



The 2022 Chattanooga Music Census

Appendix: Data Deck with Full Results



Participation and Completion Rate

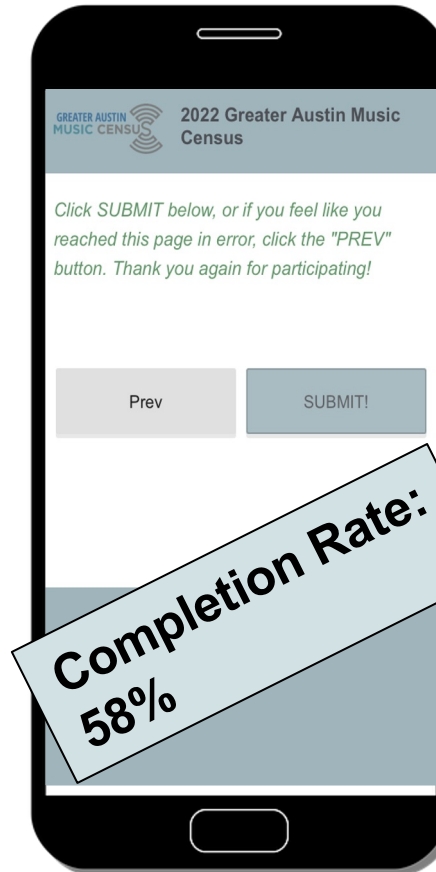
WHO PARTICIPATED?



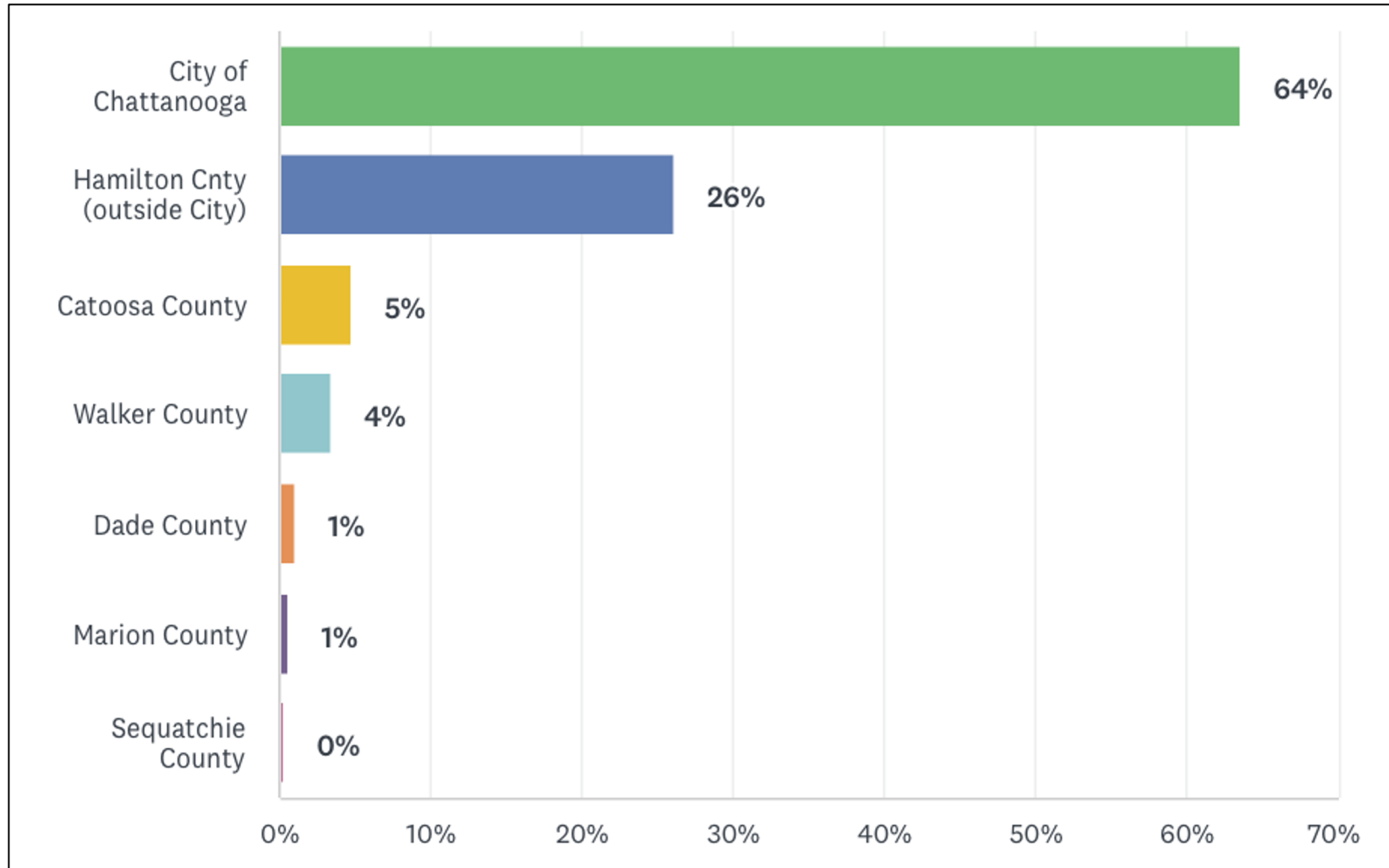
online respondents



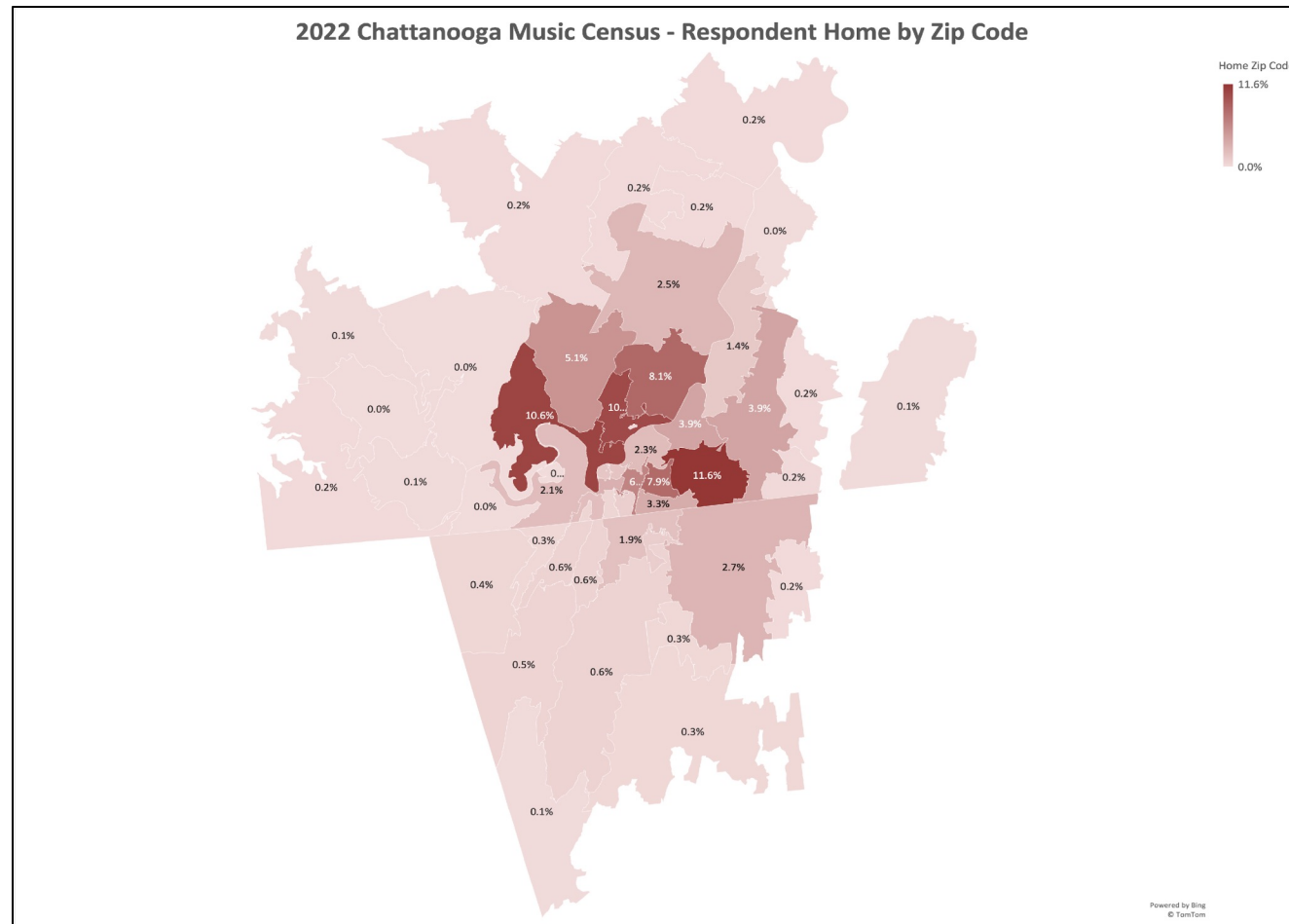
3.3 responses per 1,000 population



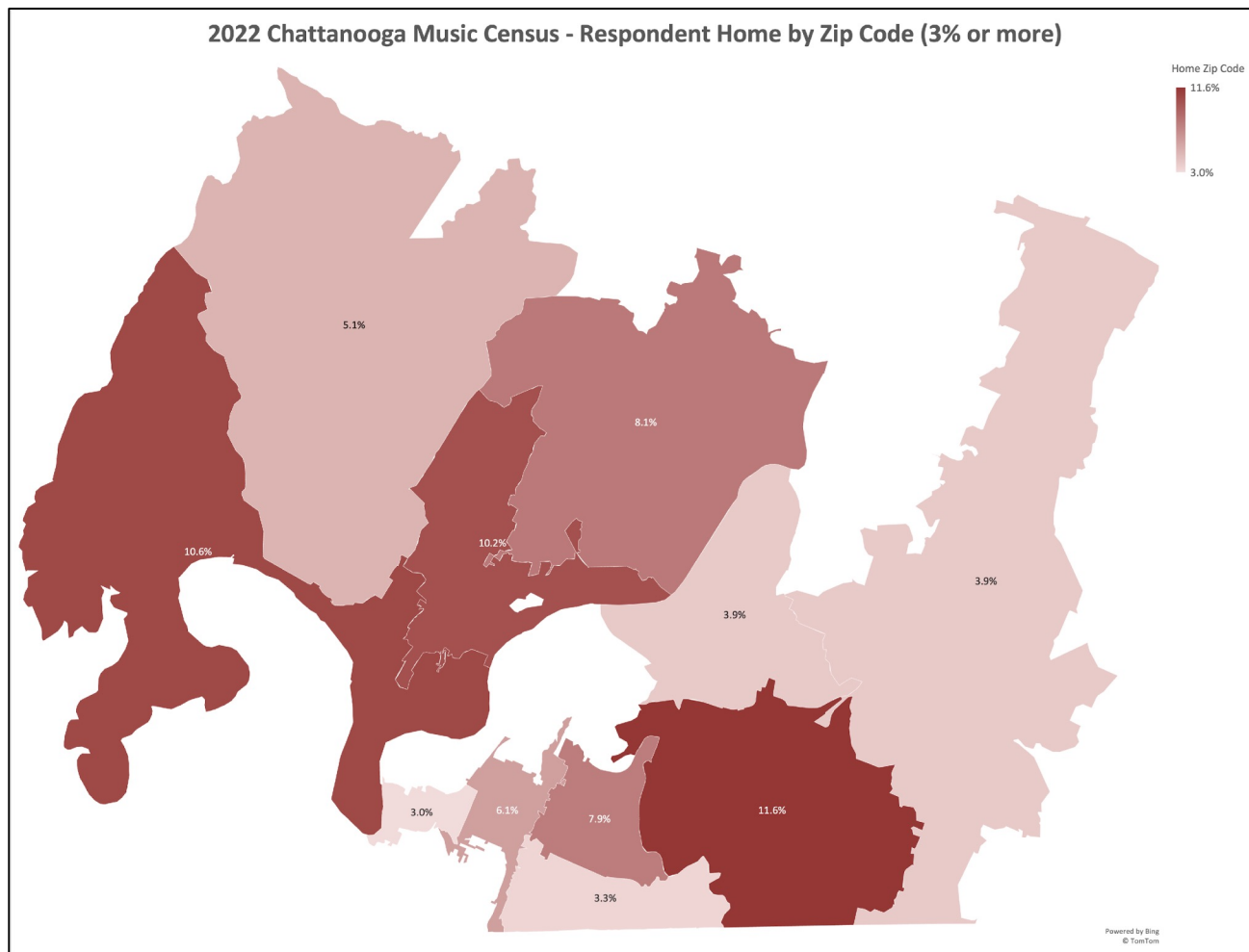
Geography: City/County of Residence



Geography: Home Zip Code (entire MSA)

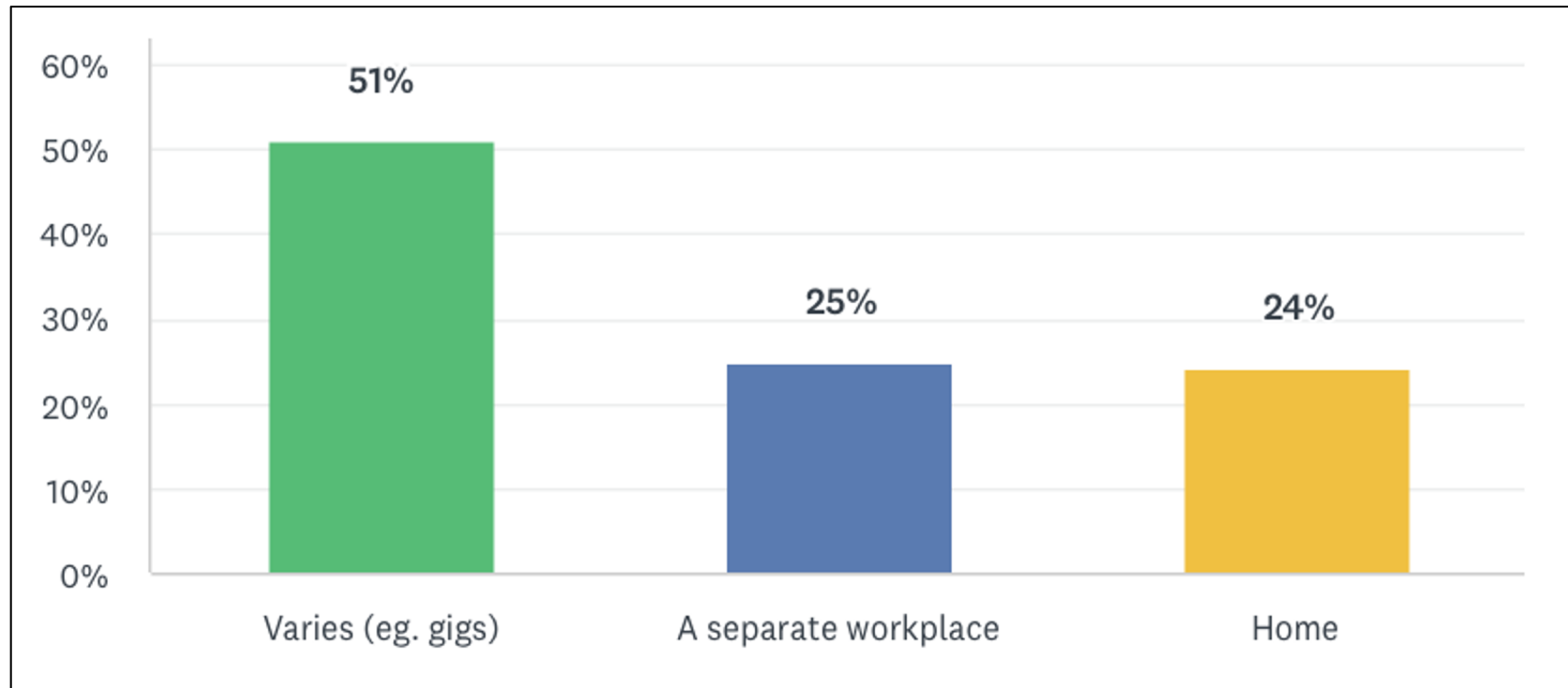


Geography: Top Home Zip Codes (3% or more of total)

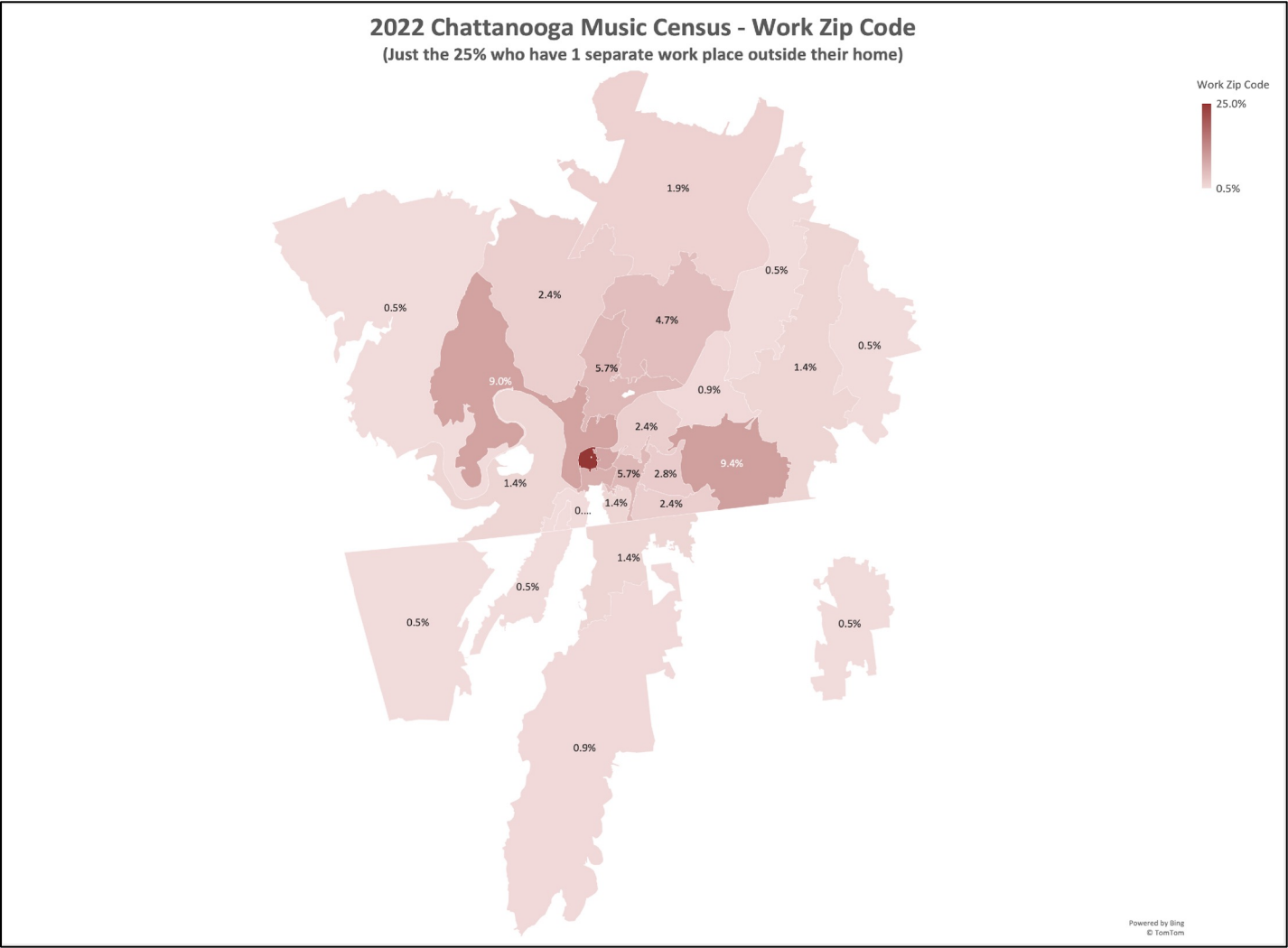


<u>Zip Code</u>	<u>City</u>	<u>Responses</u>	<u>Percentage</u>
37421	Chattanooga	153	11.6%
37405	Chattanooga	140	10.6%
37415	Chattanooga	135	10.2%
37343	Hixson	107	8.1%
37411	Chattanooga	105	7.9%
37404	Chattanooga	81	6.1%
37377	Signal Mountain	67	5.1%
37363	College Dale	52	3.9%
37416	Chattanooga	52	3.9%
37412	Chattanooga	44	3.3%
37408	Chattanooga	40	3.0%

Geography: Work Location

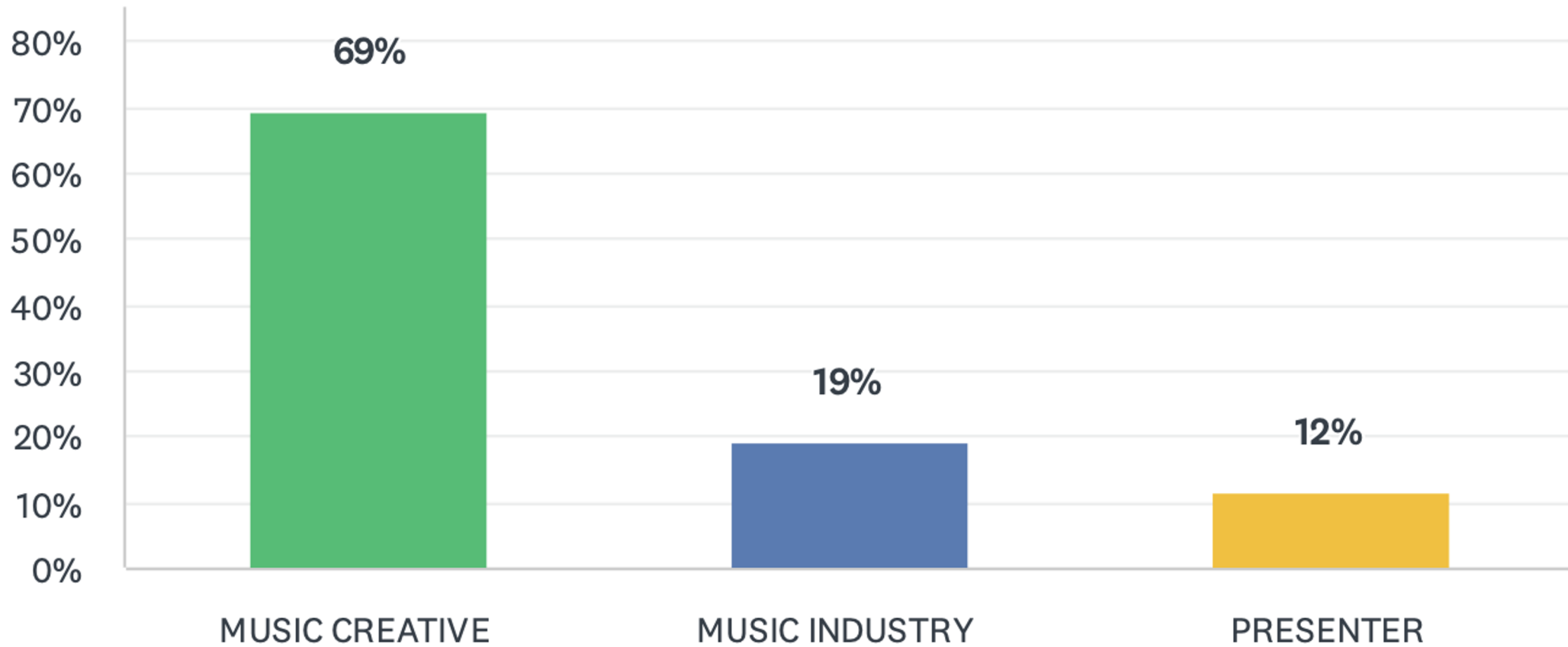


Geography: Work Location by Zip Code for the 25% who have a workplace out of home

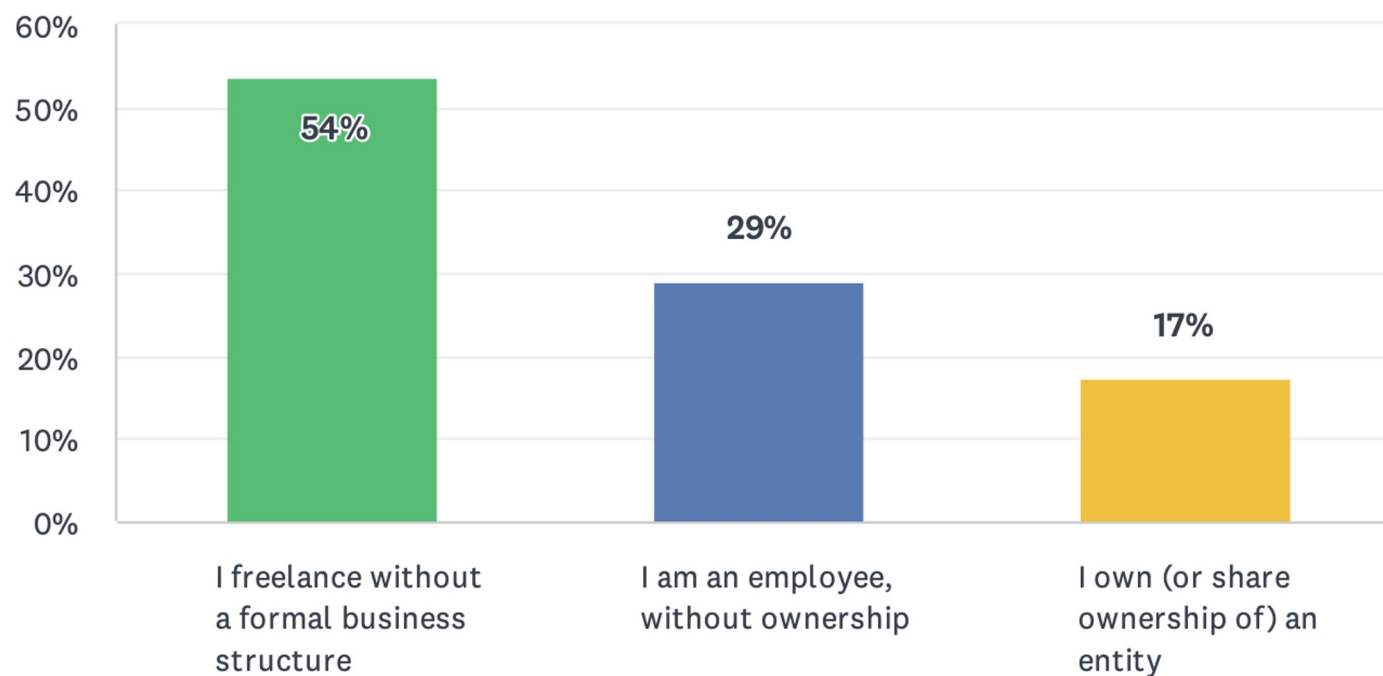


<u>Zip Code</u>	<u>Responses</u>	<u>Percentage</u>
37402	53	25.0%
37421	20	9.4%
37405	19	9.0%
37403	18	8.5%
37408	15	7.1%
37404	12	5.7%
37415	12	5.7%
37343	10	4.7%
37411	6	2.8%
37377	5	2.4%
37406	5	2.4%
37412	5	2.4%
37379	4	1.9%
30741	3	1.4%
37363	3	1.4%
37407	3	1.4%
37419	3	1.4%
30707	2	0.9%
37416	2	0.9%
30750	1	0.5%
30752	1	0.5%
30755	1	0.5%
37341	1	0.5%
37350	1	0.5%
37353	1	0.5%
37397	1	0.5%
37409	1	0.5%

Primary Industry Sector



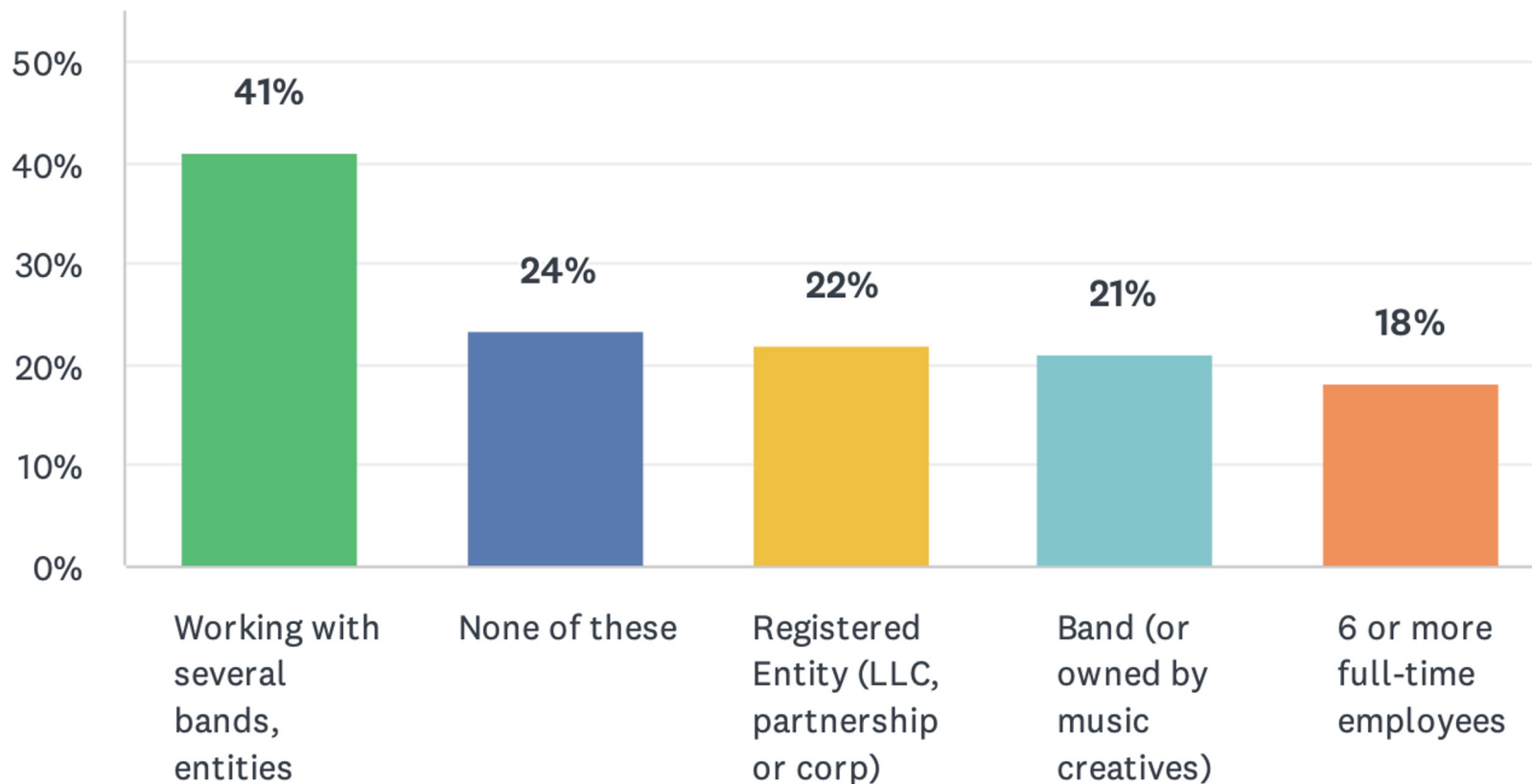
Music Business Structure



Word Cloud of Comments



Some Features of Respondents' Music Work



"I am mainly a musician at a local church along with audio engineer, and occasionally book and promote events"

"Only 2 employees dedicated to entire venue operation"

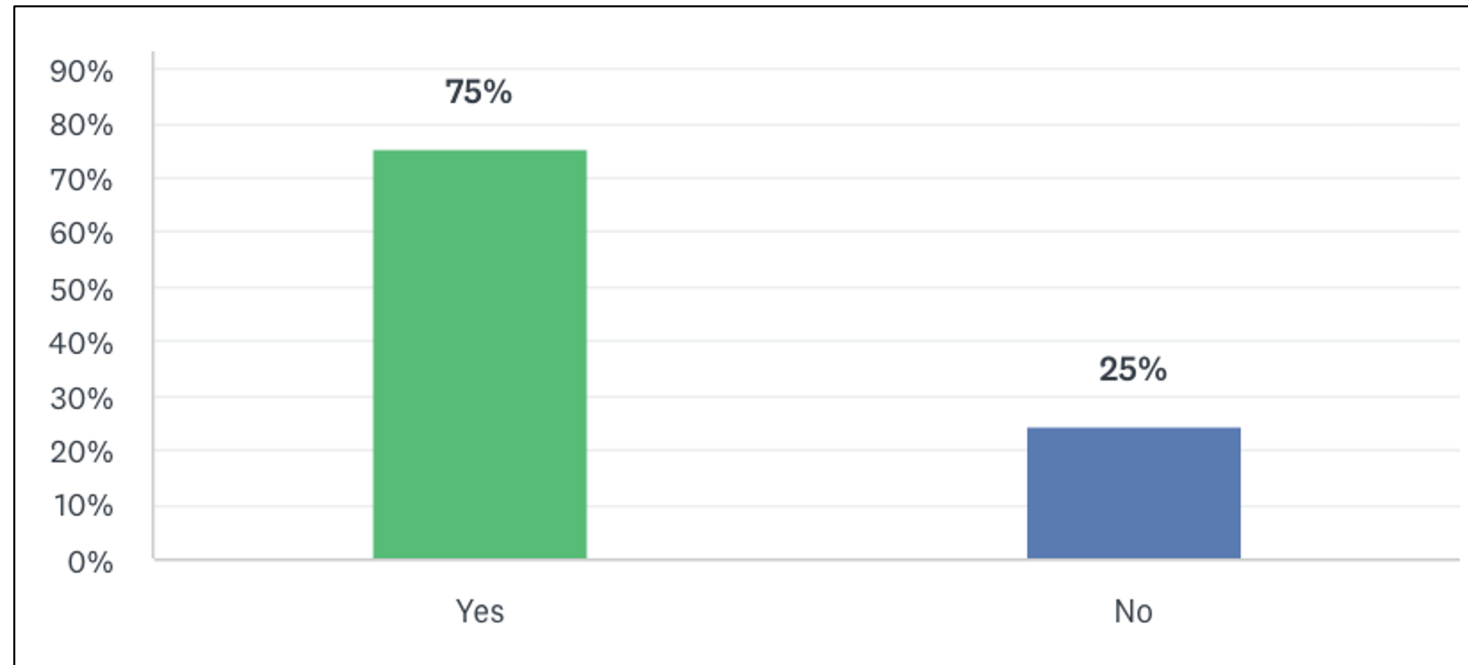
"Full time job + working musician and sound/recording engineer."

"We're a collective"

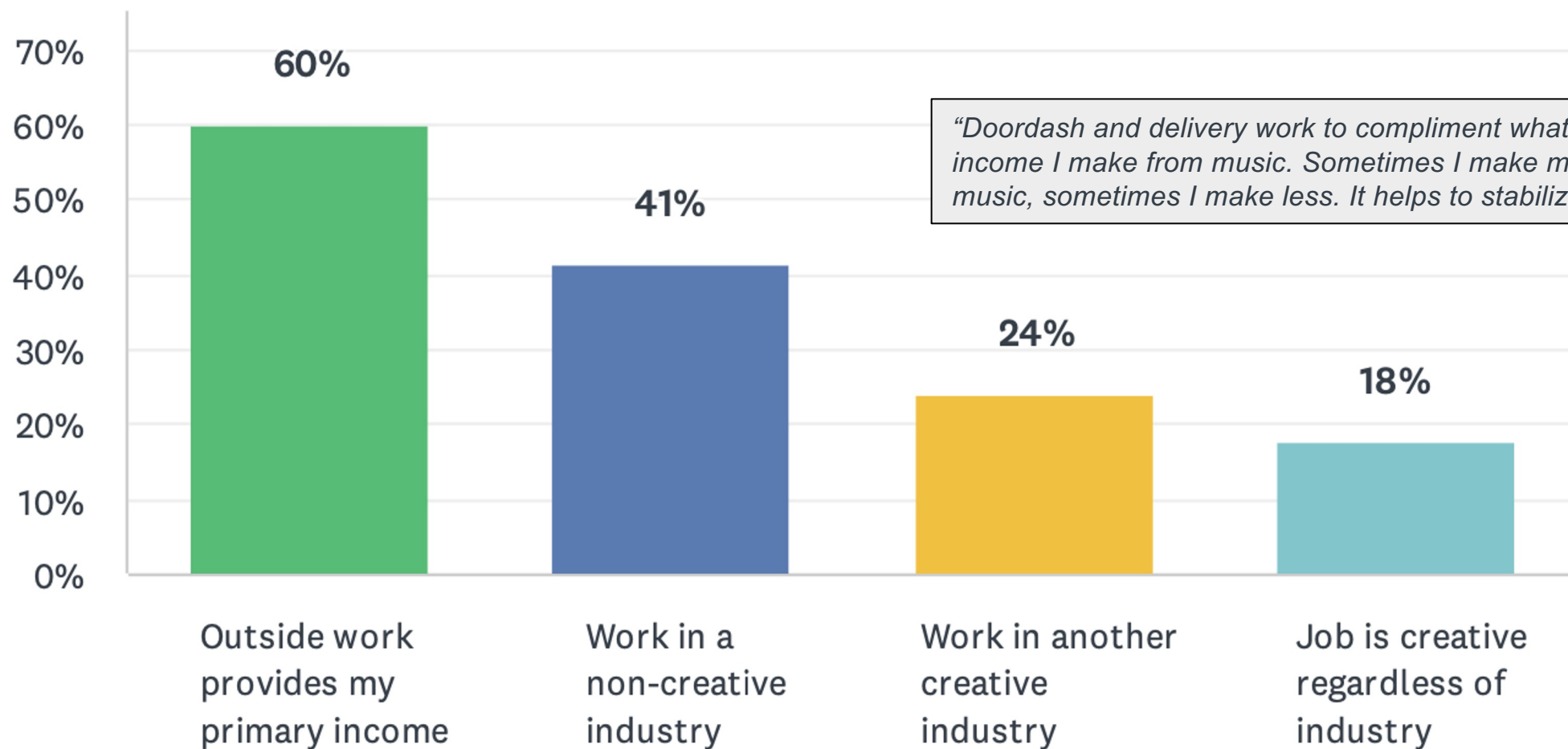
"I am a musician, and I run a music nonprofit."

"IATSE Stagehand"

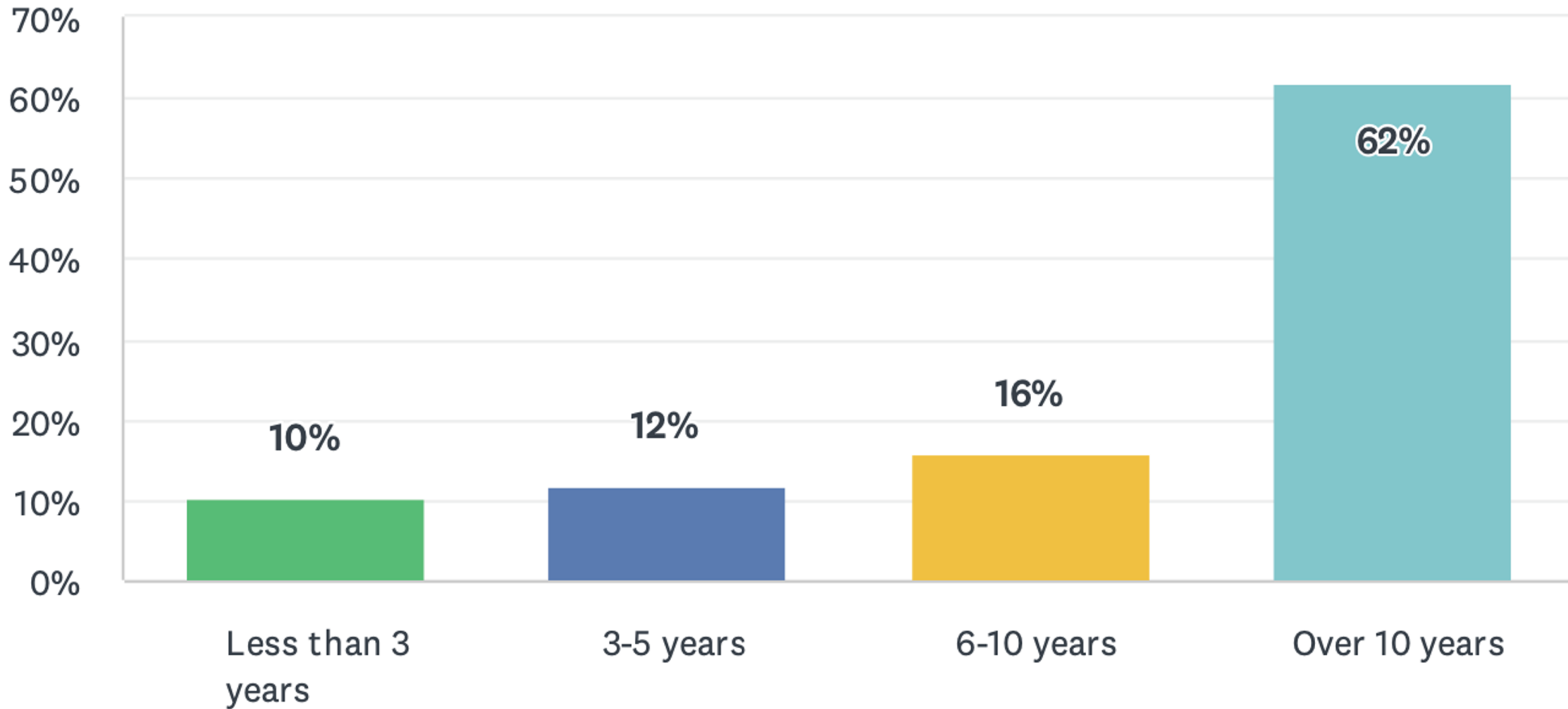
Income Outside of Music Work



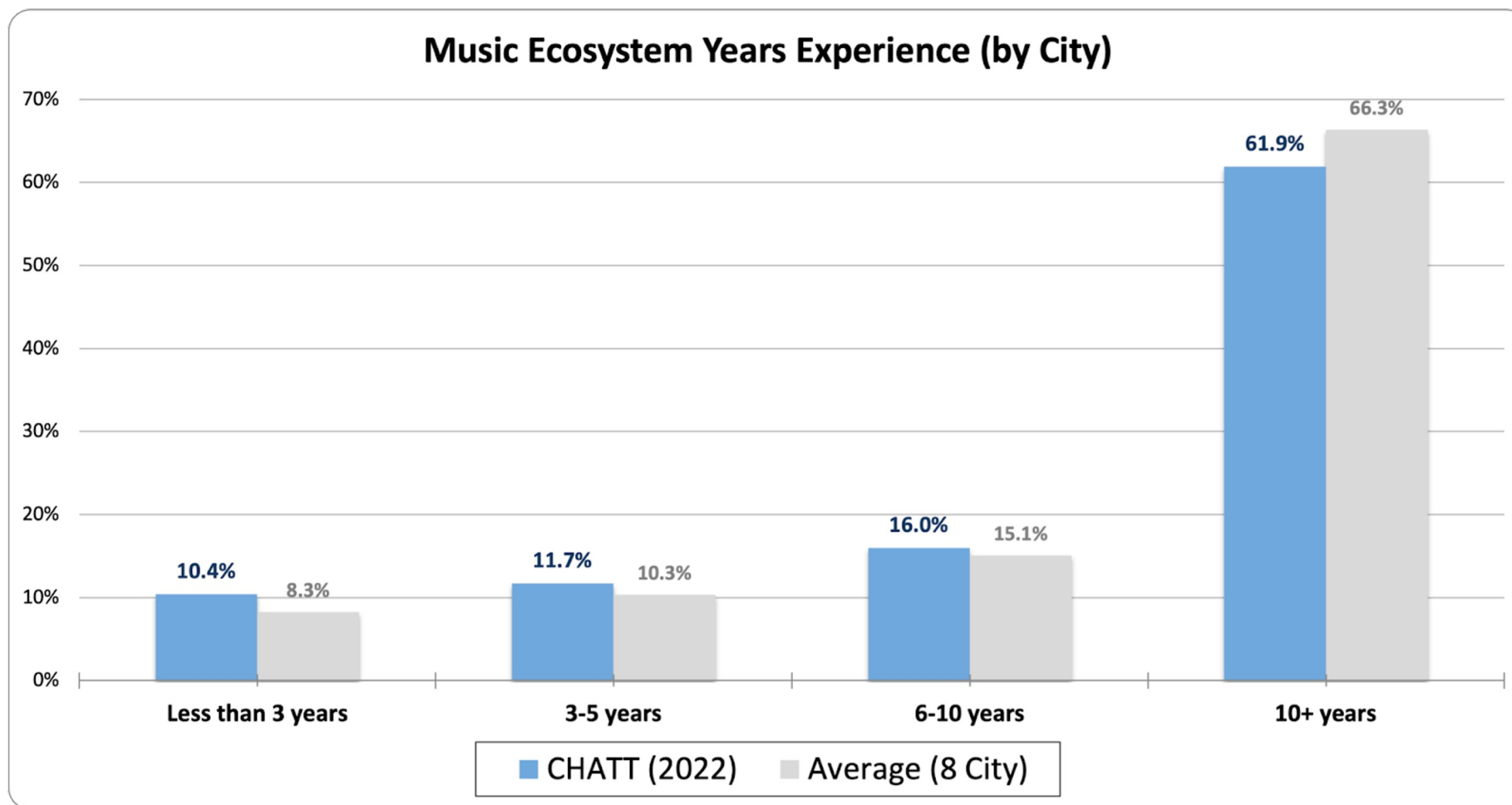
Features of Work Outside of Music



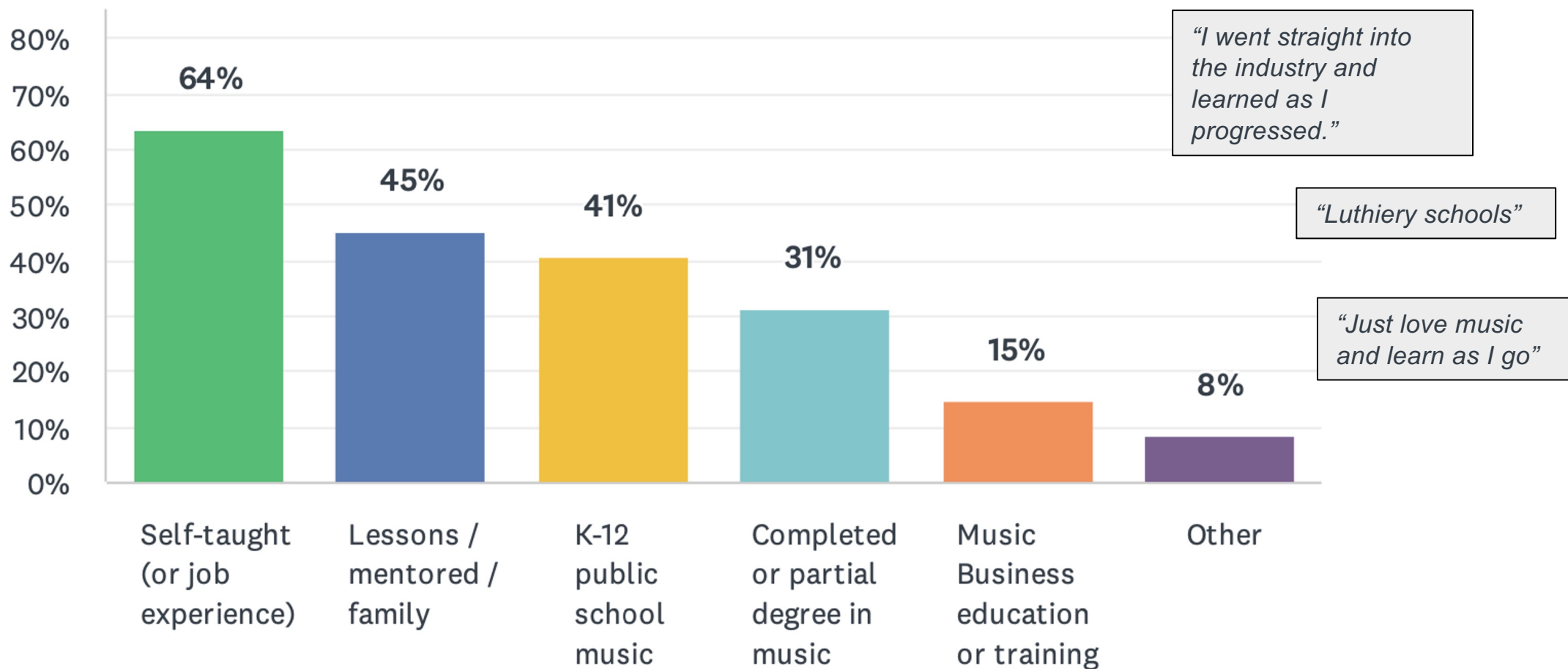
Years Experience in Music



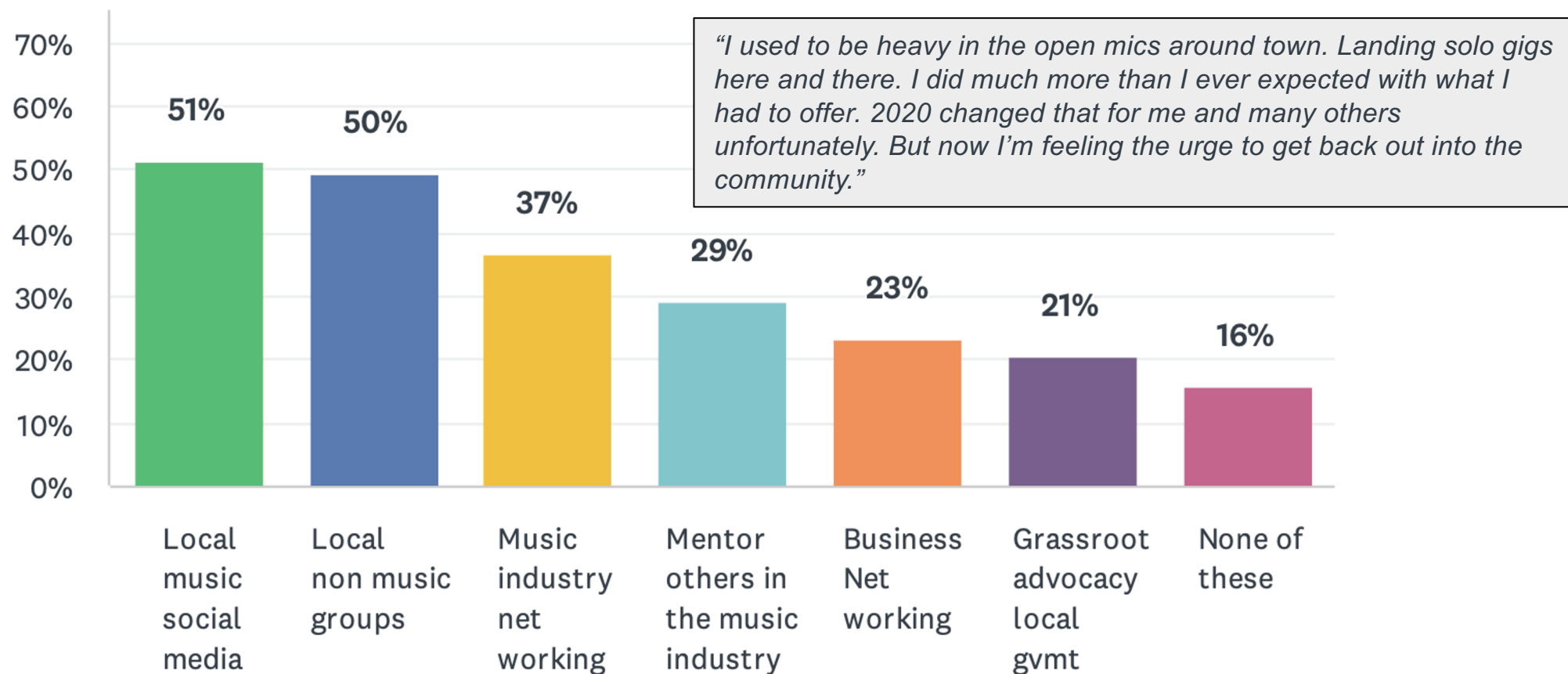
Years Experience in Music (v. average of 8 other cities)



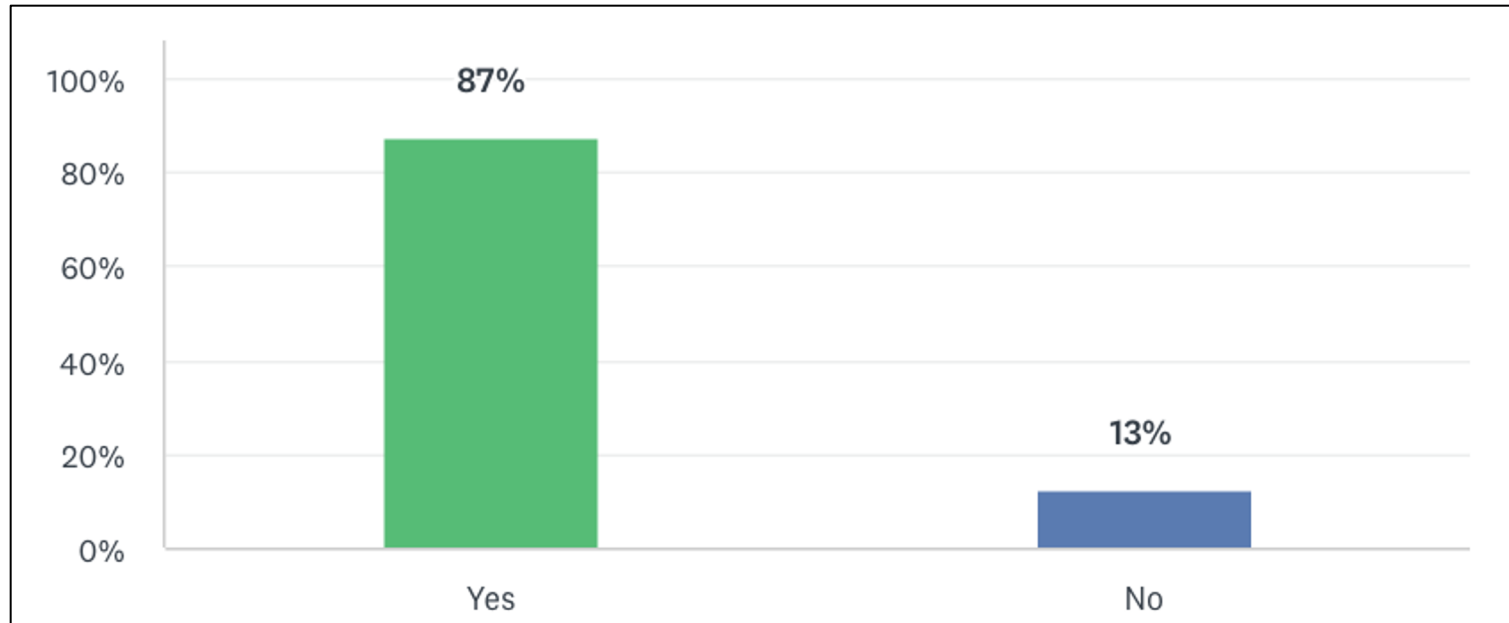
Music Training or Experience



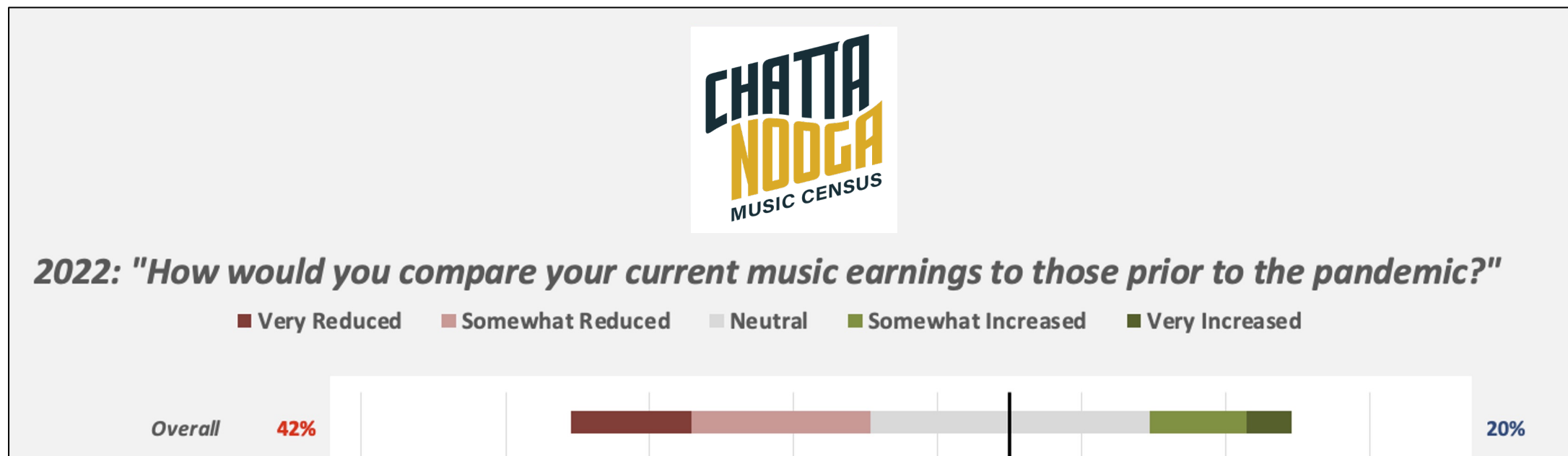
Local Activities



Worked in Music Industry Prior to Pandemic

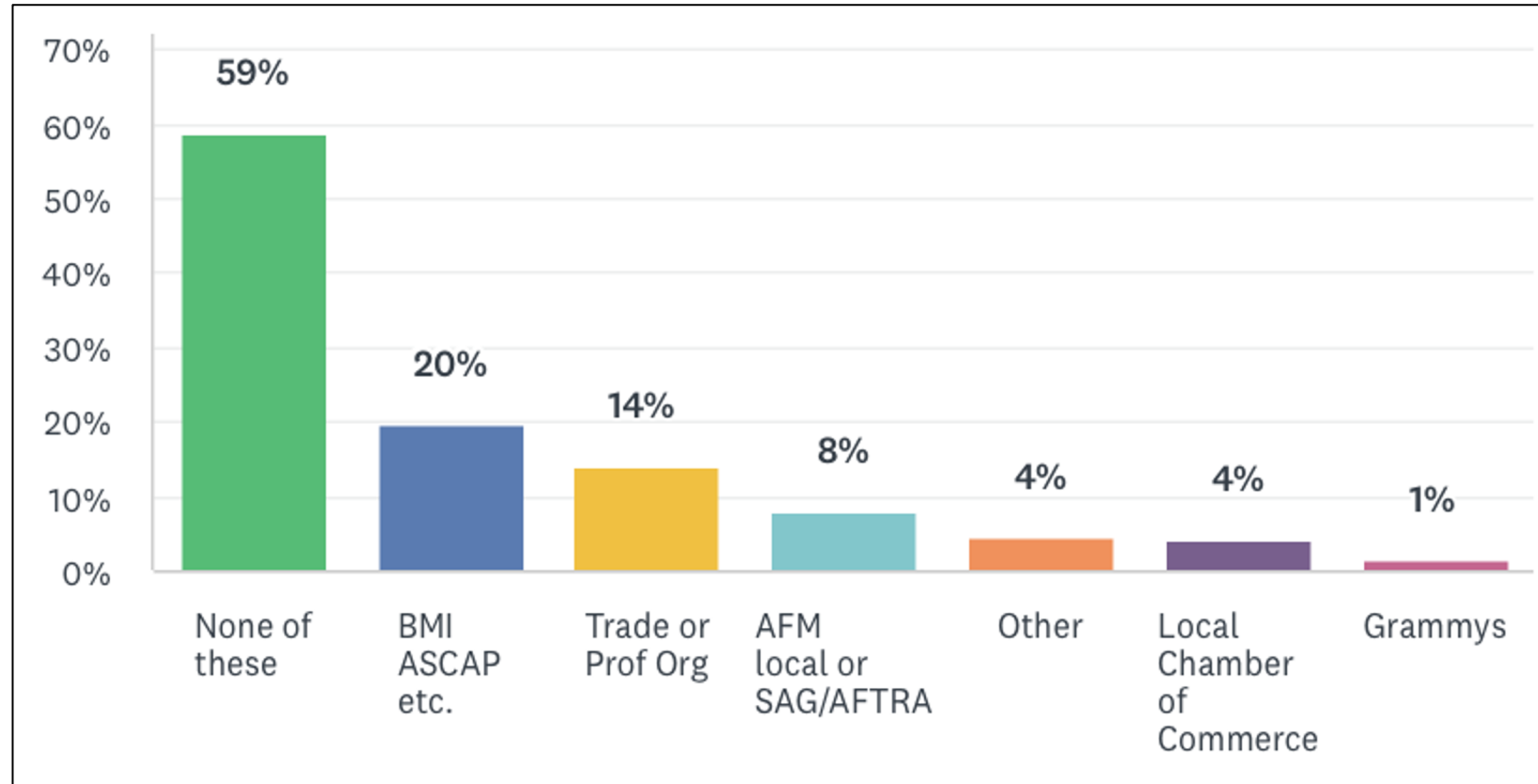


Still Recovering From Pandemic



"I am making more than before the pandemic, I invested in myself, my music and my business heavily since the beginning of Covid and a single slider does not give enough representation of the hard work some people put in during a global pandemic."

Registrations and Memberships



“Independent Promoter Alliance, National Independent Venue Association, International Entertainment Buyers Association”

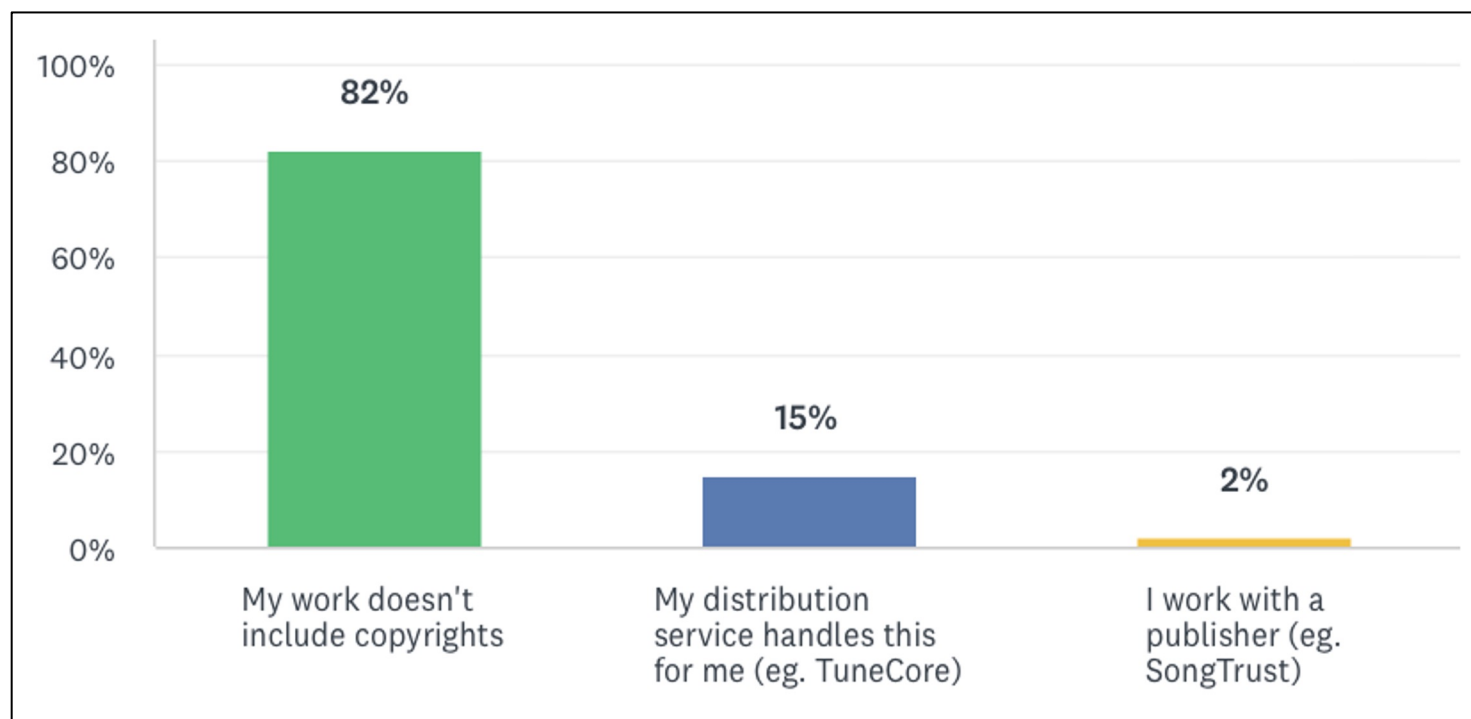
“NAMA native american music association”

“Weird question”

“Dramatist Guild, Theater Makers Studio”

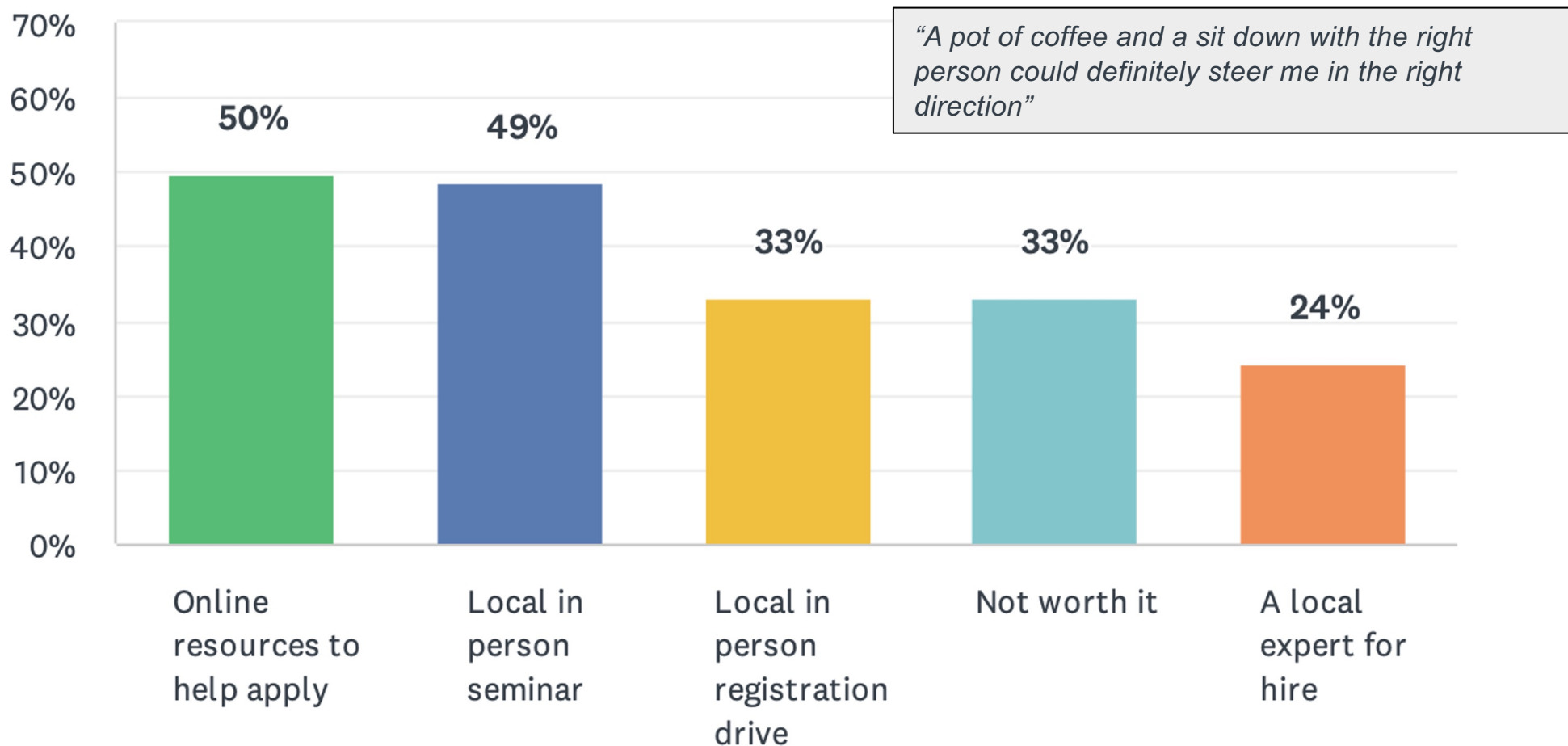
Why Royalty Collection/Registration Has Not Been Pursued

(by the subset of respondents who haven't registered for royalty collection)



Suggested Assistance to Register and Collect Royalties

(by the subset of respondents who haven't registered for royalty collection)



Similar Resolve to “Stay in Music” v. “Stay in Chattanooga”



2022: "Are you planning to continue your professional involvement in music over the next 3 years?"

■ Very No ■ Somewhat No ■ Neutral ■ Somewhat Yes ■ Very Yes

Overall 3%

84%

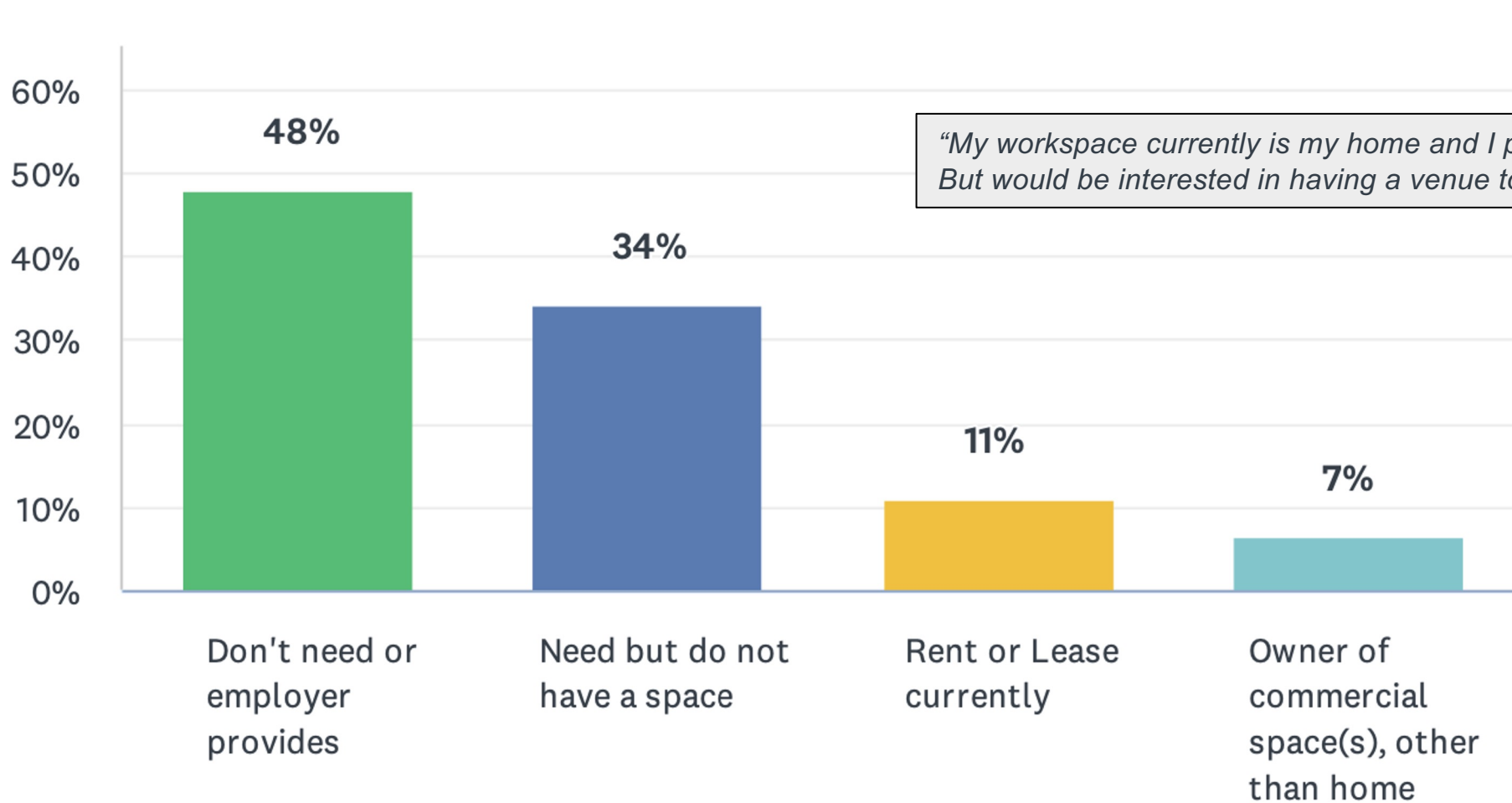
2022: "Are you planning to stay in Chattanooga area over the next 3 years?"

■ Very No ■ Somewhat No ■ Neutral ■ Somewhat Yes ■ Very Yes

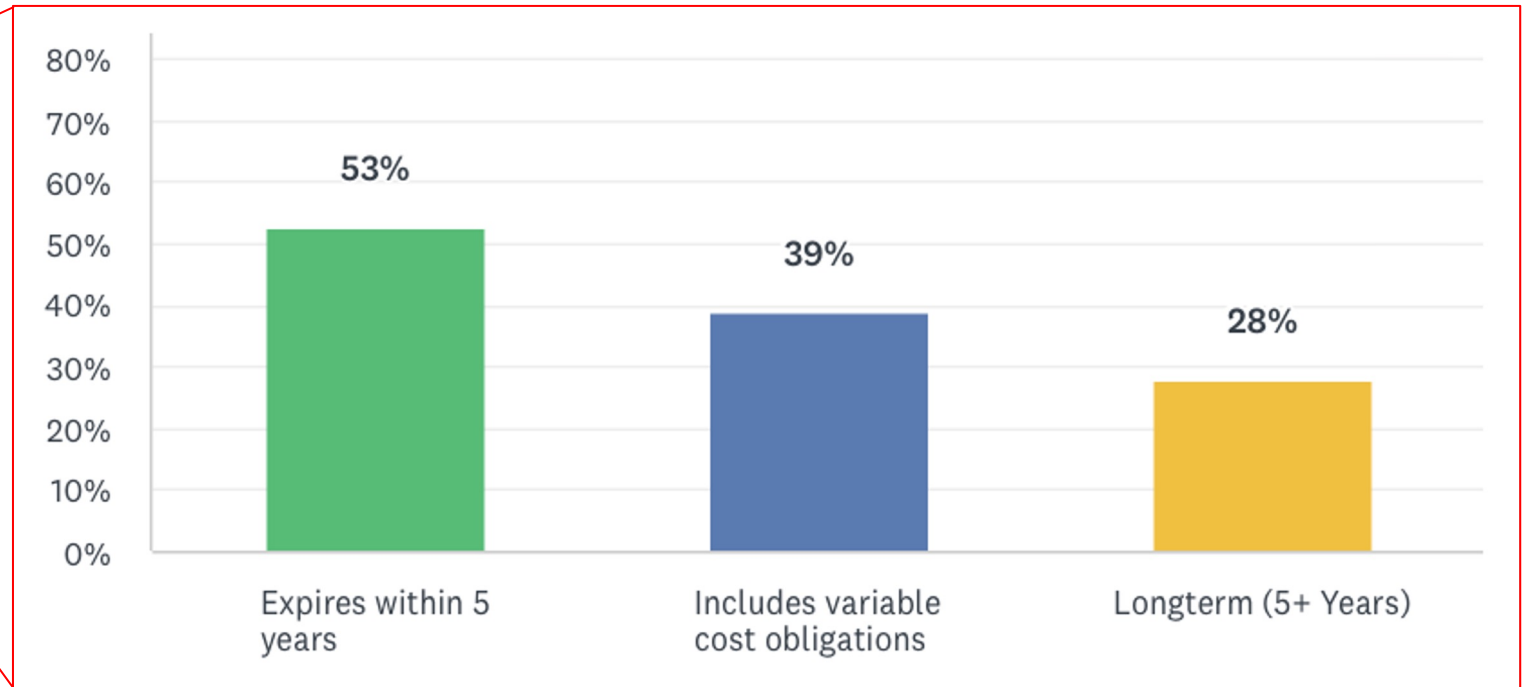
Overall 5%

80%

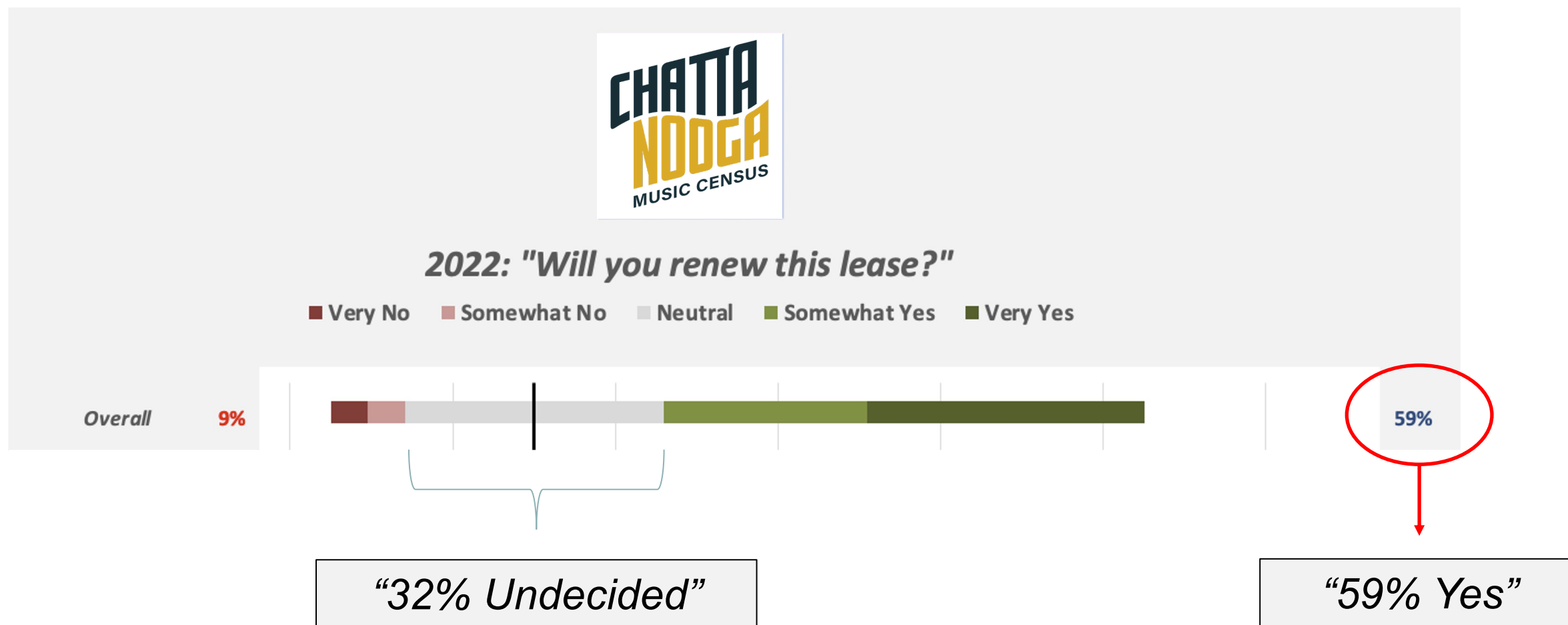
Separate Workspace Needs



Conditions of Current Lease Agreement



Majority of Current Lease Holders Will Renew

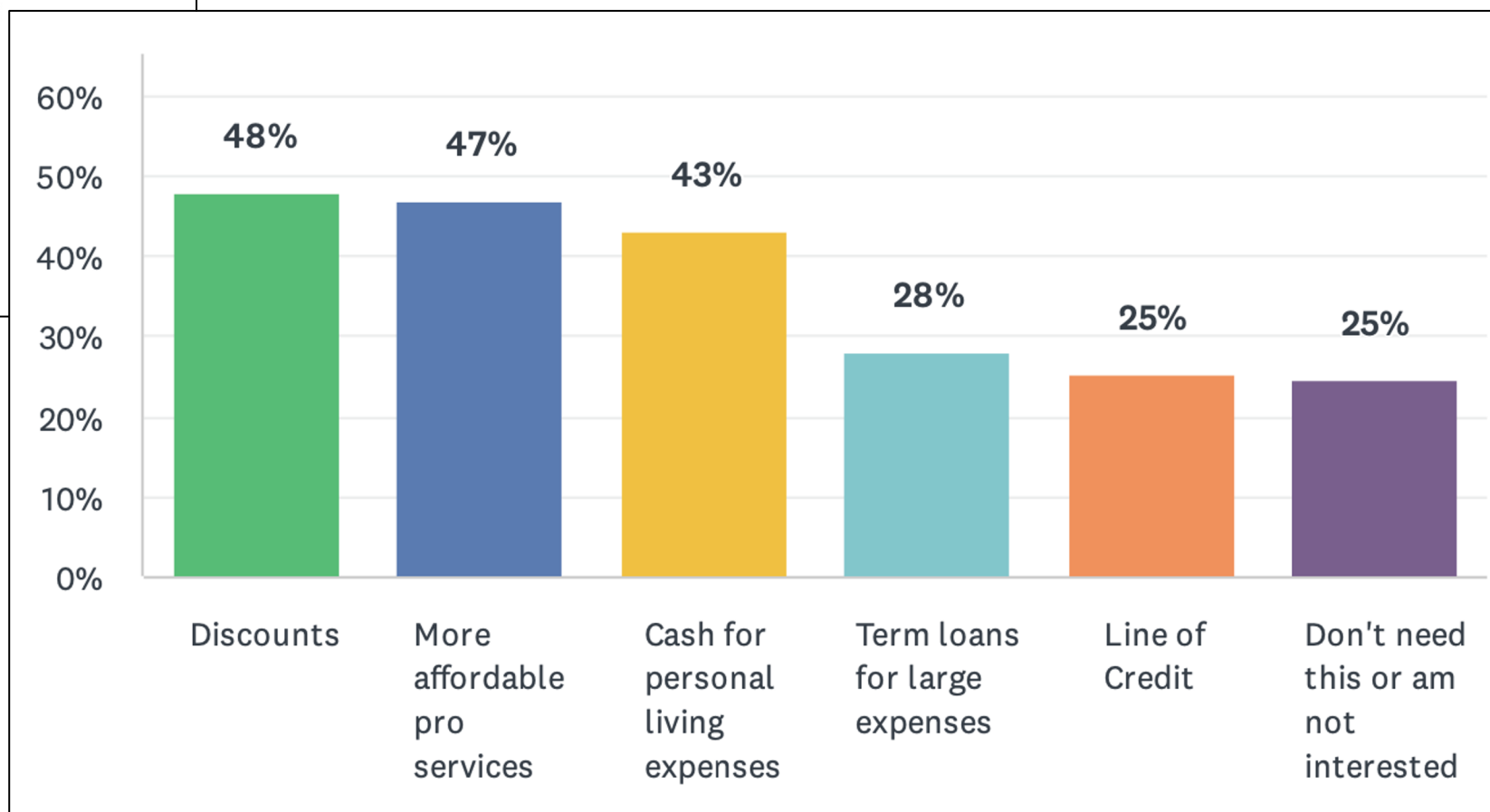


What Financing or Resources Would Help The Most

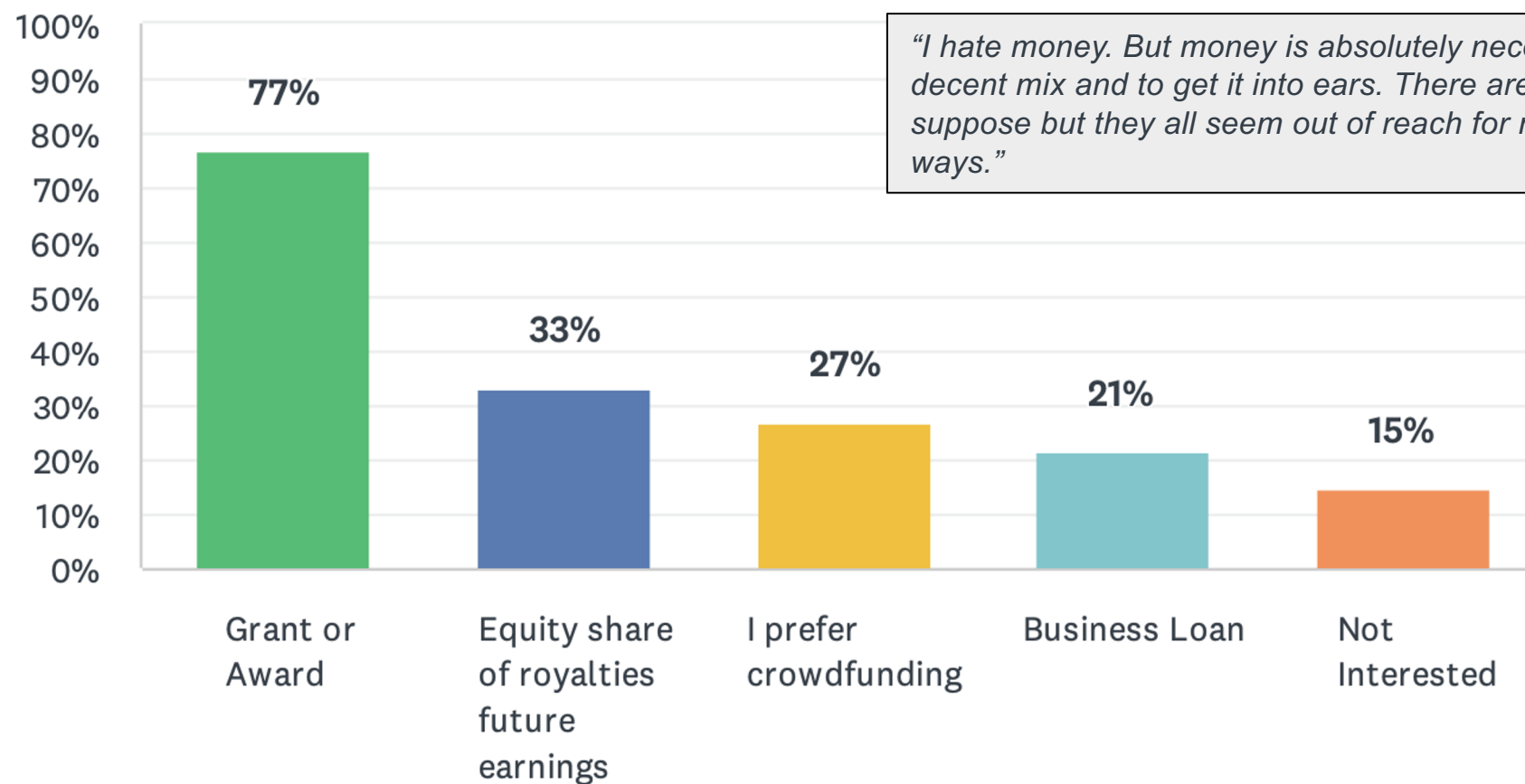
What financing or resources would help your music business the most?

Select all that apply 0

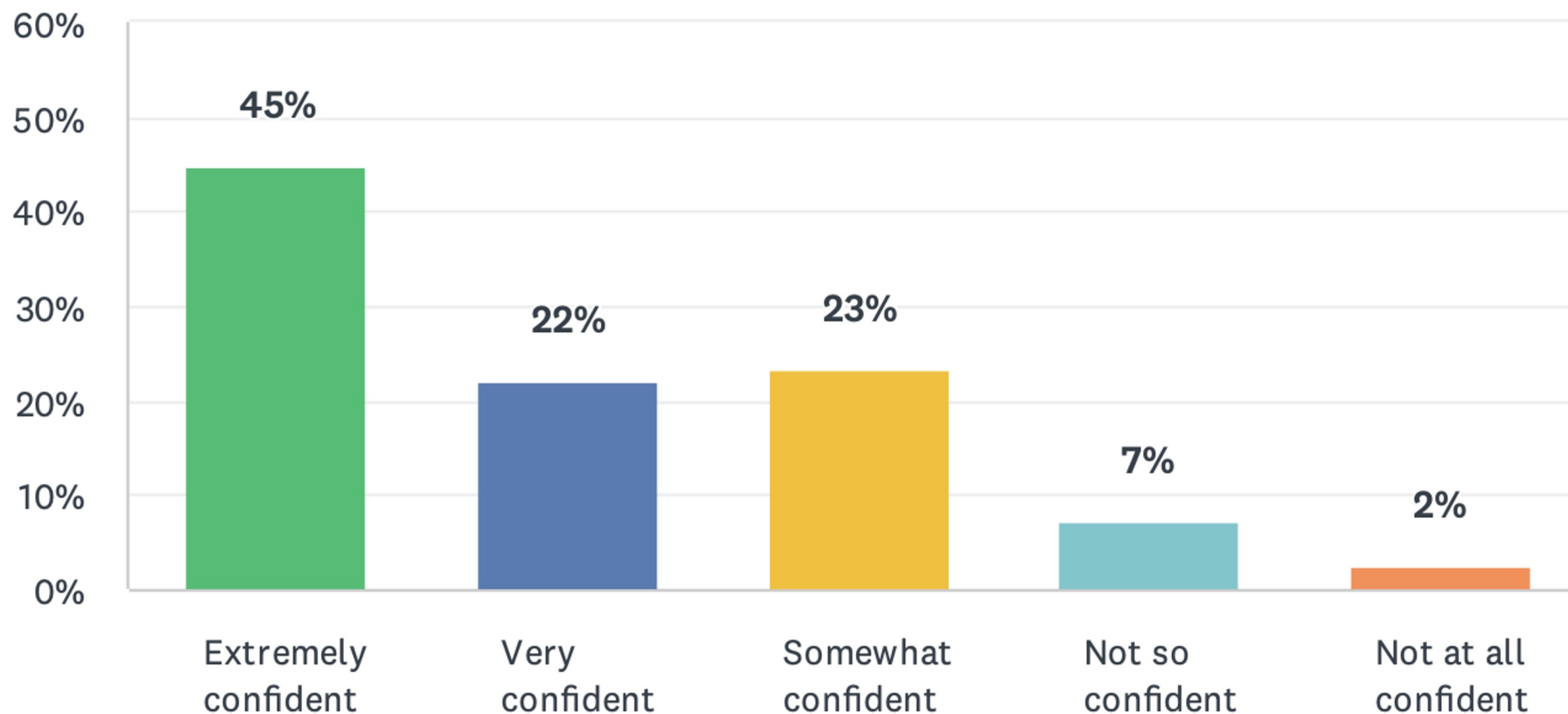
- ☐ **Term loans** for large expenses (eg. recording projects, gear, vehicle)
- ☐ **Line of Credit** (eg. to float expenses, instead of a credit card)
- ☐ **Discounts** (for regular expenses like parking, workspace rent, etc.)
- ☐ More **affordable** pro services (eg. marketing, legal, acc'ting)
- ☐ **Cash** to help with my living expenses
- ☐ I don't need this or am not interested



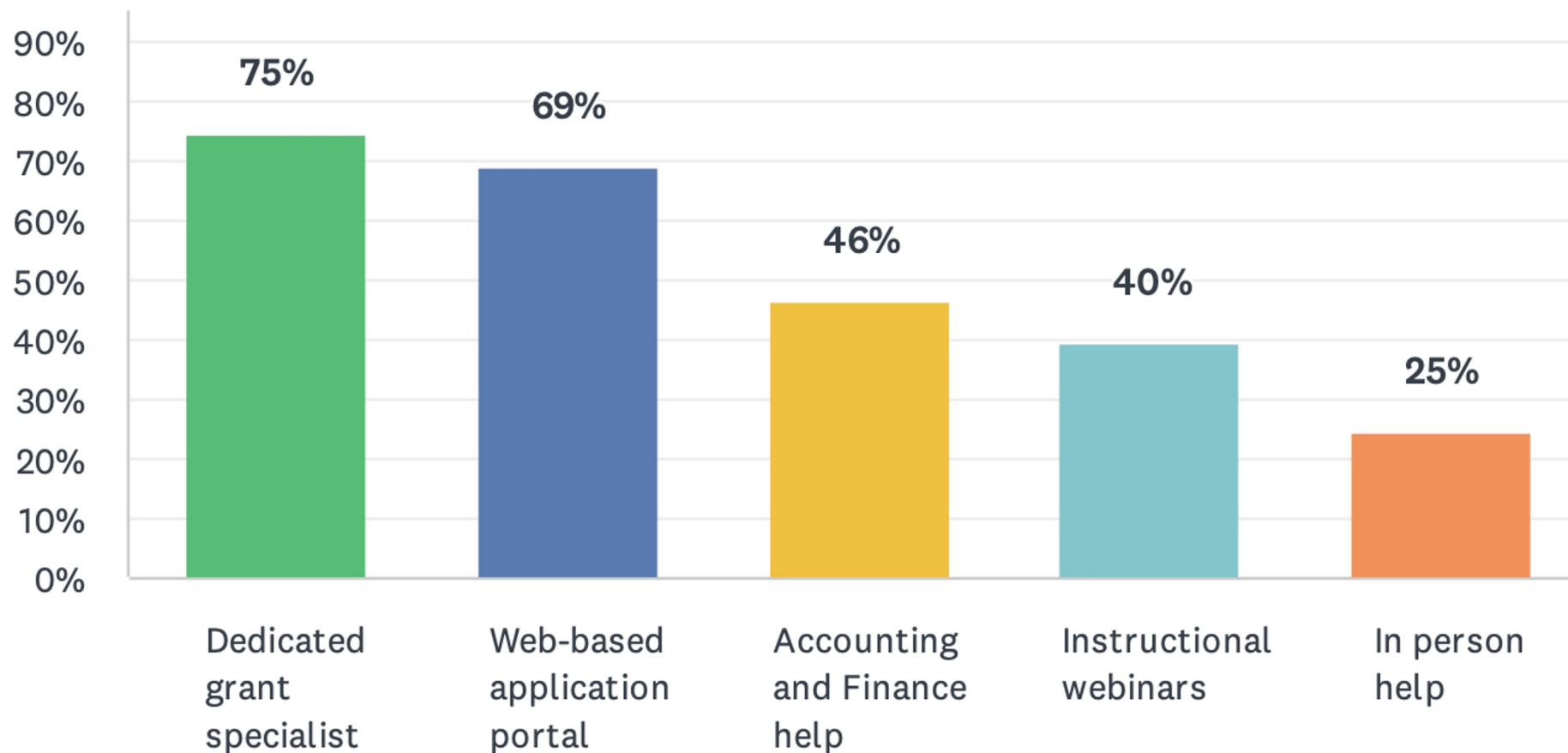
Desired Types of New Funding



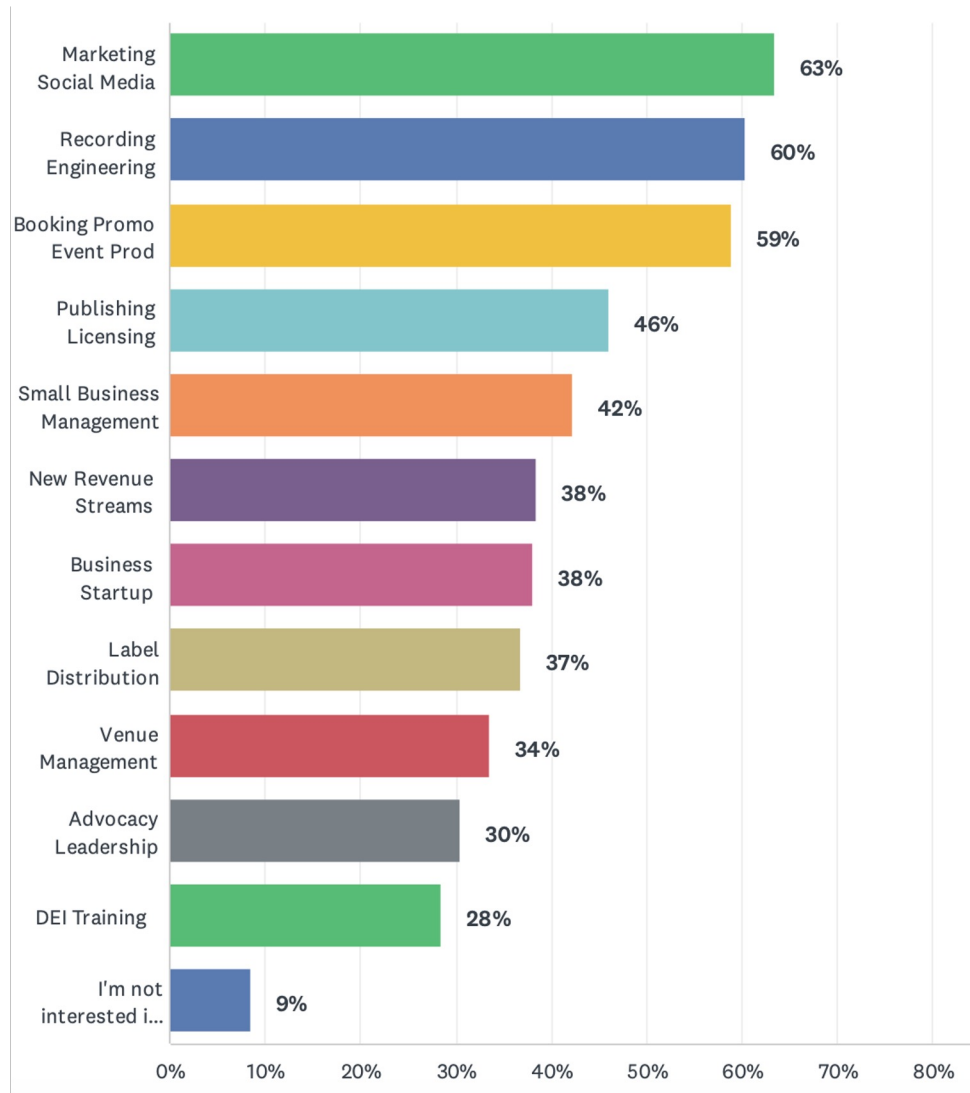
Confidence in Skills to Navigate Grant Process



Suggested Grant Assistance (applying and compliance)



Suggested Training Topics

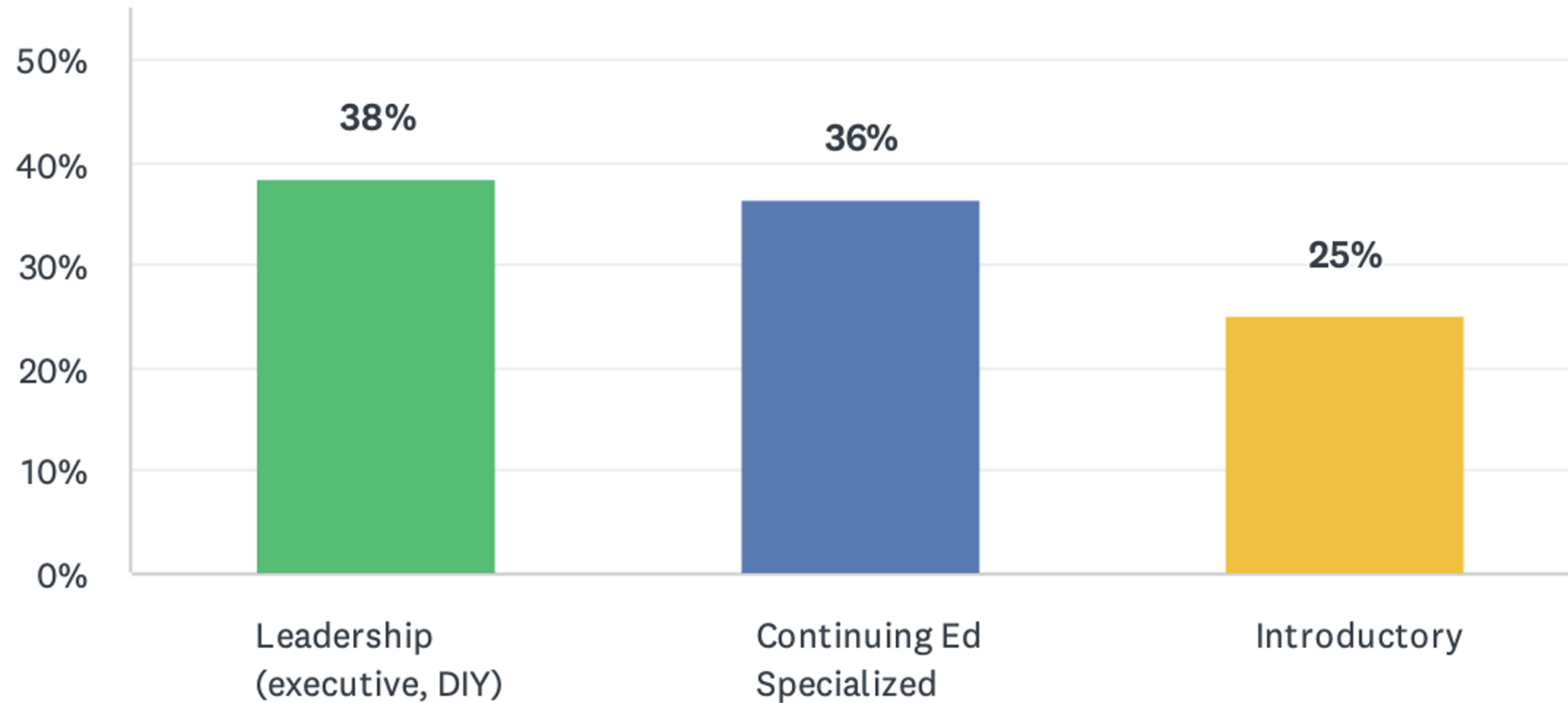


Chattanooga has a long history of training events with “experts” with no real experience. I’m burned out on attending these sorts of things.”

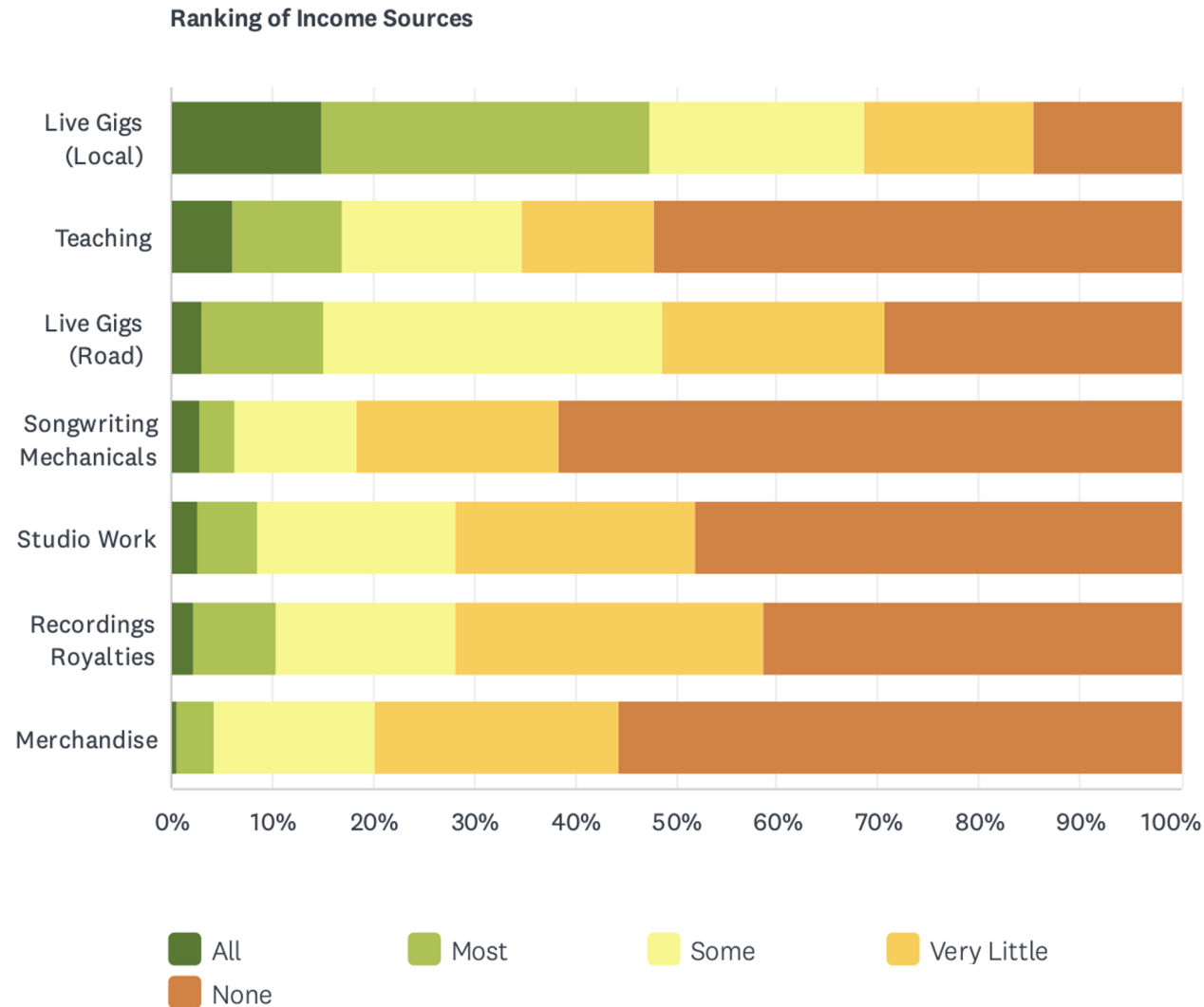
“I have all the industry contacts I could probably ever need. Just a matter of finding the time and money to expand.”

“I don’t think training of musicians is the major issue in our community. Our issue is local musicians are not valued enough. Teaching a musician how to use a contract is meaningless if the venue won’t sign it.”

Suggested Training Levels

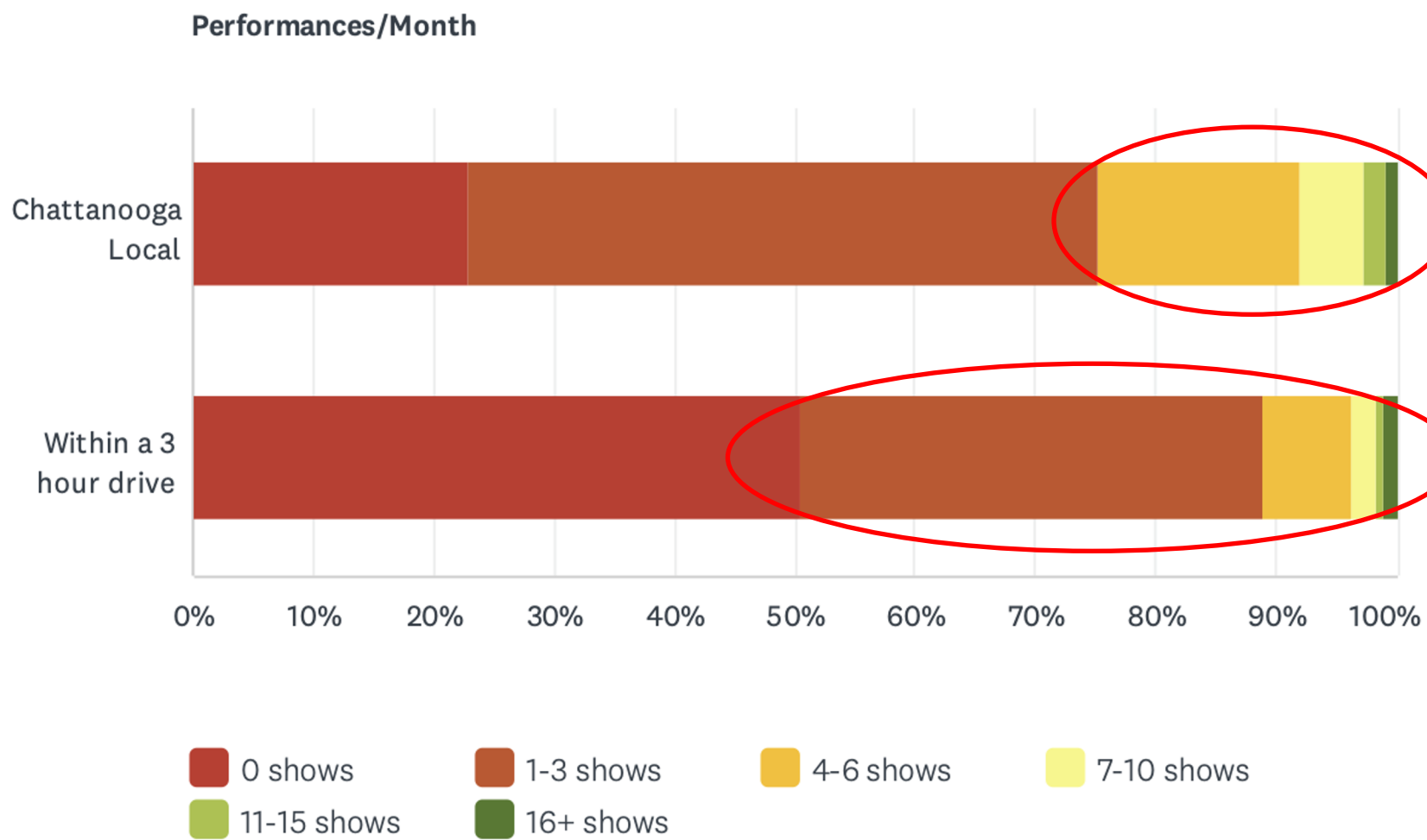


Creatives: Sources of Current Music Income



"Recording and production of merchandise is so expensive, it's nearly impossible to turn a profit. Any "income" goes directly back into making more music."

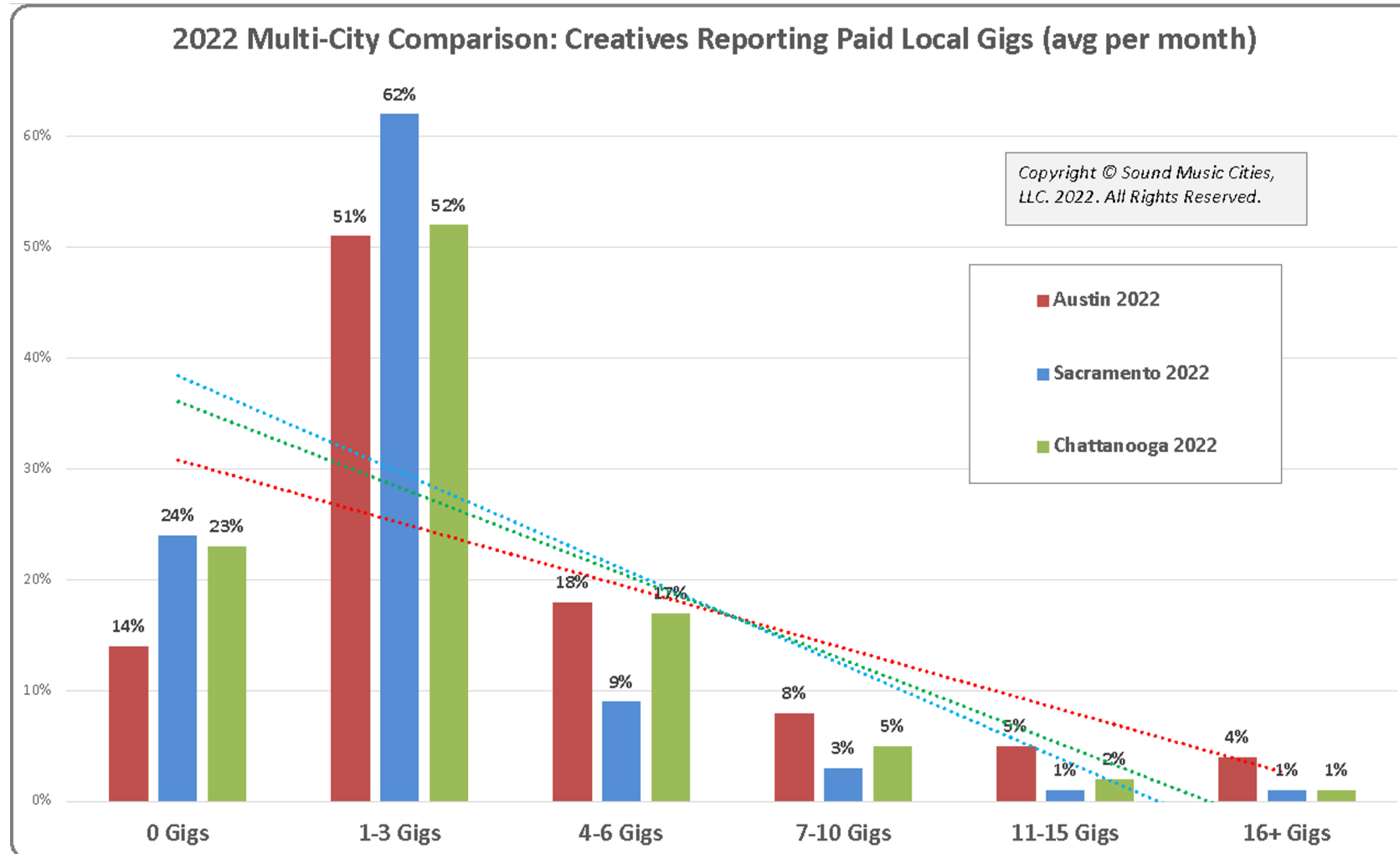
Creatives: Very Few Paid Gigs Per Month



“26% have more than 3 local gigs a month”

“50% have at least 1 regional gig a month”

Creatives: Late 2022 Comparison of Gig Frequency



Creatives: Guarantees and Why % Are Accepted

Gigs paying a
base guarantee

57%



"We know we will generally get some compensation from almost all gigs, and we enjoy playing fun shows with good bands for the love of it more than the money."

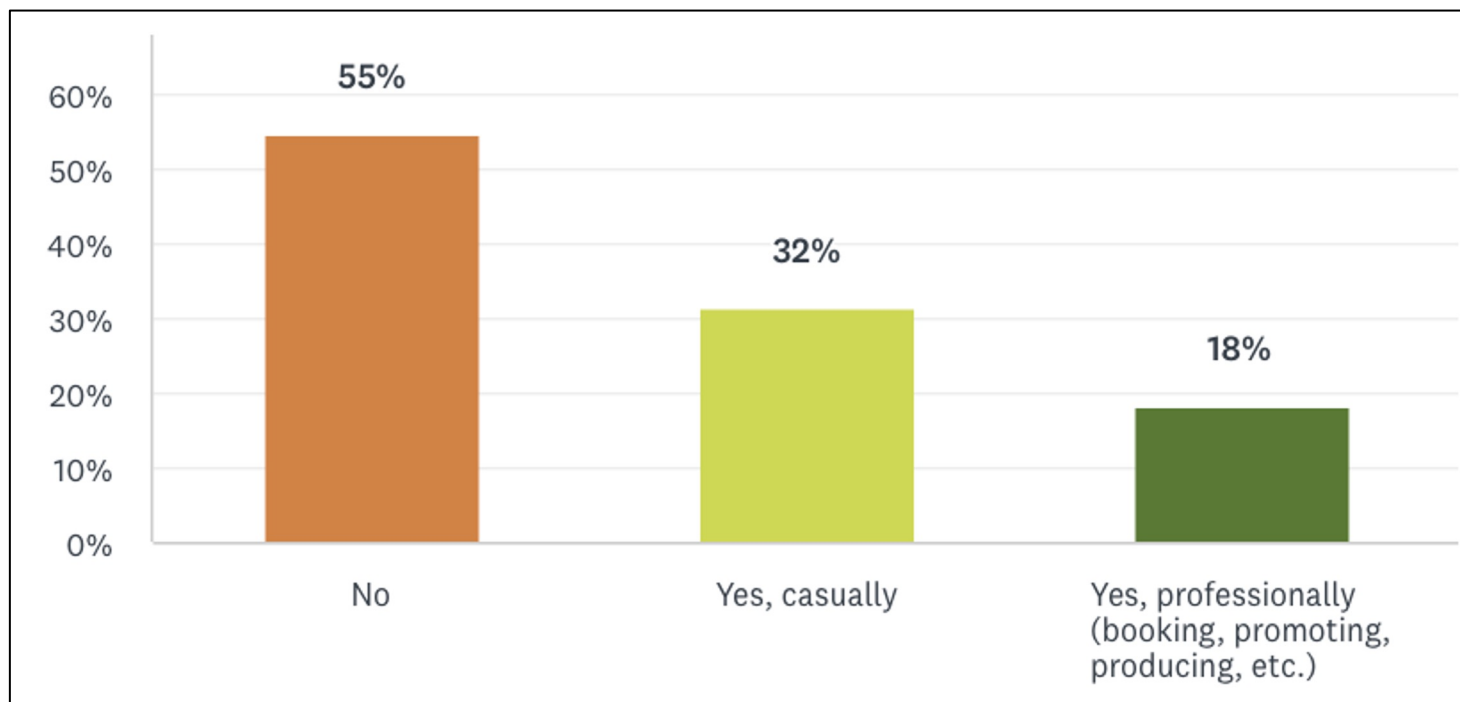
"If it will help the venue (be a win/win for both venue and artist). If venue will help get the word out. If there is a cause I am helping to support. If the gig is super fun."

"If you have a following, and bill and promote the show well, then you could make way more than most places would guarantee."

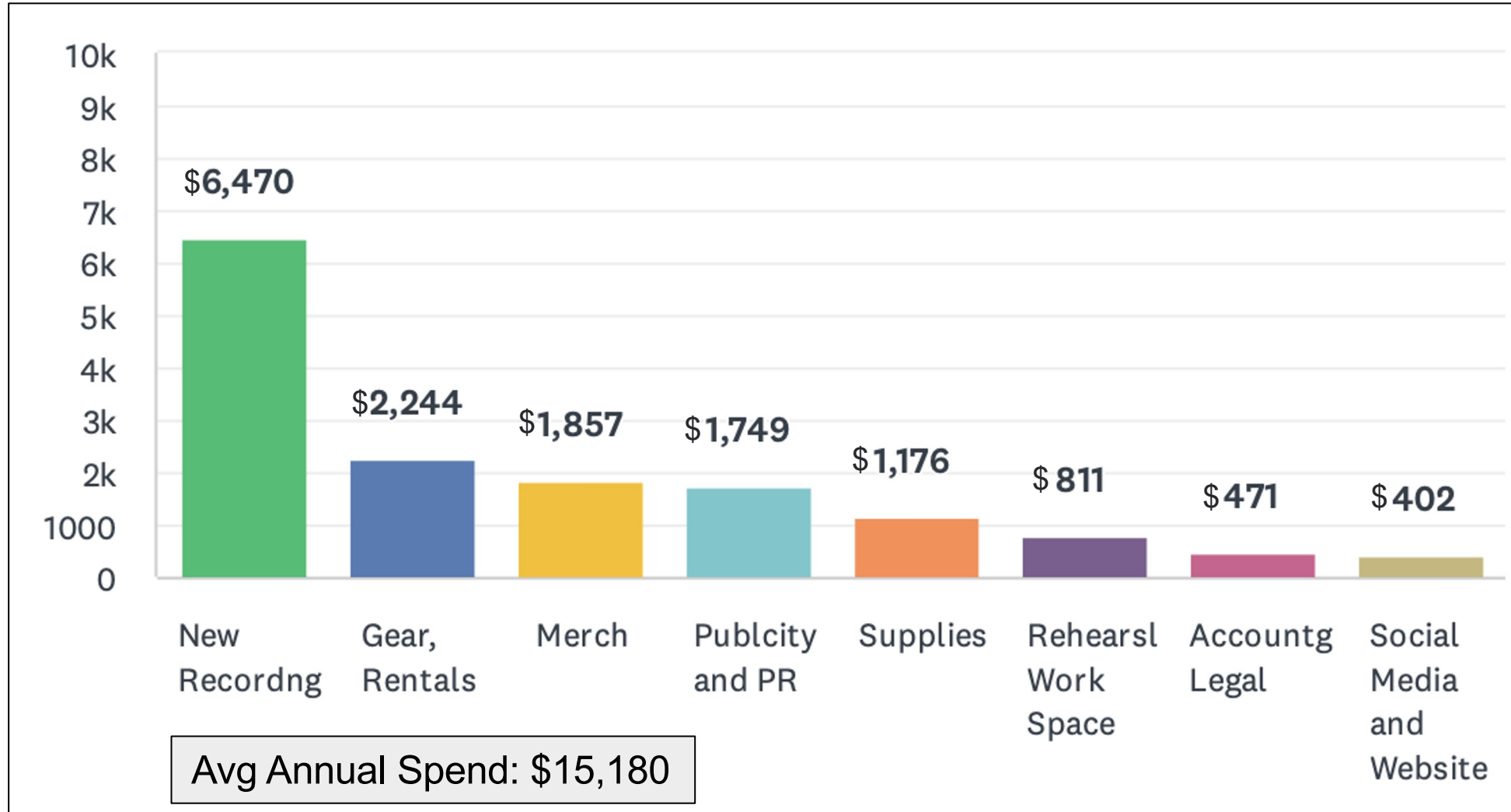
"They're the only gigs in town. If you want to work in this town, you have to accept gigs that don't pay well. Venue owners still seem to feel like they're doing us a favor instead of treating us like this is an actual legitimate job. And then we get short changed at the doors because venues won't charge a reasonable cover."

"I think that hugs and chatt for local artists pay relatively nothing. ESPECIALLY for hip hop. The pushback on a black art form respected by the world is disappointing here. However I'm proud of the community for the work they do for their hip hop summit. Black leaders have spearheaded something beautiful in this city and they deserve their flowers and support!"

Creatives: Work as a Gig Presenter/Promoter as Well



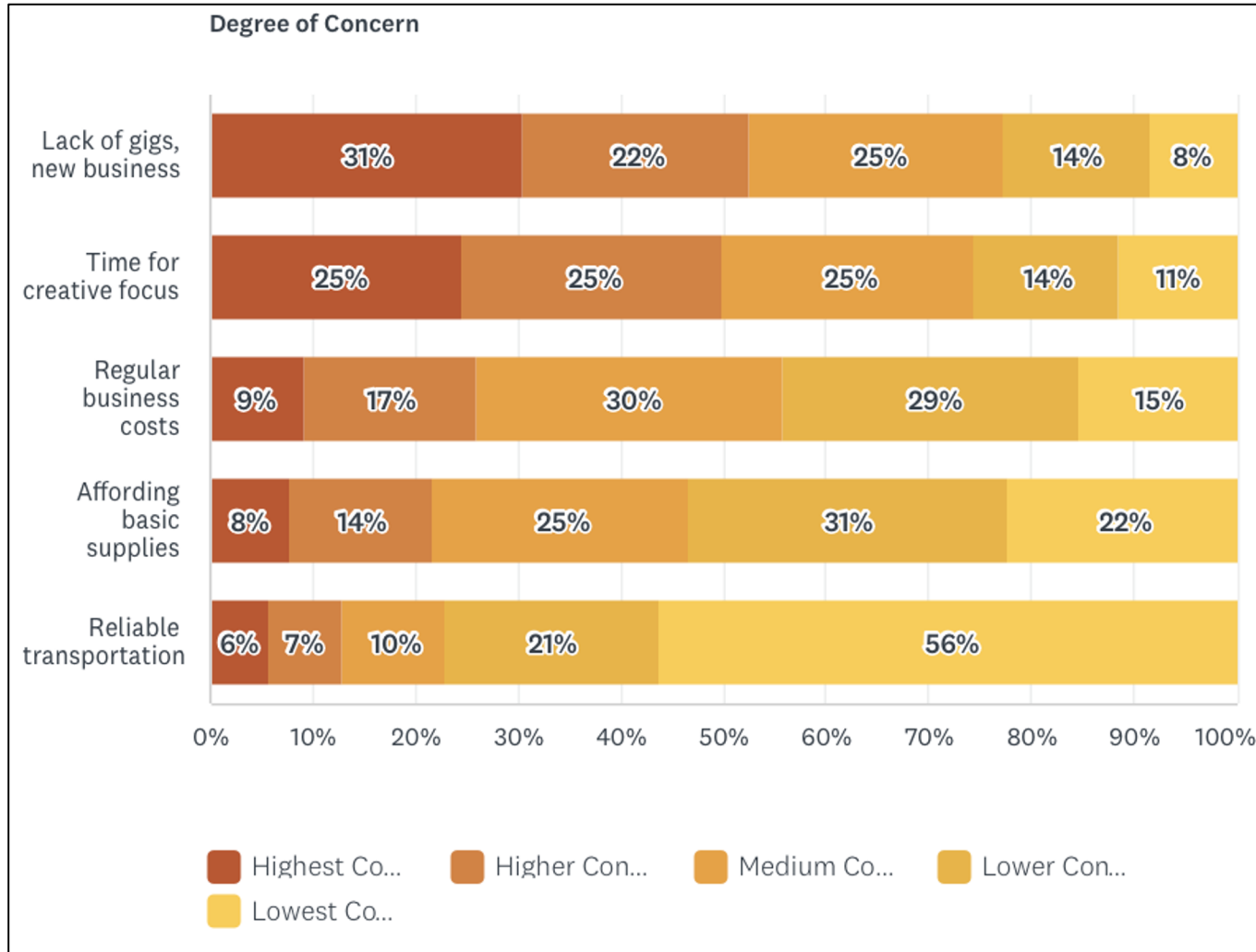
Creatives: Annual Spending by Category, % Local



Spent Locally



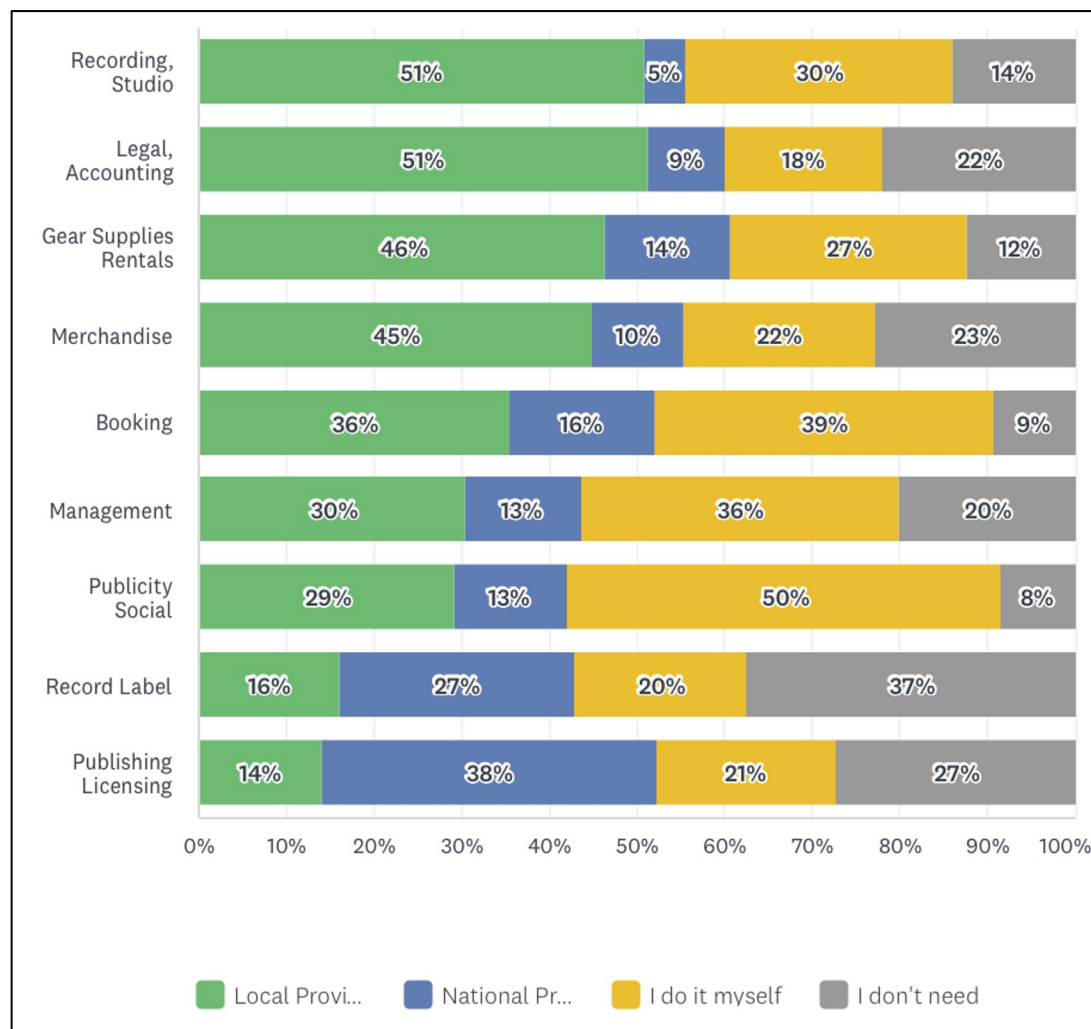
Creatives: Ranking of Concerns



"I'm only concerned about most of Chattanooga's venues lack of support for original artists."

"With a full-time non-creative job, it just makes it hard to find time. Hard to commit to regular music efforts or gigs when I can't be sure to clear the calendar."

Creatives: Where They Go For Music Industry Services



Top Local Service: Recording Studios (51%) and Legal / Accounting (51%)

Top National Service: Publishing/Licensing (38%)

Top DIY Service: Publicity/Social Media (50%)

Top Don't Need: Record Label (37%)

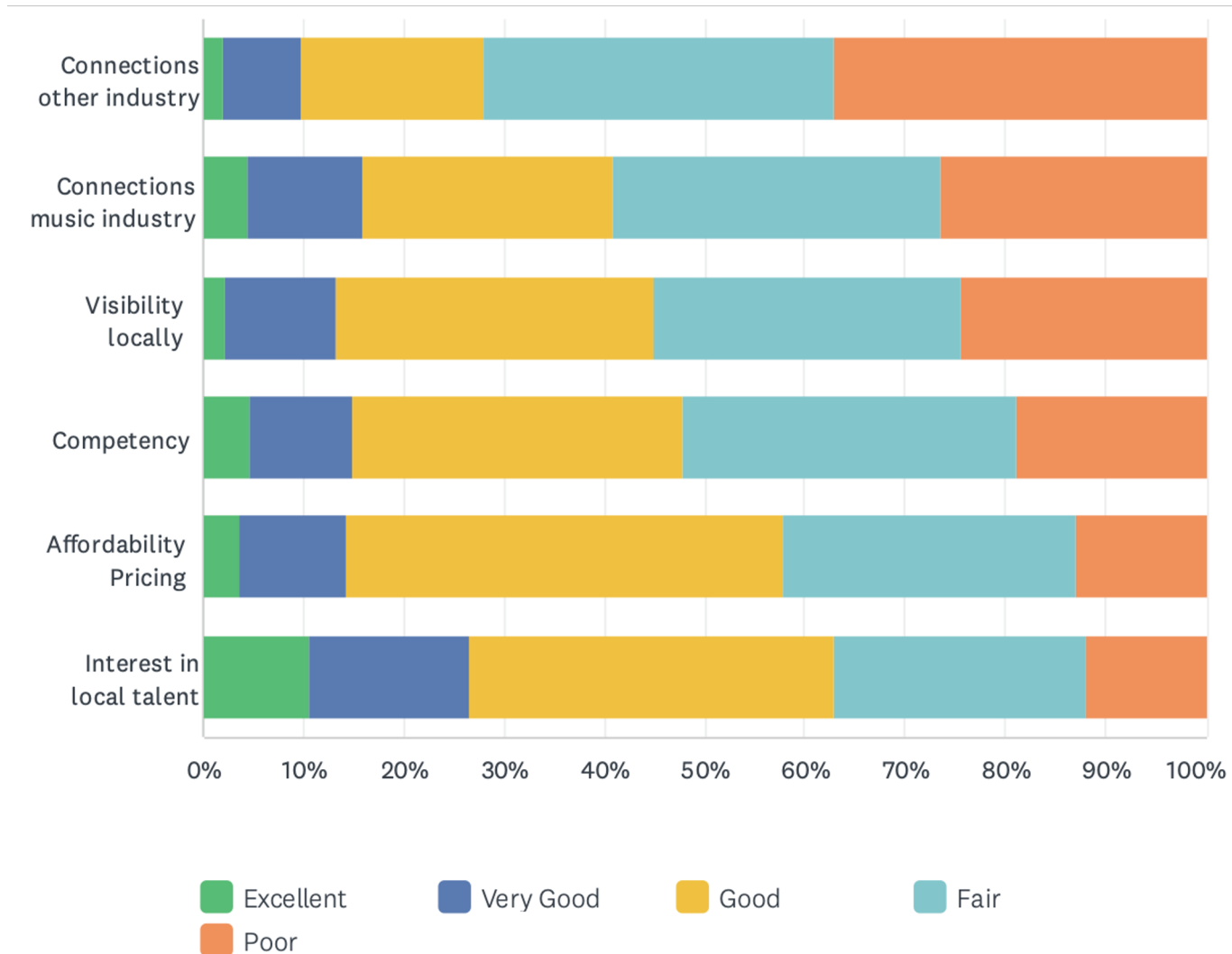
Creatives: Reasons Local Services Might Not Be Hired



"I am a musician who does everything on my own so primarily not aware of what resources are out there and what the costs are."

"If there are some legit local providers, I'd be cool with connecting with them."

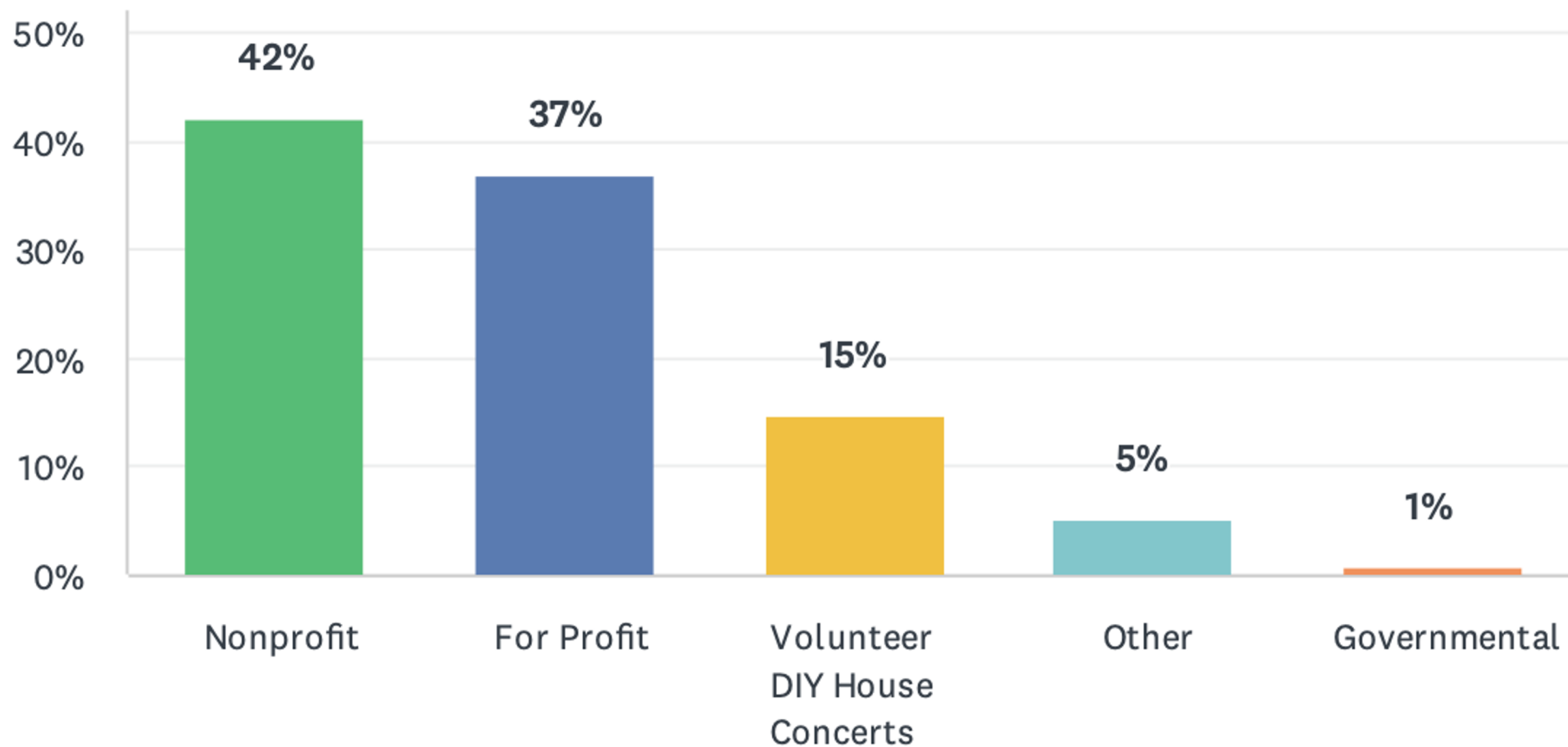
Creatives: Assessment of Local Services Strengths/ Weaknesses



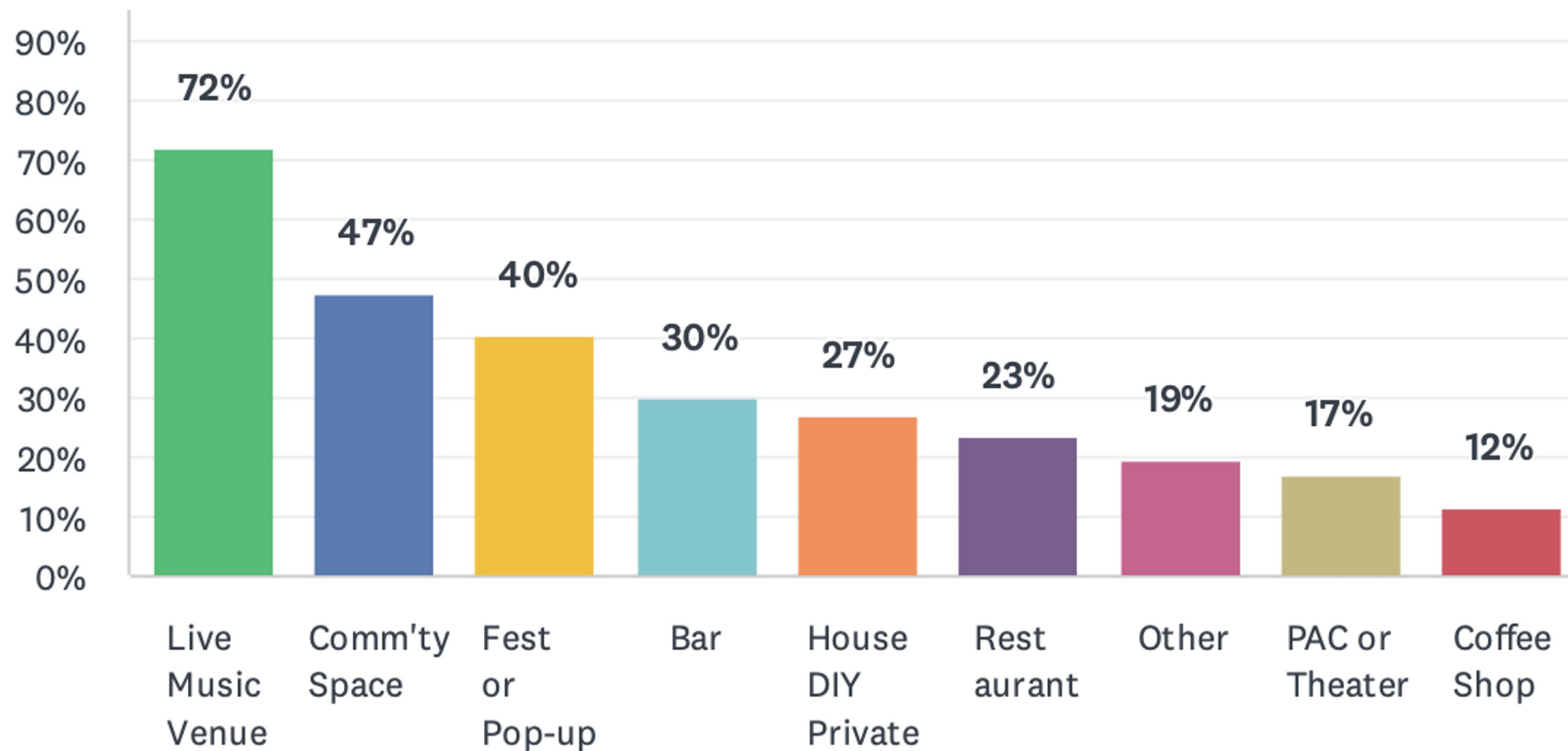
“Not too familiar with local resources and networks - this is part of the problem!”

“Studio people, live sound people all very capable, sometimes excellent. Still too many venues where staging sucks & it looks like you’re playing a friend’s basement.”

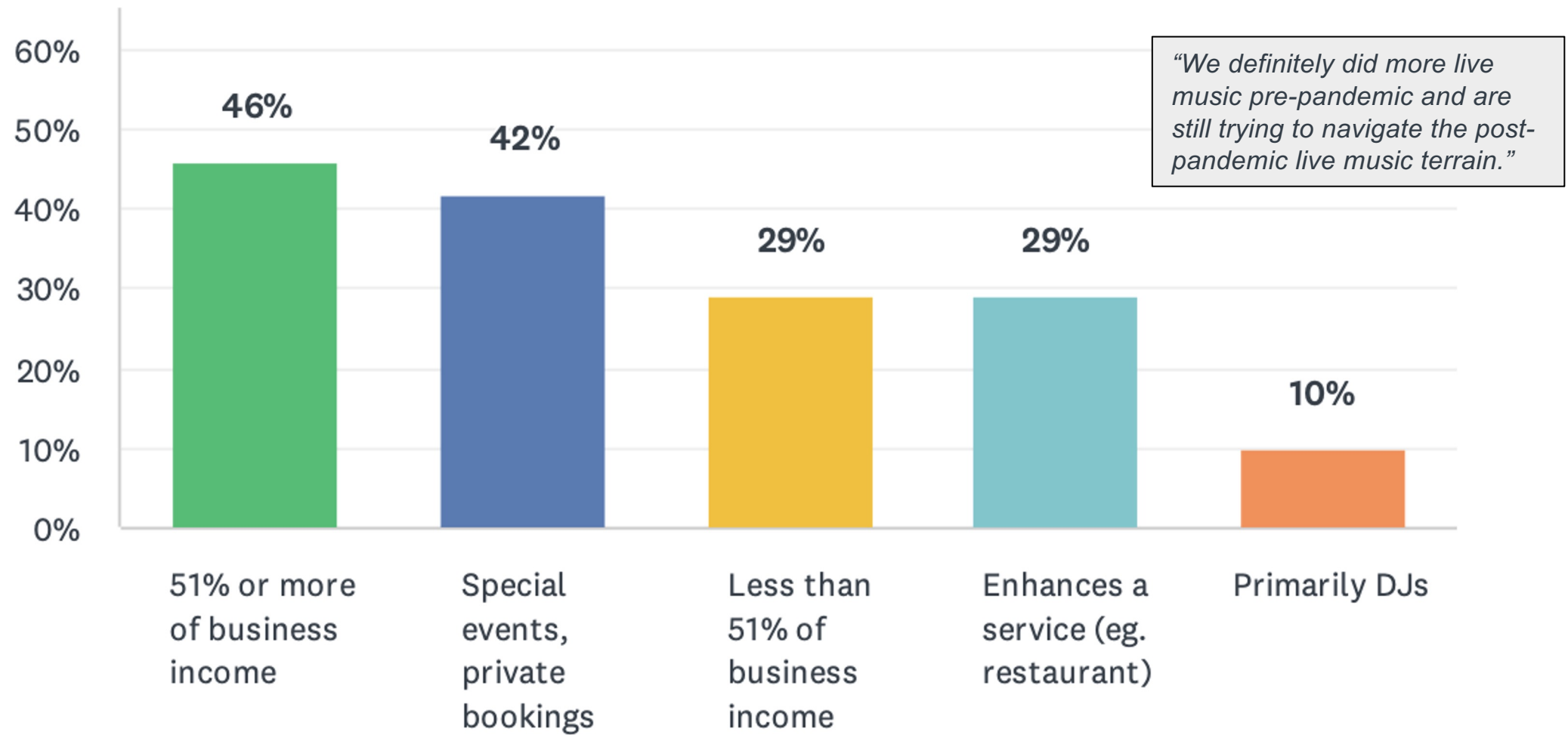
Venues/Presenters: Ownership Structure



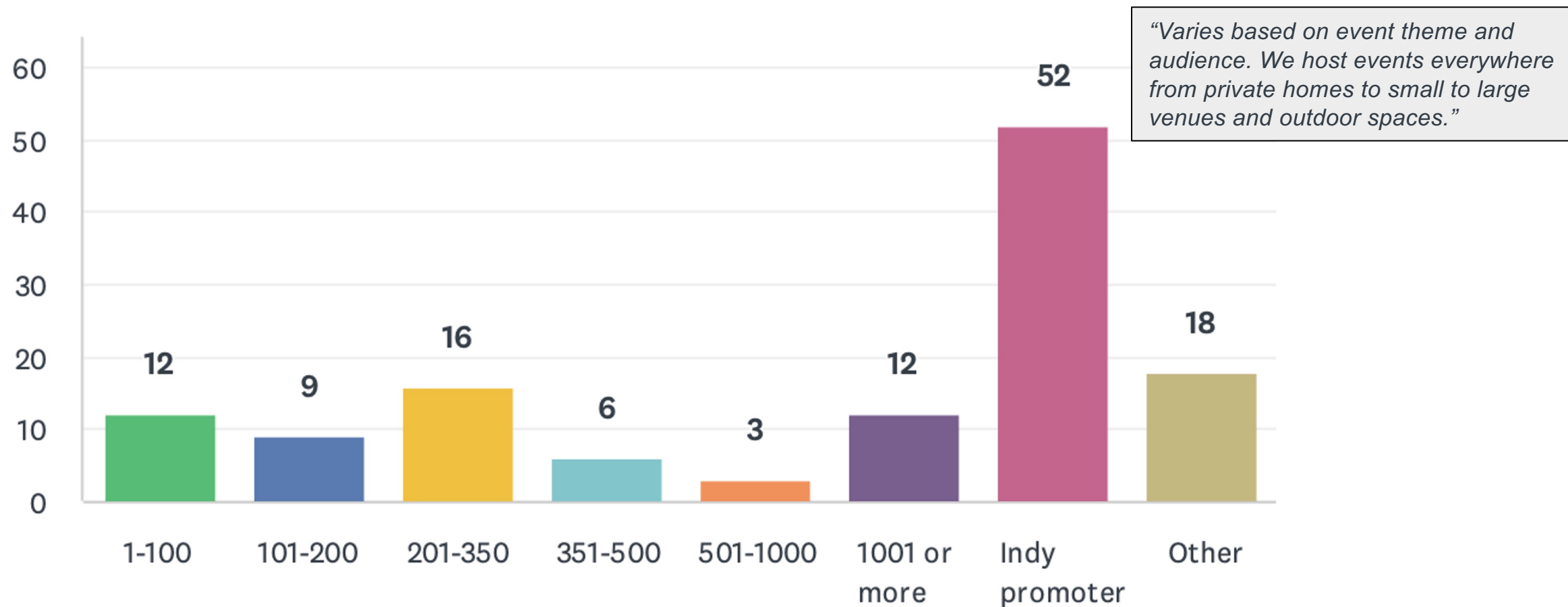
Venues/Presenters: Venue Type



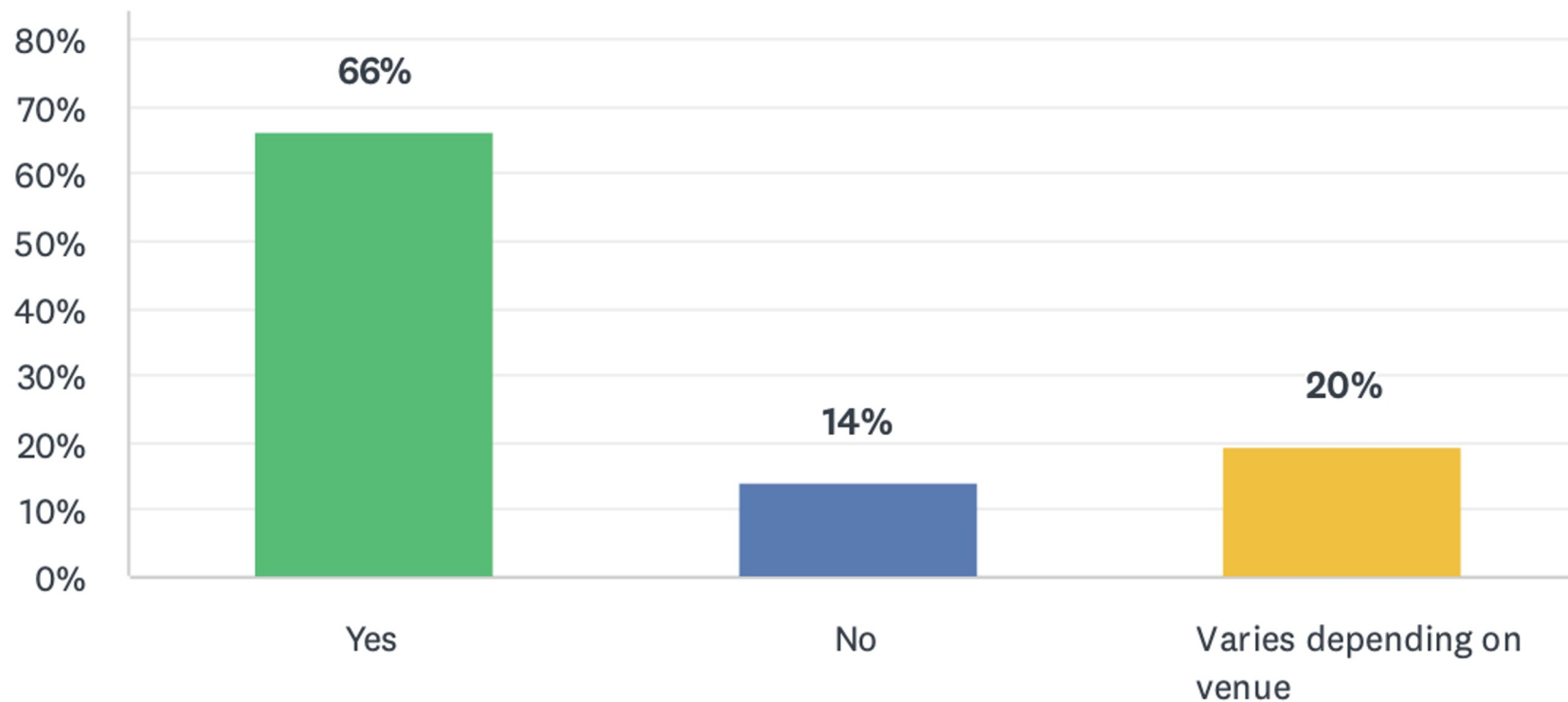
Venues/Presenters: Role of Live Music In Business



Venues/Presenters: Venue Legal Capacity



Venues/Presenters: Can Host Live Music Outdoors

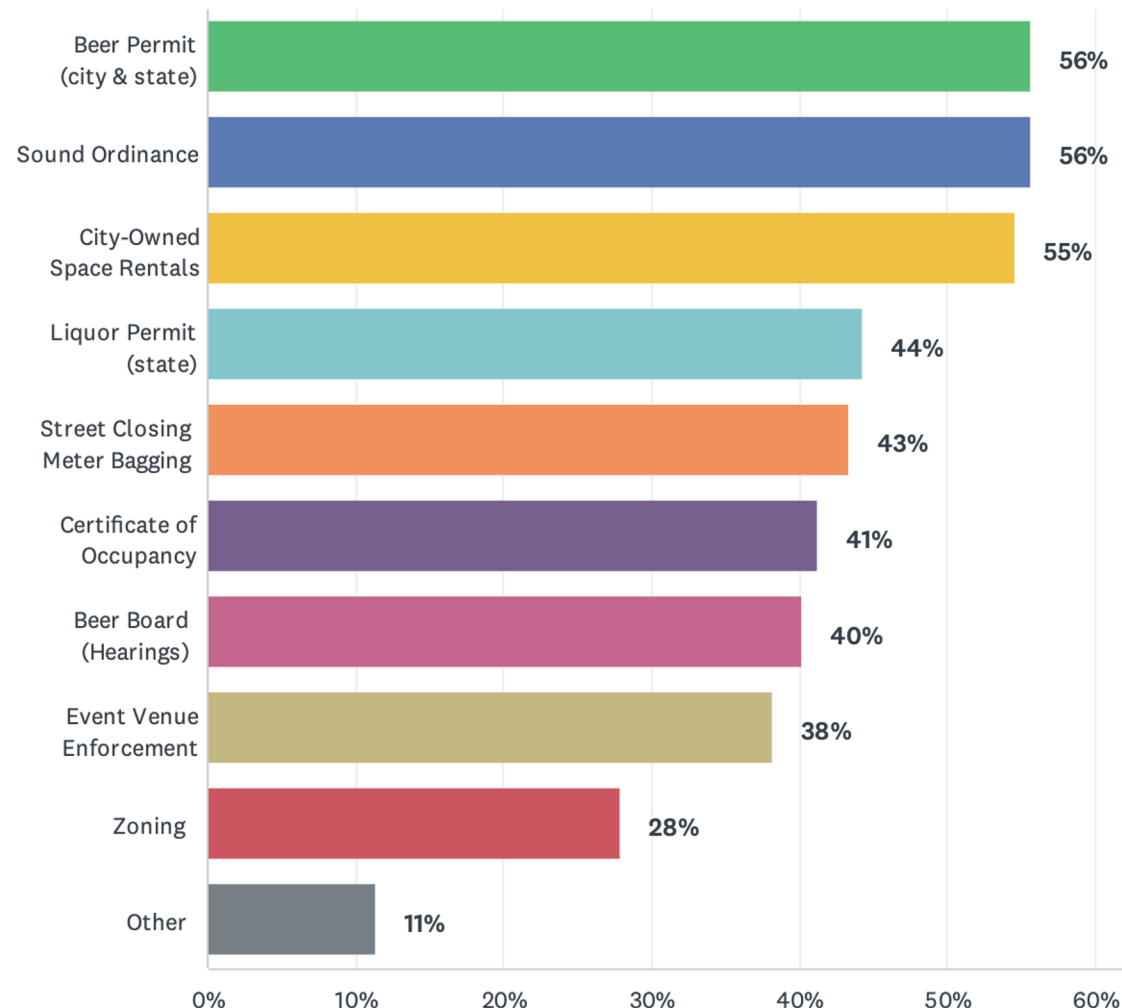


"This is the problem for us. We remodeled the venue to a more outdoor setting, and now with the current noise ordinance having live music is difficult."

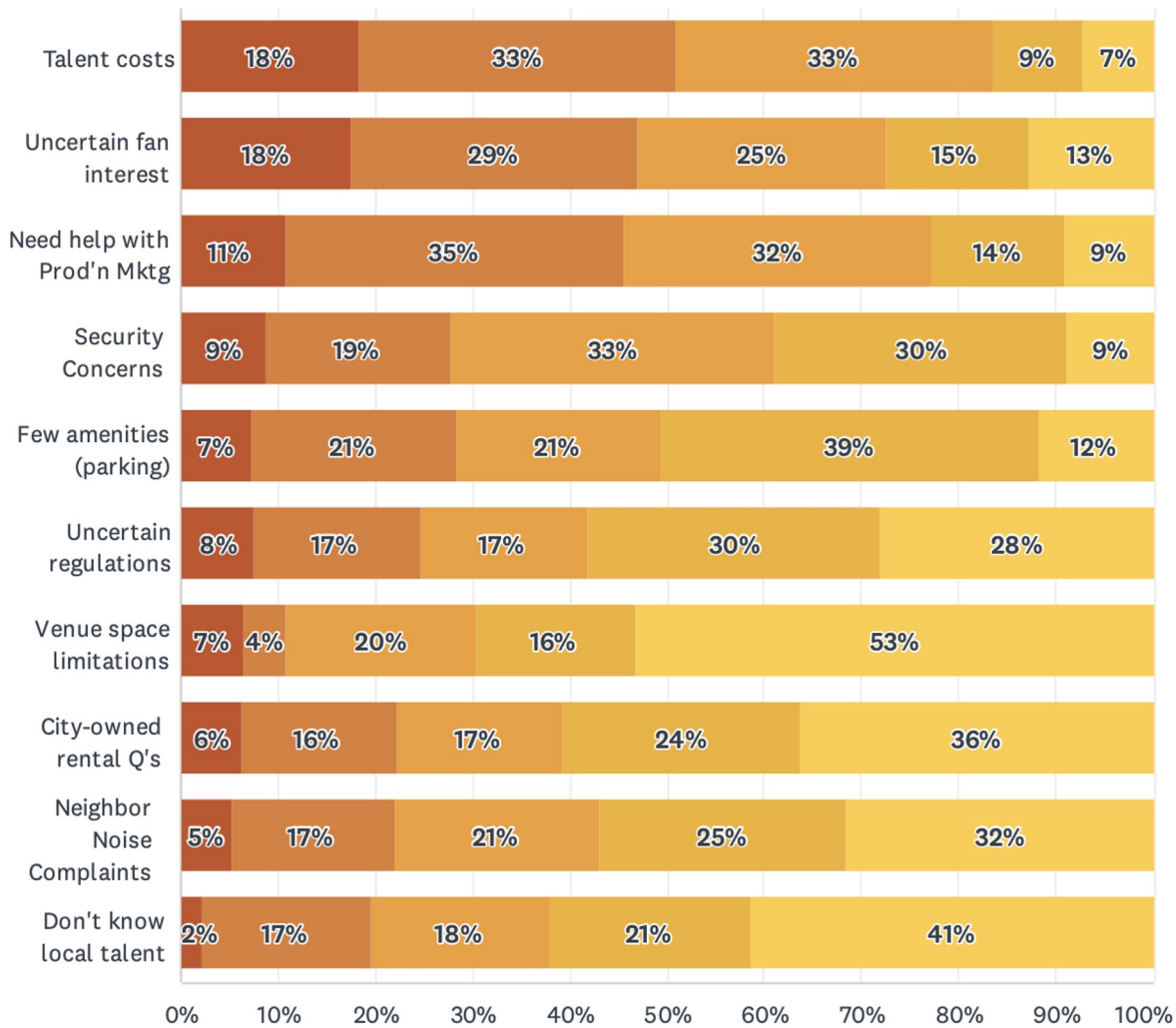
Venues/Presenters: Types of Regulation Experience

What regulatory requirements do you have experience with?

Select all that apply.  0



Venues/Presenters: Greatest Concerns With Presenting Live Music

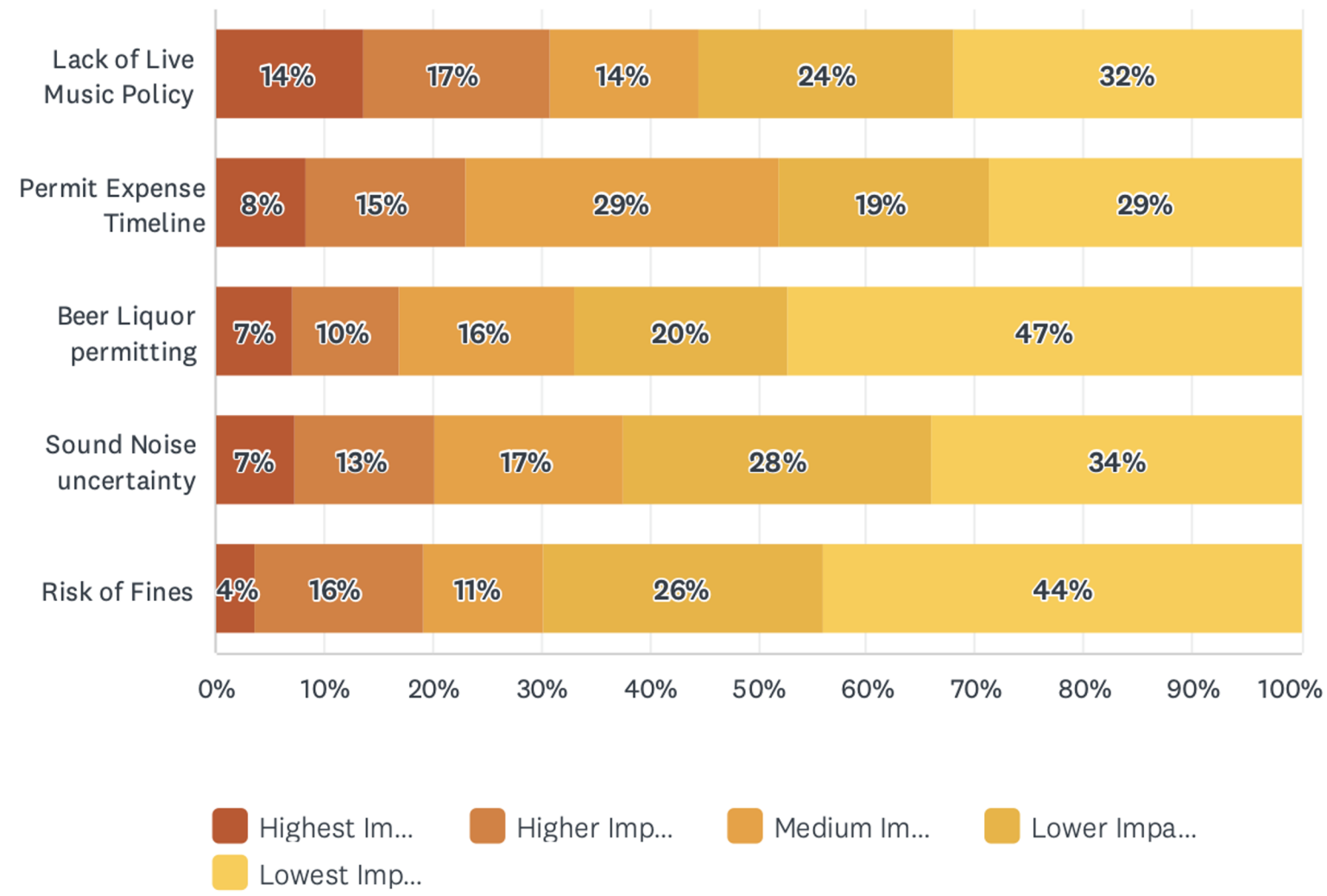


"My greatest concern is finding an outside location that we can play music outside without disturbing residence, getting noise complaints, with the ability to sell tickets"

"Parking, parking, parking!!! Cost and availability impacts attendance."

"It's not exactly that we are unsure about how to access the city-owned spaces. It's that the ones we do know about have enough associated logistical and cost overhead in order to charge a ticket fee and sell drinks such that it discourages."

Venues/Presenters: Regulations and Policies Impact

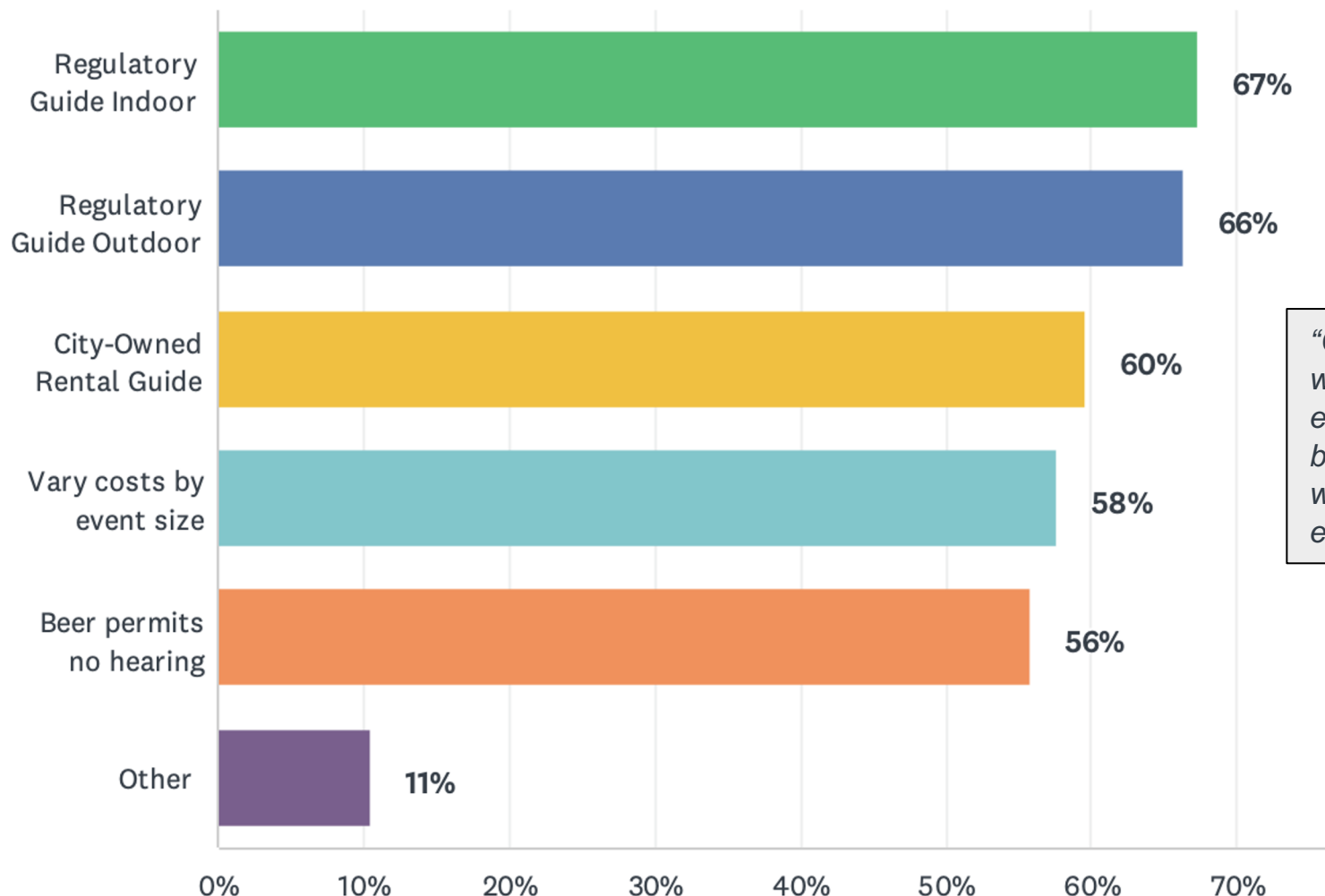


"All above are concerns of venue owners"

"None of these."

"In my context, these aren't usually issues. We have to jump through the hoops, but we know what they are. I can see how many independent artists might not, and it's not always easy to find out without the right connections."

Venues/Presenters: Suggest Tools To Improve Regulatory Compliance

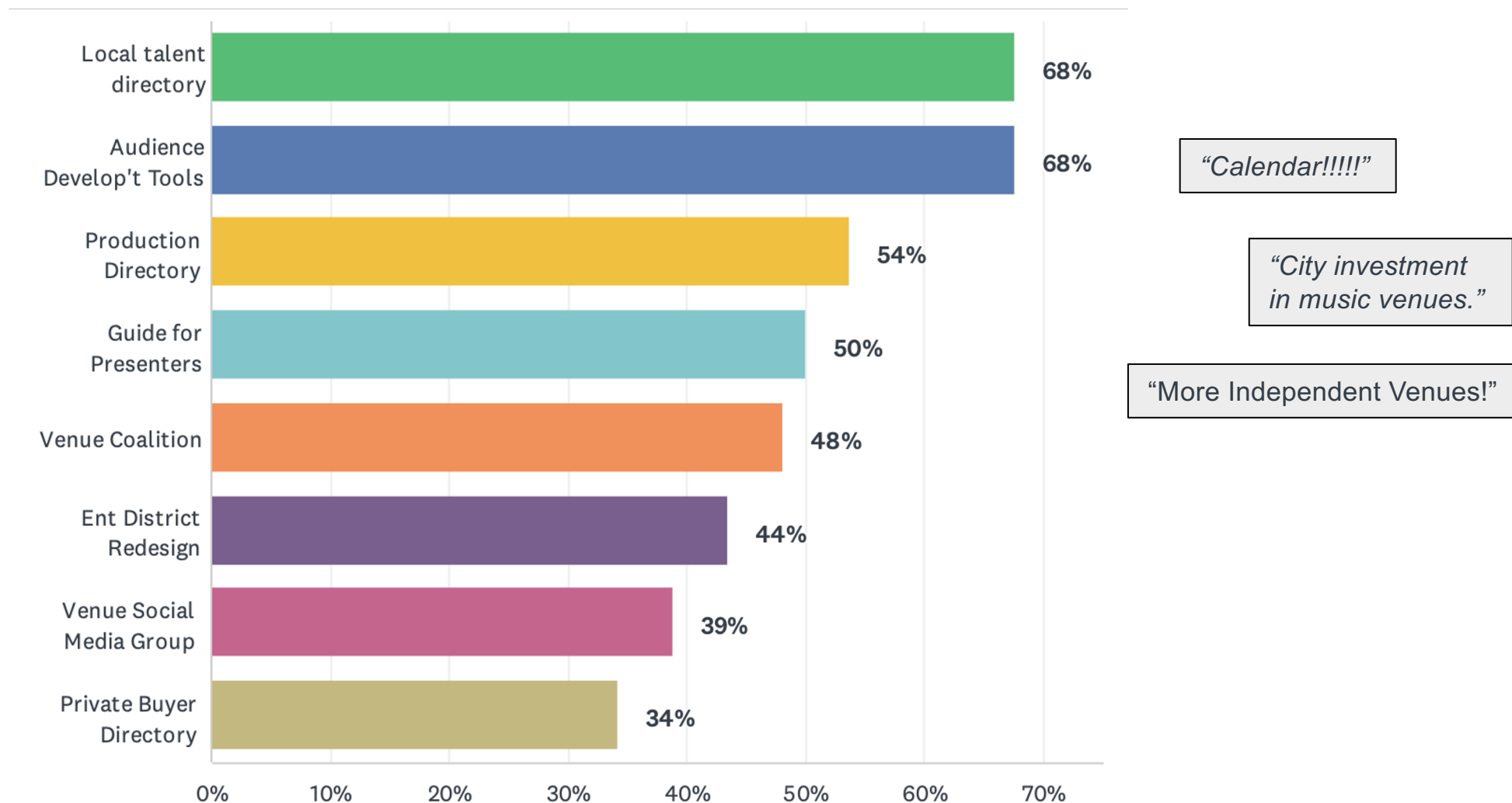


"Non-profit or community groups should get free/very reduced costs to use public spaces and parking, etc."

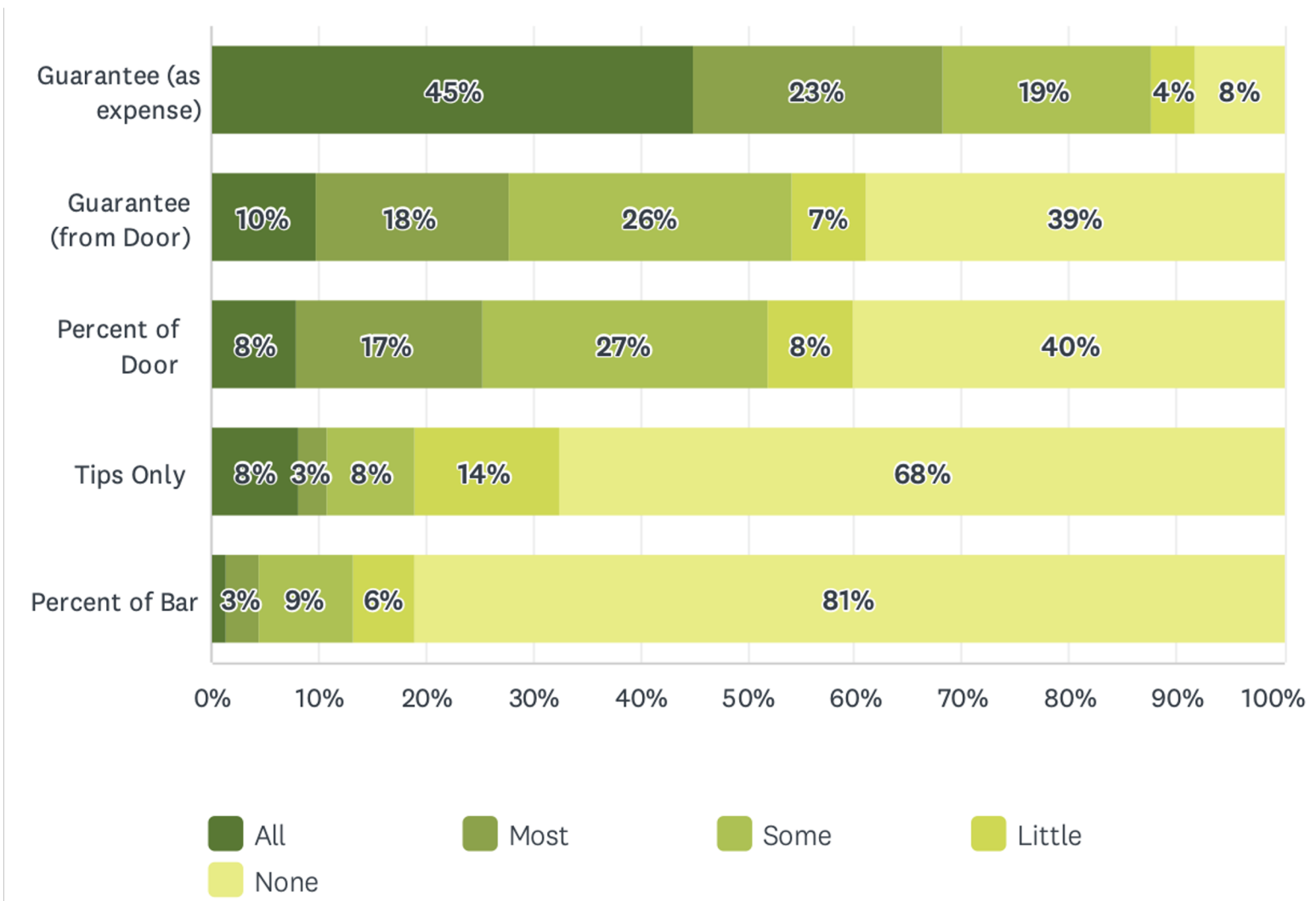
"Chattanooga needs an updated and well-informed calendar of upcoming events including all concerts, club bookings, and festivals that is updated weekly. This calendar should show all events for at least the next year."

"Education on all of the above - or some kind of resource guide."

Venues/Presenters: Desired Tools for Live Music Industry Generally



Venues/Presenters: How Talent Is Paid



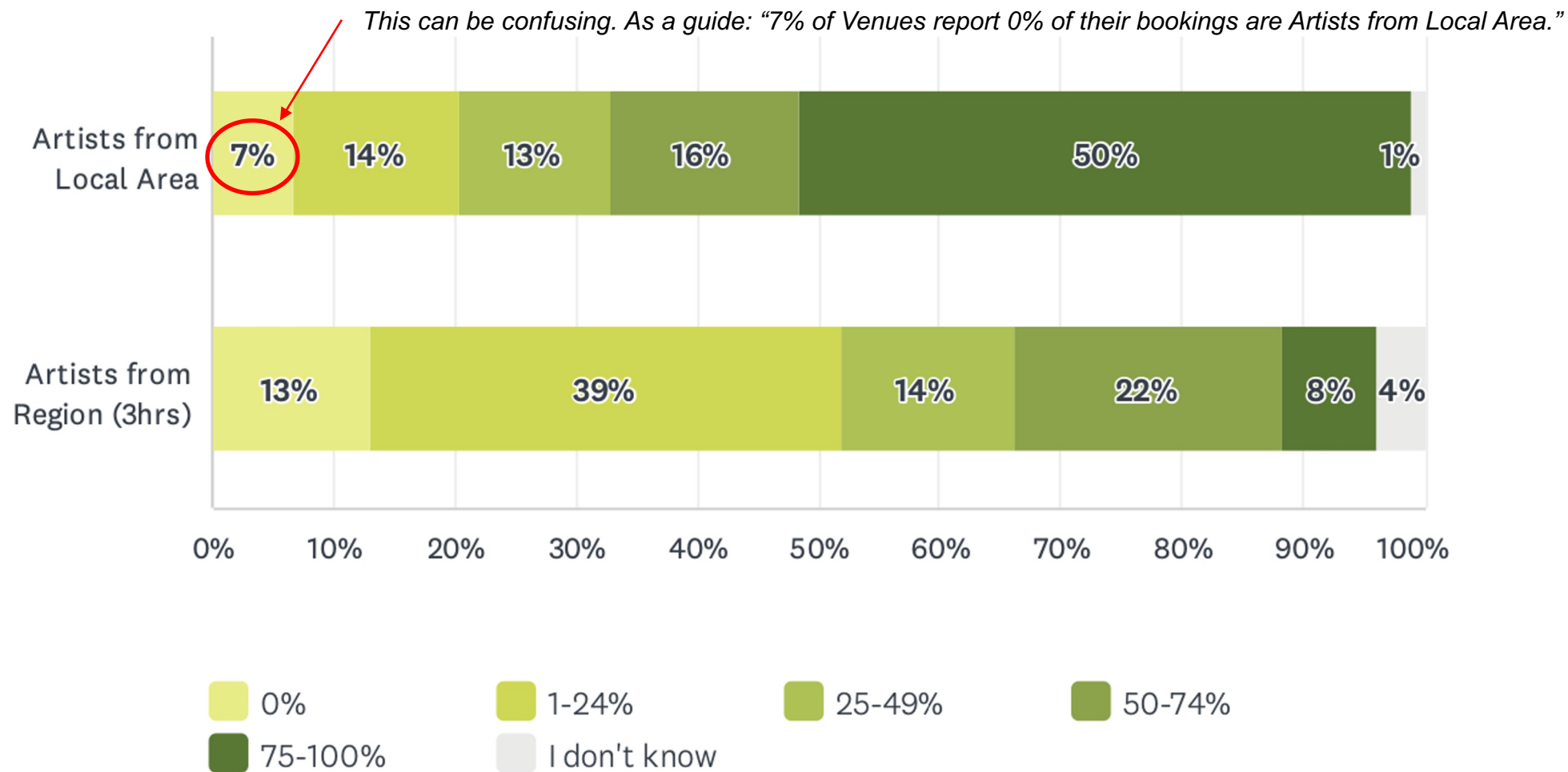
"We pay a flat rate plus feed the artist and they get tips also."

"We usually run an 80/20 split of the door- bands take 80."

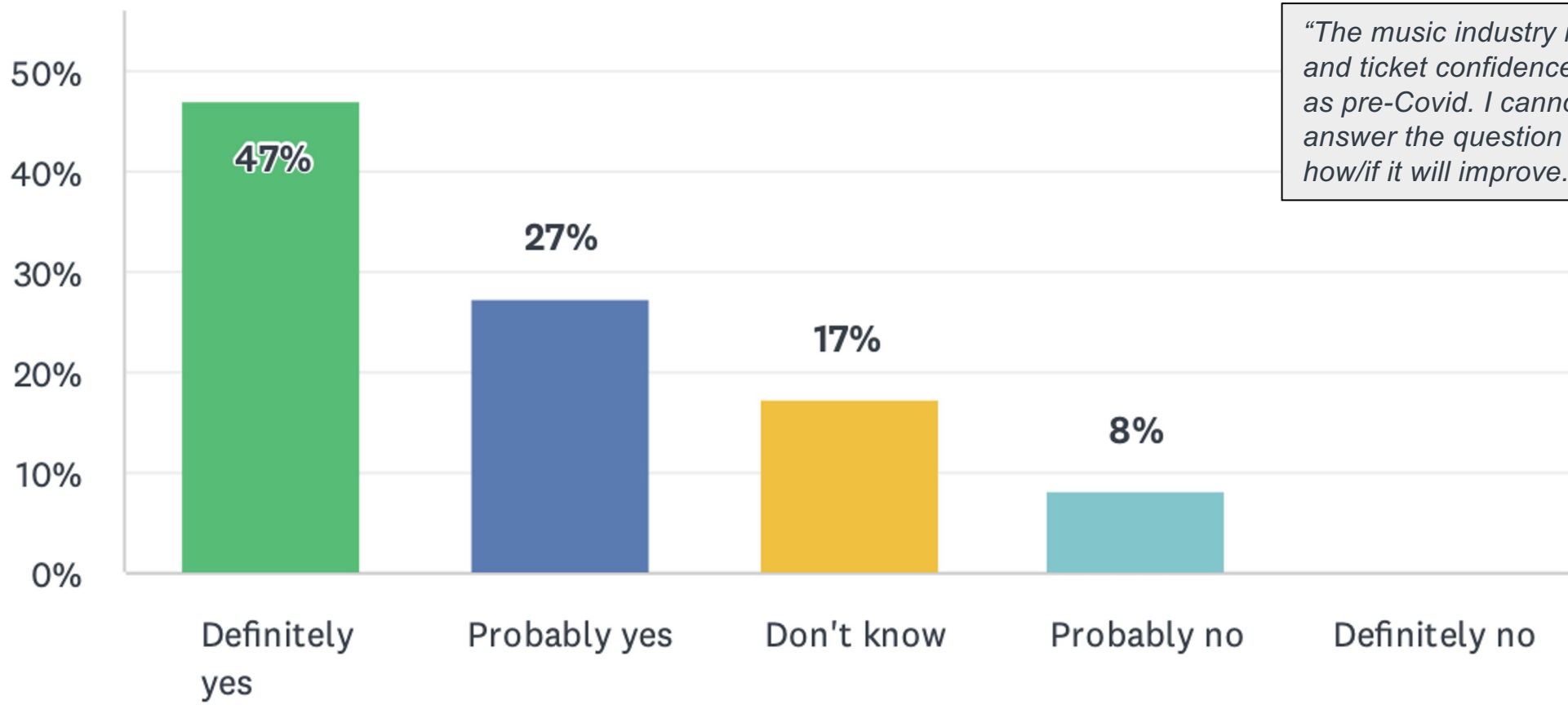
"Donations 100%."

"N/A - nonprofit volunteer-based structure."

Venues/Presenters: Local v. Regional Talent Bookings

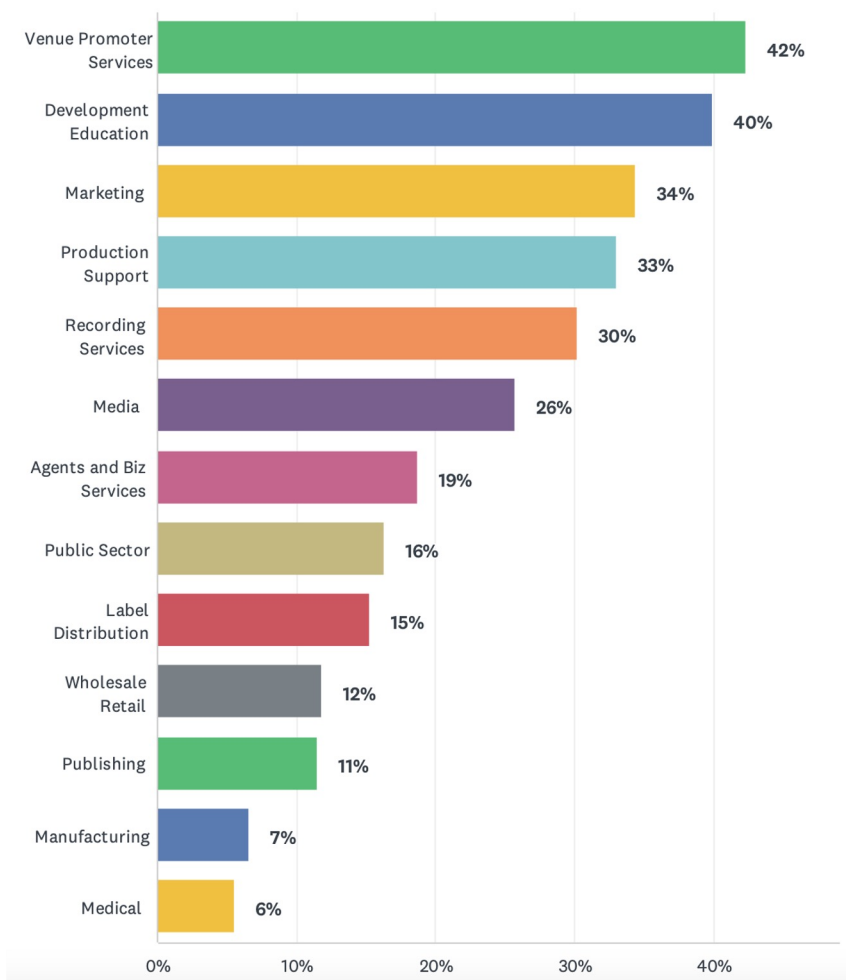


Venues/Presenters: Intent to Book More Local Artists (3 yrs)



"The music industry is in a transition and ticket confidence isn't as strong as pre-Covid. I cannot honestly answer the question without knowing how/if it will improve."

Industry: Music-Related Industry Occupations



“Artist Development, artist management, artist booking. Talent buying for venues. Entertainment management for umbrella corps. Creative services for businesses in the music industry. Small business development and consultation for startups in the music industry.”

“Bartend.”

“Writing, production, engineering, graphic design.”

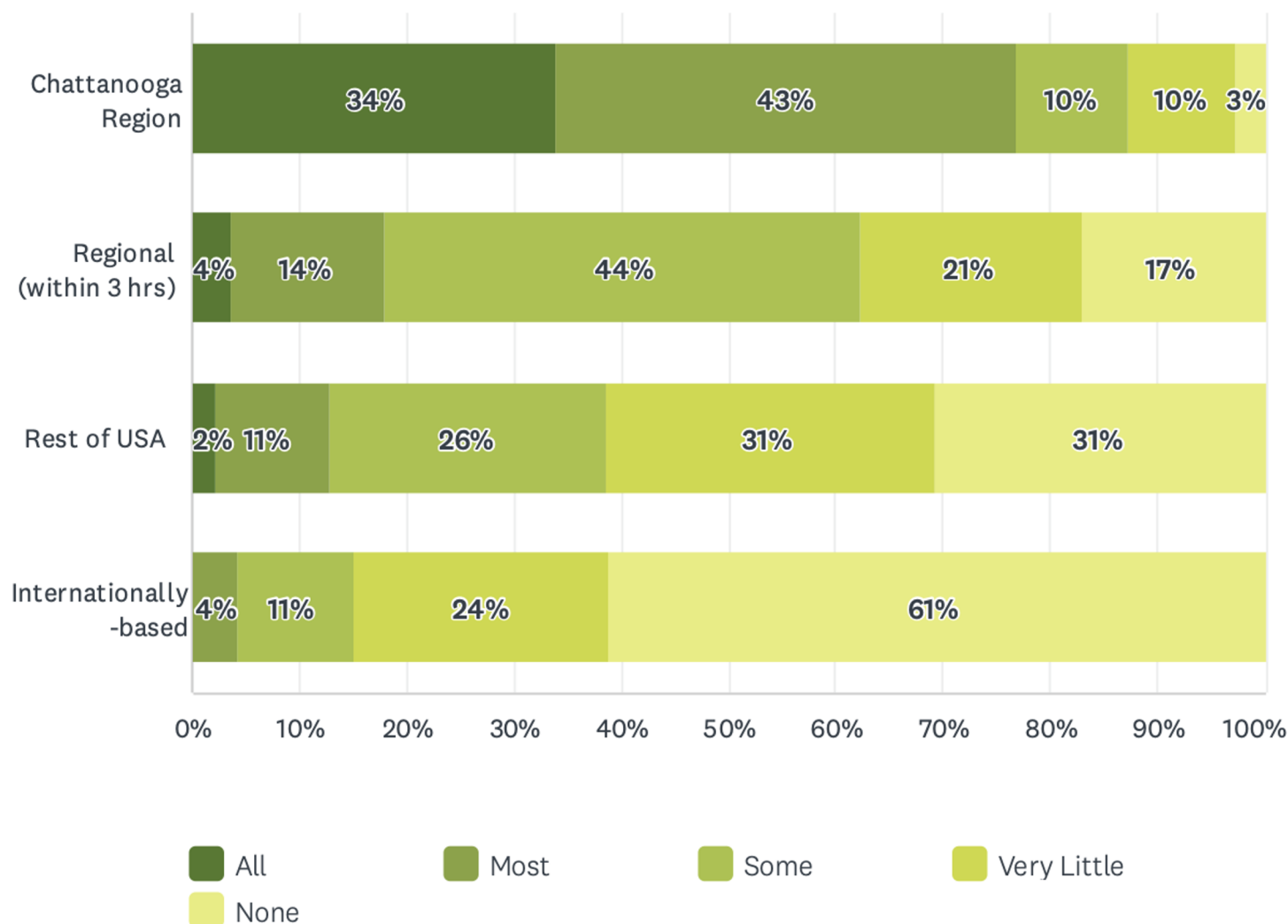
“Booking, Marketing, Managing.”

“Production support for live events.”

Industry: Percentage of All Work That is Music-Related

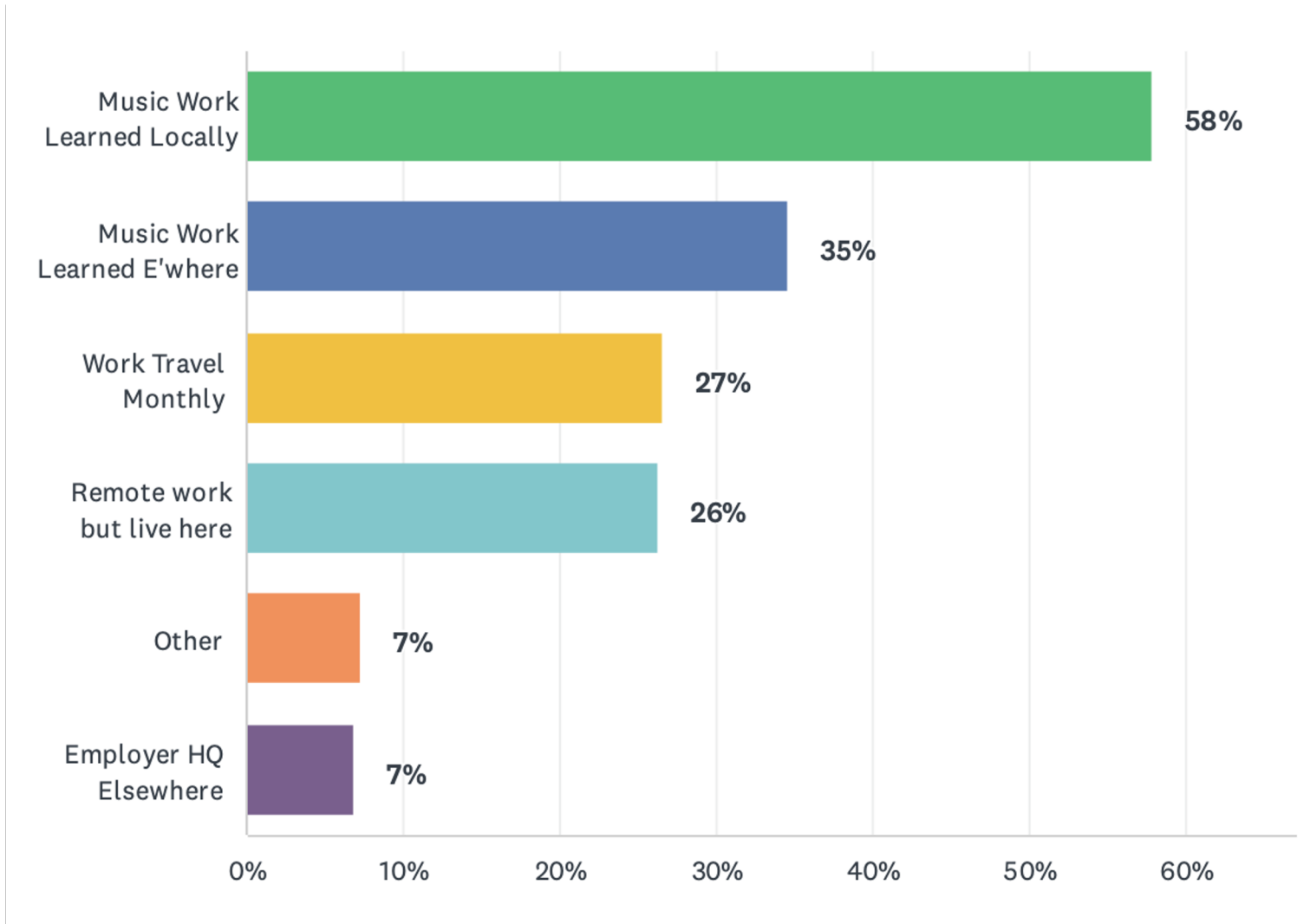


Industry: Geography of Music Clientele

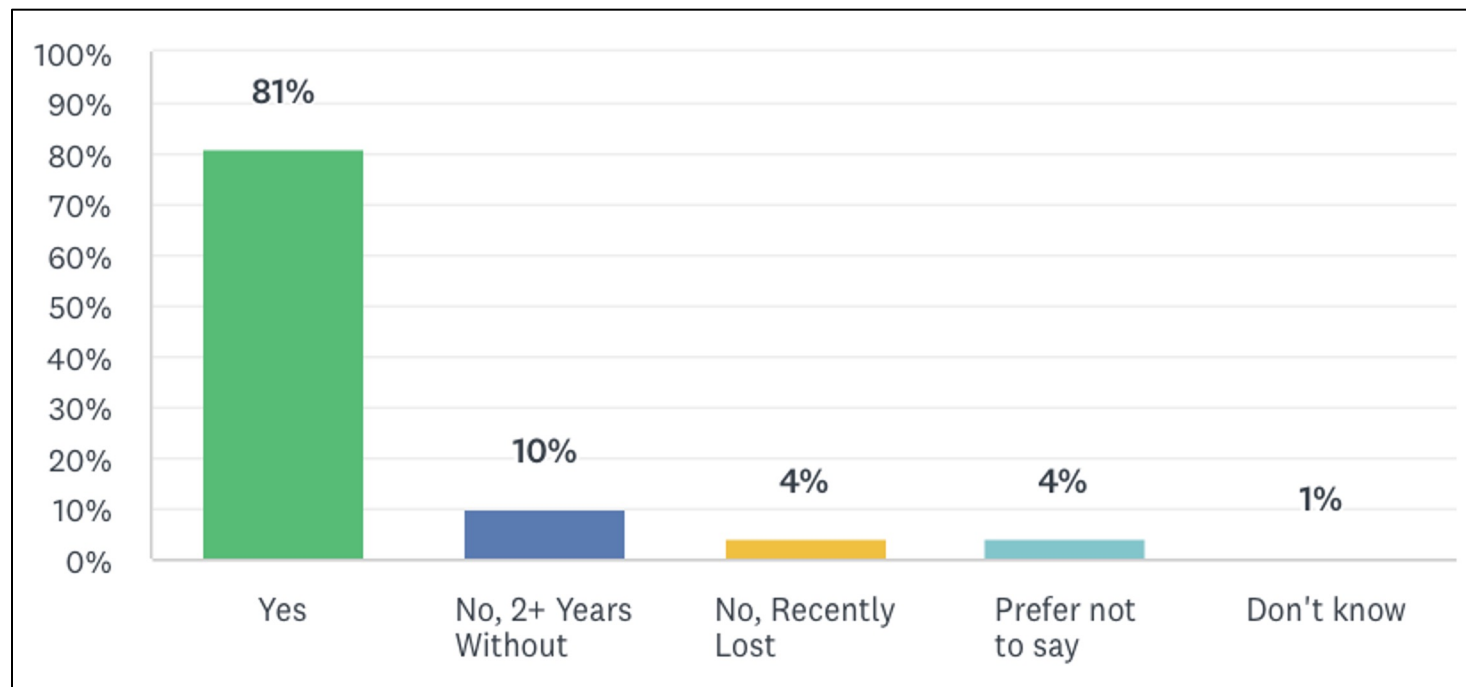


"I have a studio and am ready to work for local artists to record/mix music. I'd love to access resources to get my name out there with local artists."

Industry: Features of Music Industry Employment

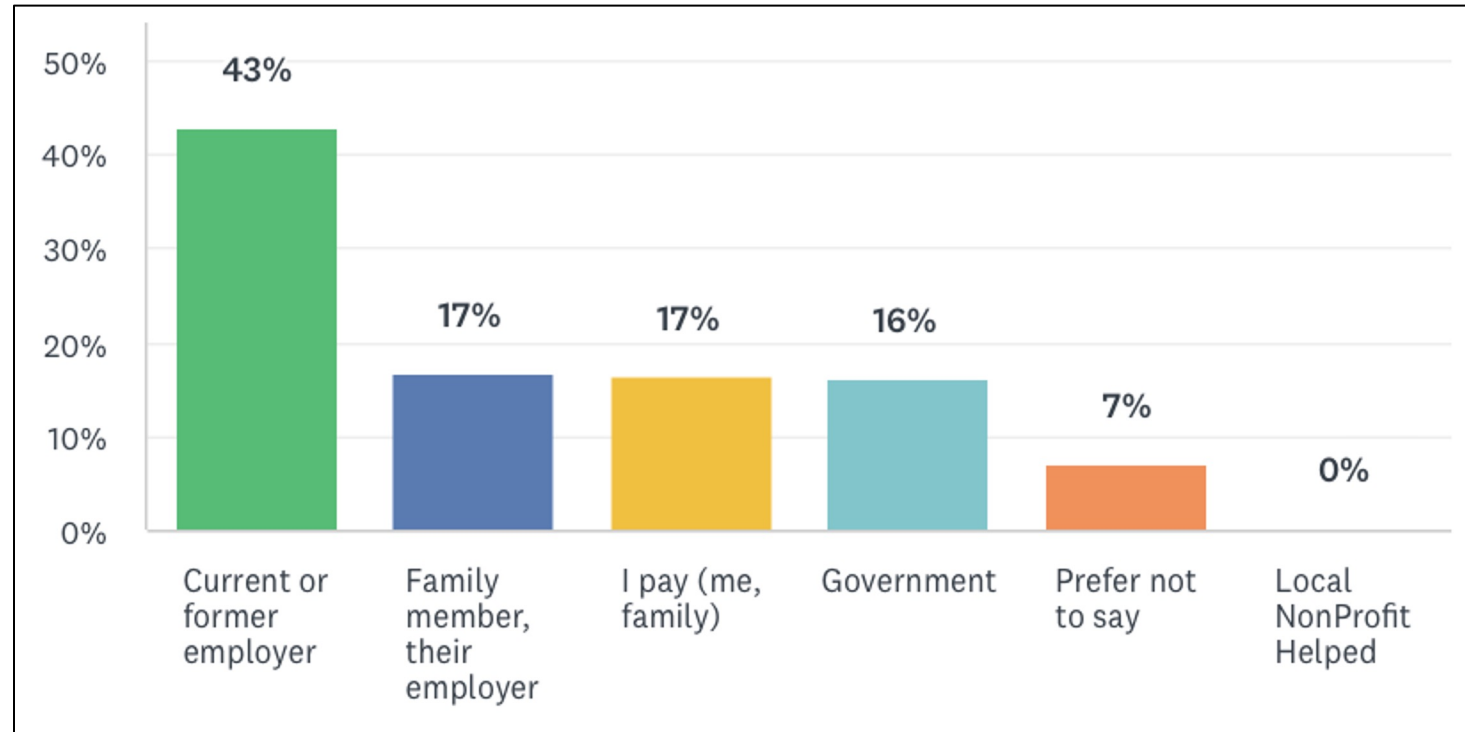


Health Insurance: Current Status of Coverage

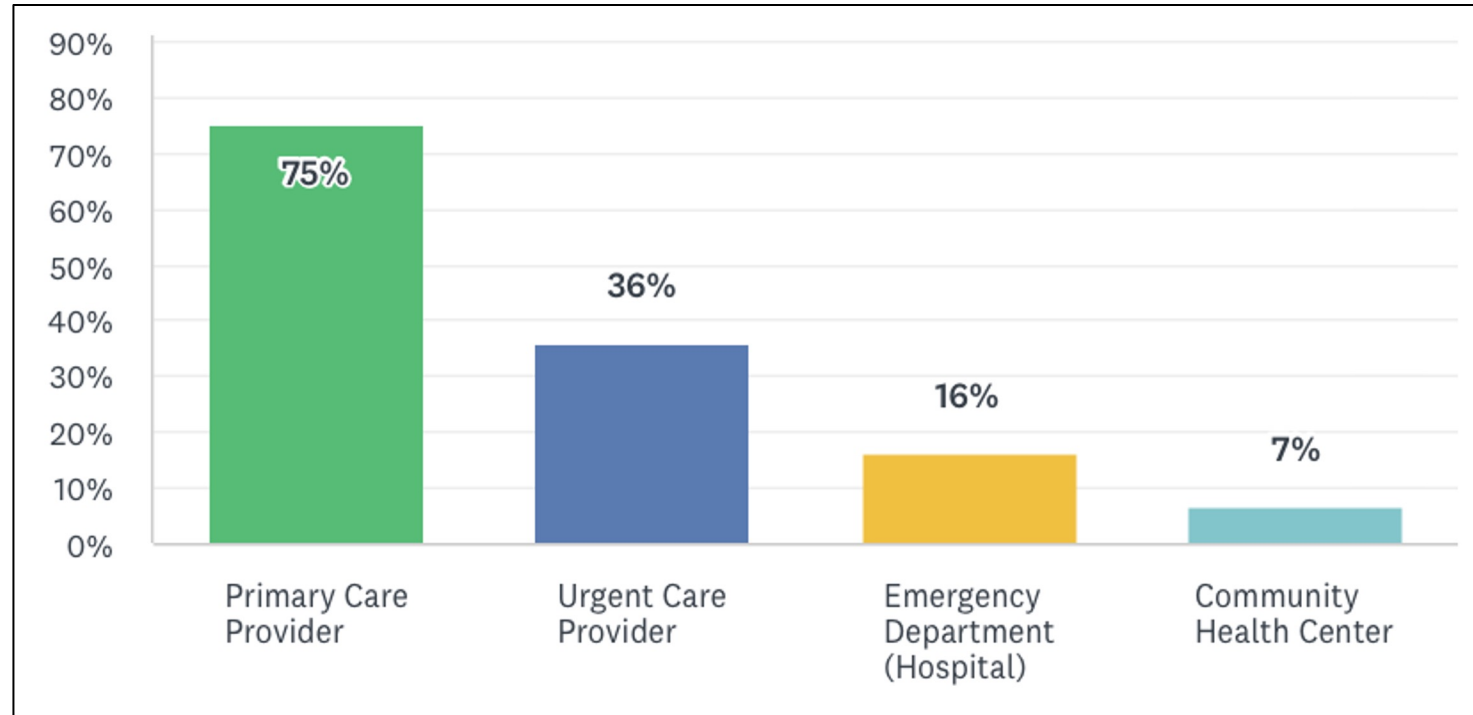


Health Insurance: Current Coverage Provided By...

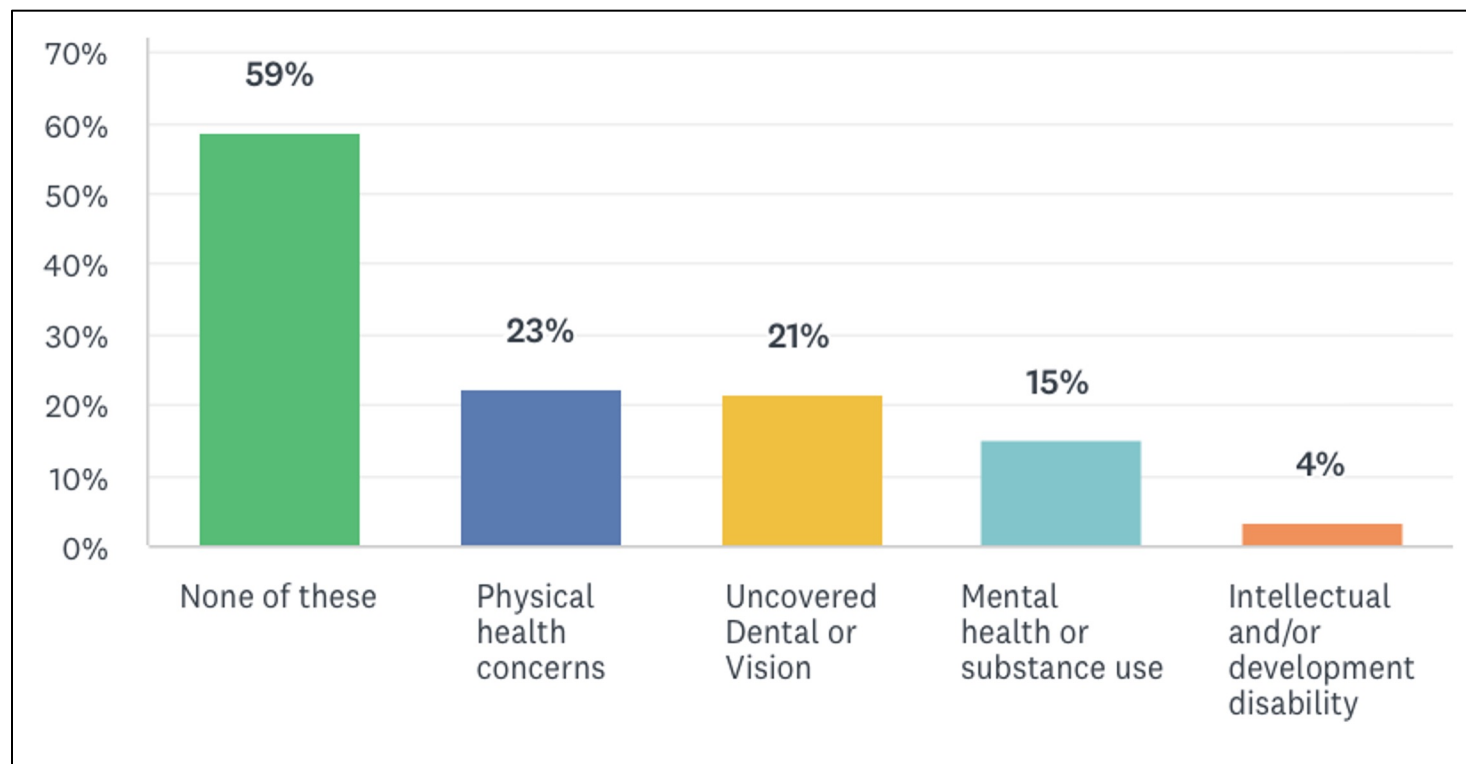
(for the 81% of respondents who currently have health insurance)



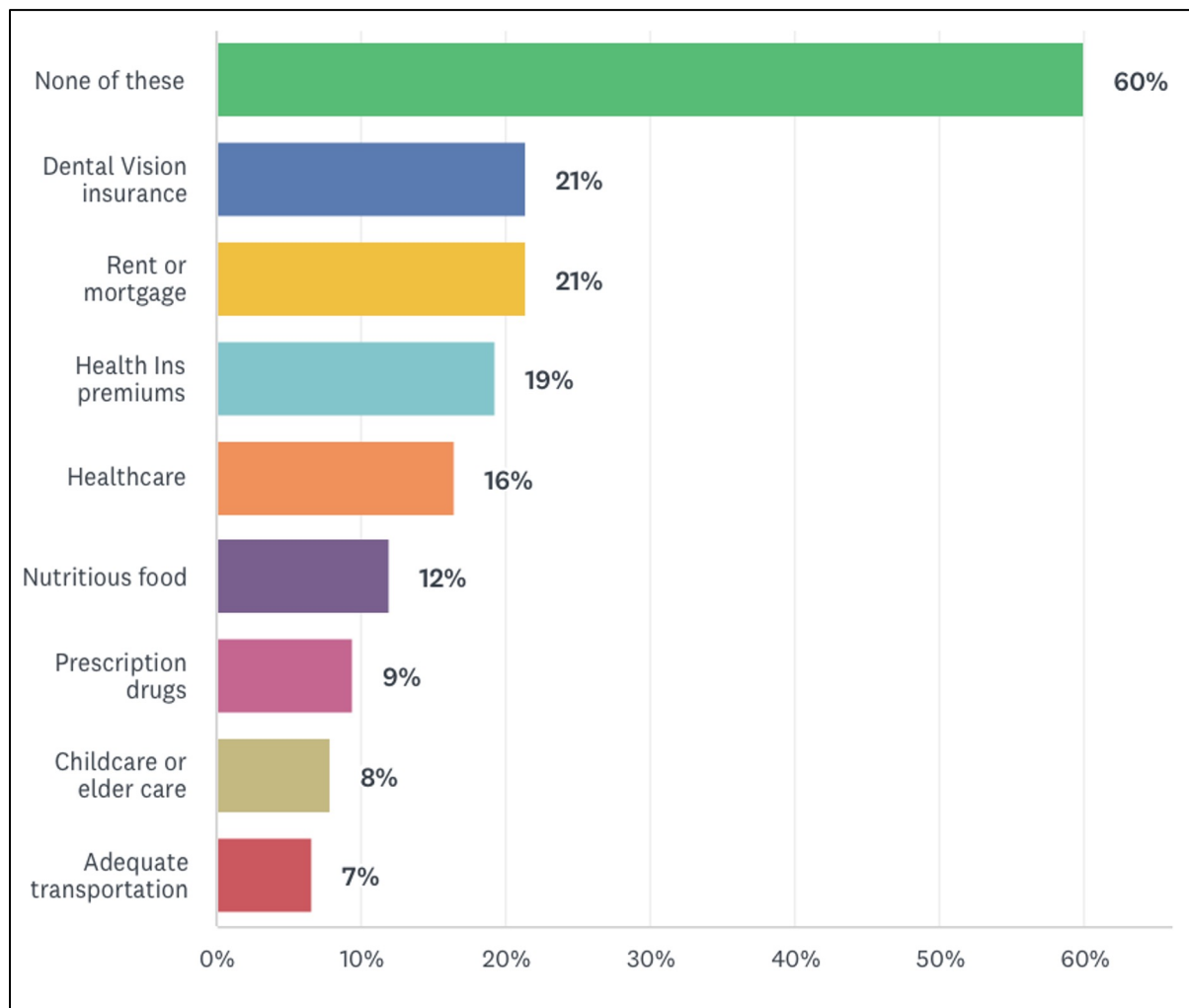
Health Services Provided By...



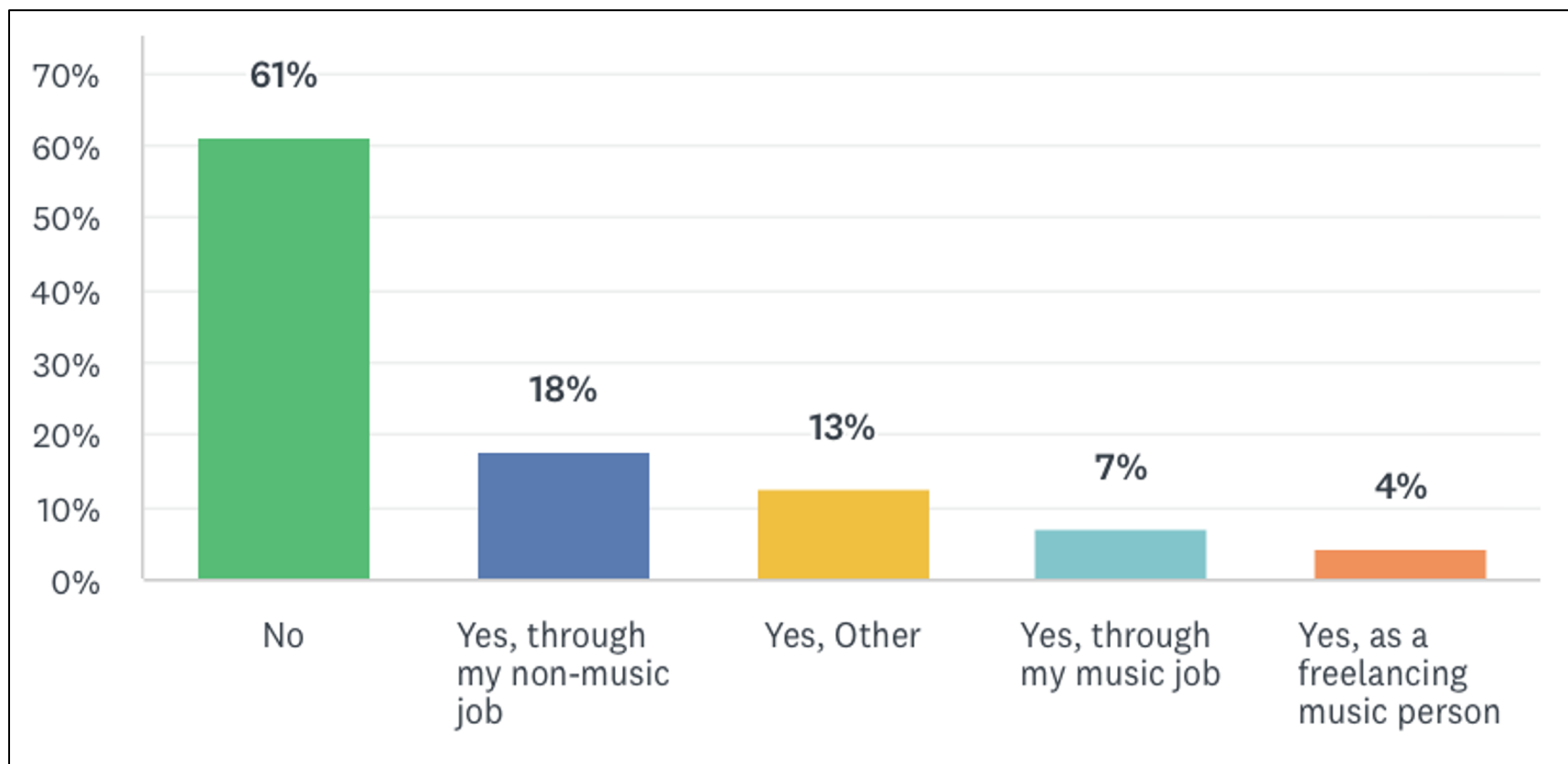
Current Health and Wellness Concerns



Current Needs Struggling to Afford

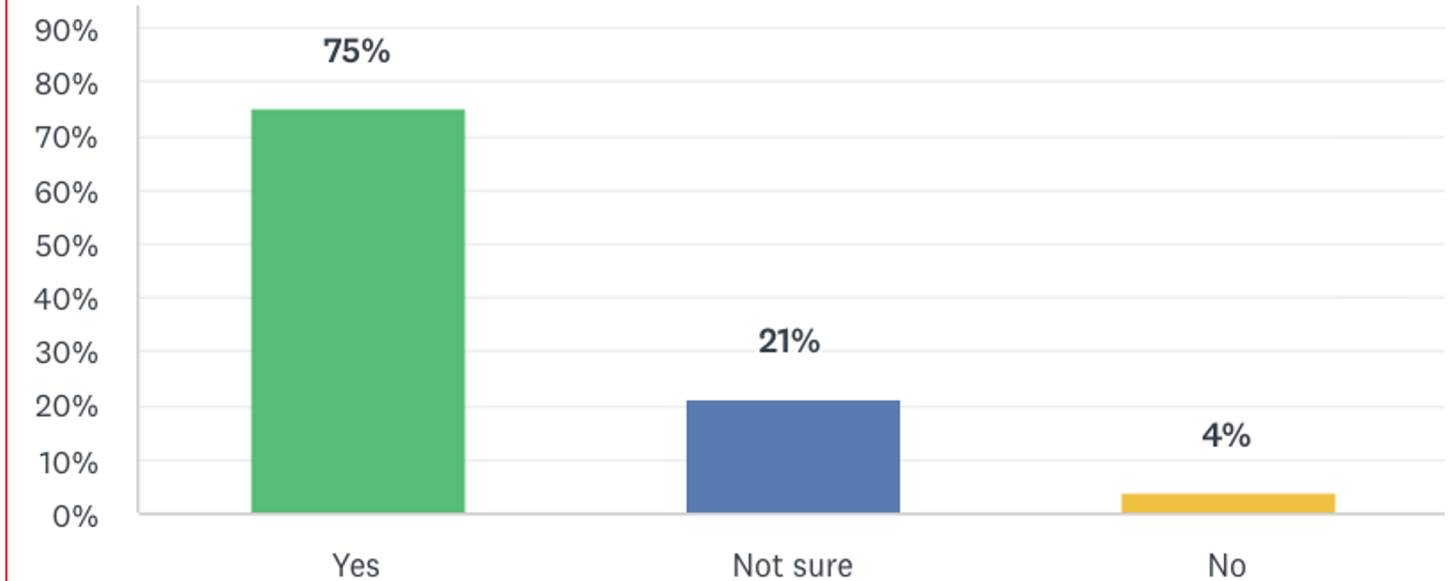


Received Pandemic Relief Funds While Living in Area

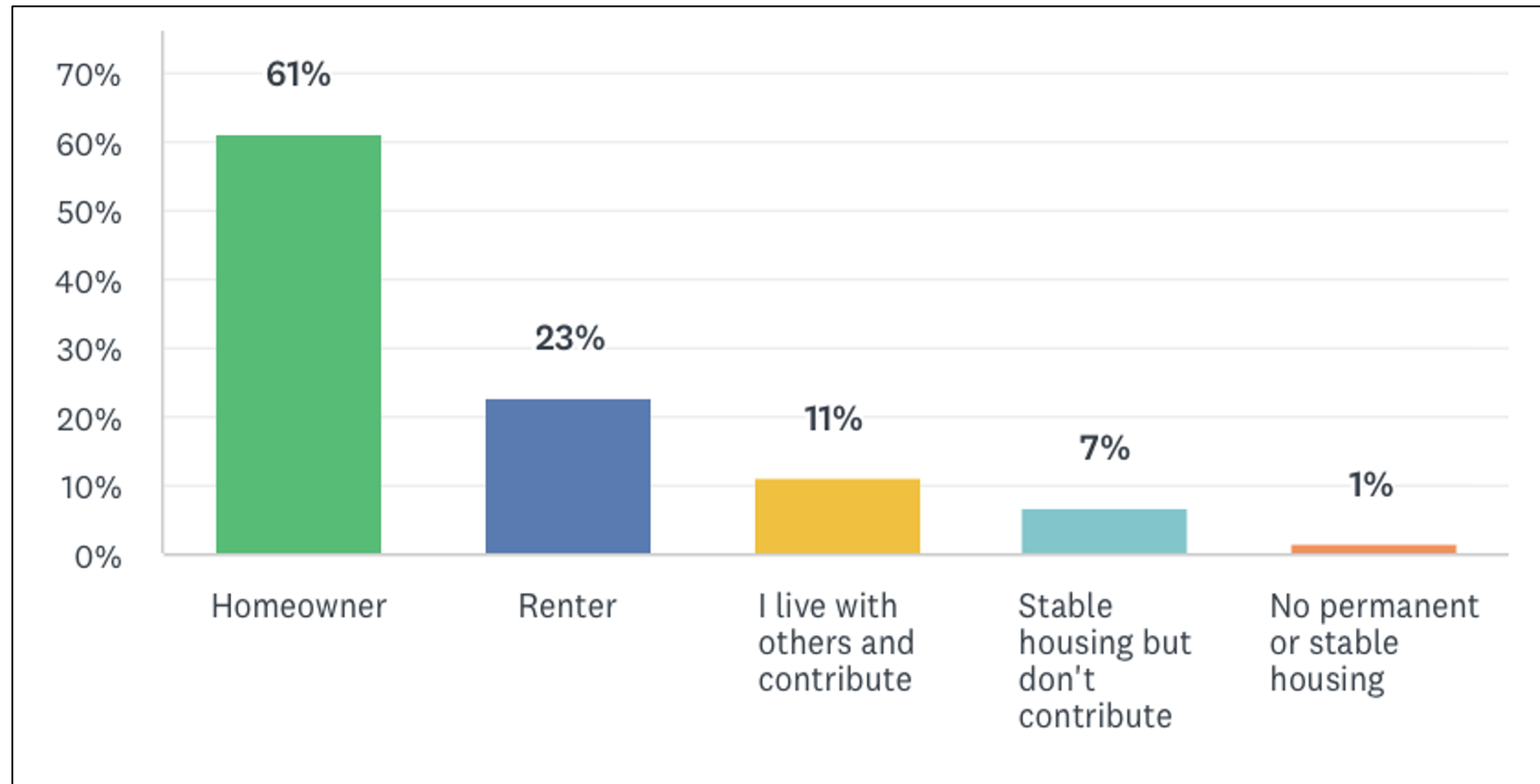


Pandemic Relief Was 1st Government Support Ever, as a Music Professional

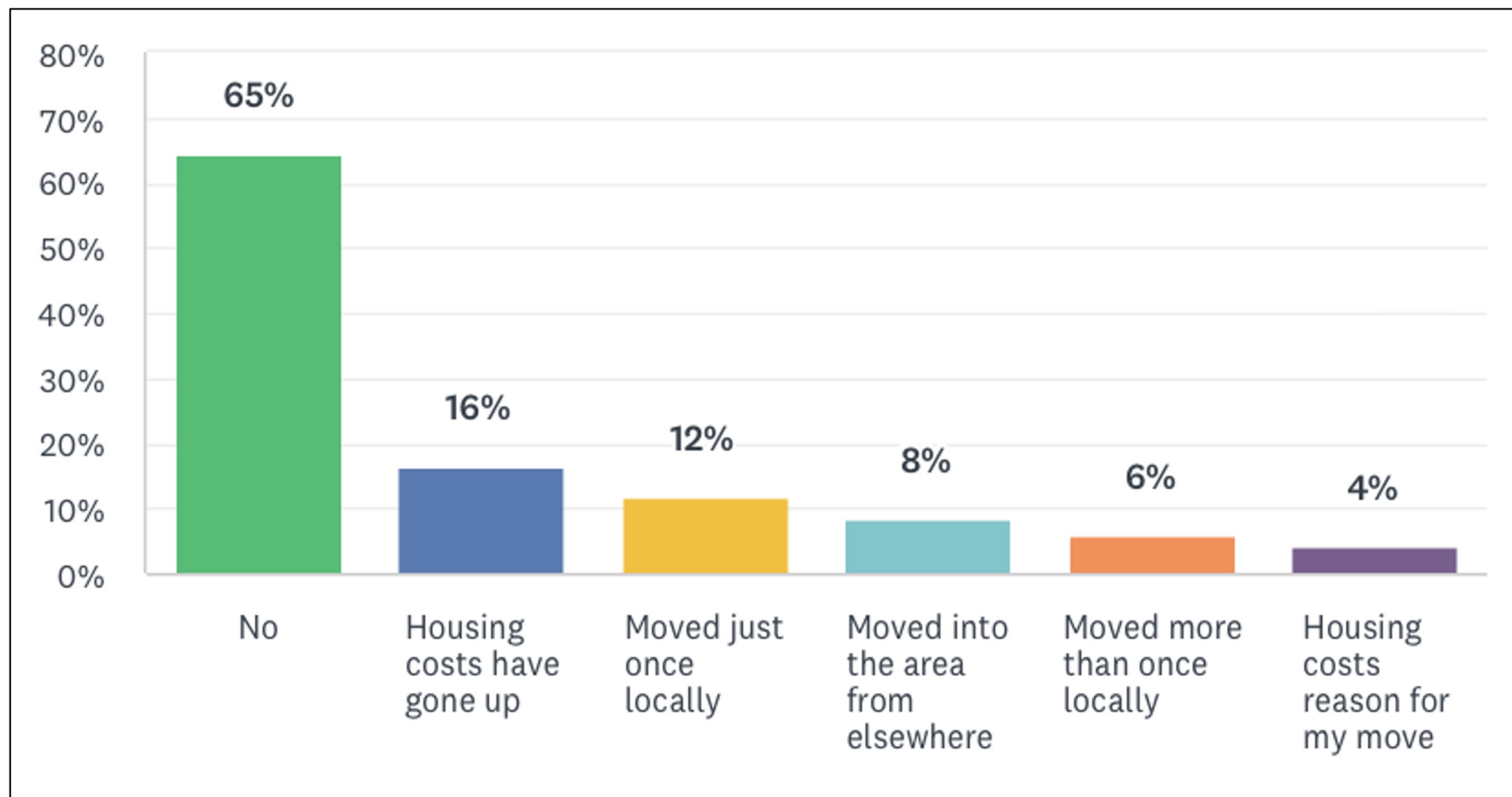
(for the subset of respondents who received pandemic relief through music work)



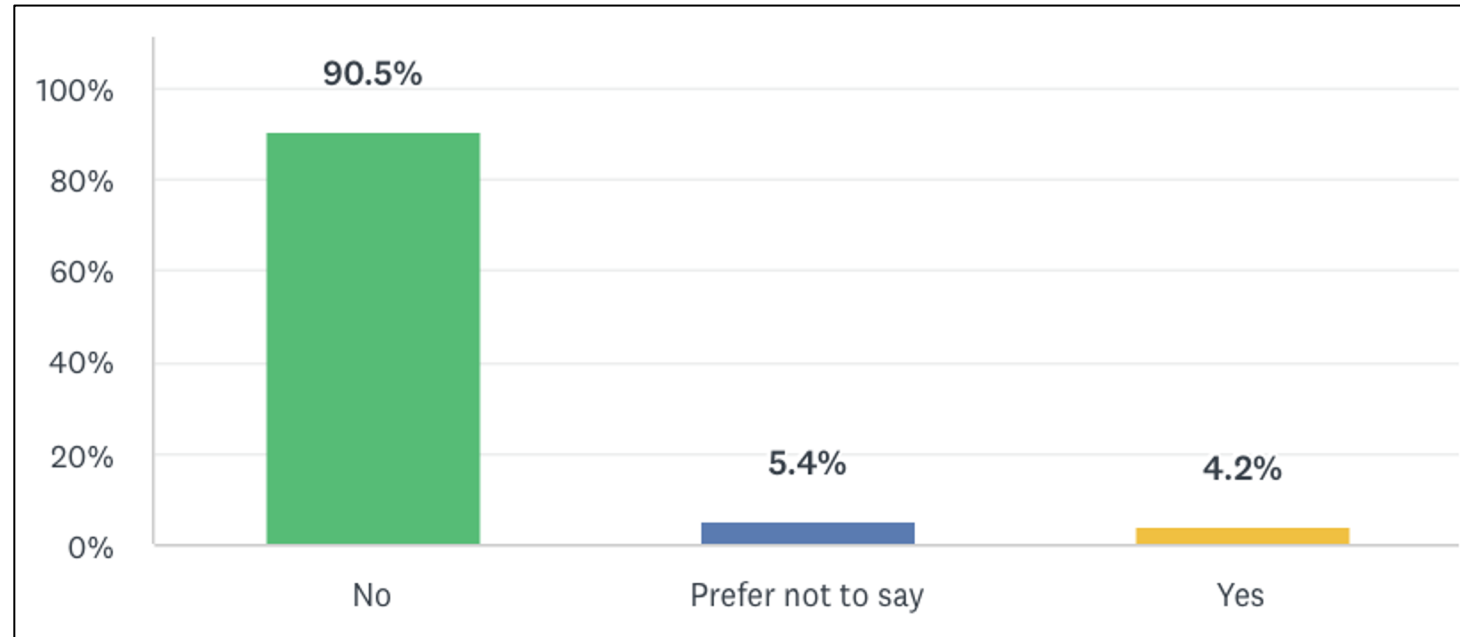
Current Housing



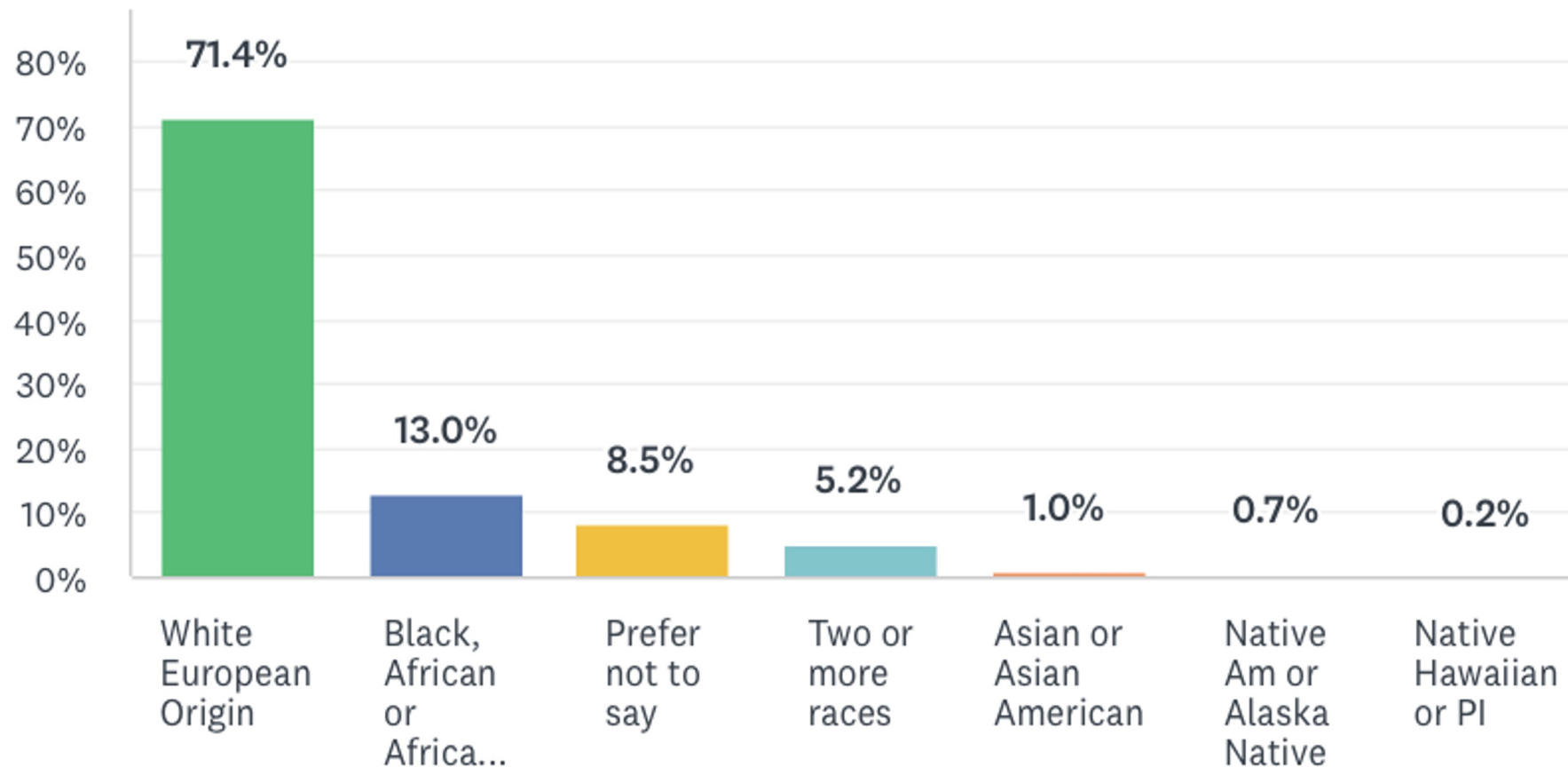
Changes in Housing (within Most Recent Two Years)



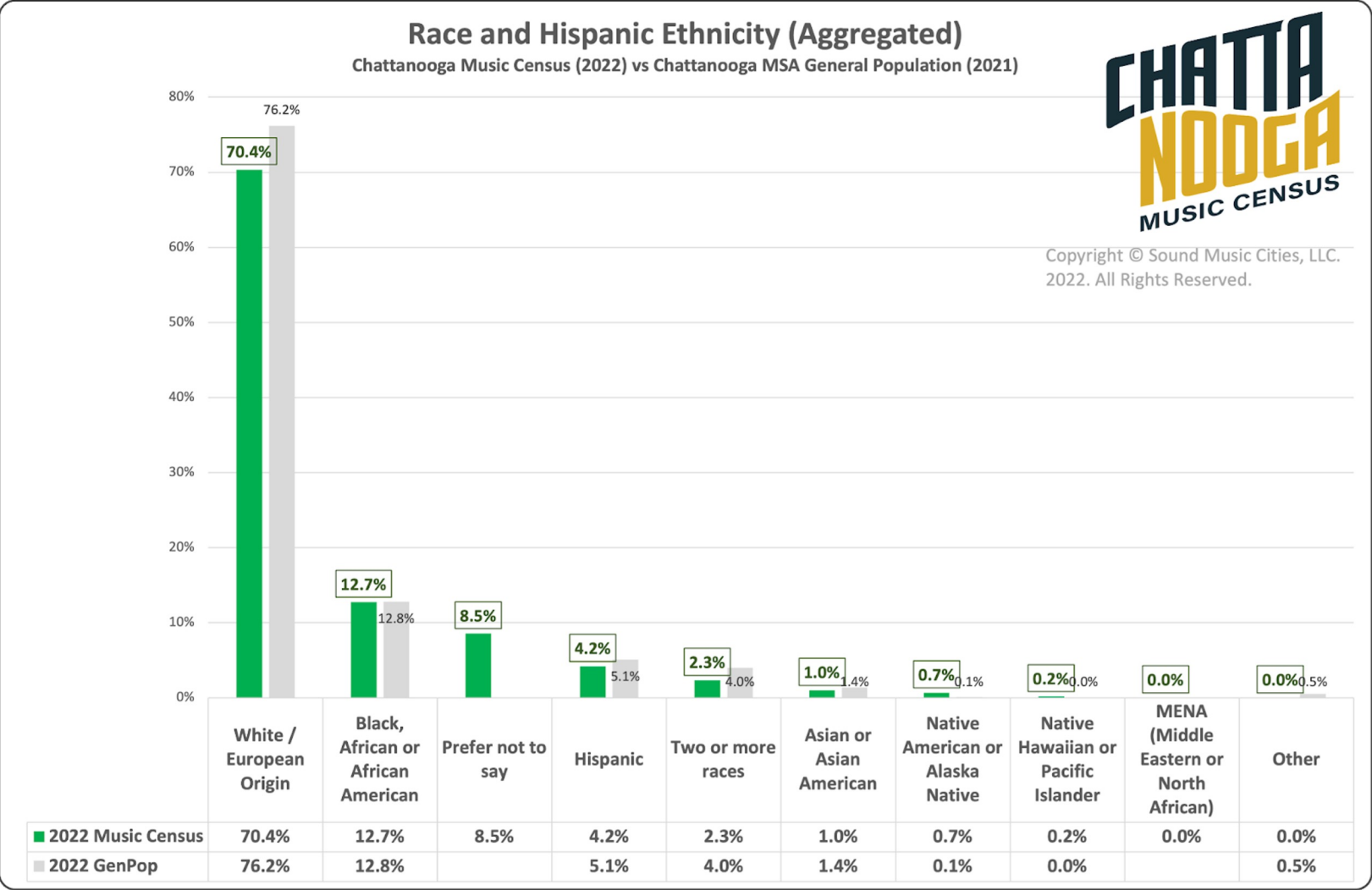
Demographics: Hispanic Ethnicity



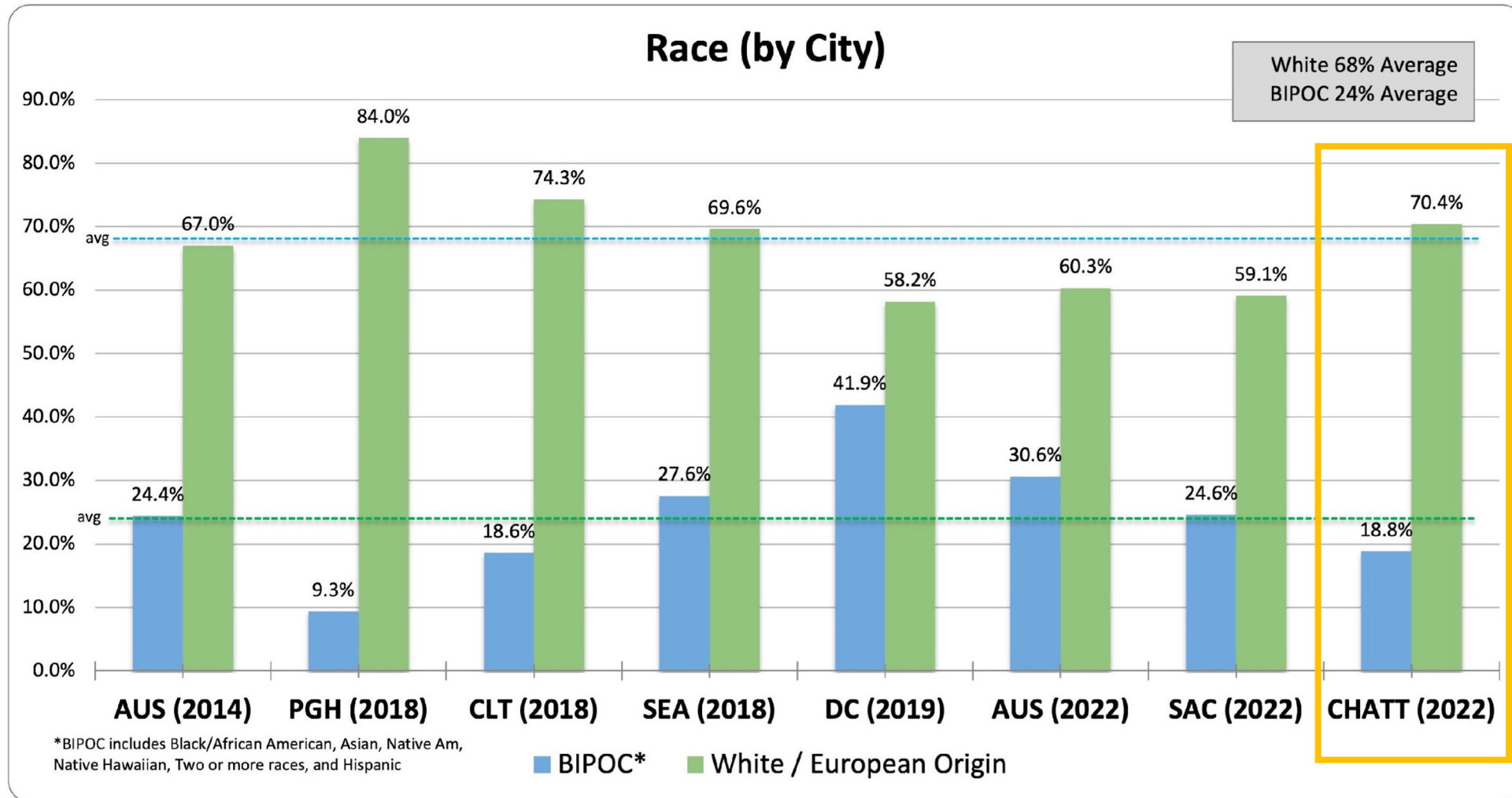
Demographics: Race and Ethnicity



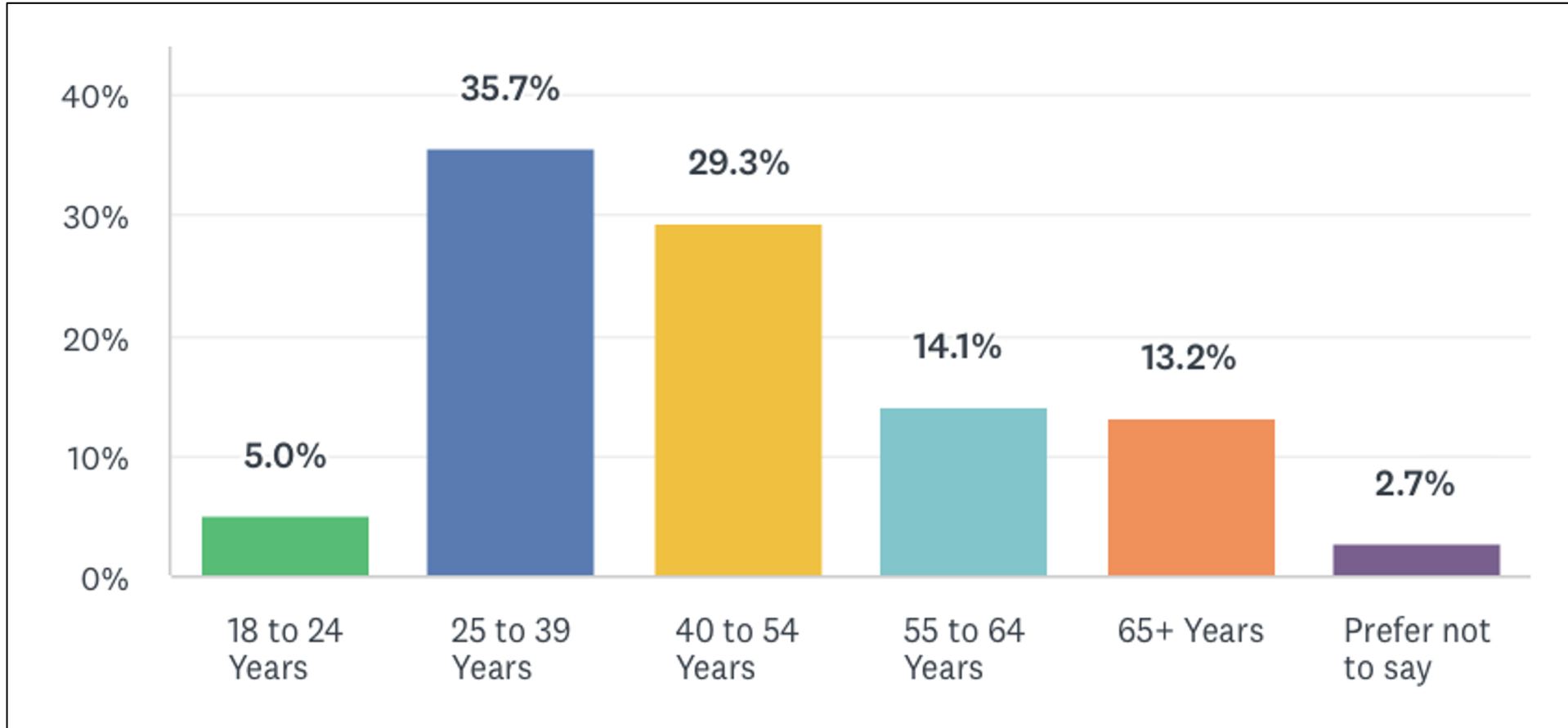
Demographics: Race and Ethnicity (Aggregate) v. General Population



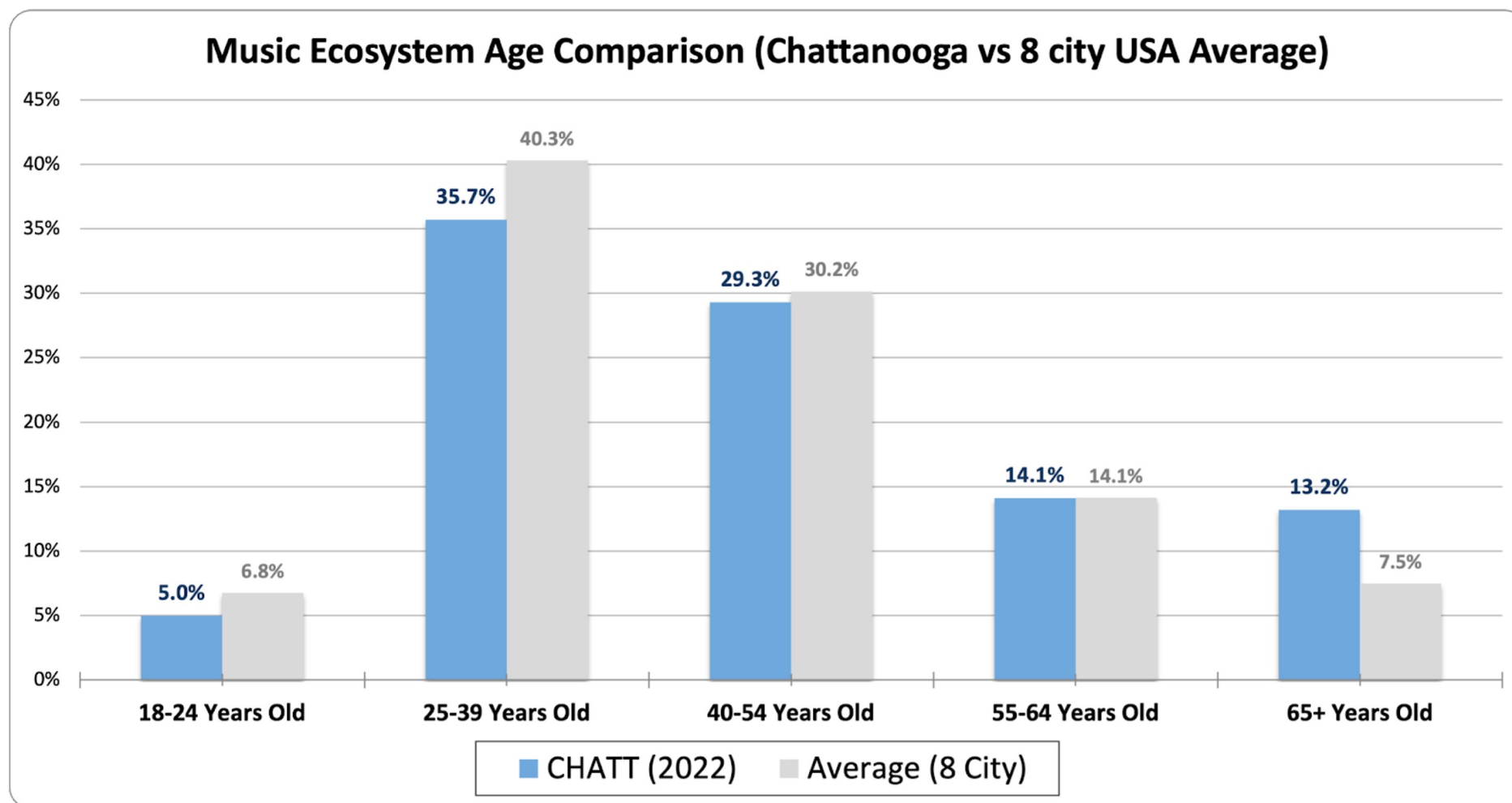
Race: Benchmarking Against 8 Other Music Cities



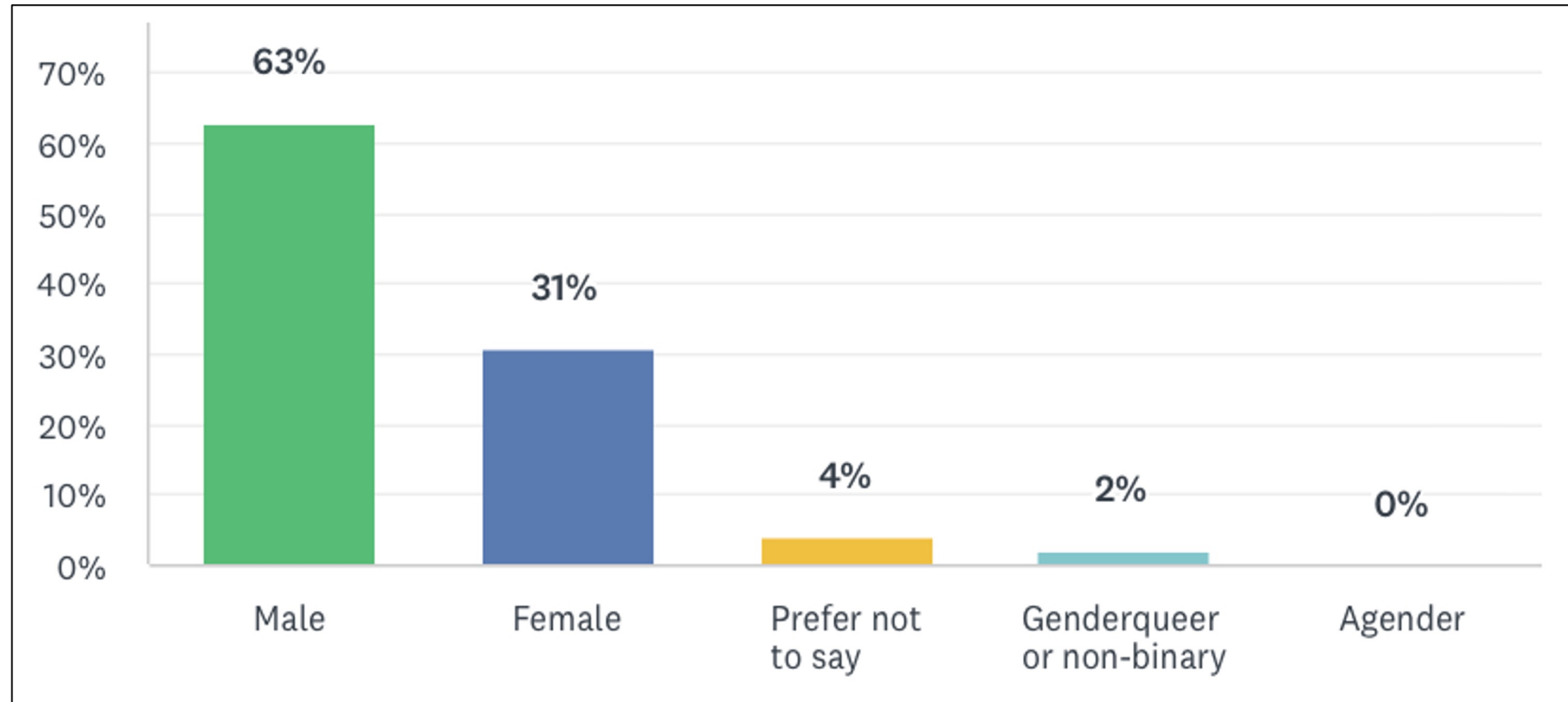
Demographics: Age



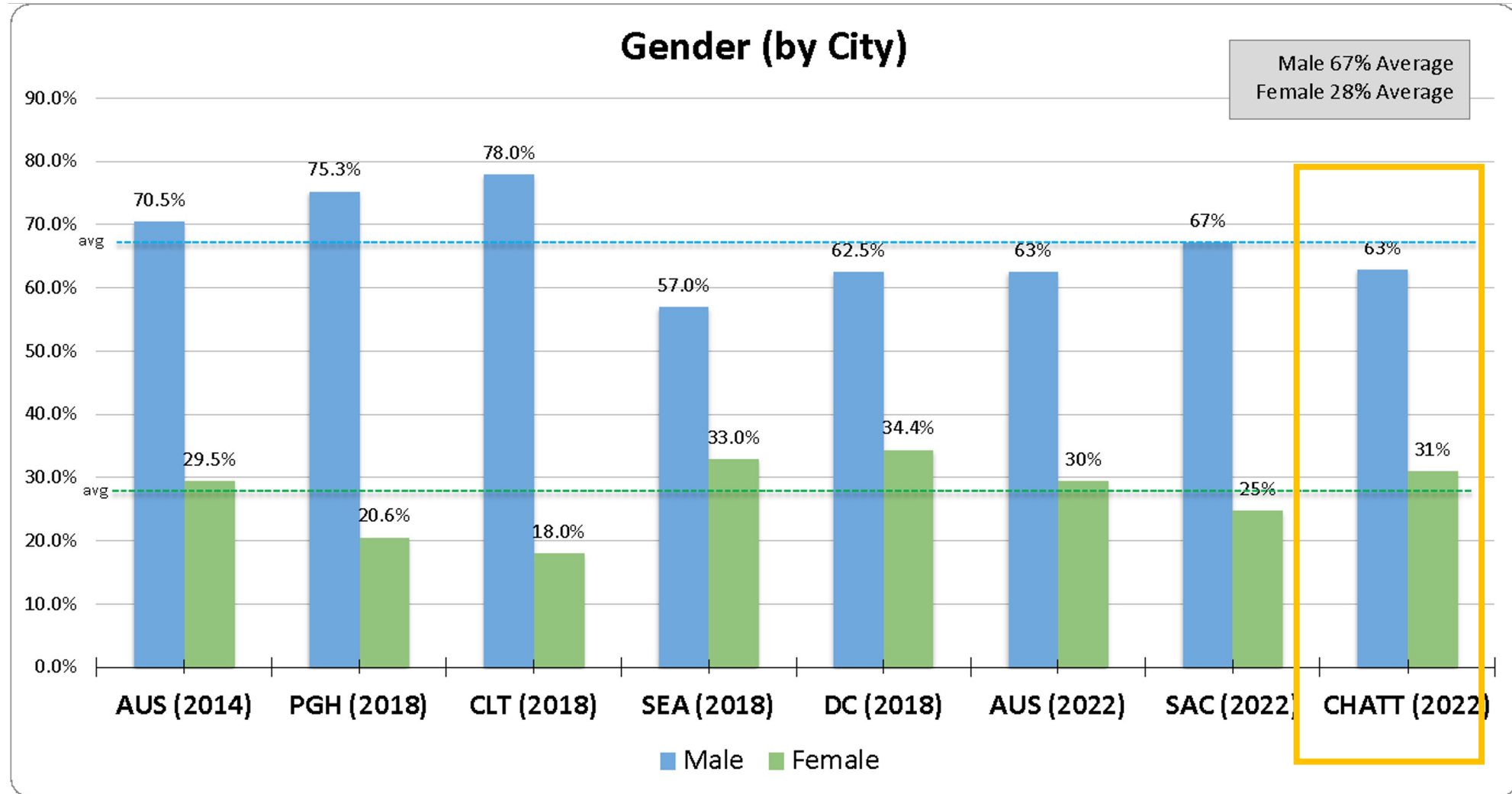
Demographics: Age (v. 8 Other Music Cities)



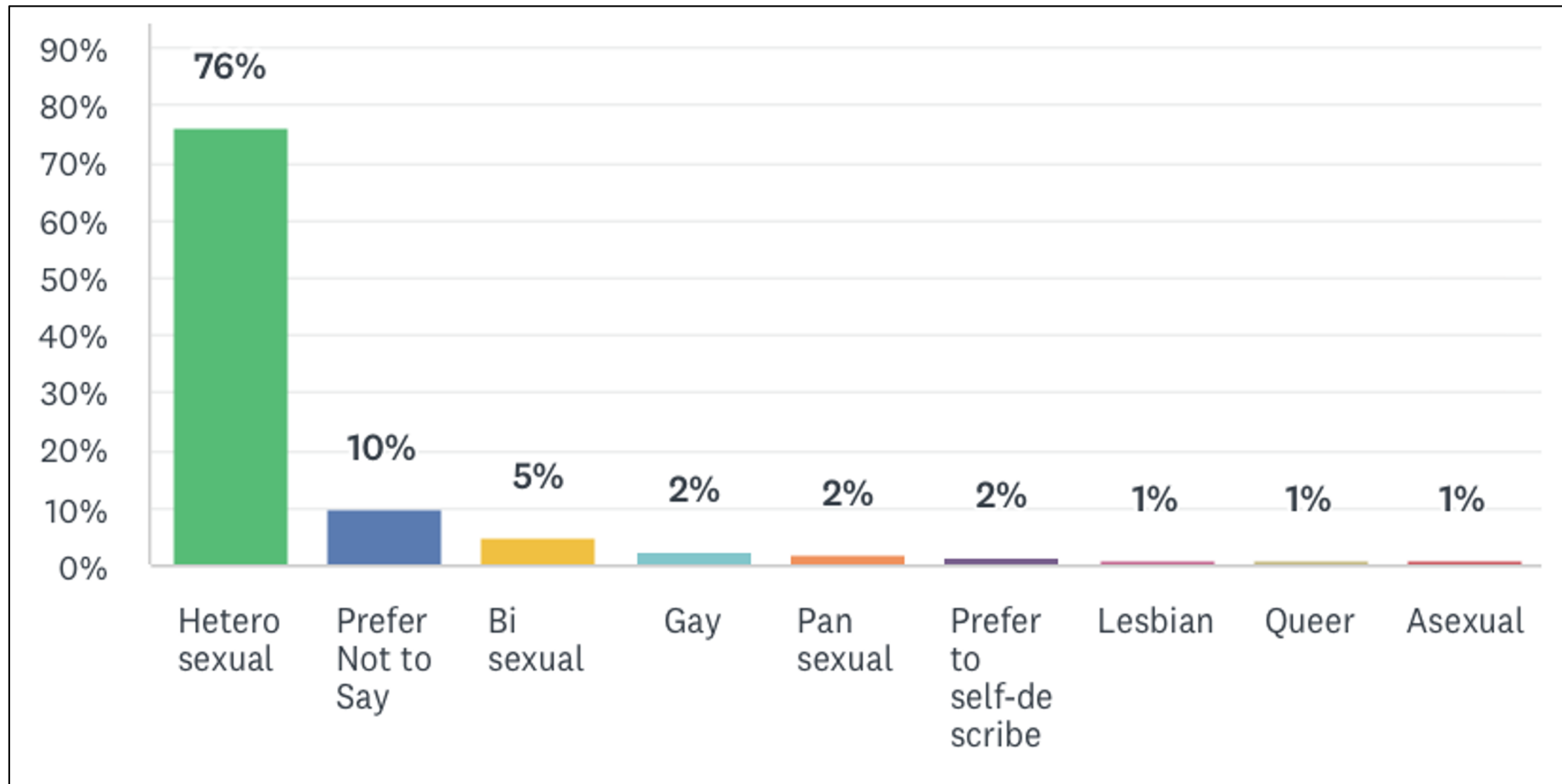
Demographics: Gender



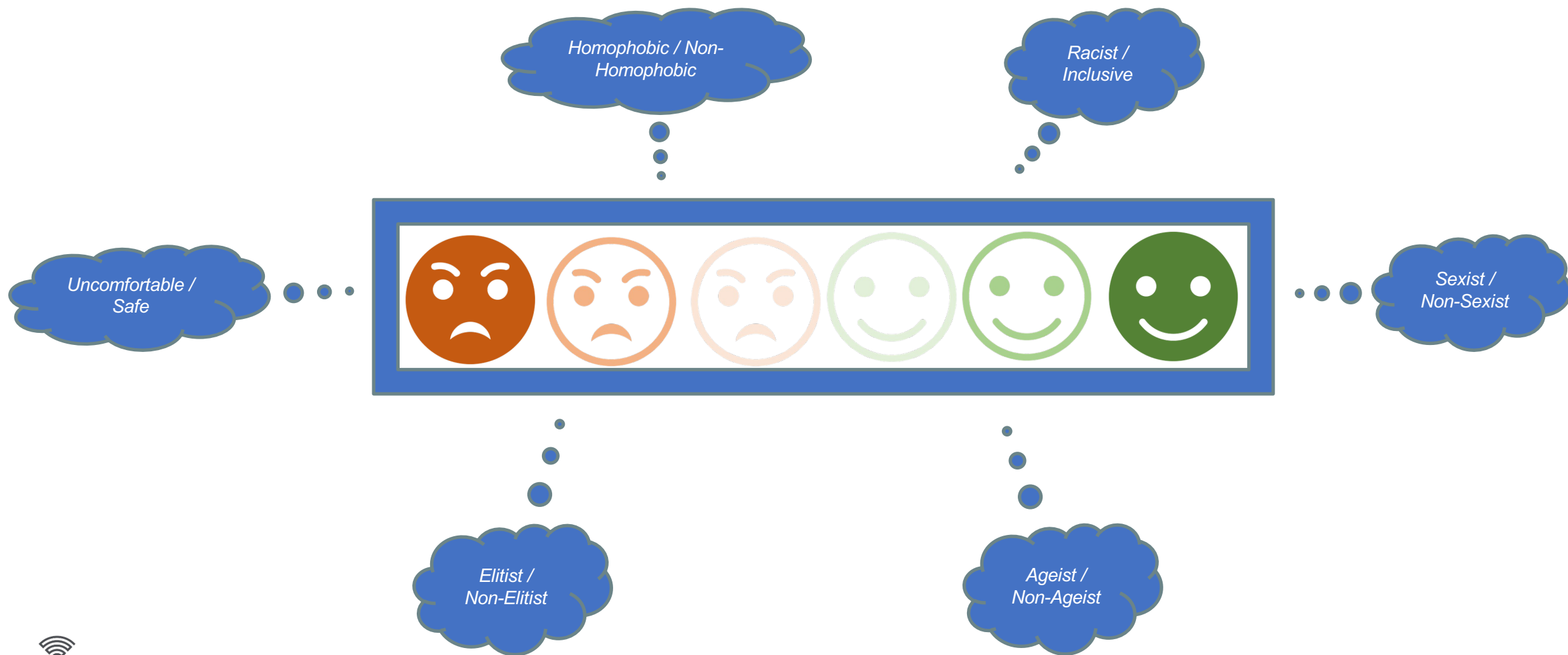
Gender: Benchmarking Against 8 Other Music Cities



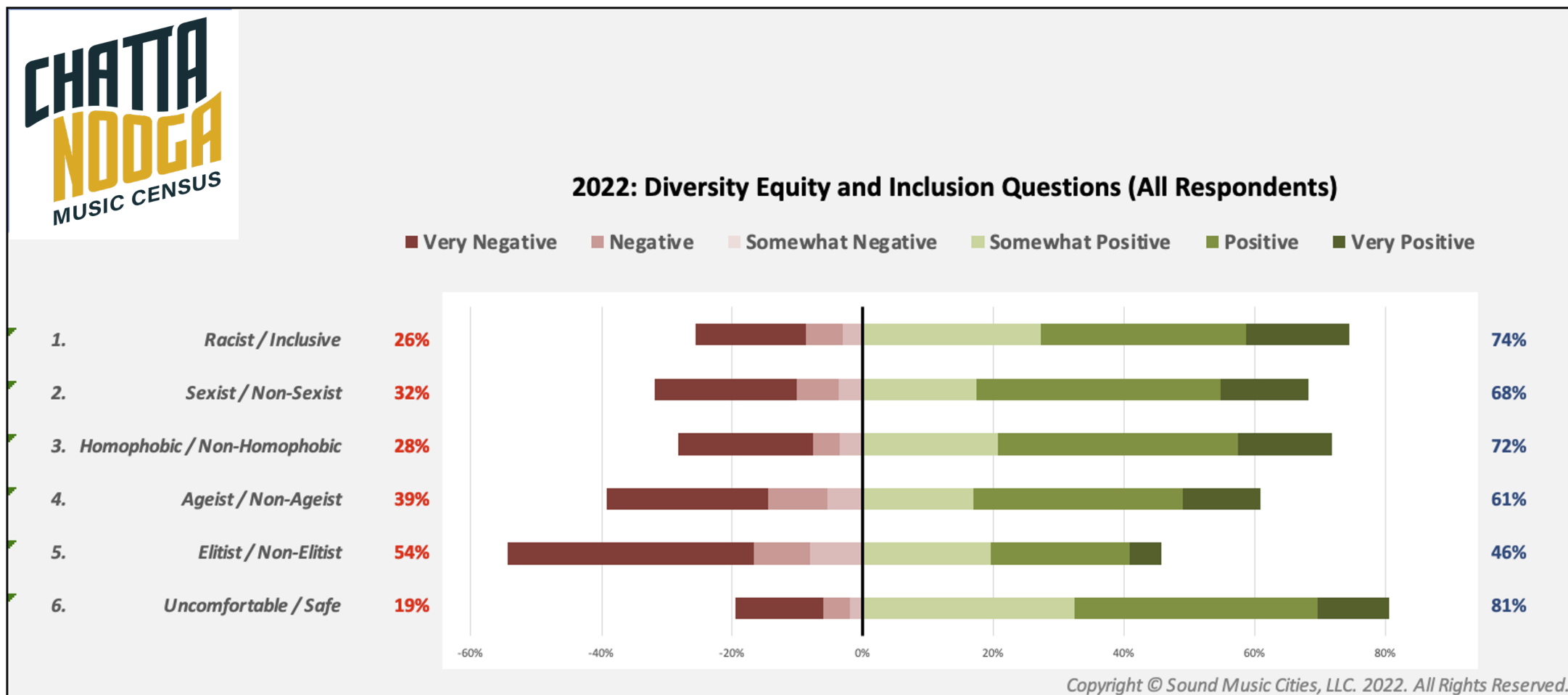
Demographics: Sexual Orientation



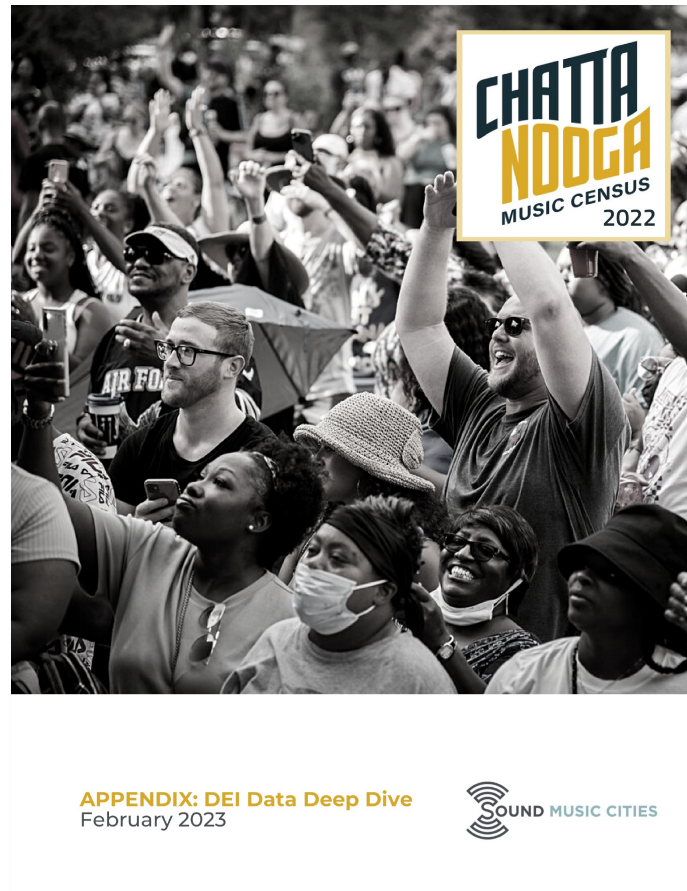
Diversity, Equity, and Inclusion Adjective Pairs



Diversity, Equity, and Inclusion – Overall Results



DEI: Deeper Analysis of Sub-Groups



**See Appendix:
DEI Deep Dive**

DEI: Deeper Analysis of Elitism (Sampling of Comments)

"There is an elitist clique in this town. The same group of people are hired to play every gig. If you aren't in the clique, you can barely find work and forget being hired to play high-profile gigs and festivals. That needs to change."

"I am not sure what the local government can do about this but the local music scene seems to be focused on a handful of bands and the same musicians. This makes it difficult for less established musicians and bands to get air time on WUTC, land better gigs, etc. lessening the variety of music in the area."

"You didn't consider "classical" musicians. Everything seemed directed to "commercial music". There is a large network of singers, instrumentalists who are classically trained in this city. They need support, promotion also!"

"Why is someone with the equivalent of a B.S. in music and years of playing and performing experience and composition skills unable to find any meaningful work in some music-related field in Chattanooga and what can be done to change that?"

"LOVE seeing the Chattanooga music community grow. It still feels like a tight-knit, kind of underground community, but I'm seeing it grow more and more. In my experience, it has been very welcoming as a new Chattanoogaan."

"We need more gatekeepers in this community. The same artists get the same opportunities."

"Even music for younger kids is elitist here. Music should not be held hostage by just the people who can afford to send their kids to private schools, or people who put their kids on a list when they're newborns. Sorry to rant, but I believe it could change a lot.."

Comments: How Has Pandemic Changed Things?

"Music was determined to be nonessential, and all hopes of income were gone in a few short weeks. I don't think I will ever be comfortable living off music related income alone anymore."

"I have lost contact with some of the people we collaborated with, they have changed focus. Need to reconnect with the music community."

"I find that more people want outdoor music opportunities and may have come to appreciate outdoor venues more than before."

"I took advantage of everyone working from Zoom. It really opened up opportunities in places that may have only been open to me if I lived there or regularly traveled there. It opened up opportunities in NYC and San Diego I might not have had otherwise."

"More people started playing instruments during the pandemic. When there are more musicians, there is more need for the services my store provides."

"Remote work has greatly increased my potential time for music opportunities."

"It made me realize that this is what I want to do for a living."

"I began learning the music production and audio engineering processes in earnest, which I hope will lead to new opportunities in film music, licensing, etc. as well as self-released music on the streaming services."

"Many smaller weekday gigs have dried up. Mainly due to venue closures and venue budgets."

"By necessity I cancelled a seven year radio program."

"Because we couldn't work for such a long time, venues have forgotten we're out here. It's really hard to rebuild an audience after an absence."

"I feel it has brought to light the vulnerability of many freelancing and gig workers, and hopefully there is more awareness and support moving forward."

"It has taught me to be creative in growing my skills and creating music opportunities that are accessible to all, regardless of income."

"It shattered my momentum, and I froze. I've spent this year in therapy getting my confidence back up."

"It shuffled the deck and gave new artists opportunities."

Comments: Role of Non-Profit Organizations

"As a non-profit, I can tell you that we have been able to support more artists after Covid than before the pandemic."

"None that I am aware of."

"They've played a role in making it more difficult to establish a legitimate industry in Chattanooga. They take up all of the social bandwidth pushing projects touted as promoting industry growth but don't have a single person on the team that's had real deal career success in the industry."

"Some local Latino-focused and art-focused nonprofits have been great at securing funds and inviting local presenters and artists to showcase their talent."

"Rising tide lifts all boats. I haven't been helped directly, but nonprofits help drive participation in music, and thus music related economic activity."

"Nonprofits have been the main stabilizer for my income."

"Nonprofits don't support the hip hop community at all."

"Lots. Non-profits are key to supporting local music culture."

"Many cities of our size do not have a local symphony, and I believe we should do everything we can to protect, preserve, support, and grow this organization for the benefit of everyone involved!"

"Nonprofits have played a major role in supporting my personal music career in the way of providing community for me. Having friends, making connections, and being encouraged and pushed creatively, has been priceless for me. Outside of the community aspect, I have never received any monetary support towards my music from any nonprofit in Chattanooga."

"They haven't. I don't know any that will support a musician of my genre."

"As a church (non-profit) musician, that is my main source of current income."

Comments: Common Goal for the Music Scene?

"To identify our authentic strengths and unique musical "niche" as a region and use these assets to grow our music economy. To build infrastructure where it is lacking that is necessary for cultivating a successful and thriving music economy."

"Efforts to encourage live music performance is the way forward. I feel Chattanooga is a music-friendly place. I feel encouraged and supported by other musicians I've met, even if I don't directly work with them, and I try to encourage/support them. And we always like to see young people up on the stage, to initiatives to encourage and cultivate young talent is key."

"More urban events and concerts for the African American community. Jazz/RnB/Hip Hop/Neo Soul."

"Take music (and the arts) seriously. As serious as STEM programs."

"Equal access and open ears."

"More independent venues of less than 500 capacity."

"It is going to take all of us in the industry to figure this out."

"Inclusivity. Not just of gender, racial, and sexual identity; Also of all different genres and styles."

"It would be nice to bridge the riverfront area with southside with music in between so the city is more cohesive."

"Creating a safe environment for all to enjoy our love of music."

"We need a music venue "village" like Nashville's 2nd Avenue, with equal opportunity for all area bands and artists to play there."

"I think we need to build a culture that promotes local artists in excellence."

"A few more spaces in the downtown area that host live music would be great, with small guarantees for local artists to encourage more artistic expression!"

"Work together and share the spotlight and bring the light to others. Unite or die."

"We need diversity and inclusion. Most cities have that but I seem to only see shows advertised for primarily the same types of bands and musicians."

"I am still figuring out what it looks like to me."

"We all love what we do but we need more community support."

Comments: Suggestions for Government Support

"Sponsor some industry-centric educational seminars."

"Support porch fest and community events."

"I would like to see improved information access/directions regarding booking public parks ie Miller Park and/or smaller neighborhood parks in order to produce live music events, including liability insurance and options from insurance vendors who may have a cooperative relationship with the city."

"RESTRUCTURE POLICIES TO MAKE LESS RESTRICTION ON LATE NIGHT NOISE. EXPAND THE MUSIC ZONE TO NORTH CHATT AND HIGHLAND PARK."

"more hyper-local events - street or area parties/gatherings."

"Rent assistance or rent-controlled spaces where music can be practiced and taught."

"Expand the library's learning studio to its own venue with multiple sound booths."

"Grants."

"Anything that creates space for or helps support DIY music culture is a great thing."

"SUPPORT MUSIC EDUCATION IN OUR SCHOOLS!"

"I think making city-owned indoor/outdoor venues available for events, at low-cost rental, would benefit all genres and sectors of the industry."

"Yes, a shared online space where we can add information about our own groups/events/etc."

"Access to health care for the self-employed would be fantastic."

"Healthcare. Establish a Musician's Clinic. Tax incentives."

"The city should open a public practice space somewhere visible downtown with all their empty real estate."

Word Cloud: Suggestions for Government Support



Comments: “What Did We Miss?”

“How can Chattanooga music scene offer more of a networking hub so that music producers and artists can link up with each other easier and find other creators/artists who have compatible creative visions?”

“Thank you for making the effort to understand musicians better. Particularly those of us who depend on it for our incomes.”

“I think this is a great idea and I think if we all work together, we can finally make this city a true music destination.”

“Create a weekly report on who is performing at what venue: radio, website, paper. A “where will I go tonight” app that is current and updated every day.”

“More about WHY Chattanooga's music scene isn't diverse”.

“What are your ideas for establishing a Musician's Co-Op?”

“Our local audiences need a trusted source to say "go see this" and to trust. But I will often travel to other cities to see the live music I want to see. Even ... and I think this is key ... even if the same band is playing in Chattanooga.”

“I would love to see how many responses you get from folks that identify as Latino/Hispanic. I'm not sure what can be done to develop/inspire more local Latino talent.”

“As a worship leader, I'd be interested to know the impact local churches have had on the musical development of area musicians.”

“I don't know if this exists - but it might be nice to have some kind of non-profit, central hub for booking and info - even just the "where can I/we play" and the policies or contact information for the establishments..”

“More questions related to teaching music.”



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