 5% identifying as a producer. The most-represented professional roles are venue owner (10, when combined with venues that answered as companies), sound engineer (5) and music broadcaster/radio (4). Although most audience categories were split about halfway between genders, 77% of the artists identify as male. Music industry professionals have the youngest average age (43), while music company owners have the highest (50). Although music education is common across all categories, with at least 50% of respondents saying they'd received it, artists and music company owners received the most (91% and 83%, respectively). Music business education, however, was much lower, with only 57% of artists, 76% of music company owners and 65% of music industry professionals having received it.

730 music fans answered the survey, with an average age of 42. 84.9% of these respondents are white. 50% of music fans prefer to stream content, while 17% enjoy digital downloads and 15% listen to the radio. Music company owners and music industry professionals regularly attend live music events, even more so than music fans.

Among all these audience categories, Huntsville's quality of talent, variety of genres and affordable living opportunities consistently held the highest rank across a range of music industry desires.

# 5.2 General survey conclusions

Live music plays an important role for Huntsville citizens, as almost 1 in 3 say they attend concerts in town at least a couple of times per month. Moreover, the local and emerging scene enjoys hearty support, as only 5% of the respondents claimed not to attend events promoting this kind of artist. At the same time, of the 13 music venues who partook in the survey, only 3 said they rely on ticketed shows. While this can mean that musicians get exposed to wider audiences, it also leads to the practice of venue patrons getting used to not paying for music, as well as music and live entertainment being perceived as something given, or background noise, rather than as a central element of the venue's offering. This was also a

major concern and take away from our roundtable sessions with local music stakeholders back in June 2018.

Asked to rate the assets within the local music ecosystem, most music fans agree on the high value of the existing sense of community and local pride. The critical challenges (based on both rating and relevance), on the other hand, have to do mostly with the city not having a strong reputation as a music place, together with a noticeable lack of variety in the music events on offer and a lack of diversity in the existing music scene. The challenges of diversity in both the music offering and the existing music places were among the key issues mentioned during our stakeholder interviews and roundtables in June as well.

In terms of audience composition, concert and festival-goers are mainly from Huntsville or surrounding towns/cities in Alabama, with only one venue being aware of the presence of international customers. There is also, however, a notable tendency for Huntsvillians to act as music tourists to nearby towns, most notably Birmingham, Nashville, Atlanta and a significant audience for music festivals in nearby states. This is especially true when it comes to seeing international touring acts. Driven by the lack of genre diversity and overall music offer - backed by the qualitative comments at the end of the survey - this might indicate that the local music ecosystem is losing significant revenues from outbound music tourism.

Local media, and radio especially are not involved enough in promoting Huntsville's music offering - while radio is the fourth most popular medium for Huntsvillians to learn about what's on, it remains relatively underutilized by musicians and music businesses - just below ¼ of them are using local radio to raise awareness about their activities.

According to those respondents working within the music industry, both formal and informal training in the music business is still not adequate, or sufficiently promoted, and therefore its improvement represents a challenge, as well as a big opportunity. As a result, about 33% of artists and 36% of professionals are self-trained in both fields.

Music businesses' overall financial status appears healthy, as about 73% of respondents either noted no change or an increase in their revenue streams, and over 80% are expecting some increase or significant increase in the upcoming 12 months.

The overwhelming majority of local artists (91%) report having at least one additional job as a source of income, with jobs outside the music industry being the most common (75% have one). In comparison, the 2015 Austin Music Census found out that 56% of local musicians keep

part or full-time jobs outside the music industry<sup>279</sup>. Supplementary industry jobs are less common, with some artists teaching music (15%), working in a music venue (6%) or working in an organisation (6%), among other roles. In May 2018 local media portrayed the variety of 'day jobs' of local musicians, highlighting a few Huntsville examples as well - physicists, teachers, designers, even correctional facility officers<sup>280</sup>.

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<sup>&</sup>lt;sup>279</sup> Sisson (2017)

<sup>&</sup>lt;sup>280</sup> Wake (2018)

# 6. Economic Impact Analysis

# 6.1 Economic Impact Methodology

The economic impact analysis provides a reliable measure of the economic importance of the music ecosystem in the local economy on three different scales: direct, indirect and induced impacts. The variables evaluated under this frame are: output, gross value added, employment and wages or workers compensation.

In order to delimit the economic activities associated with the core of the musical ecosystem, the Classification of Economic Activities of the North American Industrial Code (NAICS) is used at the most detailed level of aggregation (see list of codes and descriptions in Annex x). It is necessary to highlight that not only the activities strictly related to the creative and artistic segments of the music sector are taken into account, but also those that have to do with intermediation and management within the ecosystem. In this sense, the music ecosystem includes activities such as music recording and music publishing activities, radio broadcasting, musical instruments retail and manufacturing, operation of music venues, music performers and artists, music education, etc.

## **Data Sources**

Five main data sources have been used to calculate the economic impact analysis in the city of Huntsville: (1) The County Business Patterns Survey 2016 of the United States Census Bureau; (2) BEA Regional Economic Accounts; (3) Regional Input-Output Modeling System RIMS II; (4) The American Community Survey of the 2016 United States Census Bureau and (5) the primary data obtained by Sound Diplomacy's survey and mapping system of the music sector agents, the results of which were used as a complementary source of verification.

- County Business Patterns Survey 2016: This source provides data on the number of
  establishments according to the level of employees and its economic activity (NAICS)
  at a ZIP code level. This information allows us to estimate the total number of
  employees according to NAICS up to 6 digits.
- **BEA Regional Economic Accounts GDP by State 2016:** This source provides GDP data according to economic activity at a state level. It is possible to use this data as an alternative and control source of the County Business Patterns survey.
- Regional Input-Output Modeling System RIMS II: The Regional Input-Output Modeling System (RIMS II) provides both Type I and Type II regional input-output multipliers to

estimate the indirect and induced economic impact of the NAICS economic activities at a city level. Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the music ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by employees of the music ecosystem.

- The American Community Survey: The American Community Survey (ACS) is an ongoing survey that provides vital information on a yearly basis about the United States and its people. The survey gives us information about the occupations and earnings of people living in the country.
- Sound Diplomacy primary data: This data, collected through the sectoral survey and
  the mapping of agents, enables us to identify missing data and data that does not
  necessarily correspond to the music ecosystem but that was found in the official
  databases.

# Types of impact and calculation process

# Direct economic impact

The direct impact is defined as the economic value of the activities related to the core of the music ecosystem. Its results are the basis for calculating the indirect and induced impact. Its calculation is made by adding the output, GVA, employment and wages of each of the selected economic activities by NAICS code.

#### Indirect and induced economic impact

The indirect economic impact is defined as the changes in the values of the output, GVA, employees and wages caused by the agents of the music ecosystem in its relative supply chain. In other words, is the economic value that involves all other economic activities as a result of its relations with the music industry at a local level. On the other hand, the induced economic impact is defined as the economic value (output, GVA, and employment) derived from the spending of the wages and incomes produced directly or indirectly by the core of the music ecosystem in the city.

For the indirect impact calculation, the Type I multipliers according to NAICS economic activity are used. Likewise, Type II multipliers are used to identify the induced impact. There is a multiplier for each of the outcomes studied (output, GVA, employment, and wages). In

this sense, the effect obtained from each one of them depends on the magnitude of its multiplier.

# 6.2 Huntsville's Music Economic Impact

Huntsville's music ecosystem was responsible for generating a total output of \$139 million, which represented 0.6% of the total output of the city, and a Value Added (GVA) of \$106 million to the local economy in 2016. The total number of jobs generated and supported by the music sector in the city was 1,471, which accounted for 1.7% of employment in the city. These people's earnings totaled \$43 million.

## Direct impact

The direct impact reflects the economic value of the core of the music ecosystem within the local economy using four standard economic variables: output, GVA, employment and wages.

The businesses forming part of the music ecosystem produced a direct output of \$99 million and an estimated GVA of \$60 million. It is responsible for 986 direct jobs. According to the calculations, it is expected that the direct output derived from the music ecosystem will grow by 13.72% between 2016 and the end of 2019, reaching \$112 million.

The economic activities related to the artistic segment of the music ecosystem represented<sup>281</sup> around a quarter (\$25.6 million) of the direct output of the music sector, in turn, the creation of music represented the 0.1% (\$92,702), while professional and support activities comprised almost three quarters (\$73.2 million). Keeping consistent with the previous figure, it was found that, of the total direct employment created by the music ecosystem, 71.3% belong to the support and professional segment and the industry, while 28.7% are artists, musicians and creators.

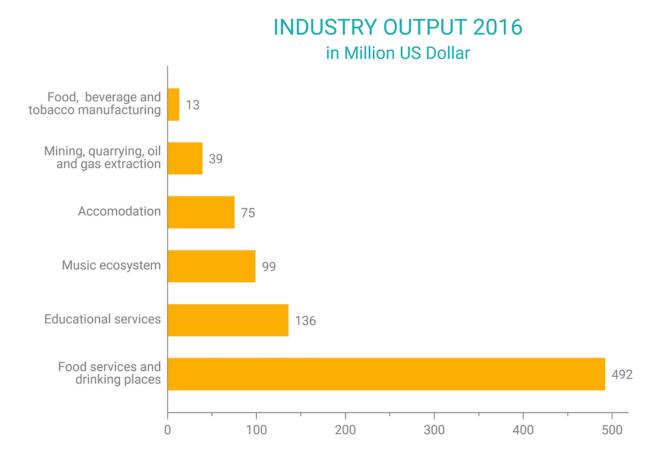
To put this in perspective, the music ecosystem's direct output in 2016 (\$99 million)

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<sup>&</sup>lt;sup>281</sup> Artistic segment of the music ecosystem: According to the NAICS 2017 this activity comprises (1) groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions) and (2) independent (i.e., freelance) artists primarily engaged in providing live musical entertainment. Musical groups and artists may perform in front of a live audience or in a studio, and may or may not operate their own facilities for staging their shows and music creation.

exceeded that of industries such as "Food, beverage and tobacco products manufacturing" (\$13.2 million for the same year) and "Accommodation" (\$75.3 million), but remained far behind "Food and drink services" (\$492 million).

Figure 1 - Huntsville Industry Output 2016



In terms of wages, the annual average income of music ecosystem workers reached \$46,257 in 2016, which was below the average salary of the city (\$58,238). Besides, according to the American Community Survey 2016 the average salary of musicians and performers in Huntsville is lower than the average salary of the whole music ecosystem (\$44,330). This figure contrasts with other occupations of the sector, for instance, sound and broadcasting technicians earned 13.4% more than the average earnings of the music ecosystem and 17% more on average than musicians and artists. In addition, it was estimated that male musicians and performers earn 34.5% more than women, while the gender wage gap of "Professionals"

and supporting" reaches 24.1% (figure 2).

Likewise, the analysis found that professionals within the music ecosystem who identify as 'white' have, on average, higher incomes than other ethnic communities in the city. For instance, the average annual wage of African Americans is 3.85% lower, while Asians and Native American/Indians receive 5.85% and 22.55% less in earnings, respectively<sup>282</sup> (Figure 3).

Figure 2 - Huntsville Music Ecosystem Annual Average Wages by Sex and Occupation

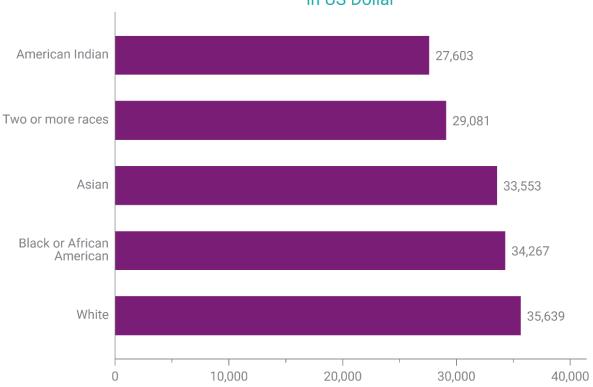


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<sup>&</sup>lt;sup>282</sup> Data source: American Community Survey 2016, American Census Bureau.

Figure 3 - Huntsville Music Ecosystem Annual Average Wages by Race

# ANNUAL AVERAGE WAGES BY RACE 2016 in US Dollar

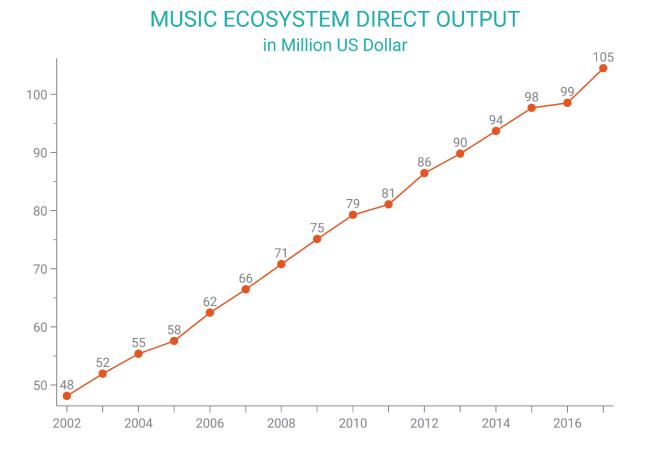


On a positive note, there was a 104.79% increase in the sector's direct output between 2002 and 2016<sup>283</sup> (figure 4 below). This figure contrasts with the direct output of Huntsville, which grew only by 75.8%<sup>284</sup>. It also contrasts with the overall growth figure of the global recorded music industry revenue, which according to the IFPI's Global Music Report 2018 decreased by 23% during the same period of time.

<sup>&</sup>lt;sup>283</sup> The values of the time series 2002-2016 were estimated using the output growth data of the large industries related to each NAICS activity of the music ecosystem, available at Bureau of Economic Analysis for the city of Huntsville.

<sup>&</sup>lt;sup>284</sup> Data source: Bureau of Economic Analysis

Figure 4 - Huntsville Music Ecosystem Direct Output (2002 - 2016)



## Indirect impact

The indirect economic impact is calculated by looking at the changes in the values of output, employment, and compensation driven by suppliers of the music ecosystem. To calculate it, it is necessary to include the measurement of economic exchanges with suppliers that do not necessarily belong to the music ecosystem, such as advertising, video production, and even legal services, communication and transportation.

The analysis, which was conducted using BEA's RIMS II multipliers, shows that in 2016, the indirect economic impact of the music ecosystem in Huntsville reached an output of \$21 million, while the sum of the indirect earnings (compensation) reached \$8 million. At the

same time, it was estimated that 299 full time jobs were indirectly supported by the sector.

### Induced impact

The induced economic impact is the economic value (output, compensation and employment) derived by "the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect"<sup>285</sup>. In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the music ecosystem in Huntsville. This includes, for example, the money spent by music ecosystem employees on food, entertainment, transportation, etc.

The induced output of the music ecosystem in the city reached \$20 million in 2016, supporting 186 jobs, whose compensation reached \$6 million during the same year.

### Total music economic impact

The table below summarizes the total economic impact of the Huntsville music ecosystem, also detailed in figures 5 (Music Ecosystem Economic Impact) and 6 (Music Ecosystem Employment Impact) below.

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (IN \$ MILLION)	EARNINGS OR COMPENSATION (IN \$ MILLION)
Direct	986	99	29
Indirect	299	21	8
Induced	186	20	6
Total Impact	1,471	139	43

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<sup>&</sup>lt;sup>285</sup> RIMS II: An essential tool for regional developers and planners, page 53.

Figure 5 - Huntsville Music Ecosystem Economic Impact (2016)

# **ECONOMIC IMPACT EMPLOYMENT IMPACT** Number of Jobs in Million US Dollar 150 1.500 186 100 1,000 Induced Indirect Direct 50 500 n Output Compensation **Employment**

## **MUSIC ECOSYSTEM 2016**

### Comparative analysis

A variable that allows comparing the development of the music ecosystem in different areas is the contribution of music employment to the local economy, this variable is represented in Figure 6 by the red bar for cities and regions, that also have music economic impact reports.

<sup>286</sup> In the case of Huntsville, the music sector generates 1.66% of the area's employment, which exceeds the contribution of music to the employment at the national level (1.3%). Nevertheless, it is still far below places with greater tradition in the music industry, such as

<sup>&</sup>lt;sup>286</sup> The figures in the graph come from different sources that used different methodologies: TXP, Inc. (2016); Asheville-Buncombe County (2016); Mayor's Office of Media and Entertainment (2017); RIAA (2018) and Musicians' Association of Seattle and Brown (2015). Furthermore, their measurements do not correspond to the same year, but they could be a point of reference for comparing the dimension of the music sector in the different locations.

Austin or Asheville, whose participation were 2.55% and 2.74% of the contribution to the local employment.

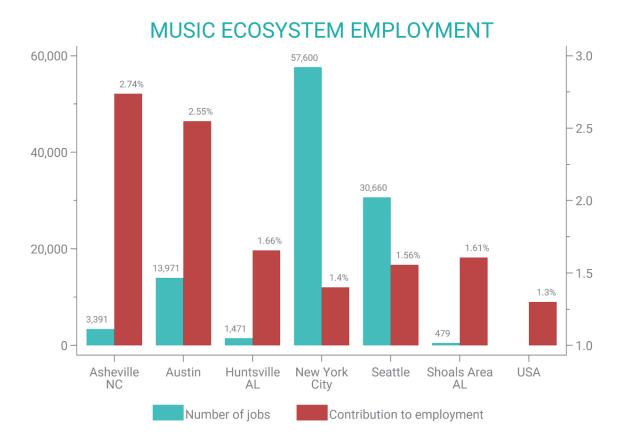


Figure 6 - Music Ecosystem Employment - Comparison

Furthermore, making use of the same reports, it was possible to calculate the music output per capita in each location, this figure is calculated by dividing the output of the music sector by the total number of residents in the city or region.

The music output per capita allows us to identify the level of industrial development of the sector since it represents the economic resources generated according to the size of the city or region. The music output per capita of the United States is \$444, while in Huntsville this figure reaches \$736. In the case of cities such as Austin and New York, which have high flows of music tourism and strongly consolidated industries this figure is \$1,899 and \$1,604 respectively.

Figure 7 - Music Ecosystem Output per Capita - Comparison

# MUSIC ECOSYSTEM OUTPUT PER CAPITA in US Dollar



# 7. Music Asset mapping overview

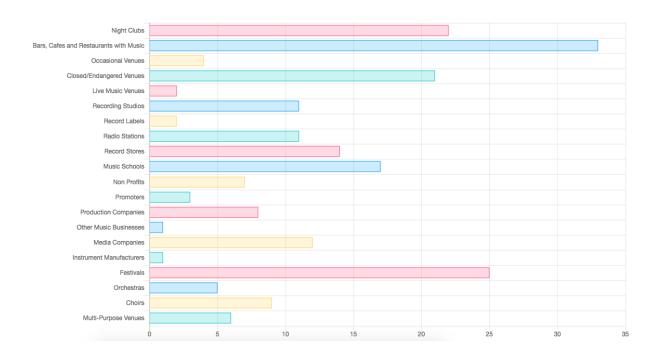


Figure 8 - Music Assets in Huntsville

Our extended mapping of Huntsville's music assets has identified the following:

- 33 bars, pubs and restaurants with live music
- 22 night clubs
- 6 multi-purpose venues
- 4 occasional venues (open-air stages)
- 2 live music focus venues

Huntsville's diverse live music venues are not agglomerated all in one location - although downtown and the established entertainment districts host the majority, and both the live music-focus venues, there is a number of bars and restaurants with live music programming, as well as occasional venues - art and open-air stages, dispersed around North, South and West Huntsville too.

Less than half of the venues are hosting ticketed events - something identified in the survey analysis and throughout our qualitative research as a 'double edged sword'. While it does give musicians a stage and exposure to local audiences, it also deprives artists of a vital source of income and 'spoils' music fans not to pay for music.

Huntsville has several venues with a broad capacity spectrum, as well as 27 festivals with a music focus or some kind of music programming. Huntsville's music festival calendar includes events running April-November. Half of the identified festivals are ticketed.

- 8 concert & event producers
- 2 booking and promoting agencies
- 2 record labels
- 1 music management business
- 11 recording studios
- 14 music record & equipment stores
- 5 co-working spaces
- 17 music schools
- 9 choirs (not including church choirs)
- 5 orchestras (not including church bands)
- 12 online media companies (music & lifestyle blogs, podcasts) operating in Huntsville, albeit not all of them based in town
- 11 radio stations
- 6 music non-profits

Evident in the survey results as well, Huntsville music business professionals carry multiple hats and play various roles within the music ecosystem. Many of the recording studios, for example, are also rehearsal spaces, music record and equipment stores or offer music lessons.

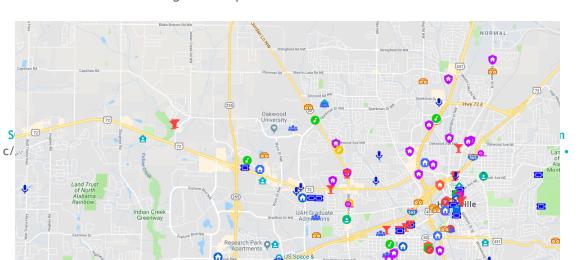


Figure 9- Map of Huntsville's music assets

Figure 10- Huntsville music venues and festivals

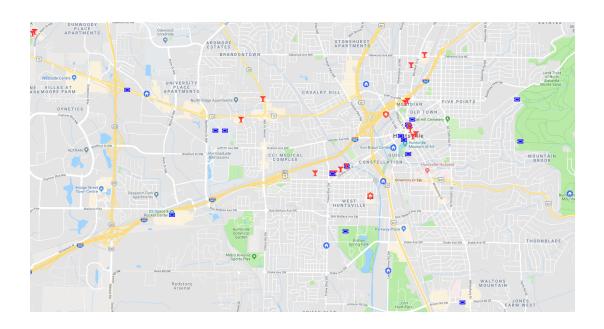
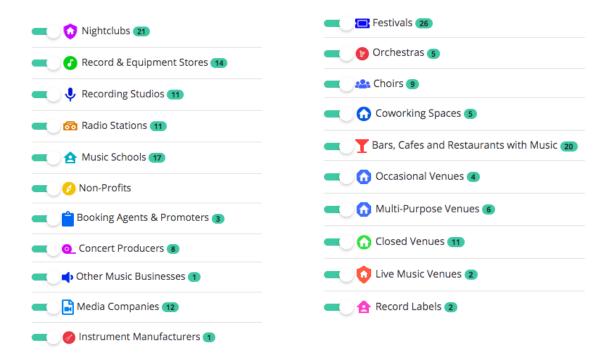


Figure 11 - Map Legend



In addition, we've also mapped over 20 music venues who have closed over the past 30 years. Those include live music focus venues, as well as nightclubs, bars & restaurants with live music programming.

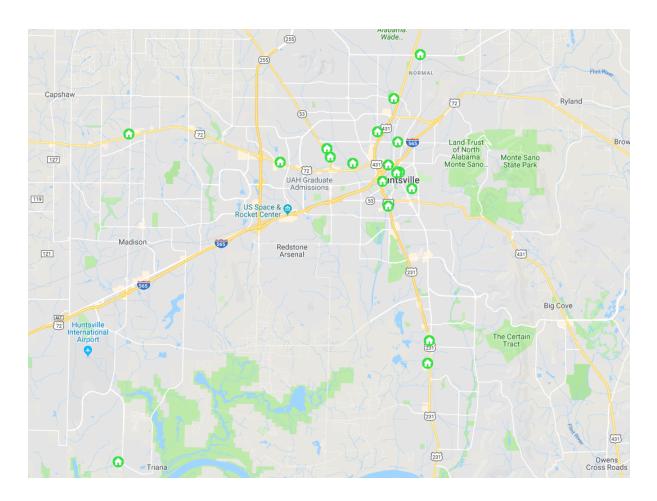


Figure 12 - Closed venues in Huntsville (1980-2018)

We've also identified 14 churches in the Huntsville/ Madison area with dedicated music ministries and/ or music programmes:

- Asbury Church, Madison has multi-age instrumental, as well as dedicated choir groups for kids, student and adults.
- Covenant Presbyterian Church hosts 5 different choir groups, including children's choir.
- Faith Presbyterian Church has a choir.
- First Baptist Church offers a number of choir and instrument groups for all ages, in addition to individual and group training, music library and special events including music festivals and children's music summer camps.
- First Christian Church offers a number of choir and instrumental groups, as well as hosts special music performances such as christmas and holiday concerts.
- Grace United Methodist Church offers various choir opportunities, but also has its own music and drama group for children (1st-8th grade) who perform a musical twice a year.
- Messiah Lutheran Church, Madison has various choir groups, offers music instrument training for children, as well as hosts classical music performances on a regular basis.
- Mount Zion Baptist Church has 4 choral groups (incl. children's), 3 instrumental and 2 dedicated music bands, incl. a student worship band.
- Sherwood Baptist Church provides musical opportunities for all ages, incl. Pre-school, children's, adult, southern gospel and hosts special holiday music shows.
- Trinity United Methodist Church hosts events (used by Huntsville Chamber Music Guild), and offers music and arts training to children via its Trinity Explorers in Arts and Music programme.
- Union Chapel MB Church has 7 different choir groups, inc. children & youth choirs, as well as a special production choir.
- Unitarian Universalist Church of Huntsville has a choir.
- Weatherly Heights Baptist Church has a number of choirs (incl. children's), as well as music instrumental groups.
- Whitesburg Baptist Church has an adult choir & orchestra, contemporary band, student choir and children's music group.

## 8. Recommendations

## 8.1 Establish a Huntsville Music Office

Reinforce positions within City of Huntsville, Economic Development Department to support the development of the music sector

Initiator: City of Huntsville, Economic Development Department

**Background:** Huntsville, historically known as the Rocket City, is making the move to become more music-centric. This is led by developments such as the Lowe Mill ARTS & Entertainment Complex and the MidCity Development, which will be home to a 8,500-capacity amphitheatre, as well as more support for local musicians to make the city a more attractive option to live and create. Behind the scenes, the city is looking to galvanize its existing tech sector to be at the forefront of music tech. These aspirations all require an overlying force to organize and champion the industry, promoting communication across sectors and implementing Huntsville's greater music strategy.

#### Goals:

- 1. Bridge the gap between the public and private sectors within the music ecosystem
- 2. Connect different sectors (within government and the overall economy) with music
- 3. Connect the music ecosystem in its full diversity
- 4. Act as the first point of contact for the music sector when addressing the public institutions
- 5. Providing the music sector with easier access to any resources and support from the City and guidance on how to navigate the City's bureaucratic processes
- 6. Advocate for the music ecosystem, and build relationships that can benefit the ecosystem
- 7. Ultimately oversee and reinforce the implementation of a music strategy

#### Overview

Huntsville's music ecosystem needs a clearly branded Music Office led by two Officers that are familiar with the sector and City departments, including Huntsville's regulatory requirements.

A music office is the connection between the City and the music ecosystem, and the office is the industry's main advocate. The main goal of the Music Office is to increase economic opportunities for the music sector in Huntsville by promoting the local music industry and being a resource to the local stakeholders. The music office can also act as a one-stop-shop for all licensing and permitting requirements from the City in relation to music.

The music office must be public and private and sit outside of City Hall in a geographically neutral area of the city. It must be led by two Music Officers supported by a team of at least 2 people. Nevertheless, the Music Office must be directly connected to all the City's Departments as an administrator of and consultant for permitting and licensing procedures, music tourism initiatives, and city grant programmes. This eases the strain on city hall as applications come in, and ensures industry concerns are addressed by those with direct and intimate knowledge of both industry needs and city regulations.

A micro-website for the Music Office should be developed as the city's digital 'music industry information hub' including an 'about' page and contact information, FAQs, and links that are relevant to City or external resources and organisations, as well as direct links to apply and check the status of permits and City-related bureaucracy. This provision of transparency helps streamline any legal processing by preparing business owners, festival organizers, etc. for the application procedures and better ensures success and sustainability by advising on the proper processes to achieve success.

#### Implementation Timeline

The Music Office should be set up within the first two months following the delivery of this report, including the identification and setup of an office space. This means the recruitment process must last for a maximum of 2 months (1 month for applications and 1 month for interviews) until the Officers are appointed.

#### **Implementation Costs**

**Office Space:** MidCity Office Complex Phase 1a, likely a charitable donation by RCP Companies

Salaries: \$50,000 per annum, divided between two part-time employees

**Other costs:** Marketing costs and transportation to other areas such as the Shoals, Nashville and music conferences

Communication: Traditional office and a dedicated page on the City's website

**Training Programs:** being developed; need a full-time, degree-holding music teacher for school interaction and a certified training program

## Recommendation 1: Appoint Two Music Officers (Tier 1)

A Music Officer is the minimum asset for a City's Music Office and will mainly be responsible for overseeing the implementation of this strategy. In the case of Huntsville, given the dispersion of the music ecosystem between East and West Huntsville, it is advised that two Music Officers are introduced in order to connect the two music realities of the city and ensure equitable delivery of services. It would be recommended to have one individual be recruited from outside of Huntsville, to maintain neutrality.

The Music Office has to be the first point of contact between the music ecosystem and the public administration, and vice versa.

As an executive position, the Music Officer's role is to:

- Advocate for the music ecosystem
- Negotiate and execute policies
- Inform the sector of the opportunities and possible challenges in areas such as regulation, licensing, funding and other music-related matters
- Liaise with philanthropists and other frequently-funded sectors (startups, particularly within STEM fields) to assess the potential for music sponsorships, grants and other funding avenues
- Develop a network for the music sector within itself and with other industries both domestically and internationally
- Promote a clear communication channel for music-related matters internally
- Create streamlined processes to cut down bureaucracy and reinforce transparency in decision-making

• Foster collaborations with other nearby music hubs such as the Shoals area and Nashville

### **Specific Implementation Considerations**

Job specifications:

- Job Title: Huntsville Music Officer
- Remuneration: Office Holder paid up to a maximum of \$25,000 per annum<sup>287</sup>
- Time Commitment: Part-time. 2.5 days a week
- Term: An initial term of 1 year, extendable
- Accountable to: Director of Long Range Planning
- Skills specification:
  - Proven leadership ability, public profile and convening power
  - Experience working in a political environment
  - Experience working in or engaging with the music ecosystem
  - Knowledge of the local, state and national Policies, Licenses and Regulatory
     Frameworks that apply to the music sector
  - International experience in the music industry

## Recommendation 2: Set Up a 2-Person Team at the Music Office (Tier 1)

The Music Office must include positions for administration and communication roles to be able to support the Music Officers in their duties and allow for the Music Officer to focus on the advocacy and relations roles the work must fill.

#### **Specific Implementation Considerations**

Job specifications. Administration Manager:

- Job Title: Administration Manager, Huntsville Music Office
- Remuneration: Office Holder paid up to a maximum of \$35,000 per annum
- Time Commitment: Full-time.
- Term: An initial term of 1 year, extendable

<sup>&</sup>lt;sup>287</sup> Salary based as a medium between average annual arts salaries and average annual city salaries.

- Accountable to: Music Officers
- Skills specification:
  - Experience working in a political environment
  - Experience working with the music sector
  - Knowledge of the local, state and national Policies, Licenses and Regulatory
     Frameworks and workings that apply to the music sector
  - Administrative Skills

Job specifications. Communications Manager:

- Job Title: Communications Manager, Huntsville Music Office
- Remuneration: Office Holder paid up to a maximum of \$35,000 per annum
- Time Commitment: Full-time.
- Term: An initial term of 1 year, extendable
- Accountable to: Music Officers
- Skills specification:
  - Experience working with the music sector
  - Marketing and Communications skills
  - Experience in PR and/or Communication
  - Excellent writing skills

# Recommendation 3: Build and maintain a digital database of the local music ecosystem (Tier 1)

The Music Office needs to develop a database of actors within the overall city's music ecosystem. This database needs to include contact information which is regularly updated with any new agents and keep track of the changes between the sector. This will allow transparent communication and keep different actors up to date with anything related to the Music Office (policy updates, new funding opportunities, networking events, workshops, etc.).

This database will also help inform other research procedures, such as a potential satellite account, performance evaluation systems for the music sector and the national and international promotion of local music.

### How to implement it:

A structured approach and a unified digital database must be the starting point. The database must include information on:

- Artists
- Rehearsal Spaces
- Record Labels
- Publishers
- Producers
- Recording Studios
- Promoters
- Venues
- Festivals
- Music educators and schools
- Music Associations and Foundations
- Music Tech
- Music Media
- Entertainment Lawyers
- Collection Societies
- Music suppliers (web, design, accountants, equipment rentals, etc.)
- Sponsors and Partners
- Other sectors relevant contacts: film, tech, real estate, education, tourism, etc.

The database must be led by the Music Office and filled with the support of the overall music ecosystem.

# Recommendation 4: Provide artists and professionals with free assistance in key areas (Tier 1)

The Music Office must provide the music sector with basic assistance and training and encourage a diversity of skills and knowledge within the music sector on key issues, such as:

Fiscal and legal matters

- Business management
- Huntsville's bureaucratic system (ie. current requirements and limitations of special events and liquor licenses, regulation and permits for outdoor music events, busking regulations, requirements and availability to rent City-owned spaces, etc.)
- Network Development

In-person sessions also need to be made available to better address the individual doubts and questions of inquirers, as each business or artist has unique needs and effective approaches, and a bespoke advisory system will better streamline the bureaucratic process.

### How to implement it:

This must be done through workshops and lectures, as well as establishing office hours for the Music Officers or their team to offer one-on-one appointments with industry players to help them more effectively in delicate matters. At least one workshop or lecture must be organised per month. This can be outsourced, ideally commanded to local music industry professionals and companies.

This should be led by the Music Office. If a budget cannot be allocated to pay lecturers, it can function as a time bank (reciprocal service exchange).

# Recommendation 5: Set up bi-monthly meetings with other city departments (Tier 1)

Cross-sector relationships and developments must be encouraged, since they are effective tools in fostering economic development within the involved sectors and can even reduce costs on the long term.

### Sectors can include:

- Tech
- Economic Development
- Tourism
- Education

- Film
- Environmental sustainability
- Health
- Social Affairs

The Music Office must be responsible for leading these conversations and advocating for formative policy and financial incentives to be set up to link these sectors. Examples include implementing a quota of local music features in products created by companies that benefit from tax incentives, introducing a grant for organisations working in social and health issues engaging with musicians or music organisations in their programme, creating regular cross-sector talks and mixers for professionals and stakeholders and including music in tech events.

#### How to implement it:

As a foundational step, the Music Officer must establish contacts with each of the sectors to ensure engagement of all the relevant industries. Once the contacts have been established, the Music Office will coordinate bi-monthly meetings to integrate the network. Non-city stakeholders can also be invited for specific matters pertaining to the discussions proposed in each meeting.

# Recommendation 6: Measure the local music sector through a Music Observatory (Tier 1)

Mapping, measuring and evaluating the local music sector and its impact is necessary to regularly check its health and capacity, measure trends and assess the sector's growth and performance. It is also a necessary tool to build economic and development policies aimed at the growth of the music sector.

The Music Office must develop an observatory for the music sector and link it to the increasing interaction with the music ecosystem, including:

- Updating place scraping information
- Regular economic impact analyses

- Employment checks
- Audience Profiling
- IP content creation
- Conducting annual surveys and focus groups

#### How to implement it:

A data framework must be designed by the Music Office to assess what information to measure and the most efficient and reliable ways to collect the data. Following this, a system must be developed in collaboration with the music sector to unify the data formats, management and collection methods. Engaging the local stakeholders in the process from the design is crucial to ensure their participation.

Once the system is validated, periodic data collections need to be established, followed by revision meetings with the relevant actors.

# Recommendation 7: Hold two Open Forums per year for the music community (Tier 1)

Community meetings are the best source of idea and information sharing at a local level. The local music sector needs to gather periodically to make its voice heard while at the same time informing the Music Officers on the actuality of the local music ecosystem. During these meetings, attendees will assess the industry's needs and challenges, identify new actors and resources and establish common goals and plans. In keeping with the goals of advocating for and maintaining transparency, the data or a summary thereof must be published on a forward-facing platform for industry members, community members and interested third parties to access.

### How to implement it:

The Music Office must organise two Open Forums per year, both open to the overall local music sector. Local assets must be used to host these meetings and a rotating system needs to be implemented to involve all of them.

The time and place must be established one month prior to the meeting, and a communication campaign must be developed, including personalised invitations if necessary.

The agenda, which must be circulated in advance, must follow a simple schedule to:

- 1. Inform on any news related to the sector
- 2. Update on the last achievements of the Music Office
- 3. Update on the progress made in addressing concerns or suggestions raised in previous meetings
- 4. Open floor for debate

The Music Officers must be ready to answer any questions.

Minutes must be taken and circulated within two weeks following the meeting.

## 8.2 Establish a Music Board

Coordinate the work scope and objectives of a board which empowers music stakeholders to represent and champion the city as music-friendly at the local, state and national level.

Initiator: Music Office (Music Officers ideally acting as Chair of the Board) and Arts Huntsville

**Background:** The Huntsville music industry operates in silos, a disconnect which makes it difficult to coordinate work which would benefit all sectors. A Music Board gives the industry a chance to check in with itself, communicate its needs and hold both itself and the city accountable for strategy implementation.

#### Goal:

 Have a leading ecosystem-representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem (ie. the music sector and surrounding sectors) taking care of music matters in the city

- Have an advisory board to help establish, promote and maintain the city as a music-friendly city
- Connect with other cities to share best practices, information and talent exchange
- Advocate for the sustainability of the music sector in the city, including the affordability of living and working spaces
- Support the development of music activity in the city.

A Music Board is integral to a successful music strategy as it will ensure participation of the different sectors of the music ecosystem and adjacent sectors in the city's music life, and buy-in across the implementation of a music-friendly strategy. It needs to have support across different city departments and develop a program that is publicly defensible. It will also ensure transparency.

The Music Board must cover a work program that is also publicly defensible and covers all aspects concerning the city's music ecosystem, including:

- Research and guidance
- Industry Development
- Planning
- Licensing and legislation
- Marketing and promotion
- Arts organizations
- Cross-sector approaches

#### How to implement it

The Board will be coordinated by the Music Office.

The board must consist of 7 members, split between 70% music professionals and 30% from government and other industries, maintain a 50/50 gender split, and reflect the diversity of the city, ensuring the participation of minorities. Board members serve for 12 months, extendable to 24 months. The board should have 2-3 members from outside the Huntsville area to bring an unbiased perspective into discussions.

Prospective members have to agree to the Terms of Reference and declare any conflict of interest before being accepted onto the board.

Depending on their area of expertise, they may be asked to carry out projects or tasks within a deadline through the course of their membership. They also have to sign a Member Agreement that outlines their commitment.

The board structure includes a chair, a secretariat, and the members. Different working groups must be set up to focus on relevant topics. The working groups can have a temporary status to meet specific needs. Guests and observers can be invited on meeting by meeting basis, either to present on a topic (Guest), or to sit in on a meeting (Observer).

The Chair will be a dual position with the two Music Officers. The Chair's role is to introduce guests and members, update members on action points from previous meetings and steer the general discussion.

The Secretariat can either be someone from within the Music Office or appointed externally. The role has an important administrative role, being responsible for:

- All communication to members
- Finding suitable dates for meetings
- Finding venues for meetings
- Creating agendas
- Minuting meetings
- Circulating all necessary paperwork
- Producing name badges, if needed

The Secretariat may also act as the strategic steer to the board, by not only organising the content of the meetings themselves, but also by pushing the board's work forward through policy work, research, and inviting appropriate guests and observers to specific meetings.

#### Implementation Timeline

The Board can be set up after the first year of functioning of the Music Office.

#### **Implementation Costs**

Board membership is a paid position, with a fixed fee of \$150 per meeting and variable fees in case members are asked to carry out specific work within a deadline through the course of their membership. Travel expenses must also be reimbursed, if applicable.

# 8.3 Create music-friendly policies

## Revise existing policies to promote a 'music-friendly' city

Initiator: Music Office, working with the adequate City departments for each goal

**Background:** There already exists a strong sense of community, support for and engagement with initiatives which raise Huntsville's profile as a 'music city'. Next, it is important that the Music Office assumes a leading role in working with the responsible government department and agencies to update and introduce policies which complement and promote a thriving music industry which works alongside its surrounding industries as a key piece of both daytime activities and the nightlife.

#### Goal:

- Use policy to improve coexistence between music spaces and places, organisations, street performers and residents
- Cluster the music sector to boost economic activity and strengthen the community
- Increase safety and diversity in the music ecosystem
- Increase sustainability and significance of music in the city
- Facilitate the development of live music and the activity of music organisations.

### Implementation Timeline:

This needs to be among the first recommendations to be developed by the Music Office, fully applied during its first year of existence.

# Recommendation 8: Streamline permits and licenses required for music activity (Tier 2)

Ease the processes to request licenses and permits needed for music activities such as outdoor events, opening a venue or starting a music business. These difficulties usually back event producers and music organisations out, so by streamlining the process, they will be more encouraged to carry out more music activities.

#### How to implement it:

The Music Office must be responsible for leading this change and advising the appropriate City departments on the best way to move forward in the future.

An app could be developed that acts as a one-stop shop and streamlines all the bureaucratic requirements, in order to assist the Music Office in its support of the music sector with these matters. The development of an app will lighten the amount of work of the Music Office.

The establishment of a Music Office should be a way to make these processes easier, but the development of an online guide or app that streamlines the bureaucratic requirements will make the processes more clear and therefore support the work of the Music Office.

#### INTERNATIONAL CASE STUDY: San Francisco Entertainment Commission

The San Francisco Entertainment Commission acts as the permitting body for the City of San Francisco. Overseen by the Office of the City Administrator, its website acts as a one-stop shop for people to identify which permit they will need for their business or event, what qualifications they must meet, what materials they need to prepare and what their fees will be for the permit or permit renewal. The applications and fee payments can also be submitted through the site. One example of the lengths the Commission has gone to in order to help streamline the process is the 65-page "SF Outdoor Event Planning & Permitting Guide", which is regularly updated according to changes in city law or fees. There are charts and tables for organizers to identify which services and city amenities they will need to avail of and what the estimated costs are for them, such as street closures, security, alcohol licensing, etc. Beyond the FAQ page, the Commission also provides contact information for any inquiries left unanswered by online content, as well as quick links to the City Code for all chapters relevant to the entertainment industry (such as definitions of places of entertainment, noise laws, licensing policies and other administrative codes).

# Recommendation 9: Reassess taxes and fees in the entertainment sector (Tier 2)

The City generates additional revenue by imposing certain taxes and fees on the local music sector. These financial burdens pose a challenge to the majority of local music ecosystem professionals and hence hinder the development of the sector by increasing costs and

extending the bureaucratic processes. Nevertheless, the revenue from these taxes is important, as it provides funds to the cultural budget.

The tax system needs a re-assessment and the use of the revenue that it generates to be completely transparent, and reverting back into music:

- To fund the Music Office and its activities
- To fund a possible Music Board
- To allocate funds for live music programming
- To expand the music education system

#### How to implement it:

This reassessment must be lead by the Music Office and include an in-depth analysis of the cultural and economic impact of the contribution of the music companies to the city, and an assessment of the benefits of alleviating the costs of those companies both for them and the overall impact of the music ecosystem. For this, a satellite account is needed to obtain the necessary data to make informed decisions.

# Recommendation 10: Set up incentivisation schemes focused on inclusive growth (Tier 2)

#### 10.A Venues/festivals that use local original music

**Background:** Many survey respondents and roundtable participants singled out the lack of genre diversity and need for more touch-points with local, original music as one of the biggest challenges in the Huntsville music ecosystem. To encourage growth in the prominence of original music, the city should integrate incentivisation schemes which reward those venues and festivals which feature a certain amount of local music.

#### How to implement it:

Venues and festivals should be given tax rebates on employment costs or county liquor license tax if they meet a quota of local original music. As part of the application process, venues should submit a list of performers and songs which prove they have employed at least 80%

local performers playing original music. The city already offers in-kind support, such as providing portable toilets or setting up the stage, though many are not aware of this due to lack of advertising.

#### EXISTING GOOD PRACTICE: Alabama Incentives for Film Production

The Entertainment Industry Incentive Act was signed into law in 2009 by then-Governor Bob Riley. Under the act, production companies are entitled to 25% rebates on all expenditures certified by the state and 35% rebates on payroll issues to Alabama residents.<sup>288</sup> The total production expenditures must range between \$500,000 and \$20m for the production to qualify for the reward. The state has been given an annual budget of \$20 million in incentives to issue to qualifying productions. These incentives can come in the form of an income tax rebate, and an exemption from states' sales, use and lodging tax. Current qualifying projects also include music videos and soundtracks.

#### 10.B Venues/festivals that follow the Fair Play Scheme

Background: In addition to its multi-arts and occasional venues, Huntsville boasts an impressive number of bars, pubs, cafes and restaurants (33) with live music offering, ranging from the occasional gig to hosting live music performances a few times a week. Unfortunately not all of them treat music talent fairly. Our interviews, roundtables and survey analysis have indicated that covering musicians' performance fees is an issue, with artists being offered to 'play for exposure', rather than being paid decently. This format is unsustainable for artists, who often end up having to choose traditionally paid jobs over their craft in order to make ends meet. Musicians need to be seen as an asset of restaurants and bars, a main feature which patrons come to see, and need to be compensated accordingly.

#### How to implement it:

Incentivization can come in the form listed above, where venues which submit proof of artist remuneration may receive tax rebates on payroll costs. Huntsville would be a frontrunner in implementing such a scheme, but can look to tax rebate programmes such as Louisiana and Georgia's film and music tax breaks<sup>289</sup> for precedent on which qualifications to mandate. In addition, paying venues should receive a sticker to display onsite and receive priority listing on music tourism platforms.

<sup>&</sup>lt;sup>288</sup> Alabama Film Office (2010)

<sup>&</sup>lt;sup>289</sup> Georgia Music Partners (2019); Louisiana Economic Development (2019)

### INTERNATIONAL GOOD PRACTICE: Musicians' Union Fair Play Venue Scheme<sup>290</sup>

The Musicians' Union advocates and promotes activism against unfair treatment of musicians in the UK. Their advocacy led in 2015 to the Fair Play venue scheme, which aims to "recognise good practice and stamp out the unfair treatment of musicians" 291.

The guide<sup>292</sup> contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events, and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme, and after evaluation the venues can include a sticker to display as the badge of their respect for artists.

## Recommendation 11: Review the noise regulation (Tier 2)

Currently, permitted sound levels in Huntsville are determined by the land use of the facilities around the source of the sound. They range from 62 dB(A) in commercial zones at all time, 55 dB(A) in residential and public space from 7am-10pm and 50 dB(A) from 10pm-7am. There is no specification on measurement terms. City policy should reflect little room for personal interpretation, and noise complaint processes must be clearly communicated to both the noise source and the receiver.

### How to implement it:

City code should be revised to specify official measurement techniques, from meter type to measurement location. These techniques must be clearly communicated with those business which are known to be noise sources (venues, restaurants, etc.) as well a residents living near such businesses. For all others, the policy must be simplified into a 1-2 page guide and placed in an accessible place online, such as the website of the Music Office. Other key information to have accessible and, importantly, easily read by an untrained eye is the complaint process (including forms), the appeals process, and a quick-guide for sound attenuation techniques. Such a guide would include advice such as keeping windows closed, promoting staggered exits from the venue throughout the evening, etc.

<sup>&</sup>lt;sup>290</sup> Musicians' Union (2019)

<sup>&</sup>lt;sup>291</sup> Ibid.

<sup>&</sup>lt;sup>292</sup> Musicians' Union (2012)

### INTERNATIONAL GOOD PRACTICE: San Francisco Police Code Guidance for Noise Control<sup>293</sup>

In 2014, the San Francisco Police published a 45-page guide on noise control in the city. The guide defines 'noise' and reminds citizens of the city's "Good Neighbour Policy", which encourages parties to overcome noise complaints between each other before turning to legal action. The Guide clarifies which type of sound measuring meter should be used, as well as what settings the meter should be set at, when measurement should take place and where measurement should be taken from. The guide further defines the differences in technique between daytime and nighttime noise measuring as well as indoor and outdoor noise.

The guide is available on the San Francisco Entertainment Commission's website, which lists all forms which may be utilized during a complaint process. This includes a questionnaire which not only sheds light on the specific complaint, but acts as a data collection tool to help identify complaint patterns. The website also lists proper citation procedures, which depend on the number of noise offenses a venue has previously committed. Such a collective source ensures transparency and accountability and helps promote fair noise attenuation across the city.

# 8.4 Zoning

Recommendation 12: Assess the implementation of 'Agent of Change' (Tier 1)

New developments and the arrival of new residents to high-activity or industrial areas can threaten the cultural vibrancy created by long-standing venues and programmes. The Agent of Change principle is a protective policy used in cities around the world to hold new developments accountable for sound attenuation. Its implementation should be assessed to better serve the necessities of cultural operators in expanding development areas, including

<sup>&</sup>lt;sup>293</sup> City and County of San Francisco (2014)

sound attenuation measures when a proposed residential development is within 100 feet of existing live music performance venues.

The 'Agent of Change' should be triggered automatically when a new planning permit application is lodged to initiate the sound attenuation assessment. New developments may either soundproof themselves, soundproof the source of potential noise/nuisance or take no measurements, but must be aware that the city will not shut the existing venue down due to noise complaints from a new development. Similarly, if a venue builds next to an existing business, the venue will be responsible for noise attenuation and the existing premises will be protected through Agent of Change.

### How to implement it:

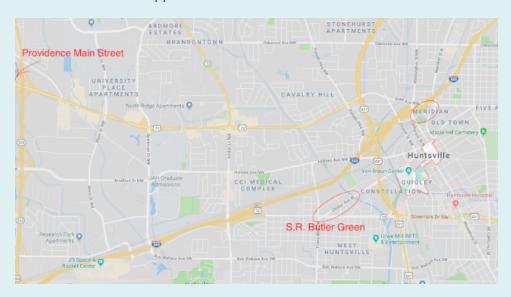
Agent of Change can be added to the City Code of Ordinances to define procedures and laws around noise abatement responsibility. This should be done within one year of the Music Office's inception. Places which have already implemented the practice include San Francisco, the state of Victoria (Australia) and the UK; they would be good best practice sources for legal phrasing. It's important to remember that Agent of Change works both ways, and if a venue builds near an existing residential unit, then the venue is responsible for noise attenuation. New residents or businesses should be asked to sign a memorandum of understanding when moving into property involved in an Agent of Change jurisdiction.

# Recommendation 13: Expand Entertainment District Parameters with a Creative District (Tier 2)

Assess the possibility and implications of introducing a new entertainment district in a neutral zone (geographically and demographically) between the predominant nodes of Huntsville to balance current districts and maintain the polycentricity of the entertainment offer. Purple cup use and territories should also be expanded, and the cups themselves be made of more sustainable materials. While there is no area or infrastructure to directly create an entertainment district currently, fostering business development in the area can make this easier to expand in an entertainment hub as a long-term goal.

## EXISTING GOOD PRACTICE: Huntsville's Arts & Entertainment Districts & Purple Cups

Huntsville currently offers four designated Arts & Entertainment Districts to help animate the city's urban areas by attracting cultural events, entertainment and dining. The outdoor purchase (from a licensed business with an adequate permit), carrying and consumption of alcoholic beverages in a designated open container (purple cup) is allowed within the districts' limits and during certain times of the day. The four designated Arts & Entertainment districts are mapped below:



Quigley - Encompasses the heart of downtown Huntsville, including Courthouse Square, Big Spring Park, Von Braun Center, Huntsville Museum of Art and surrounding restaurants and bars.

Hours: Thursday nights from 5pm-11pm, and Friday - Sunday from noon-11pm.

Meridian - Around Meridian Street and Cleveland Avenue, essentially the Lumberyard area. Hours: Thursday nights from 5pm-11pm, and Friday - Sunday from noon-11pm.

Village of Providence - Along Providence Main Street.

Hours: Wednesday, Thursday, Sunday from 5pm-11pm, Friday 4pm-11pm and Saturday 11am-11pm.

S.R. Butler Green - Encompasses the current Campus No. 805 complex and stretches east toward downtown to include the Salty Nut brewery and several adjacent areas. It includes only those buildings east of Campus 805 that face Clinton Ave.

Hours: Thursday nights from 5pm-11pm, and Friday - Sunday from noon-11pm.

#### How to implement it:

All entertainment districts' operational hours should be uniform, reflecting the same hours and days of the week. Any discrepancy, such as in the chart above, is confusing for a professional in the entertainment industry, as it must be for law enforcement, and it is likely not being enforced properly. Experience has shown that a singular, city-wide policy is easier to enforce and allows the public to know the rules wherever they may be. In a decade, purple cups will likely be a point of nostalgia.

The new Creative District should be located along the Meridian Corridor all the way to A&M. It will be both about decentralizing current entertainment offers and attracting creative businesses in order to foster networking and community. The creative district should also be host to a small outdoor public event space, as well as a small incubation hub for students and start-up business owners. Although nothing elaborate, the hub should include minor office space and resources, a cafe to congregate and network and provide a home base for a visitors center.

# Recommendation 14: Consider zoning to support music venues out of main entertainment areas (**Tier 2**)

The current zoning is concentrated on specific areas - the four designated Arts & Entertainment Districts of Quigley, Meridian, Village of Providence, the S.R. Butler Green, as well as the Lincoln Mill historic district - which puts a lot of pressure on those areas and might lead to tensions with the local residents in the long term. Together with local concert organizers and promoter collectives, the city should assess whether there are spaces outside of the high activity areas, either unused or already in use, that could be further developed for cultural and music activity.

This decentralization would relieve the main areas and also develop new spaces that can be used by local independent music ecosystem professionals to develop new projects, concert series and club nights. Ultimately, these new independent spaces would allow local music ecosystem professionals to develop new projects sustainably. To make such spaces attractive,

it would be important to allow longer opening-hours, either on a permanent or on a case-by-case basis, and offer better nighttime transportation.

### How to implement it:

There are a large number of entrepreneurs in Huntsville who do not lead 9-5 work lives due to the nature of their jobs, and with this comes a different expectation for a city's leisure offer. These entrepreneurs are typically very high earners who are interested in music, gaming, and entertainment in their free time. Zoning must allow for a 24-hour economy in order to cater to this demographic. MidCity might be the perfect case study for the City of Huntsville.

# Recommendation 15: Extend night-time transport in key entertainment areas (Tier 2)

Private transport, such as cars, is common in the United States. While extensive public transport networks are often not needed in a city the size of Huntsville, a scale public transport system is just as vital during the night as it is during the day. Not only does it provide a safe, reliable means of getting to and from work for night time employees, it can encourage potential audiences to come out and enjoy the nightlife Huntsville has to offer. There are some demographics that would greatly benefit from a reliable bus service which connects entertainment areas to residential suburbs at all hours, such as those who cannot drive due to age or health conditions, visitors who may not have access to a private vehicle during their stay, revellers who have consumed too much alcohol to safely journey home or get between venues across town.

#### How to implement it:

The shuttle bus system, currently running 9 routes until 6pm, should be extended in both reach and time to connect the four entertainment districts of Quigley, Meridian, Village of Providence and S.R. Butler Green until 12am, which allows time for revellers to leave the bars at 11 and employees to close up the establishments. Routes should also service key nightlife centres such as Lowe Mill and the upcoming Sandra Moon Community Complex and the MidCity Development. One route should be introduced which is specifically designed to act as a

go-between for nightlife establishments (as opposed to those which connect nightlife to residential areas), acting as a shuttle service of kind.

### BEST PRACTICE: Public Transportation Integration with Private Rideshare

Around the US, local governments are beginning to partner with ridesharing services to address issues in transportation such as late-night service interruptions and commuter parking shortages. Most transit services use smartphone applications to communicate information on routes, so app integration is an obvious, low-cost choice for partnership. One of the most common problems solved by this collaboration is the 'first-last mile' dilemma where one's initial and/or final destination is too far from public transit to comfortably walk. This solution was implemented in a 6-month pilot program in Centennial, CO.

The project was led by the Centennial Innovation Team, funded by Bloomberg Philanthropies. The City's i-team developed the Go Centennial pilot concept and led development of the implementation plan by securing private-public partnerships with Xerox, Lyft, Via and the Denver South Transportation Management Association. This application was the first public-private partnership in the U.S. to fully subsidize Lyft rides for transit commuters, and offer multiple ways to book and pay. The program is also accessible for those without smartphones. Lyft Line rides were offered for free Monday through Friday, 5:30 a.m. to 7 p.m. In respect to older users who require extra assistance in their travel, the city partnered with nonprofit Via who assists those with the use of wheelchairs or other mobility devices.

Summit, NJ used the solution to amend their current problem regarding lack of parking places. According to the research conducted by the city, the cost of subsidizing Uber rides will be competitive with the price of building new parking spaces. Riders who have already paid for a parking permit (\$4 daily) will not need to pay for an Uber trip to the station. For those who haven't purchased a pass, it will cost \$2 a ride. Summit pays the actual fare or the difference. This service is provided Monday through Friday between the hours of 5AM and 9PM.<sup>294</sup>

In addition to these other collaborations are being piloted: WageWorks now allows users to pay for UberPool rides using pretax dollars in New York City, Boston, Washington D.C., San

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<sup>&</sup>lt;sup>294</sup> Cmar (2017)

Francisco, Philadelphia, Las Vegas, Denver, Atlanta, Miami, and New Jersey; and cities are using rideshare services to accommodate increased transit demand during major events like St. Patrick's Day in Dallas, TX<sup>295</sup>, as well as Comic-Con and the MLB All-Star Game in San Diego, CA<sup>296</sup>.

## Recommendation 16: Create tax breaks for creative businesses (Tier 2)

Tax breaks come in a variety of schemes for several business types. They can range from credits toward payroll to reductions in property taxes. Although rare, Huntsville does have precedent for giving tax breaks to those redeveloping existing properties for renewed use. This could be implemented more regularly to those redeveloping existing properties into music venues or cultural facilities. The tax break could be issued during the development stages to offset costs, or could materialize as a reduction in property tax rates to aid in the sustainability of cultural entities.

### BEST PRACTICE: Louisiana's Motion Picture Production Program

Also known as the Motion Picture Production Tax Credit, this state programme gives up to 40% tax credit to motion picture production companies headquartered and domiciled in Louisiana and creating films with budgets over \$300,000 (\$50,000 for screenplay productions). Eligible production expenditures include payroll and staff fees (except those whose payrolls exceed \$3 million per individual), prop and equipment rental, lodging, makeup, and post-production services. Expenditures for costs to out-of-state payroll, rentals/purchases from out-of-state companies and airfare. The maximum amount of credits that can be issued per fiscal year is \$150 million, and credits may be used to offset state income tax liability. The programme has significantly increased the presence of the film industry across Louisiana, but particularly in New Orleans, due to the amount of resources clustered there.

<sup>&</sup>lt;sup>295</sup> DART Daily (2016)

<sup>&</sup>lt;sup>296</sup> Pollock (2016)

## Recommendation 17: Dedicate percentage of State Lodging tax income to music *(state task)* (Tier 3)

**Background:** Our music ecosystem survey shows that lack of funding is the number one challenge identified by those forming part of the Huntsville music industry - music companies, professionals and freelancers, and music artists. While efforts with fundraisers, private sponsorships and philanthropy should be pursued and expanded (also as part of the immediate Music Office tasks), opportunities to revert targeted funding on county and state level must be pursued as well.

In Alabama, revenue from the 4% lodging taxes has been rising by an average of 7% per year for the last four years, all of which gets funneled into the state's General Fund, which in turn is used to supplement residential taxes. In 2017, the number of visitors to Madison County was 3.15m, and of the top five most-visited counties, it boasted the most overnight visitors for two years in a row, accounting for 12% of the state total. The county lodging tax totaled \$6.3 million.

**Goal:** If the City lobbies for 0.015 (1.5%) of every dollar paid in lodging tax to be diverted towards music, this could mean a pot of \$94,500. That is a decent amount of funding to be made available toward, for example:

- Music creation (grants for artists), up to \$5,000. Individual musicians currently have very limited sources of funding with the existing city/state funding system mostly focusing on larger artist collectives and not-for profit organizations. This new, original music can in turn be incorporated into city communications, promotion materials and city-promoted events, raising the profile of the City of Huntsville as a music-nurturing and loving community.
- Provide Live Music Business Support Matching Grants, up to \$20,000 each. These
  matching grants could be made available to both nonprofit and for-profit businesses.
  Example uses of this funding are new staging and audio equipment, sound-proofing
  infrastructure, etc.
- Media radio in particular could host more local music

## INTERNATIONAL GOOD PRACTICE: Partial Allocation of Hotel Tax for Arts and Culture, San Francisco<sup>297</sup>

In November 2018, The City of San Francisco voted Proposition E to utilize some of the city's existing hotel tax to support arts and cultural enterprises. The existing law creates a 14% tax on all hotel room rental rates (8% base tax and 6% tax surcharge). Currently, the tax goes into a General Fund, which can be distributed for public purpose as the Board of Supervisors feels appropriate. It creates approximately \$370 million for the Fund. Under the new amendment, 1.5% of the 8% base tax would be allocated to arts and cultural purposes (the remaining 6.5% would still go to the General Fund). The measure divides the new funding pool 5 different ways:

- \$16.3 million for nonprofit cultural organizations in San Francisco
- \$6.4 million for the Arts Commission for programs that promote cultural equity
- \$3.8 million to the Arts Commission for operational costs of city-owned community cultural centres
- \$3 million to the Mayor's Office of Housing and Community Development for further support of cultural districts
- \$2.5 million to the Arts Commission to address needs identified in a cultural services allocation plan

## Recommendation 18: Create a business classification for culture (Tier 1)

Music venues often operate in a grey area between clubs/dance halls, bars and restaurants. This subjects them to regulations that either don't apply to them or hinder their operations based on the interpretation of the law. A new classification should be created for cultural businesses in order for permitting and policing to be more transparent and supportive.

#### How to implement it:

Formal recognition in the city's planning laws should cover the use of meanwhile spaces, both indoor and outdoor spaces commonly used for music and events and, of course, music venues. This will be an integration point for the Agent of Change law and set forth procedures on noise limits and zoning allowances.

<sup>&</sup>lt;sup>297</sup> Ballotpedia (2018)

## 8.5 Education

Huntsville has a wide range of world-class education offerings for students of all levels, particularly through its magnet programmes. This provides incomparable resources to maximise across the student population through in-school and after-school programmes.

Initiator: Music Office, Huntsville Board of Education

**Background:** U.S. education budget cuts are a threat not only to Huntsville, but the entire nation, and arts programmes are almost always the first to be affected. Placing focus on well-rounded, integrated music education as early as possible reaps benefits in both the short and long term.

Even though this falls outside the scope of this study, students should have arts requirements for high school education reinstated (it was taken out a while ago).

#### Goals:

- Promote the benefits of music education among school children and young people
- Strengthen the foundation of public music education
- Increase accessibility to music education
- Develop audiences from childhood
- Increase the number of specialist music teachers
- Improve cognitive abilities among children and youth, increasing skills in STEM subjects and others
- Increase creativity among the younger population

# Recommendation 19: Strengthen the private music education system (Tier 3)

Music production needs to be taught as well as new digital tools and resources for music production. This implies including digital and IT skills in music education programs (in schools and extra-curricular) for music production courses. The optimization of these skills requires continued training. Music production is very accessible nowadays, and very popular among the

younger generation. This would make music education more attractive and would have a wider reach among students. Local young musicians could be involved in this.

## How to implement it:

The Music Office should lead this by involving existing successful modern music program providers (such as the Maitland Conservatory), providing schools and educators with the necessary pedagogic resources and linking them with possible production teachers. It should also create links with music production and hardware companies to foster collaborations such as recycling of old or test materials, master classes, etc.

### EXISTING GOOD PRACTICE: Music Studio at Williams Elementary School

In June 2018, the Boys and Girls Clubs of North Alabama opened a new music recording studio at the group's Williams Elementary School location in Huntsville.

It's the first such studio in Northern Alabama, but others exist throughout the country. Sponsored by Google Fiber, the studio was built by local music producer Craig Groove, who will help train the kids on how to use the studio and computers after school<sup>298</sup>.

## Recommendation 20: Utilize magnet program resources to expand music education (Tier 1)

Huntsville has unparalleled resources for elementary and high school music education which can be utilized to expand programming in the city's public schools through primary curriculum or after-school programmes. Public schools follow state-issued curriculums, which require minimal music education at K-6 levels and maintain no requirements for later years. This means students who are not accepted into arts-centric magnet programmes such as those at Lee High School can miss out on crucial music education. The tools and curriculums used in these programmes can be distributed across public schools or used as guidelines in expanding arts programmes access across the city.

<sup>&</sup>lt;sup>298</sup> Ary (2018)

### How to implement it:

The Music Office must work alongside the Huntsville Board of Education to lead the coordination of this goal. There are a few ways in which resources can be maximised, such as implementing after-school programmes at the magnet schools which are open to students across the city from homeschooled students to public school students. These could be taught by existing teachers or provide an opportunity to employ local musicians and professionals. The Music Office can also help create a network of Huntsville and surrounding area arts teachers who share their curricula using feedback from local industry on what skills and knowledge will best prepare students for post-secondary education and further careers in the music industry, such as songwriting, production or basic business skills. This will ensure students from non-magnet schools will have equal access to arts education. There is an opportunity here to teach cross-sector collaboration by integrating videography and creative writing courses into vocal performance programmes at the magnet schools and choir/orchestra programmes at public schools for project-based work. Students can work together to create an end-of-year performance programme which they organize, film and market.

## Recommendation 21: Create more points of contact with local music from an early age (Tier 1)

Both from an education perspective, but also from a music ecosystem perspective, it is important to enable children to access music education and create touch points. An initiative that allows children to experience more music from early ages would grow the interest of students in music on the one hand, and foster the creation of new audiences on the other. The initiative would involve local artists or A&M students playing in front of students in their schools, giving workshops or specialised classes, including music in their learning processes for other subjects, making handmade musical instruments, and even performing with a group of students.

#### How to implement it:

The Music Office should lead this project and involve the Huntsville Board of Education to engage the schools that would participate. University students are a great resource and could receive school credit or small scholarships in compensation for their time. The Office should

also work with the local music sector to include them in the design and implementation of these programs. Results should be evaluated to assess primarily whether the children that have participated in these programs enroll in music lessons afterward (in schools or extracurricular).

## EXISTING GOOD PRACTICE: Huntsville Community Drumline

Founded in 2010, the percussion instruction center offers free extracurricular music education to children and teenagers in grades 1 to 9. Besides teaching the craft of drumming, the focus also lies on other values such as self-discipline, respect and pride in the community. The free access to instruments and instruction is thereby attached to a commitment to training and performance schedules as well as to fundraising efforts. "Empowering Youth Through Music Education" is the non-profit's slogan.

## Recommendation 22: Develop a musical instrument lease system (Tier 1)

One of the main barriers for younger students is the acquisition of musical instruments, which sometimes vary in size as they grow and are very expensive. The development of a system of lease of music instruments would better the situation, and allow students to rehearse outside of schools. Huntsville Community Drumline, a project providing after-school percussion instruction and mentorship to students from less privileged backgrounds, is one that could particularly make use of such a lease programme.

## How to implement it:

The Music Office should lead this. This can be done, for instance, in collaboration with music equipment rental companies or high music education entities, such as the Music Department at the University of Alabama Huntsville, to reutilize their instruments when they can no longer use them for professional uses.

## 8.6 Marketing and Branding

## Recommendation 23: Create a unique Music City brand (Tier 2)

Huntsville is and always will be The Rocket City, and for good reason, but that doesn't mean it has to be associated only with space exploration. A good tourism campaign will communicate that to the world through taglines and or wordplay, such as "The Rocket City: More Than Space" or "The Rock It City".

### How to implement:

The chosen brand should be attached to any national and international music tourism campaigns, and a logo should be placed on initiatives such as Huntsville Music Week promotional material, the live music passport, online calendars and listings, etc.

### EXISTING GOOD PRACTICE: Best Music of the Rockin' City

This programme not only plays on Huntsville's 'Rocket City' title, but creates a promotional platform to celebrate and recognize Huntsville's musicians and their contribution to the city's creative industry. Awards are given to those rock musicians in Huntsville which have played at least 5 gigs in their genre and 3 gigs in any other genre. Open mics are not counted towards eligible gigs. Voters may choose up to three people in each category, which are Best Male Solo Performer; Best Female Solo Performer; Best Classic Rock Music; Best Rock Music; Best Blues; R&B & Soul Music; Americana/Roots Music; Best Country Music; and Best Jazz Music. The official website also keeps a master list of nominees for voters to hear their work. Winners receive gifts provided by several of the events' sponsors, a collection of local restaurants and other businesses.

## Recommendation 24: Restart an old event (Tier 3)

In our discussions and roundtables, one event which was continuously brought up was Big Spring Jam. It was a community event that is sorely missed by both audiences and musicians. Huntsville should bring back Big Spring Jam as the centrepiece of community events season, alongside Huntsville Music Week. It is important that the reintroduction features many genres,

caters to a diversity of audiences and is held in a geographically neutral area. It should be branded as "the classic is back".

## How to implement it:

There are many people trying to fill this space. The best of the best will come through good old-fashioned competition. Festivals are very risky financially in the South due to weather. Recently Sloss Festival in Birmingham folded, despite being backed by AC Entertainment and Red Mountain Entertainment, both owned by Live Nation. Pilgrimage Festival in Franklin, Tenn., had its first negative weather experience in 2018. MidCity offers a viable place for Festivals due to a large Amphitheater with weather cover, and 30 square blocks of indoor locations where patrons can seek relief from storms. Entrepreneurs will continue to put on festivals, and the more the better.

#### EXISTING GOOD PRACTICE: R&B Vibes Live

R&B Vibes Live is an event held at various locations around Huntsville. 299 What started small quickly grew to serve crowds of 350, requiring a weekly presentation. Recently celebrating its 1 year anniversary (in November 2018), the focus for this event is local artists and musicians from pop, r&b, oldies and other genre backgrounds. It aims to be a community event. Tickets are \$5 (\$7 at door), and the event is only open to ages 21+. Merch is available online.

## Recommendation 25: Create a local events calendar (Tier 1)

One of the grievances aired by attendees of the discussions and roundtables is that many are often unaware of the events happening around town, which is a great hindrance to deciding to go out at night. Fragmented events calendars do not appease this issue, as most will not have the thought or patience to check all platforms for Huntsville's happenings, so there must be a single calendar which acts as a one-stop-shop for people to discover local shows and events. Currently, Our Valley Events is the most comprehensive Huntsvillian events calendar. It allows users to filter to music events, but the calendar should be more accessible/forward-facing and should include grassroots events such as open mic nights and student-organized shows.

<sup>&</sup>lt;sup>299</sup> R&B Vibes Live (2019)

#### How to implement it:

The Music Office needs to coordinate an online platform where venues may submit events for the month, which will be placed on a master calendar online and also made available in app format. The boards should be free to list, but a premium feature can be added in which events may add a photo or link their own page. Creators could work with Our Valley Events to incorporate a music-specific calendar

## Recommendation 26: Promote local music amongst visitors, young professionals, locals (Tier 2)

Two common themes that emerged from the survey and roundtables/interviews we conducted were the lack of information about what is on the Huntsville music calendar and the poor promotion of the city as a music-friendly place. Huntsville needs to share its music with all its visitors, newcomers and locals to consolidate its brand.

Tourism information desks should be able to deliver information on all music events taking place in the city and its venue offer, as well as facilitate ticket purchases. These should be featured on the Huntsville/Madison County Convention & Visitors Bureau website. Furthermore, the Tourism website could integrate a dedicated Music site featuring the top festivals, music tours, music shops, iconic venues, hidden gems and free music options available. Blog articles could include curated playlists and music and other inspirational places in the city. This could be an opportunity to develop artist-curated content into the strategy.

The momentum created by Mayor Battle's "State of the City" address in December 2018, that highlighted Huntsville's music vitality as a key feature in attracting workforce and improving the quality of life should be leveraged in collaboration with major local employers. Employers within technology/ bioengineering/ defense companies operating in town should include the local music assets in their welcome pack for visitors/ newly joined employees. Their general internal communications, such as newsletters, social media, should also be utilized to promote local music and music places. Venues and events should work closely with the major companies community officers' to develop special deals, discounts and experiences for their employees.

### How to implement it?

The Music Officer is to lead on this, working closely with stakeholders across the Huntsville/Madison County Convention & Visitors Bureau, the Huntsville Chamber of Commerce and city marketing authorities, as well as community engagement and internal communication officers at companies and institutions such as NASA, HudsonAlpha, Lockheed Martin, Google Fiber, etc. Huntsville should also campaign to place its musical history and successes into the Alabama Music Hall of Fame, which will reach tourists visiting the Shoals area.

## EXISTING GOOD PRACTICE: Valley Sounds on WLRH Radio

Valley Sounds shines the spotlight on original music of all genres created and performed in the Tennessee Valley. Each hour contains a mix of music, interviews and other special segments that provide insight on the creative process of making and performing music.

## 8.7 Professional Development

Huntsville needs to encourage professional development in the local music industry from early career stages. This shows budding entrepreneurs the options available to them in the industry and encourages existing professionals to see Huntsville as more than just a live music scene, but rather a potential place to move their business.

**Initiator:** Music Office

**Background:** Our assessment of the Huntsville music ecosystem has shown that the industry itself has room for improvement, as there is a lack of music business education, which can lead to DIY artists making poor career decisions. The lack of local music business professionals, such as labels and managers, means many artists have no choice but to go this DIY route as a next step in their career. What local industry exists operates in silos rather than collaborating, creating a fragmented industry.

#### Goals:

- Increase professional development and business skills development opportunities for local artists and professionals
- Develop networking opportunities at a local level, to encourage professional development and improve the sense of community
- Connect local artists and industry professionals at all stages of their careers to foster learning and cooperation
- Increase youth employment within the music sector
- Bring the local music community together

## Recommendation 27: Provide Continued Formation for Professionals (**Tier** 2)

As in every industry, music industry professionals worldwide need continuous professional development. It is recommended that a series of periodic workshops for music industry agents is organised, ideally by the Music Office in partnership with local music and music industry education organisations. These workshops should take place across the city and be targeted to specific sector professionals.

In addition, these gatherings usually serve as a platform to bring the sector together and share ideas and concerns. The workshops can be imparted by local or by national and international experts, and attendance should be encouraged by the music companies and agencies.

## How to implement it:

As a leader of the initiative, the Music Office will appoint a taskforce of professionals to compile a list of topics, most relevant for the local music industry's needs. Possible topics could include copyright, artists management, promotion and marketing, etc.

## Recommendation 28: Create Industry Guides for Music Professionals (**Tier** 3)

Although music business programmes are increasingly popular in colleges, the networking nature of the music industry means many professionals and musicians are self-taught. In the successful development of a professional career in music, knowledge of the local market and stakeholders is essential. The creation of a guide that includes information on the local music industry would assist both business training and development such as: the music industry database (see Section 1.2.1) in order to provide access to all stakeholders in the area; local venues and programmes for touring or recently-relocated musicians to get involved in; and key industry trends on consumption, marketing techniques, etc.

## How to implement it:

The Music Office will be the initiator of this initiative. The guide, however, should be created in collaboration with all the music companies and institutions, and other relevant organisations to include as much local knowledge as possible. It is important that it's updated on a regular basis, reflecting both the latest industry trends and the local ecosystem context.

## Recommendation 29: Develop periodical networking events (Tier 2)

The Music Office, in partnership with local music stakeholders and organisations, should establish monthly meetups in music venues to network and build trust. This can be occasionally elevated to regional, specifically focusing on The Shoals' area music industry, or national levels. All entities in the city should be involved. These meetings should be free, open to the public and relaxed, featuring talks from local musicians or music professionals, networking events, small showcases, technical visits to music spaces in the city, etc.

The aim of these meetups is to establish relationships between the music sector, and ultimately fostering communication, information sharing and collaborations.

### How to implement it:

Music Officer to initiate the meetups, with input from as many music ecosystem stakeholders as possible. Local music venues and spaces could take turns in hosting the meetups. Apart from strictly industry topics, the agenda for these can be made more open to include professionals from related fields, such as film, marketing, or startups.

#### EXISTING GOOD PRACTICE: Music Biz Mondays

Industry meetup and networking event started by the Purple19 collective in 2018. Meetings are free and open to the public, and topics change each month. Upcoming subjects include songwriter tools, licensing and publishing, local studios in Huntsville, booking advice, branding and marketing, and social media. Each discussion begins with a preliminary networking period, followed by an hour-long discussion of the month's topic, followed by another networking period and opportunities for further discussion.<sup>300</sup>

Recommendation 30: Use industry grants and internships to promote youth employment (Tier 3)

Internship grants should be developed to allow students to work with artists while studying and also once they leave university. This would increase the number of available qualified professionals to work with emerging artists, and it would also promote youth employment. On the other hand, it would help accelerate the professionalisation of young and emerging artists, and thus contribute to the overall music industry economy.

#### How to implement it:

The Music Office should initiate this, in collaboration with leading local educational institutions - University of Alabama Huntsville, Maitland Conservatory, Calhoun Community College, as well as other stakeholders from within the music industry (community radio

<sup>300</sup> Music Biz Mondays (n.d.)

stations, media, venue bookers, etc.).

Community radio is a tool for community cohesion, broadcasting local news, content and showcasing new talent from the local community. Community radio stations are already acting as a training ground, offering first work experience in sound, audio production, and presenting for the local community. Dedicated internship programs developed in collaboration with station managers can enhance their scope.

## Recommendation 31: Incentivize start-ups (Tier 3)

Huntsville has a unique goldmine of educated young professionals and students that are the perfect storm to make the city a global music tech capital. IP creation and music tech are two sectors of the music industry which move alongside trends enough to not only be sustainable, but even stay ahead of industry changes.

#### How to implement it:

Start-up incentives can be either financial or in-kind. A dedicated grant pool should be set aside with certain qualifications including a local start-up team and use of local third-party resources. Long-term financial incentives include tax rebates on payroll costs or discounted property taxes on office space. In-kind resources would be low-rent or subsidized space, advisory services and discounted or free physical resources. Tech and research companies should also be encouraged to network and collaborate to better facilitate relationships between their employees and spark creativity.

## 8.8 Creative and Artistic Development

## Recommendation 32: Set up a 'Fair Play' certificate for venues (Tier 3)

The Music Office should develop a 'Fair Play' guide and principles that support local artists, promoters and venues to create fairer deals that help the creatives and the music ecosystem at large. While it would not be a mandatory requirement, it would be more encouraging if organisations such as venues, festivals and promoters eligible to receive local or provincial grants would need to provide proof of complying with this 'Fair Play' standard, including not

having pay-to-play bookings and covering diversity quotas in their programme. This would include guaranteeing the adequate collection and distribution of copyright revenues. A 'Fair Play' badge could be designed to be placed in the space.

## How to implement it:

Once the guide is developed with the input from across the spectrum of the local live sector, a survey should be released that collects the necessary information from all venues and live music spaces and events promoters to evaluate the commitment to the guide's principles. The Music Office should be responsible for the data collection and periodic verification of the enforcement of these by the agents.

## Recommendation 33: Create a Huntsville Music Week (Tier 2)

Findings this addresses: Our interviews and survey have shown that there are already strong bonds between Huntsville talent/industry and the historical music scene emerging from the nearby Shoals region. By more closely linking Huntsville's efforts with the music industry in the Shoals, Huntsville could grow its audience and attractiveness to musicians.

The design of a Music Week which involves local and regional musicians and visitors will champion Huntsville's reputation as a music-friendly city on both the state and national level. As part of this Music Week, Huntsville needs to promote concerts in iconic parts of the city, such as public parks, The Three Caves, Ditto Landing, Big Spring Park and venues of all sizes; create alliances with the 4 cities from the Shoals region by inviting a selection of their artists to play in showcases; involve educational and professional activities and cultural exchanges which are inclusive and diverse; and, as a culmination, organise events with artists from a wide spectrum of genres in all stages of their careers in different parts of the city.

#### How to implement:

The Music Office will lead and facilitate the establishment of a task-force between the main regional tourism entities and music and music tourism associations: Huntsville/ Madison County Convention & Visitors Bureau, Florence-Lauderdale Convention and Visitors Bureau, Colbert County Tourism, Muscle Shoals National Heritage Area, Muscle Shoals Foundation, etc. The event will have to be accompanied by a strong marketing campaign, collaborations with

the regional cities, and brand and industry partnerships. The Huntsville celebration should be tied into existing regional events, such as the W.C. Handy Festival and the prospective 256 Day (a celebration of local musicians operating under the 256 area code). Celebrations can begin as a 1- or 2-day event, and grow to last for a week in the coming years.

#### **EXISTING GOOD PRACTICE: Noisemakers**

Noisemakers is a series held at the Maitland Conservatory. 301 The series presents a new artist each session to discuss their career and experiences in the industry, offering advice and answering audience questions. Afterward, the artist performs a selection of their songs. Events are free for all to attend, but numbers are kept to a limit via Eventbrite signups.

## Recommendation 34: Create an annual industry event (Tier 3)

There is currently no major music conference in Alabama, and Huntsville has the size and infrastructure to support such an event. Huntsville can create a unique selling point of having a music tech-focused conference, which plays on its regional strengths to cement it as a key player in both the regional and global music industry.

## How to implement it:

MIdCity, with the assistance of the City of Huntsville and the Huntsville/Madison County Chamber of Commerce, is committed to hosting the 2021 edition of Sound Diplomacy's Music Cities Convention. The event will not only introduce Huntsville to key music policy makers and industry stakeholders, but it will also welcome the international music industry to tour the newly completed \$45 million dollar Amphitheater as a highly desirable venue for artists to play. Huntsville needs to capitalize on the momentum of this convention by creating a similar, but broader-reaching conference as an annual event following Music Cities Convention.

The conference should be comprised of many elements, including networking opportunities, roundtables, panel discussions, product showcases, TED-style talks, workshops and masterclasses. In order to maximise the impact, the conference should be held during Huntsville Music Week, and be a platform for artist exchanges and showcases. It is also vital

301 Maitland Conservatory (2019)

that the conference plays up Huntsville's technology sector as a unique selling point for industry impact.

## 8.9 Collaborative Opportunities

Huntsville's location at the crossroads of major music hubs is something that has been mentioned frequently within the scope of this project. There are also many regions nearby which, like Huntsville, are taking the first strategic steps in supporting and furthering their music industries. Huntsville should work with these municipalities to introduce artist and professional exchange programmes, share best practices, cross-market music tourism, and generally hold each other accountable to progress. One sensible opportunity here is The Shoals area, a region with commonalities such as music industry size and sense of community, but with major differences the Shoals' focus on creation and music history compared to Huntsville's focus on tech and research. This is a foil which allows the cities to see eye-to-eye while offering each other invaluable insight on challenge areas.

# Recommendation 35: Coordinate exchanges with regional artists and professionals (Tier 2)

Huntsville is often overshadowed by industries in Nashville and Atlanta and overlooked as a state touring destination by Birmingham. One of the biggest reputational growth opportunities is for the city to reassert itself as a prime location for creativity and business development in a more affordable and less crowded environment, as well as having an attentive audience thirsty for fresh, original music. Incentivizing regional (and even national/international) artists and professionals to experience the offer for themselves and spread the word back home will slowly but surely grow Huntsville's reputation and network to establish it as a mecca for business and innovation.

## How to implement it:

Exchanges must coordinate opportunities to perform, network and learn in Huntsville's industry. Guests can be hosted in a dedicated space at the music hub (see Recommendation 49: Establish a dedicated Music Hub) and introduced to key players in the local business. In exchange, guests should be required to write a piece for local and at-home publications and

post to their social media pages. The Music Office must be a driving force behind this. A good starting point would be the Shoals Area, which has no shortage of artists and budding professionals through UNA who would benefit greatly from Huntsville's larger size and tech companies, while Huntsville's music professionals would benefit from the Shoals' recording studios and density of seasoned and budding creatives.

## Recommendation 36: Collaborate with regional music industries (Tier 2)

Huntsville is in a nice pocket of distance from major music hubs such as Nashville and Atlanta, as well as local regional hotspots like Muscle Shoals. With such a wide variety of musicians and professionals nearby, Huntsville's network can be maximised with these resources.

## How to implement it:

Creating partnerships with these hubs is a great way to share best practices, expand networks, share resources and ensure accountability towards goals. Artist exchanges and collaborative conferences/conventions are a great way to expand audience reach and foster collaborative opportunities and creation. The Shoals is a particularly good collaborative opportunity, as it has the historic creative factor to balance Huntsville's present-day tech approach, and the two industries could have a lot to learn from each other.

## INTERNATIONAL CASE STUDY: Toronto-Austin Music City Alliance

The alliance between Toronto and Austin<sup>302</sup> has pushed each city to progress its policies and infrastructure, leading to new music offices and tourism campaigns. The Music City Alliance collaboratively works to increase investment, tourism, insight, and industry growth. Beginning with 14 members in 2013, Toronto and Austin have worked to export talent between the two cities leading, in 2017, to Canadian Music Week providing the platform for the first Austin-Toronto showcase, displaying musical talent from both cities. For 4 years running, the Austin music export and documentary film project, ATX6, has chosen artists to travel to Toronto to perform and film in partnership with the alliance.

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<sup>&</sup>lt;sup>302</sup> Gonshor (2017)

Recommendation 37: Become a part of the Americana Music Triangle (Tier 2)

The Americana Music Triangle is a comprehensive collection of historical, musical and cultural attractions that define the birthplace of our America's musical traditions, including: Blues, Jazz, Country, Rock 'N' Roll, R&B/Soul, Gospel, Southern Gospel, Cajun/Zydeco and Bluegrass. It is a collaboration between the Williamson County Convention and Visitors Bureau and different institutions in the region, including state and local representatives, music tourism boards, artists and musicians and music companies. The projects presents itself as a series of routes for tourists to follow which will take them to key attractions. One of these routes connects Nashville and the Shoals, taking people on a journey from the Grand Ole Opry to Franklin, Leiper's Fork, Lawrenceburg (the home of Southern gospel) and along the Natchez Trace into the contrasting small town calm of the Shoals recording industry.<sup>303</sup>

### How to implement it:

The Americana Music Triangle website is its main asset, as it compiles the regional routes that showcase key spots in the history of Americana music. Huntsville's integration into this list will take time as it collects its history to present its case, but the existing events (as well as the recommendations listed herein) will be great additions to the music calendar featured on the Triangle's website and provide extra promotional grounds.

## 8.10 Audience Development

Increase and promote audience accessibility in local live music

**Initiator:** Music Office

**Background:** One of the key challenges that came up frequently during the interviews, roundtables and music ecosystem survey is a lack of diversity, from genres to audience members. The downtown areas especially tend to cater to limited demographics.

<sup>&</sup>lt;sup>303</sup> Americana Music Triangle (2019)

#### Goals:

- Increase accessibility for live music audiences in terms of age, ability, sexual orientation, cultural and ethnic backgrounds
- Increase the sustainability of the local music ecosystem through audience development support programmes
- Improve the experience of music audiences

## Recommendation 38: Create a Live Music Passport (Tier 2)

Some feedback echoed by many in Huntsville is that they are a) often unaware of what's happening around the city and b) willing to pay big money to see big names even outside the region but are unwilling to pay for local acts. Convenience is one of the biggest tools to encourage people to attend events, and a Live Music Passport creates a ready-made agenda with the potential for discounted rates.

### How to implement it:

Live Music Passport can be issued as part of the music tourism steps of the Music Office, available at information centres, hotels and participating music venues. The passport should allow discounted entry to venues across Huntsville, especially those which are certified to be meeting the original music quota. Additionally, local businesses such as restaurants or record stores could sponsor the passports by offering discounts or deals to passport holders in exchange for placement on the passports. The Passport should be linked to a Music Map app of the Huntsville area, to help inform people of current events at the hotspots and guide their night out.

## EXISTING GOOD PRACTICE: The Bridge Meets Downtown

This collaboration between The Bridge Cyphers and Arts Huntsville was held in 2018.<sup>304</sup> The cypher was open to all, regardless of local 'fame'. Instrumentals are announced before the event so participants can better prepare their verses. The event is done in one take, and is open to the public to watch, so participants are asked to keep their lyrical content family-friendly.

<sup>304</sup> The Bridge Cyphers and Arts Huntsville (2019)

Recommendation 39: Promote youth-organised concerts in community spaces/churches (Tier 3)

Support should be directly provided by the City through youth engagement in community centres, or developing an accessibility grant or policy to encourage the lease of spaces to young professionals. This will help young aspiring musicians and music professionals to develop their skills while increasing the number of all-ages music shows locally.

This initiative could be combined with the production of a local radio programme to showcase the city's young and emerging talent on-stage and off-stage.

#### How to implement it:

The Music Office should work together with Arts Huntsville and the Office of Multicultural Affairs, to define and start this process, involving also music ministers of churches, education centres and non-profits such as the Huntsville Community Drumline.

## EXISTING GOOD PRACTICE: Young Performers Open Mic

This open mic is specifically reserved for performers 20 and under, aspiring to give them a low-pressure performance platform with the opportunity to use premium gear, such as the onsite guitar and piano. There is no cover charge, but guests are asked to purchase a drink from the sponsor before going to the venue.

Recommendation 40: Encourage corporate entities to promote music internally (Tier 2)

Huntsville is home to companies such as NASA and Hudson Alpha, which are a hive of modern creative brain power. Companies should work internally and among each other to encourage

their engineers to get involved in the local music industry as interactive fans or creators. Some suggestions for this include:

### How to implement it:

- 1. Open a branded venue in the city with live music programming, at which tech company employees receive discounts.
- 2. Form collaborations with local city musicians and maybe recorded or performed live at NASA or venues in the city
- 3. Get corporate companies to communicate local gigs to employees and give them access to discounted tickets.
- 4. Introduce music lessons, a NASA employee choir, music for sleep and relaxation playlists into the employee wellbeing program to promote mental health, stress reduction and brain health.
- 5. Create playlists of what employees are listening to during their shifts.
- 6. Encourage employees to form bands and perform at local venues.
- 7. Create a collaborative piece of music (co-written by NASA employees and local musicians) that can be recorded and played in space.
- 8. Bring more music events to the US Space and Rocket Center (in talks).
- 9. Coordinate music events and trips to the Shoals through Space Camp.

#### EXISTING GOOD PRACTICE: Music from the Moon

Contestants are in to win cash prizes and a paid trip to Huntsville to perform their winning song at the NASA National Gala. Martin Guitars also exclusively built a guitar for the gala, which the winner may play on before it is put on display in a museum. Song submissions must stick to the theme of space exploration and reference the moon as a means of honouring the Apollo 11 mission. Celebrity judges already announced include Mumford & Sons' Ben Lovett as well as John Paul White, with more announcements expected before the contest closes. Submissions start in the New Year and run until April 30, 2019. The Gala will be held in July 2019.

## 8.11 Spaces and Places

## Recommendation 41: Establish a dedicated Music Hub (Tier 2)

Artists and music professionals, especially at the beginning of their careers, struggle to dedicate the hours needed to perfect their craft and skills since they mostly complement their income with non-music jobs. By creating accessible spaces for the music sector to work and play, the city will support the developing and retaining of the grassroots scene and allow individuals to focus on their musical careers. The size and capacity of the hub should be assessed by the Music Office and the Music Board to ensure it is suitable for the needs of the professionals working in the music sector in the city. Ultimately, the centre should act as a professional development hub by providing access to learning, rehearsing, performing and networking opportunities to the music sector.

### How to implement it:

Much of the hub's role is already being accomplished through partnerships such as that of RCP Companies and the Maitland Conservatory. RCP, a community empowerment company, noticed the work of The Conservatory in teaching modern commercial music production and talent development and helped them expand their operations beyond their original North Huntsville location (which will stay open) to Madison Square in conjunction with the professional talent development program. The 7-2 and FAME Studios in Muscle Shoals also have programmes expected to be feeders for the next generation of music industry, with 2-year degree programs offering certifications in the most sought-after music production systems. MidCity is the most sensible location for the physical manifestation of the hub, due to its central location and the already-dedicated space designed to inspire technological and creative IP.

## Recommendation 42: Provide a regulatory framework for temporary event space (**Tier 2**)

Huntsville should create regulations which facilitate temporary leases for local music and cultural organisations in non-traditional spaces. This allows for more creative and unique audience experiences at events, experiences which generate an authenticity that audiences crave these days.

## How to implement it:

All this requires is the desire to try it, and not finding a reason to say no. It's already happening in neighborhoods across the city. There are bands practicing in houses, parties happening in non-traditional spaces, and that can expand with informed cooperation of neighbors, a relaxed enforcement of non-compliant issues, and non intervention of citizens participating at events in temporary spaces and complying with posted city policy.

## Recommendation 43: Programme public spaces (Tier 2)

Huntsville has a plethora of public spaces and community facilities which can be maximised to host public programming. Parks, town squares, churches and the like are perfect settings for fairs, markets, festivals, summer concert series, busking series, etc.

#### INTERNATIONAL CASE STUDY: Quartier des spectacles

The Quartier des spectacles is downtown Montreal's primary entertainment and arts district. It boasts over 30 performance venues in an area just over 1km², as well as public spaces for its over 40 events per year. The district was designed for music and cultural events, with several projectors bringing surrounding infrastructure to life, lamp posts designed for rigging, illuminated walkways and several other urban design features. Although originally intended to support the Montreal International Jazz Festival, it now serves other cultural events. During the summer, the area is pedestrian-only.

The district can host 50k people in its various spaces, and organizations can apply to hold events via the Quartier des spectacles website, which lists each public space alongside their respective specs. Proposed events must be free to the public and must not act as a sales or

promotional platform for commercial entities.

### How to implement it:

Summer programming with be the easiest to book, as it will have the most public engagement. Weekend concert series, farmers markets and fairs are all good warm-weather options. Featured music should be local, and musicians should apply through the Music Office to be given slots as performers. Winter months can more strongly utilize spaces such as churches and community centres, incorporating educational elements and family-friendly events.

## Recommendation 44: Plan for the Amphitheatre (Tier 2)

It is important in the developing of Huntsville's music strategy, identity and overarching brand, that the amphitheatre be a place where the community can congregate, both inside and outside of the live music experience. It's imperative that the premises not be only a 'shed' for music, 15-20 times per year. The overarching community engagement strategy must be embedded in the delivery strategy of the amphitheatre and respected by the operators, stakeholders, shareholders and landowners. This means encouraging secondary activities on show days and ensuring the space is open to the public as a leisure facility on dark days, and that the evaluative framework attached to the amphitheatre's success is not only measured in attendance and music-related revenue, but by footfall 365 days per year, and the amount of engagement the community has with the space in a variety of ways, from an exercise facility to a food market, an educational offer to one that can host community engagements.

#### How to implement it:

This is in line with the findings of the RCL & Co strategy and the discussions previously held at City Hall in the operational contract with the operators of the amphitheatre. This strategy must be stressed and benchmarks applied to it, and it must be agreed upon by all parties before construction commences. It must ensure that access points to the facility are open to all on off-dates and there is ample space for congregation, markets and community events. Explore utilising the venue as an exercise facility on off-dates (similar to Red Rocks), and ensure the amphitheatre is marketed as one for all in Huntsville. In addition, look at ticket

offers for local schools and constituents, ancillary uses such as film screenings and sports screenings, and ensure this is mandated in the marketing of the facility, from day one. This can include developing a marketing offer to bring Muscle Shoals into the amphitheatre project through commissions, exhibitions, branded food and beverage, licensed content, themed concerts and genuine, open collaboration with musicians and stakeholders from across the Shoals and the Americana Music Triangle. This delivery should be managed by the operators but governed by a community engagement advisory structure.

## 8.12 Implementation Timeline

These recommendations must be implemented in a certain order in order to be the most effective, although considerations must also be taken for realistic timeframes. They have been classified into Tiers 1, 2 and 3, with Tier 1 being a 1-2 year implementation range, Tier 2 being 2-3 years, and Tier 3 being long term goals.

The first step is to create the Music Office and accompanying Music Board, as those are the core bodies from which most of the other work will branch. Education points are also primarily short-term tasks, even if their full effects may not be measurable in the short term. Mid range goals include zoning and audience development work, while long term goals include some event work, marketing, education and tasks which will require state coordination. The following table is a collection of the recommendations listed in this chapter and their respective implementation timelines, for quick access.

Recommendation	Tier
Recommendation 1: Appoint Two Music Officers	1
Recommendation 2: Set Up a 2-Person Team in the Music Office	1
Recommendation 3: Build and maintain a digital database of the local music ecosystem	1
Recommendation 4: Provide artists and professionals with free assistance in key areas	1
Recommendation 5: Set up bi-monthly meetings with other city departments	1

Recommendation 6: Measure the local music sector through a Music Observatory	1
Recommendation 7: Hold two Open Forums per year for the music community	1
8.2 Establish a Music Board	1
Recommendation 8: Streamline permits and licenses required for music activity	2
Recommendation 9: Reassess taxes and fees in the entertainment sector	2
Recommendation 10: Set up incentivisation schemes focused on inclusive growth	2
Recommendation 11: Review the noise regulation	2
Recommendation 12: Assess the implementation of 'Agent of Change'	1
Recommendation 13: Expand Entertainment District Parameters with a Creative District	2
Recommendation 14: Consider zoning to support music venues out of main entertainment areas	2
Recommendation 15: Extend night-time transport in key entertainment areas	2
Recommendation 16: Create tax breaks for creative businesses	2
Recommendation 17: Dedicate percentage of State Lodging tax income to music (state task)	3
Recommendation 18: Create a business classification for culture	1
Recommendation 19: Strengthen the private music education system	3
Recommendation 20: Utilize Magnet Program resources to expand music education	1
Recommendation 21: Create more points of contact with local music from an early age	1
Recommendation 22: Develop a musical instrument lease system	1
Recommendation 23: Create a unique Music City brand	2
Recommendation 24: Restart an old event	3
Recommendation 25: Create a local events calendar	1
<u> </u>	

Recommendation 26: Promote local music amongst visitors, young professionals, locals	2
Recommendation 27: Provide Continued Formation for Professionals	2
Recommendation 28: Create Industry Guides for Music Professionals	3
Recommendation 29: Develop periodical networking events	2
Recommendation 30: Use industry grants and internships to promote youth employment	3
Recommendation 31: Incentivize start-ups	3
Recommendation 32: Set up a 'Fair Play' certificate for venues	3
Recommendation 33: Create a Huntsville Music Week	2
Recommendation 34: Create an annual industry event	3
Recommendation 35: Coordinate exchanges with regional artists and professionals	2
Recommendation 36: Collaborate with regional music industries	2
Recommendation 37: Become a part of the Americana Music Triangle	2
Recommendation 38: Create a Live Music Passport	3
Recommendation 39: Promote youth-organised concerts in community spaces/churches	3
Recommendation 40: Encourage corporate entities to promote music internally	2
Recommendation 41: Establish a dedicated Music Hub	2
Recommendation 42: Provide a regulatory framework for temporary event space	2
Recommendation 43: Programme public spaces	2
Recommendation 44: Plan for the Amphitheatre	2

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