

# EXECUTIVE SUMMARY

## CHATTANOOGA MUSIC VENUE NEEDS ASSESSMENT

### WHAT IS THIS STUDY?

The Chattanooga Music Venue Needs Assessment is a comprehensive analysis conducted to evaluate the current state of music venues in Chattanooga and identify opportunities for growth. This study aims to enhance Chattanooga's music scene by addressing gaps in venue offerings and recommending new developments to meet community needs and market demands.

### CHATTANOOGA AS A GROWING ARTS MARKET

Chattanooga has been recognized as a vibrant and growing market for both residents and visitors. Positioned between the major markets of Nashville and Atlanta, Chattanooga boasts a variety of natural assets and a robust, expanding arts and music community. The city's unique location and cultural offerings make it an attractive destination for a diverse range of audiences.

### IDENTIFIED MARKET GAP

The study revealed that while Chattanooga is well-served by a variety of existing music venues, there is a **significant gap in the availability of outdoor, music-specific venues**. Currently, there is no dedicated outdoor music venue in Chattanooga, which limits the city's ability to attract touring acts that require such facilities.

### RECOMMENDED SOLUTION: AMPHITHEATER

To address this market gap, **the study recommends the development of a new outdoor amphitheater with a capacity of 6,000 (3,000 fixed seats and 3,000 lawn capacity)**. This amphitheater would not only fill the existing void in the market but also provide a versatile space for a variety of events, enhancing Chattanooga's appeal as a music destination.

### KEY STATS FROM SURVEY:

- Concert Activity Location: Only **24% of concert attendance** currently takes place within Chattanooga, with **76% occurring outside the city**.
- Need for a New Music Venue: **75% of respondents** indicated a need for **a new music venue in Chattanooga**.
- New Venue Preferences: Among the **12 venue types presented, various types of amphitheaters were the top four preferred options**.
- Impact on Existing Venues: **90% of respondents** stated that a **new music venue would not affect their attendance at existing Chattanooga venues**, but approximately **50% said they would attend fewer events outside Chattanooga** if a new venue were available locally.

### ACKNOWLEDGEMENTS

This study was conducted with the invaluable support of over 25 local organizations, including the Chattanooga Tourism Co., music operators, arts organizations, public officials, and community leaders. Their in-depth analysis and recommendations have been instrumental in shaping the future of Chattanooga's music venue landscape. Research and analysis were carried out by CSL (Conventions, Sports & Leisure), a specialized consulting firm established in the mid-1990s, providing expertise in the sports, entertainment, hospitality, and leisure industries.

# VENUE RECOMMENDATIONS

## RECOMMENDED NEW VENUES

### Market Gap

As part of the assessment of existing venues, CSL identified a market gap within the Chattanooga area for a music venue with capacity between **4,000 and 9,000**. It is important that a new music venue in Chattanooga, should it be developed, not compete directly with any existing venue in order to be additive to the marketplace and add new inventory for music goers and music performers. Currently, the Chattanooga area has numerous venues of 1,500 capacity or lower as well as two theaters of low- to mid-capacity (Tivoli Theatre at 1,750 and Soldier & Sailors Memorial Auditorium at approximately 3,900). The largest indoor space is McKenzie Arena at 10,600. There are no concert-specific outdoor spaces in Chattanooga, though sports venues and public parks can be re-purposed for music as needed, such as the 9,000-capacity new ballpark for the Lookouts. It is important to note that AT&T Field on Hawk Hill is not a recommended venue for hosting live music events as the geographic characteristics of its location has proven difficult to host consistent concert activity. Ultimately, it is recommended that a new facility have a capacity somewhere in this range of 4,000 to 9,000.

### Promoter Feedback

As part of the needs assessment process, CSL interviewed a number of local, regional, and national event promoters and venue operators. In terms of new venues, concert promoters, especially those that represent touring concerts, indicated that Chattanooga is underserved from the perspective of **outdoor concert-specific venues**. There is a segment of touring concerts that specifically performs in small- to mid-sized outdoor amphitheaters and routes most often between Nashville and Atlanta. While there are numerous regional amphitheaters along this route, there are none in Chattanooga, causing tours to skip over Chattanooga entirely.

Promoters indicated that the greatest need for outdoor amphitheater tours is an outdoor facility with capacity of **4,500 to 7,000** with proper artist amenities, including a large stage, lighting, high level acoustics, storage space, dressing rooms, and green rooms. The types of acts that venues of this type can accommodate, according to promoters, have been growing in recent years. Promoters indicate that the touring event utilization this type of venue would be additive to the marketplace and serve a different niche than the existing indoor or sports facilities. Promoters were generally enthusiastic about the Chattanooga market as a whole, noting its growth as a tourist and residential destination. Promoters indicated a new venue of this type could host 25 to 30 touring concerts annually.

### Survey Results

A key component of the market survey was asking respondents about a potential new venue. When presented with 12 potential new music venue options (arenas, amphitheaters, clubs, etc.), the top four options were all some type of **amphitheater**. 90 percent of respondents also indicated that their attendance at a new music venue would not affect their attendance at existing Chattanooga venues.

# VENUE RECOMMENDATIONS

## RECOMMENDED NEW VENUES

### Comparable Venues

In addition to promoter outreach and initial market gap analysis, CSL benchmarked various music venues around the country, both in markets of a similar size (population-wise) to Chattanooga and also to venues that have been recently developed that represent recent trends in music venue development.

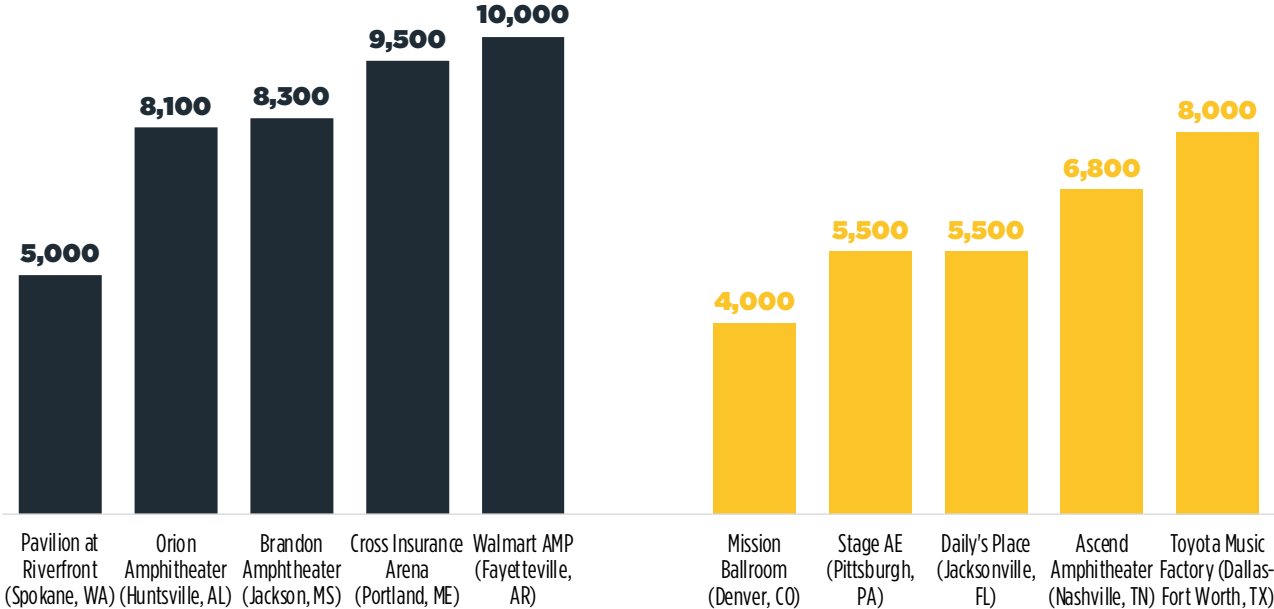
As shown to the right, venues range in capacity from 4,000 to 10,000, with an average of 8,200 in the comparable markets and an average of 6,000 among trendy recently developed buildings.

It should be noted that eight of the 10 comparable venues are some type of amphitheater.

This capacity analysis provides a frame of reference for the size and type of venue that could be accommodated in Chattanooga.

### IDENTIFIED COMPARABLE MUSIC VENUES

Venues in Comparable Markets to Chattanooga | Other Recently Developed Music Venues



**8,200**  
AVERAGE

**6,000**  
AVERAGE


# VENUE RECOMMENDATIONS

## RECOMMENDED NEW VENUES


### Building Program Recommendation

Based on the market gap analysis, direct feedback from promoters, and comparable benchmarking, along with the community survey feedback, it is estimated that Chattanooga could support a new outdoor amphitheater with the following building program elements.


### SEATING CAPACITY



**6,000**  
TOTAL SEATING CAPACITY




**3,000**  
FIXED SEATS



**3,000**  
SRO SEATS

### PREMIUM SEATING



**150**  
PREMIUM SEATS

**KEY AMENITIES:**

- Physical seat and/or experience add-on to general admission seat
- Access to air-conditioned club lounge
- Preferred parking
- Premium food & beverage and/or in-seat wait service
- Sold on seasonal and/or event-by-event basis

### OTHER AMENITIES



**1,700**  
PARKING SPACES



AMPLE CONCESSIONS  
POINTS OF SALE



HIGH QUALITY RESTROOMS



DRESSING ROOMS

When facility planning is undertaken, it will be important that project architects experienced in live entertainment design work closely with tour promoters and facility management to create a design that would maximize the market and revenue potential of the venue.

# VENUE RECOMMENDATIONS

## RECOMMENDED NEW VENUES

### Estimated Utilization

The chart to the right depicts the estimated event and attendance utilization for the proposed Amphitheater. This utilization estimate was developed based on utilization at comparable venues within the context of feedback received from event promoters and community stakeholders

As shown, it is estimated that proposed amphitheater could host **30 ticketed events**, including **25 concerts**, in addition to 55 other non-ticketed events such as community events, conferences, galas, festivals, and private meetings.

Overall, it is estimated the venue could host **85 total events** on an annual basis that attracts **154,000 annual visitors**.

It should be noted that this is the estimated utilization is specific to a single new amphitheater. It is the opinion of this report that the Chattanooga market can support **one new amphitheater**, but not multiple. CSL is aware that there are multiple potential new amphitheaters in potential discussion in Chattanooga, including at The Bend; it is CSL's recommendation that the market move forward with one of these options, but not multiple. It is specifically not recommended that AT&T Field on Hawk Hill be developed into a music venue. It is recommended that the new Lookouts ballpark be designed for multi-use, easily accommodating events such as live music, other sports (such as football), private events, among others. Stakeholders should provide input on potential uses to inform the building program and design of the new ballpark.

ESTIMATED UTILIZATION			
EVENT TYPE	# of Events Annually	Average Attendance	Total Attendance
<b>Ticketed Events</b>			
Concerts			
Tier 2A	1	5,750	5,750
Tier 2B	10	5,500	55,000
Tier 3	10	4,000	40,000
Tier 4	4	3,500	14,000
Other Ticketed Events	5	2,750	13,750
<b>Subtotal</b>	<b>30</b>	<b>4,283</b>	<b>128,500</b>
<b>Non-Ticketed Events</b>			
Community Events	12	1,000	12,000
Conference / Conventions	5	1,000	5,000
Banquet / Gala	8	500	4,000
Private Meeting	30	150	4,500
<b>Subtotal</b>	<b>55</b>	<b>464</b>	<b>25,500</b>
<b>Total</b>	<b>85</b>	<b>1,812</b>	<b>154,000</b>

# VENUE RECOMMENDATIONS

## EXISTING VENUE IMPROVEMENTS

Chattanooga is well-served by a wide range of existing music venues, which includes numerous theaters, clubs, and outdoor spaces, including sports venues. Based on conversation with community stakeholders, key existing venues in need of improvement include:

### Public Parks

CSL recommends improvements to public parks for more permanent concert-hosting capabilities. For example, Coolidge Park, while serving as the home to the Moon River festival, lacks many permanent building program amenities to serve as a regular host to music performances throughout the year. It is recommended that a major public park, like Coolidge, develop a **permanent bandshell** to serve as a home especially to local and regional artists in community concerts. The permanent bandshell should be oriented on the west side of the park with stage facing the east (to avoid direct sunlight on performers in the evening) and should include a number of permanent amenities, including acoustically-optimized stage covering, speaker system, small backstage area with storage, and overhead lighting. Providing a park with this type of permanent building program would help provide a facility with ample support to host numerous community concerts, especially in the warmer months (spring to fall).

### Miller Park

Miller Park, in downtown Chattanooga, is home to a variety of music events throughout the year, including the Nightfall concert series. Throughout this needs assessment, many project stakeholders indicated the importance of Miller Park to the music scene in Chattanooga and stressed the desire for increased concert capabilities. Miller Park is currently being renovated to include, among other improvements, increased power availability, improvements to the backstage area, and A/V capabilities. It is recommended that **continued enhancements** be added to Miller Park, including enhanced back stage artist amenities and storage. By helping to continue professionalizing this community asset, local and regional music performers of all types and sizes could have the ability to play at this unique venue in the heart of the downtown community.

### Tivoli Theatre

Many of the community stakeholders interviewed for this analysis expressed their admiration for the building program and size of the Tivoli Theatre and also lamented that its ability to be utilized has been diminished through the elongated renovation process. There was a strong desire for continued operations of a venue of this type with improved amenities, acoustics, and back-of-house space. Additionally, many stakeholders representing the local performing arts community expressed a need for smaller theater space (150 to 800 seats) that provides an intimate, affordable option to host their events. Made possible by the Tivoli Public Funding Campaign, the Tivoli Theatre is presently undergoing a number of renovations that address these exact concerns, modernizing the facility and also adding a new 250-capacity theater. CSL recommends that public support through the Tivoli Funding Campaign continues, ensuring that **renovations** progress so that the theatre can reopen with wide **accessibility** to all community groups, in addition to the touring acts that currently utilize the facility.

### Finley Stadium

Finley Stadium, the approximately 20,000-seat football stadium, has, in the past, been home to a number of musical and other local events. It is recommended that the stadium continue to make investments in its event-hosting capabilities, including staging and flooring capabilities, A/V infrastructure, and back-of-house improvements (e.g., storage, dressing rooms, etc.). While the football-specific stadium is not likely to hosting numerous touring concerts on an annual basis, this increased **event-hosting infrastructure** would be beneficial for hosting local and regional community-oriented events, including live music, which could provide grass roots growth opportunities for local artists to perform on a large-scale to gain exposure at a low cost.