



CHATTA NOOGA MUSIC CENSUS 2022

SUMMARY REPORT
February 2023



Introduction

The 2022 Chattanooga Music Census is a community-led initiative to gain a better understanding of the current needs of the Chattanooga music ecosystem. This marks the first time that the community will have data that captures key information about the Chattanooga music economy and helps the city and community to make more informed, data-driven decisions to support the music ecosystem.

The 2022 Chattanooga Music Census was administered by Sound Music Cities, a leading Austin, Texas based provider of music ecosystem studies and music census work, in conjunction with the City of Chattanooga, Chattanooga Tourism Co., Lyndhurst Foundation, ArtsBuild and over 50 local partners.

This summary report for the public has been prepared by Sound Music Cities and includes key findings and recommendations to guide immediate and longer-term strategies for the music community, municipal partners, and civic partners. **Two appendices showcase responses: a data deck as well as a DEI data deep dive.**

**3.3 responses per
1,000 population**

Chattanooga's Music
Census enjoyed the
highest participation
rate in Sound Music
Cities' history

INTRODUCTION TO A MUSIC CENSUS

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

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



A Community Effort

The 2022 study was sourced and promoted by the Chattanooga Tourism Company, City of Chattanooga, Lyndhurst Foundation, and ArtsBuild. This study took a grassroots approach that engaged local partners who hold the relationships with music people and the structure reflects that:

- **Lead Partners** composed of a mix of city government, expert consultants, and community organizations offered leadership to the entire census.
- **Community Partners** served as the primary means of outreach to music people and these organizations were instrumental in shaping the census itself.

This project was made possible by the generous support of many individuals and organizations.

We especially thank the Lead Partners:

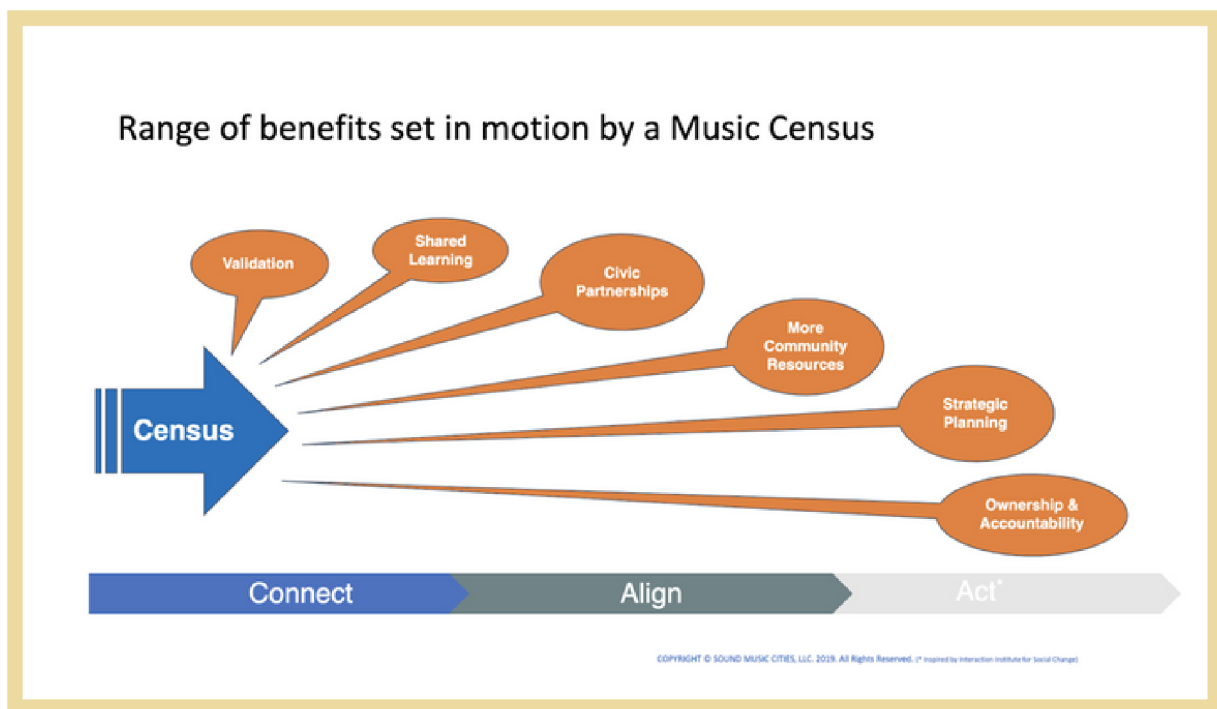
Chattanooga Tourism Company | City of Chattanooga | Lyndhurst Foundation | ArtsBuild

We thank our amazing Community Partners:

Barking Legs Theatre	J103
Barrelhouse Ballroom	JFest
Benwood Foundation	Music + Fashion + Arts Foundation
Bessie Smith Cultural Center	New Covenant Fellowship Church
Brewer Media	NoogaToday
Caravan Tribe	RISE
Chattanooga Business Elite	River City Company
Chattanooga Chamber of Commerce	Riverfront Nights
Chattanooga Cigar Club	Songbirds Foundation
Chattanooga Girls Rock	SoundCorps
Chattanooga Presents/Nightfall/Granfalloon	Soundforce
Chattanooga Public Library	String Theory
Chattanooga Symphony and Opera	Summer Dregs
Chattanooga Theater Center	The Union Chattanooga
CMinorWorld Co./Upper Room Studios	Times Free Press
CSO	Tivoli Chattanooga
Dynamo Studios	UTC
East Lake Expression Engine	WanderLinger Brewing Company
Finley Stadium	WRCB
Friends of the Festival	WUTC
Hamilton County Schools	Pax Breu Ruim
Hip Hop CHA	Eric Turner
Hunter Museum	Tennessee Arts Commission

Data & Insights

The Census is a robust dataset that can be referenced in the days, months, and years to come, fostering a more evidence-based discipline to the planning stages for action in the music ecosystem.



This summary report offers key takeaways and insights as a starting point and a way to inspire curiosity and to encourage deeper engagement. This dataset is not meant to offer quick fixes, rather it provides a current state understanding from which to identify challenges and co-create solutions. Data and insights are plentiful given the number and depth of quality responses this community has shared.

In the next section, we offer a snapshot of the the Chattanooga music ecosystem as well as key insights to spotlight as a starting place. This summary report is an invitation to dive into the breadth and diversity of topics about which the Census provides data, and we welcome more in-depth statistical analysis in 2023 (such as a hackathon, regressions, etc.) across the community.



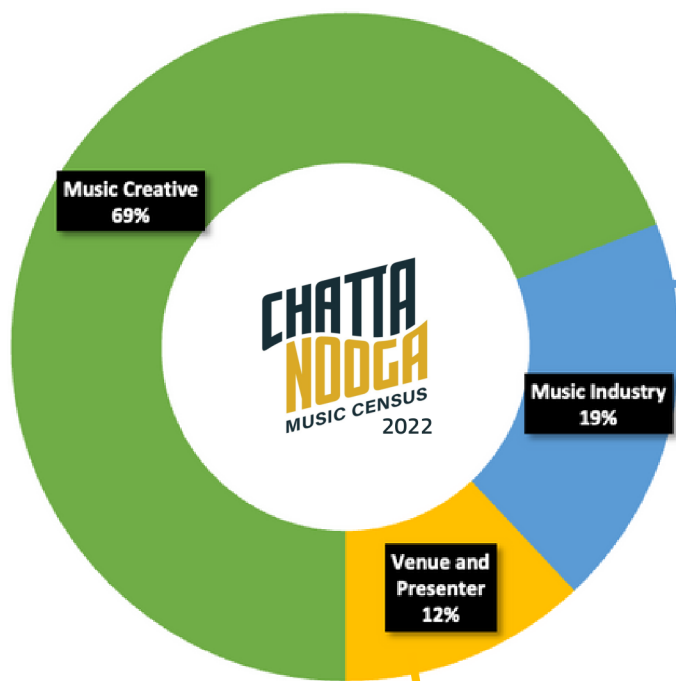
Chattanooga Music Ecosystem Composition by Role

As in other cities, Music Creatives are the dominant majority in Chattanooga's ecosystem

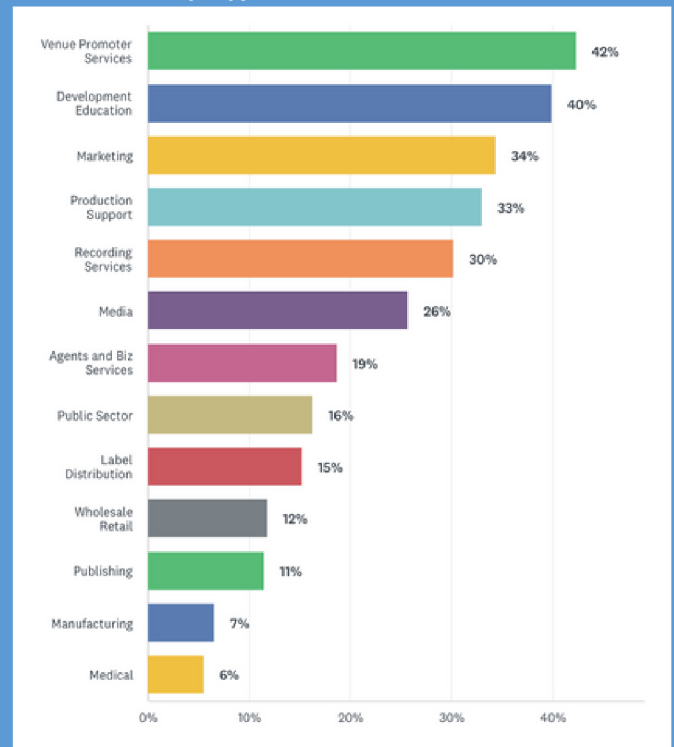


What types of people did the 2022 Chattanooga Census survey?

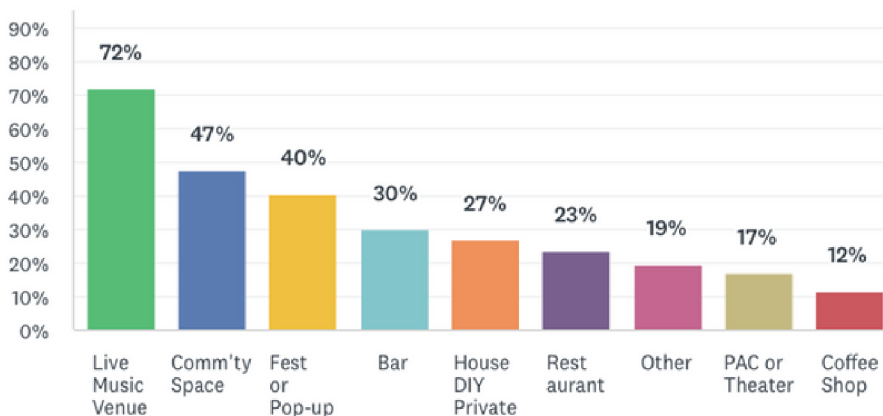
Data was gathered from an online survey of residents 18 years or older who are living in the greater Chattanooga metro area (City of Chattanooga as well as Hamilton, Catoosa, Walker, Dade, Marion, and Sequatchie counties) who participate professionally or semi-professionally in a vast range of sectors all connected to music. This includes part-time work, rarely paid or volunteer work, and work that is more administrative than creative. Music creatives (musicians, bands, songwriters, engineers, teachers, producers and more) are the largest group, but it also includes dozens of other roles such as artist managers, agents, studio operators, equipment and music retailers, manufacturers, event producers, presenters, music support services, anyone employed in a space that presents live music, and many more.



Music Industry Types



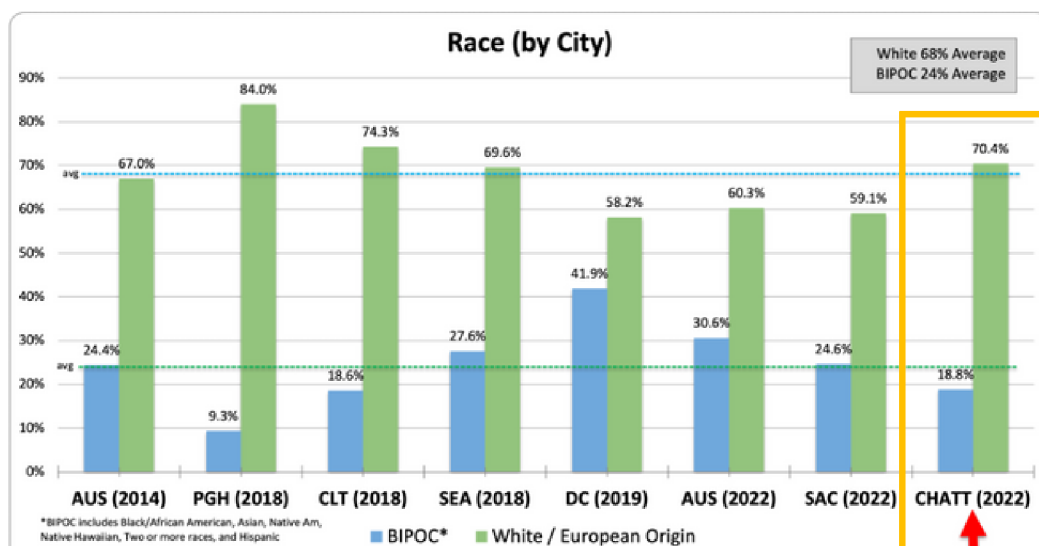
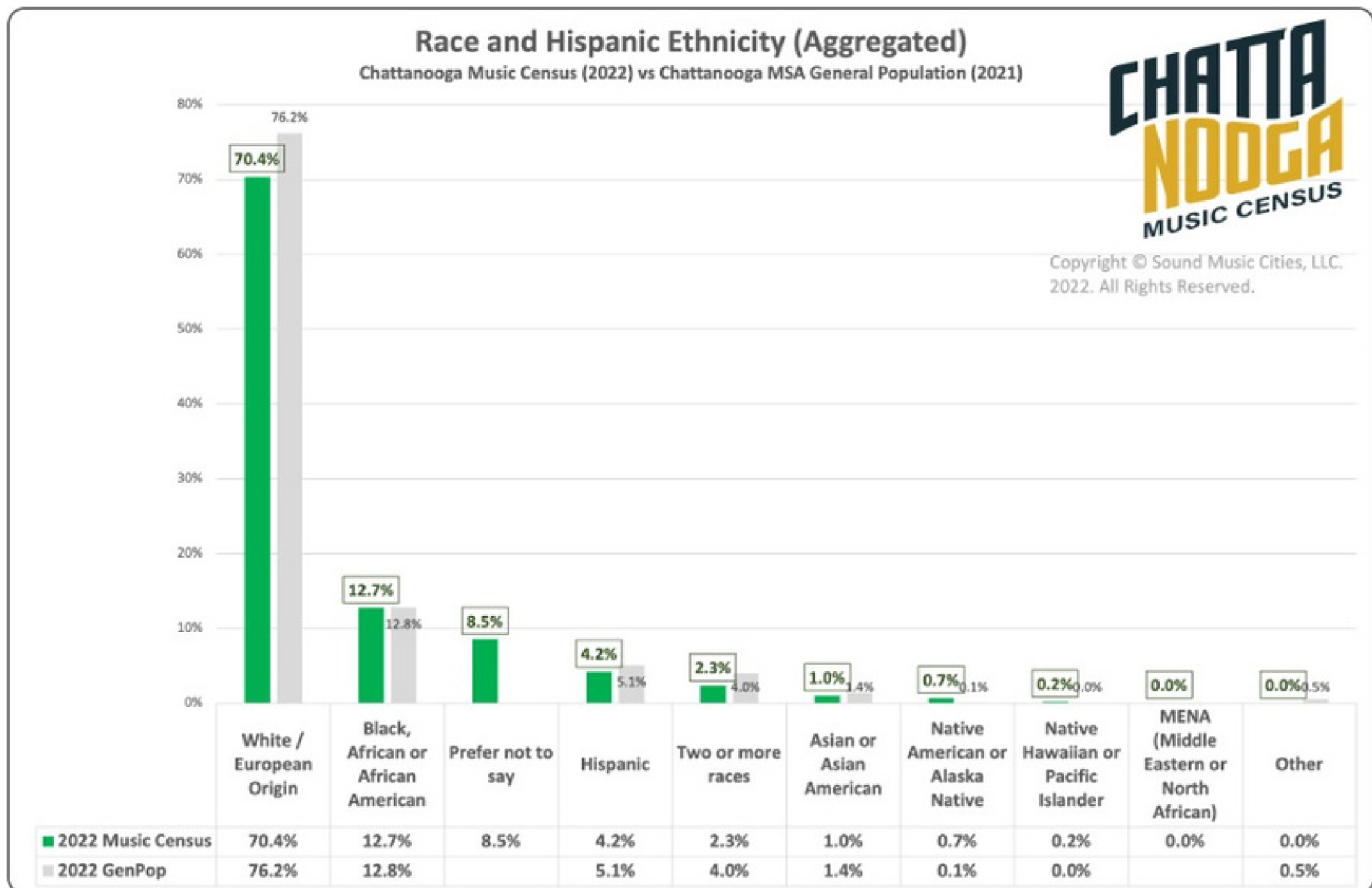
Presenter and Venue Types



Chattanooga Music Ecosystem Demographics: Race and Ethnicity

Notable Trends:

- Respondents overall are predominantly male, white, heterosexual and 25-54 years old
- **Chattanooga music ecosystem's** racial diversity reflects Chattanooga's general population



Comparative Data with other Music Cities' Census: Austin 2014, Pittsburgh 2018, Charlotte 2018, Seattle 2018, Washington DC 2019, Austin 2022, Sacramento 2022, and Chattanooga 2022

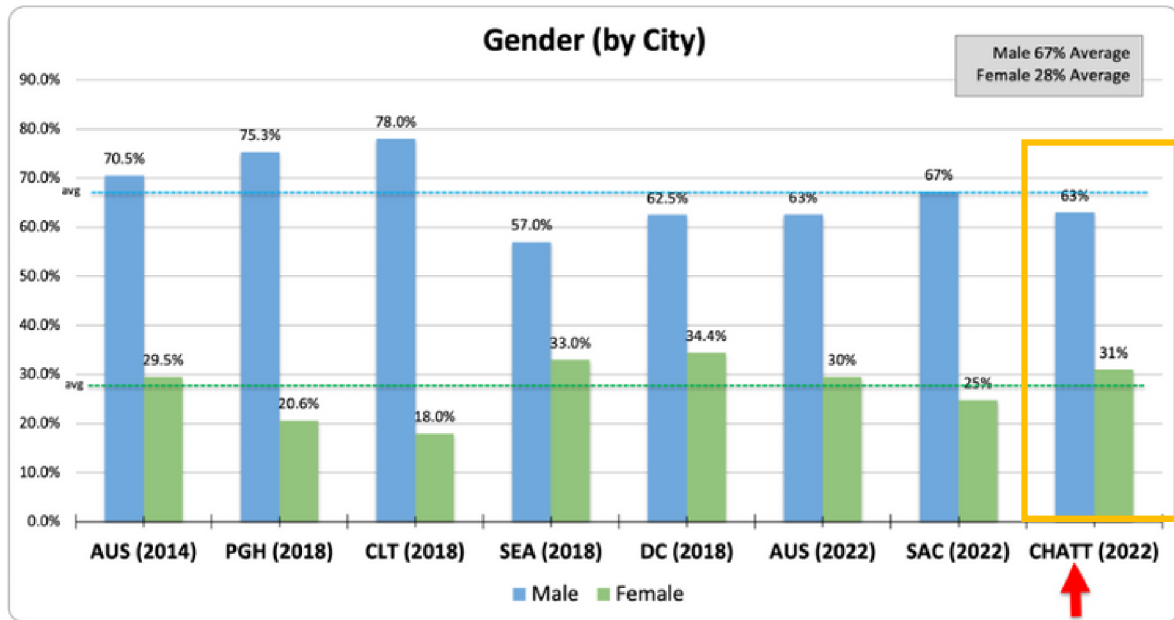
Chattanooga Music Ecosystem Demographics: Gender and Sexual Orientation



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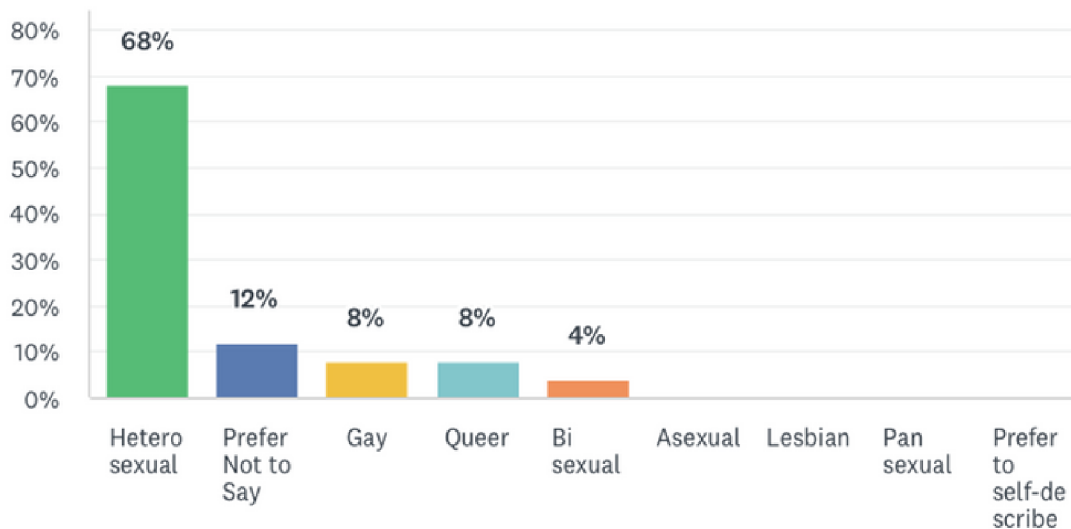
Notable Trends:

- Gender inequality is pronounced (63% male/31% female), and this is similar to other cities



Comparative Data with other Music Cities' Census: Austin 2014, Pittsburgh 2018, Charlotte 2018, Seattle 2018, Washington DC 2019, Austin 2022, Sacramento 2022, and Chattanooga 2022

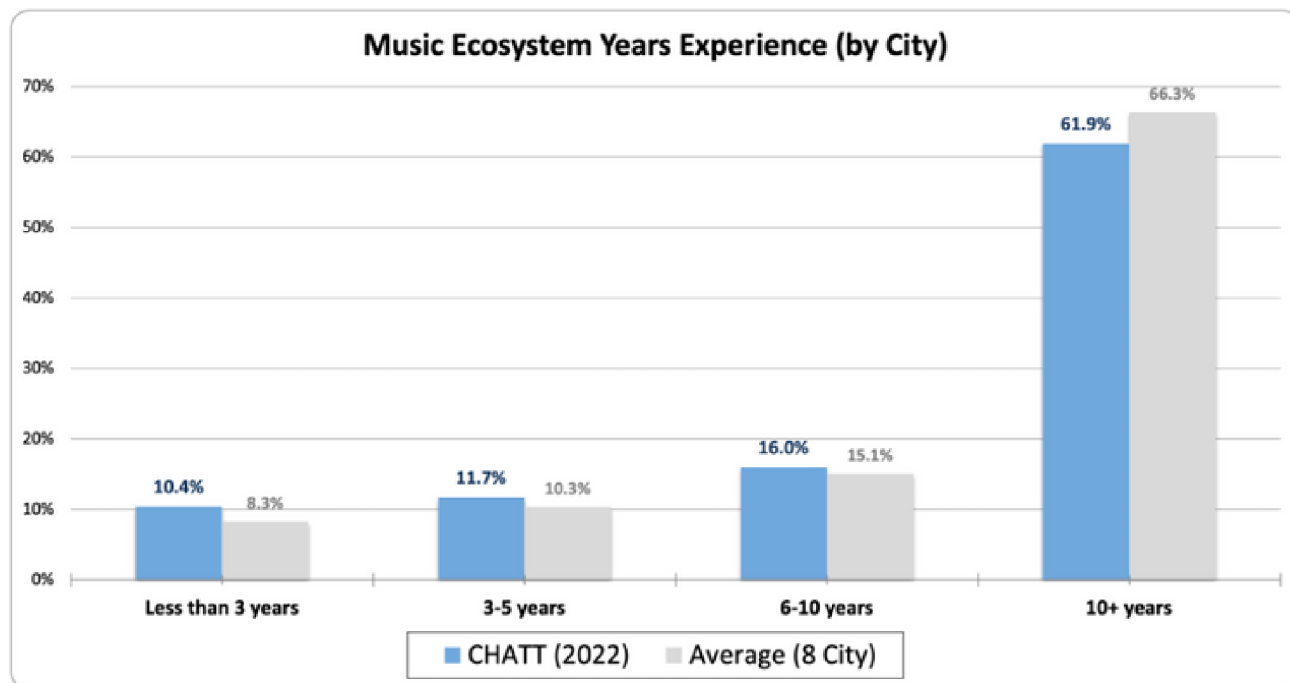
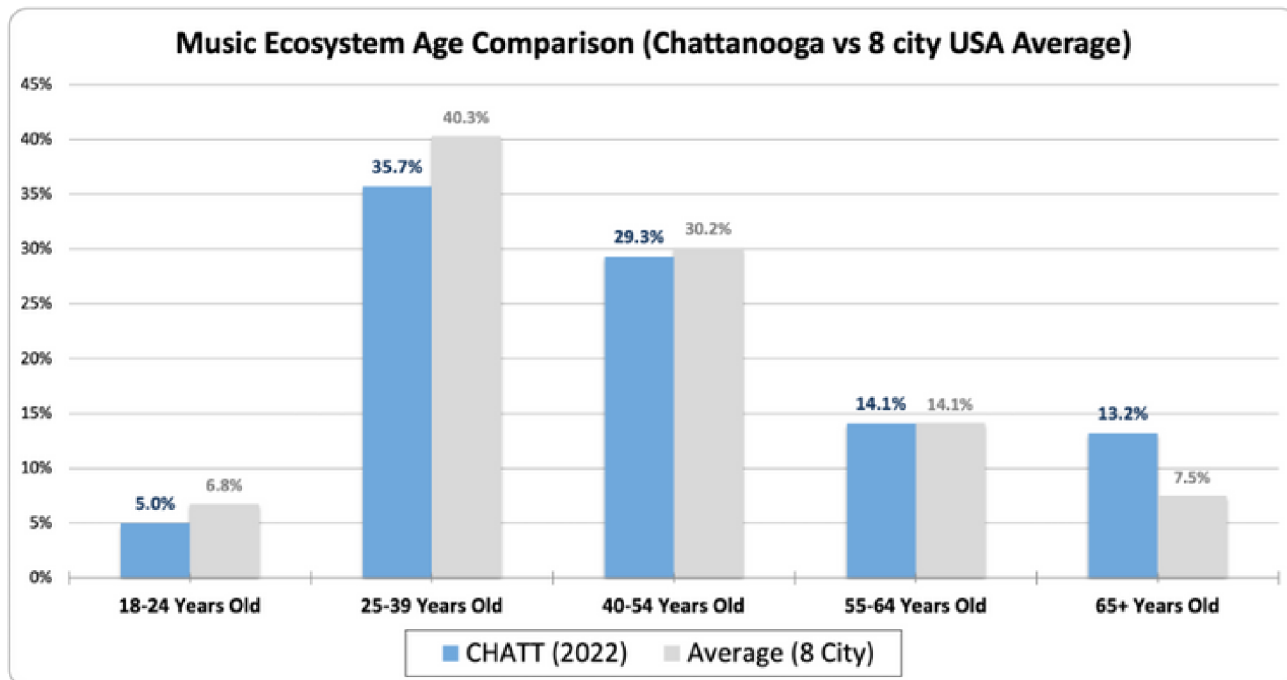
Sexual Orientation



Chattanooga Music Ecosystem Demographics: Age and Years Experience in Music

Notable Trends:

- While predominantly 25-54 years old, most music people have 10+ years experience showing limited growth in terms of new entrants/talent.
- Compared to other music cities, Chattanooga's workforce is slightly older, but showing a bit more growth in new entrants than other cities.



The parts are all here, but fragmentation limits Chattanooga's music ecosystem

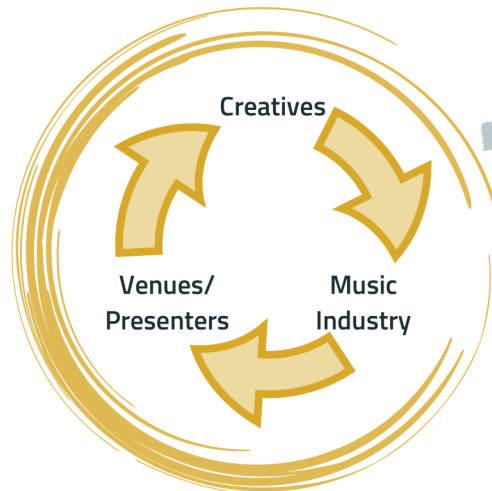
Chattanooga has all the elements to build a vital music ecosystem; it's a matter of pulling the parts together into a cohesive ecosystem that is interdependent and works in concert. There are roles for champions, connectors, funders, communicators, and most importantly civic leadership to advocate for and incentivize the entire ecosystem. The impact of the fragmentation on music creatives, music industry, and venues/presenters is detailed out as subsequent insights to this overarching theme. Below, you can see how the needs of each part could be addressed by building connections between the component parts to fully realize Chattanooga's music ecosystem. Chattanooga clearly offers a strong foundation for this community who enjoy higher levels than other music cities of health insurance (80%), home ownership (61%) and having their basic needs met (60%).

Creatives Top Needs:

- More Gigs, More Creative Time
- 75% income outside music; 3 out of 5 have another job that is primary
- 59% of creatives can't find local music industry service providers
- Creatives spend average of \$15,180 annually on industry services - 45% of that is spent locally
- 34% need space to work
- Desired training: Marketing/Social Media, Recording Engineering, Booking Promotion/Event Production, Publishing/Licensing

Venues/Presenters Needs:

- Talent costs, and lack of demand concerns
- Too few (37%) for-profit music venues
- Lack of live music policy
- Very little regulatory experience; 40% don't have any experience with government regarding live music presentation
- Lack of music business education and small business resources to train music people



Music Industry Needs:

- 59% of creatives can't find local music industry service providers
- Lack of industry affiliations / registrations
- Resources of music non-profits are valued when music creatives can find them
- 26% of music industry works remotely (goes up to 46% for recent transplants - those who have moved here in last 2 years)

"A pot of coffee and a sit down with the right person could definitely steer me in the right direction."

-survey respondent

OPPORTUNITY:

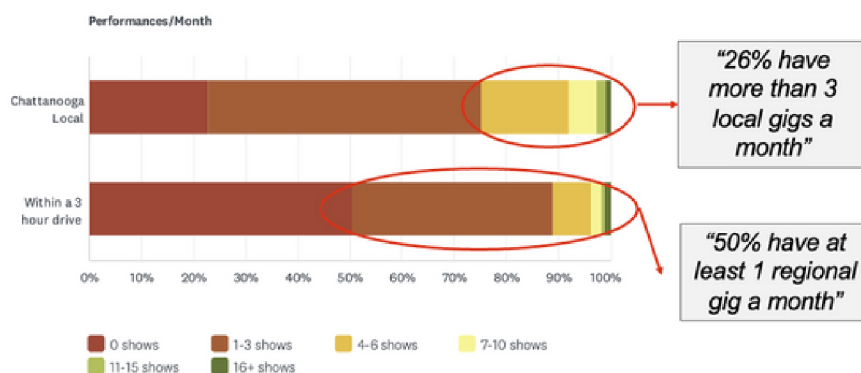
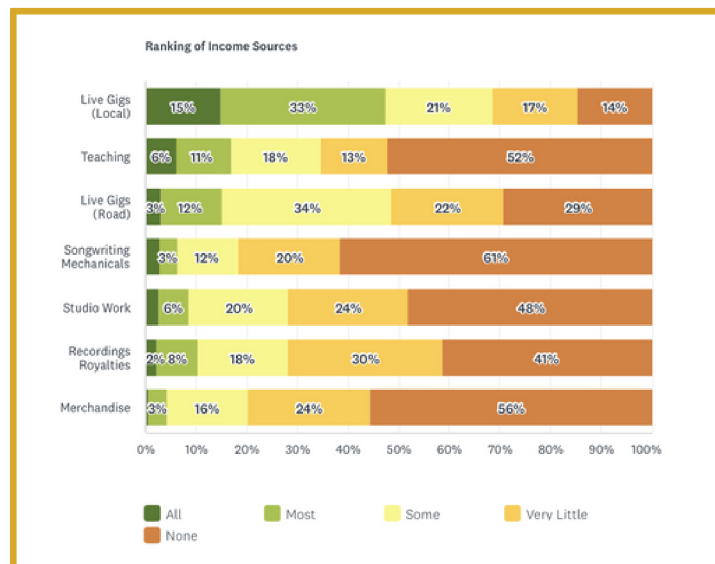
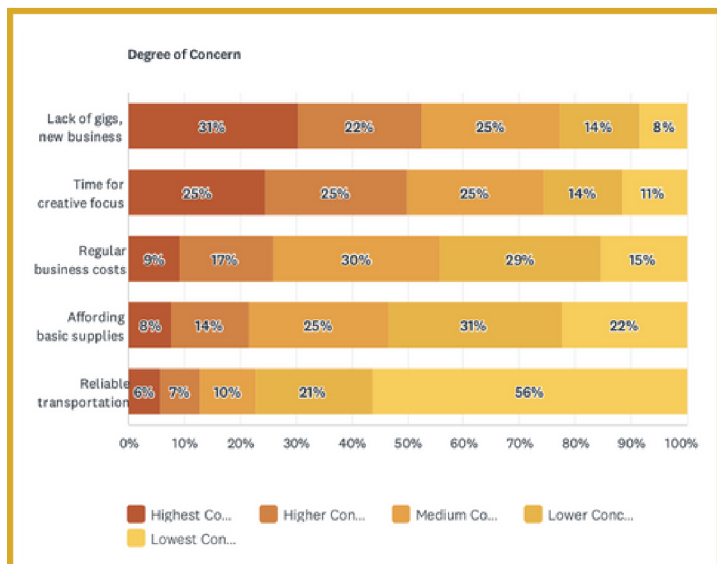
- More collaboration across sub-sectors: creatives, industry and venues (directories, build connections, etc.)
- Develop a mayor's monthly music mixer, spotlighting at least 4 organizations each month (both music businesses and nonprofit organizations)
- Focus on more local live gigs and greater economic support for venues
- Regional collaborations to take advantage of Chattanooga's geographical location and augment live performance needs with a regional export strategy
- Strategic grants and other revenue development
- Audience development around local live music
- More for-profit venue and presenter initiatives
- Diversity is an essential component of creative industries, so bias (perceived or real) in any areas will weaken the music ecosystem. The community would benefit from tapping into the expertise of community organizations and DEI/social sector research to facilitate community conversations, workshops, etc.

Music creatives need pathways to sustainability

Chattanooga's music creatives are highly educated, and largely employed in a job outside music. There's a need to develop the ecosystem to bring more opportunities for music creatives who seek to support themselves solely in music. It is important to recognize that part-time creatives can provide professional quality output to a music scene as well, especially if given access to music business training as part of their career development.

Creatives Top Needs:

- More Gigs -- 75% income outside music; 3 out of 5 have another job that is primary
- More Creative Time (grants desired)
- Creatives spend average of \$15,180 annually on industry services - 45% of that is spent locally
 - 59% of creatives can't find local music industry service providers
- 34% need space to work
- Desired training: Marketing/Social Media, Recording Engineering, Booking Promotion/Event Production, Publishing/Licensing



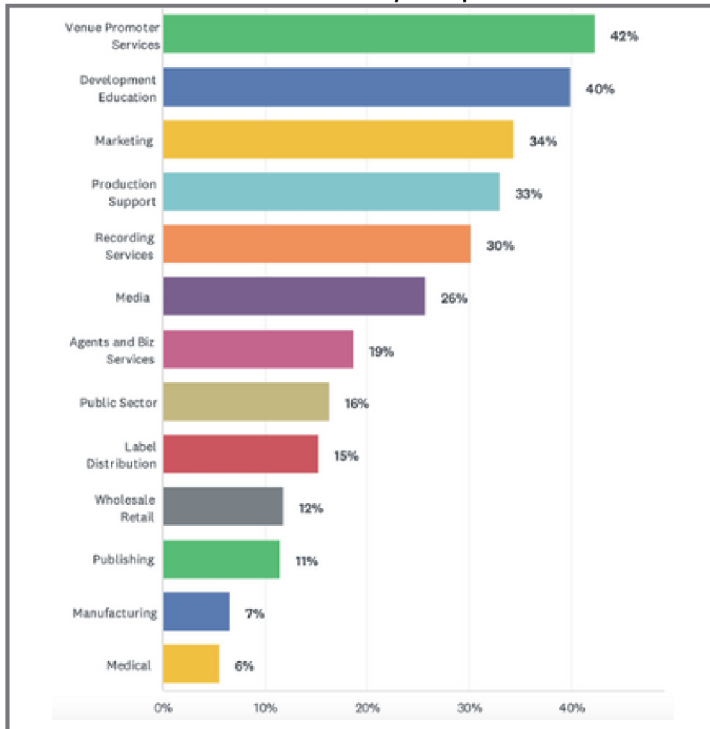
OPPORTUNITY:

- Grants (to support more creative time)
- Revenue development (diversify creatives' income sources)
- Audience development around local live music artists (demand generation will help artists and venues)
- Industry training - creatives' spending is strong but not strategic
- Improve awareness of and ease of finding local industry services to reduce DIY and cost of non-local services
- Mentorship programs to get industry experience for younger participants

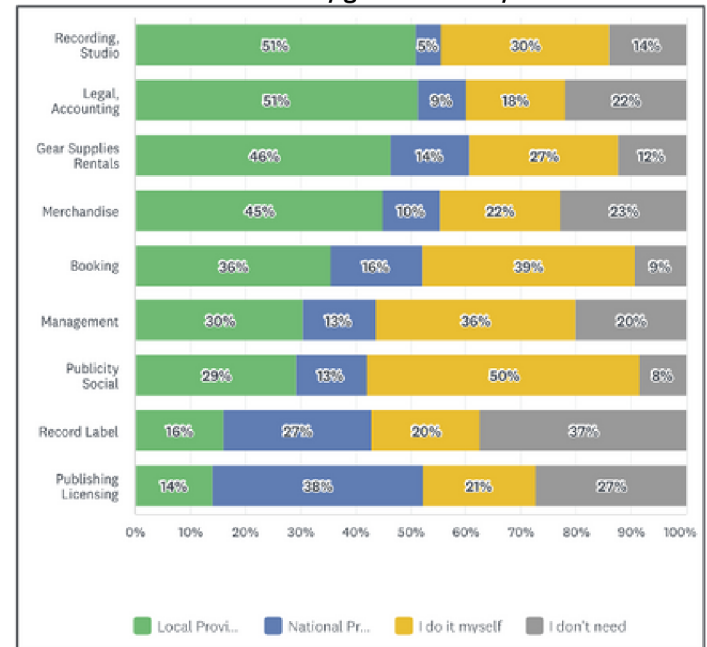
Local music Industry is undiscovered

Chattanooga's music industry has a healthy roster of industry sectors represented. 59% of industry work solely in music. Local music creatives could more fully contract with local providers in lieu of doing it themselves or going to national providers, if there was a more effective way for them to discover local industry providers. 59% of music creatives can't find the industry services they need.

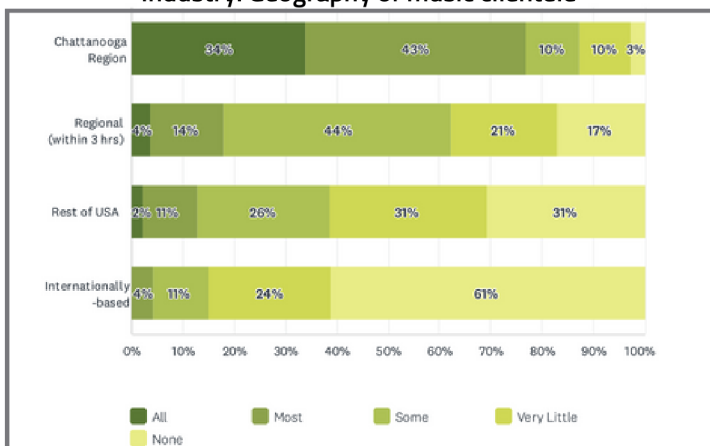
Music-related industry occupations



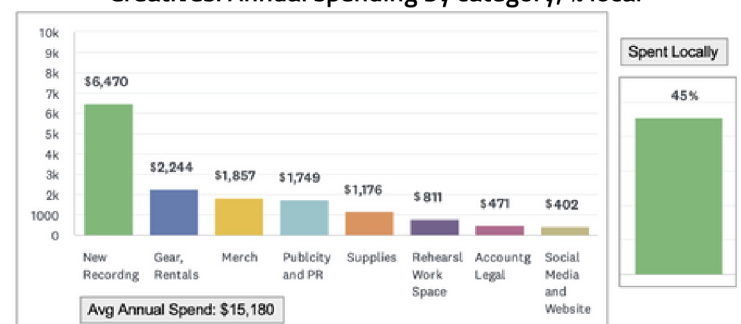
Creatives: Where they go for industry services



Industry: Geography of music clientele



Creatives: Annual spending by category, % local



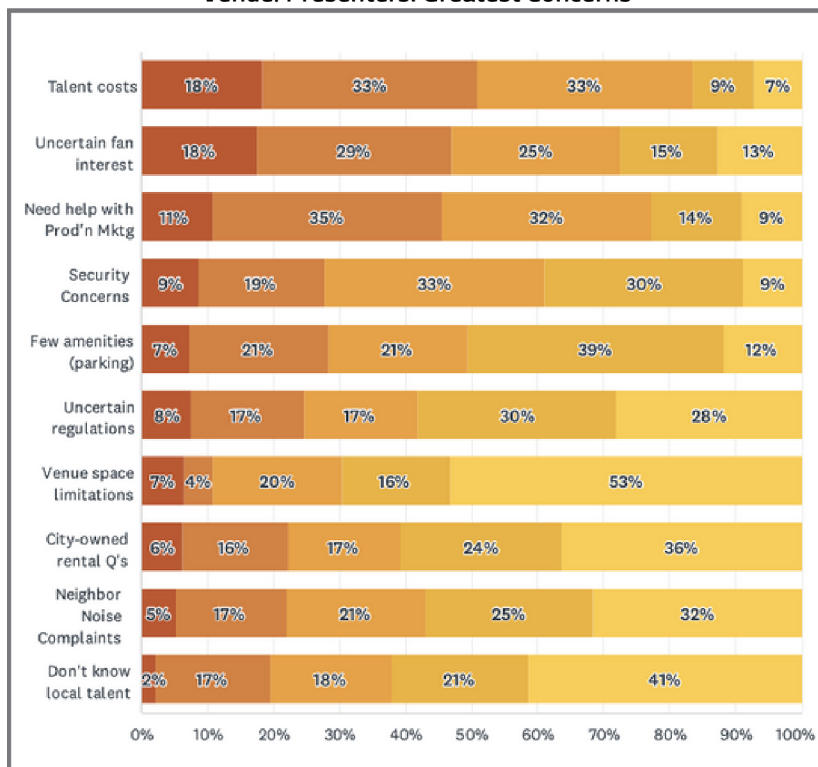
OPPORTUNITY:

- Improve awareness of and ease of finding local industry services to reduce DIY and increase local spending for industry services
- Create incentives for working with local providers in grant programs
- While the primary focus should be on connecting Chattanooga creatives to industry services, there's an opportunity for growth of industry services beyond Chattanooga as well.

Venues struggle to become sustainable businesses

Chattanooga's venues and presenters struggle on many levels to find their business models. This is a concern because these venues are a critical piece of a music ecosystem, especially in regards to creating more opportunities for Chattanooga's music creatives. Chattanooga's venues are primarily nonprofit (42%) with only 37% for profit businesses. This speaks to the fact that venues struggle to make music a business and need access to grant funding. Venues struggle with the tension between talent costs and uncertain fan interest. Venues have very little regulatory experience -- 40% don't have any experience with government at all regarding live music presentation. Venues could benefit from music business education and small business resources.

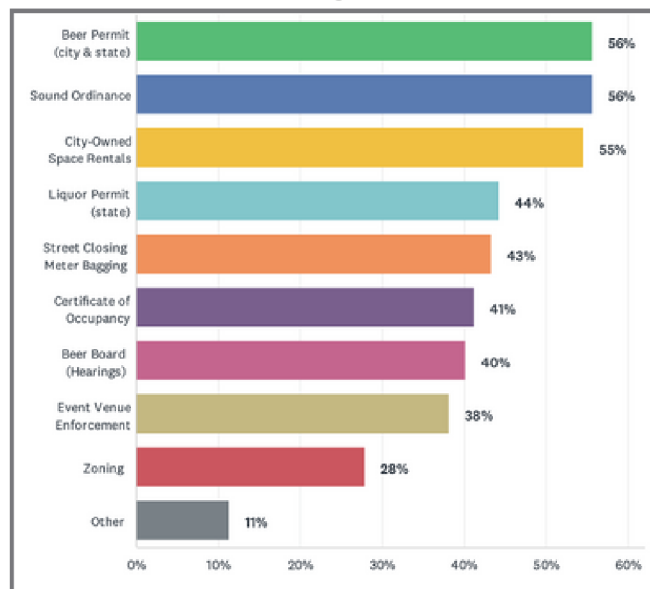
Venue/Presenters: Greatest Concerns



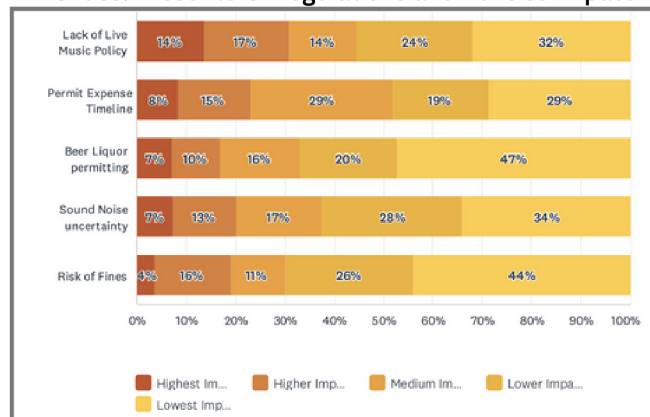
“This is the problem for us. We remodeled the venue to a more outdoor setting, and now with the current noise ordinance having live music is difficult.”

-survey respondent

Venues/Presenters: Regulatory Experience



Venues/Presenters: Regulations and Policies Impact



OPPORTUNITY:

- Focus on more local live gigs and greater economic support for venues
- The City can help by making the regulatory requirements more transparent through a resource guide (regulatory guide indoor, regulatory guide outdoor, beer permits, etc.)
- A live music venue rental guide (for city-owned spaces)
- Audience development around local live music artists (demand generation will help artists and venues)
- More for-profit venue and presenter initiatives
- Music business education and small business resources

Going Forward

This Summary Report and appendices are the beginning. Going forward, we hope the community will embrace and work with this new dataset to develop ways forward that will continue to strengthen and build the Chattanooga music ecosystem.

There are many potential uses of this data set including:

- Foster greater understanding /empathy (within and externally)
- Sharpen and clarify the focus of public and private initiatives
- Identify needs and gaps (training, regulations, health needs, etc.)
- Bring to light differing perspectives from different communities and sub-groups
- Provide market research to organizations for new service opportunities
- Provide reference point for future research, trends, performance

We are grateful for the opportunity to work with Chattanooga music people on developing this census and data set and look forward to seeing good things emerging from this community effort and data collected and shared.

