

VISIT
FORT
WORTH



SOUND
DIPLOMACY

FORT WORTH MUSIC ECONOMY

EXECUTIVE SUMMARY

February 2021

INTRODUCTIONS SOUL OF THE CITY

Shain Shapiro and his Sound Diplomacy team introduced us to a larger world. They have a vision for helping cities create music-driven night-time economies that are good for tourism, business and all those who live here.

Music sets a vibe and a tone for how we market Fort Worth. Since launching Hear Fort Worth in 2016, we have supported countless artists by providing travel grants, hiring them for events and using their music in our advertising.

Now it is time to take the next step.

In 2019, Visit Fort Worth asked Sound Diplomacy to consider our music industry and help point us to the future. They provided the first-ever map of our local music economy and a measure of its impact. And when COVID-19 delayed this final report, Shain and his team gave us invaluable advice about how to advocate for musicians and the greater industry.

Challenged by COVID-19 but not defeated, our local music industry needs all our support more than ever. They have survived through virtual content and pumping out new music. But it's time to plan for a return to live performance and ways to grow the industry here, including recording studios and mid-sized venues.

Music played a big role in Fort Worth's history. And music has always had special meaning for me. Raising my kids in Fort Worth, we have discovered music together at the Botanic Garden, at Billy Bob's Texas and at Bass Performance Hall.

We must work together to ensure its future. This report from Sound Diplomacy outlines important ways to do that.

Bob Jameson
President and CEO
Visit Fort Worth

All Photos Courtesy of Visit Fort Worth, unless stated otherwise.

INTRODUCTIONS MUSIC CITIES

I began my work on music cities in London, helping the mayor's office support our network of performance venues. Through that I discovered that music can play a big role in economic development, especially if we look at our night-time economy and all that entails.

Now through our company Sound Diplomacy, we are helping hundreds of cities unlock this potential. For every Nashville, New Orleans and Austin there is a Fort Worth, Memphis or Huntsville with just as much opportunity to support and leverage this business.

When I visited Fort Worth several years ago, I was impressed with the breadth of genres and the growing network of music venues – from Dickies Arena to intimate stages. But the smaller locations are vulnerable to encroaching development without proper sound ordinances to protect them. Other policies are needed, including guidelines to ensure consistent compensation for musicians.

The Hear Fort Worth music association has done important work to rally and promote the local industry. Now more support is needed to ensure all aspects of the industry recover and grow. Not just live performance but also music education to inspire the next generation.

This report contains the first real study of the music industry in Fort Worth and our recommendations for growth. My team and I look forward to continuing this work with you.

Shain Shapiro PhD
Founder and Group CEO
Sound Diplomacy



ABOUT THE PROJECT

Fort Worth music is worth investing in for the future. In Fort Worth, music is a visible and celebrated part of the city's past, present and future. From opera performances at the polls on election day to the need addressed by CARES Act funding allocated for venue relief; music in Fort Worth is both a foundation for identity and a springboard for its competitive edge. But timing is everything.

While music was already important to Fort Worth in early 2020, as the year fell into the pandemic, we saw a global sense of urgency as the music industry suffered. Today, as the global economy recovers, we have to rethink and reshape the role of music and culture in our cities, towns and places. In 2020, we all witnessed a world with drastically less live music and yet, we also witnessed an increase in live streaming¹, instrument purchases² and new music being uploaded online.³

We saw a need for diversifying revenue streams for music by witnessing how recession proof music rights can be. One of the world's largest investment funds for music rights has increased during the pandemic, achieving an annualized 4.2% yield.⁴ The music and creative economy remained robust, despite the pandemic and there's more growth on the horizon. Music streaming is forecast to grow by 19.8% in the next five years.⁵ And people want to be creating as we saw that musical instrument sales were at an all-time high during the pandemic.⁶

As a result of the pandemic, musicians in Fort Worth are losing livelihoods and live music is in distress. But we all need music. And, because of the importance of music, Fort Worth looked at immediate relief efforts and turned this long-term strategy work into developing systems, structures and policies to facilitate music's success, protect it and pay for it by valuing the work and its creators.

Fort Worth is looking to reimagine the role of music and culture in recovery – one where the music industry is active, resilient, economically viable and contributing socially for all citizens. To do that, Fort Worth needs to think about music and culture differently. By studying what has been done before, what has worked and what has not and how, Fort Worth can create a better music and cultural ecosystem that works for everyone. It can create a better music community and creative economy. But it requires commitment to bold policies, leadership and partnership.

To bring the greatest benefit, music must be assessed, managed and evaluated like all other forms of infrastructure. Measurement, upkeep and reflection is the foundation of a successful music policy. This must be a long-term priority with regular and consistent work to reflect not only the dynamic environment of the music industry but the changes Fort Worth is experiencing as a city.

Fort Worth is a city with a competitive music edge for taking this step to invest in a future that builds on its long-celebrated musical heritage in order to build a better, more resilient music industry. And it is not only worth this investment for its music industry, the current reality begs for it and the building blocks are already in place.

Fort Worth was the first city in Texas to be granted the Music Friendly Community title⁷ in 2017. This title is a proud achievement recognizing a city steeped in a rich history of country music that is constantly evolving and diversifying in modern times. This was a result of Visit Fort Worth championing this effort and, since then, working to market the local music scene for tourism and give the city's artists performance



and touring opportunities. To continue these efforts, Visit Fort Worth worked with [Sound Diplomacy](#), the leading global advisor on music cities strategies and market development, to assess its status as a Music Friendly community and reestablish itself as a leader of music friendly policies and communities.

Fort Worth is consistently ranked as one of the fastest-growing cities in the United States.⁸ Many of the jobs being created are within the service industry, which is expected to make up almost half of all jobs by 2045.⁹ In part, this influx of population means a diversification in workforce and audience that needs to be reflected in its identity. This is an exciting opportunity to realize Fort Worth's full potential as a music city.

The timing of this study and resulting recommendations could not have been more crucial to the music industry, as this work progressed during the COVID-19 pandemic. Because of this, Sound Diplomacy was able to witness and address changes in the industry with best practices of recovery and on-going industry sustainability.

- 1 Westcott Grant, Kristin (2020) "The Future of Music Streaming: How COVID-19 has Amplified Emerging Forms of Music Consumption". Online at <https://www.forbes.com/sites/kristinwestcottgrant/2020/05/16/the-future-of-music-streaming-how-covid-19-has-amplified-emerging-forms-of-music-consumption/?sh=5358a0d1444a> accessed 20-1-2021
- 2 Hissong, Samantha (2020) "Sales of Instruments and Music Gear are Soaring. Will Quarantine Spark a Renaissance?" Online at <https://www.rollingstone.com/pro/features/quarantine-diy-music-renaissance-988394/> accessed 20-1-2021
- 3 Page, Will (2020) "Streaming is Stalling: Can Music Keep Up in the Attention Economy?" Online at <https://www.billboard.com/articles/business/9500546/streaming-music-growth-stalled-factors-attention-economy/> accessed 20-1-2021
- 4 Gilbert, Iain (2020) "Liberum Raises Target Price on Hipgnosis Song Fund". Online at <https://www.sharecast.com/news/broker-recommendations/liberum-raises-target-price-on-hipgnosis-songs-fund--7592265.html> accessed 20-1-2021
- 5 Kalyani (2020) "Global Music Streaming Market Share, Growth Rate, Sales Value and Industry Production Volume by 2025". Online at <https://thedailychronicle.in/news/426077/global-music-streaming-market-share-growth-rate-sales-value-and-industry-production-volume-by-2025/> accessed 20-1-2021

- 6 Financial Times (2020) "Sofa rockstars' help instrument sales hit the high notes in lockdown". Online at <https://www.ft.com/content/dfdd70c3-8402-4e8d-8680-c4d061c191fc> accessed 20-1-2021
- 7 Texas Music Office (2020) "Music Friendly Communities". Online at <https://gov.texas.gov/music/page/music-friendly-communities> accessed 20-1-2021
- 8 Heinz, Frank (2019) "DWF Fastest-Growing Metro in US, Fort Worth Moves Up 13th Largest City". Online at <https://www.nbcdfw.com/news/local/dfw-fastest-growing-metro-in-us-fort-worth-moves-up-13th-largest-city/248895/#:~:text=Frisko%2C%20McKinney%20and%20Rowlett%20are,growing%20cities%20in%20North%20Texas> accessed 9-1-2021
- 9 City of Fort Worth (2018) "Comprehensive Plan, Chapter 2: Economic Trends". Online at https://www.fortworthtexas.gov/files/assets/public/planning-data-analytics/documents/comprehensive-planning/pdf-adopted/02_economic_trends.pdf accessed 9-12-2020

KEY FINDINGS



Experiences expressed in our stakeholder interviews shared a few common themes.

SMALL-TOWN FEEL

Many interviewed loved the city's sense of community and small-town feel, something rare for a city with such a large rate of growth.

IDENTITY AS A MUSIC FRIENDLY COMMUNITY

We also heard that one of Fort Worth's biggest weaknesses is that, despite being Texas's first Music Friendly Community, it does not identify as a music city in practice.

COWBOY CULTURE

Many cited the motto of "Cowboys and Culture", emphasizing that the city celebrated the 'cowboys' aspect much more than the 'culture' aspect and there was a notable lack of diversity in performances and marketed genres. This has been slightly eased by the increase in pop-up performances at cafes and restaurants, though there is still an opportunity in the market for a mid-level venue to service acts returning for tours that are not quite ready for big arena shows, such as the Dickies Arena.

MORE SUPPORTIVE REGULATIONS NEEDED

Finally, city policy is not pro-actively supportive of the music industry, with busking not permitted, antiquated alcohol laws and restrictive noise limits.

GROWING POPULATION

The city's willingness to prepare for and embrace the substantial growth it's facing can present a threat or opportunity. With a larger population and influx of young professionals comes an increased lust for cultural and creative offer, a large pool of artists and supportive professionals to strengthen the local industry and, of course, a larger local audience to support the industry.

COVID-19

Stakeholders shared that Fort Worth's music community was also struggling through the pandemic as the rest of the global industry has lagged. A focus on recovery and resiliency was desired.

This actionable strategy can help proactively address the threats that this level of growth can generate before they come to a head. With COVID-19 recovery in mind, we hope these recommendations are setting up Fort Worth for success and growth in the music sector for many years. We look forward to seeing what Fort Worth, Texas's first Music Friendly Community, has in store for its future.



ACTIONS & RECOMMENDATIONS



Photo: Adobe Stock/CK

FORT WORTH MUSIC ECONOMY PRIORITY ACTIONS

This section includes strategic recommendations across seven action areas. Within these seven areas, we have outlined 26 opportunities pertaining to Fort Worth. An expanded explanation and implementation plan for each of these action items can be found in the full report.

GOVERNANCE AND LEADERSHIP

RECOMMENDATION #1

Create a Permanent Music Office at Visit Fort Worth

RECOMMENDATION #2

Expand Hear Fort Worth Board

RECOMMENDATION #3

Update the Local Sound Ordinance to Improve Regulations and Include an Agent of Change Principle

RECOMMENDATION #4

Create a Fair Pay Pledge or Artist Compensation Policy

RECOMMENDATION #5

Develop Busking Guidelines

RECOMMENDATION #6

Encourage All-Ages Events and Venue Opportunities

RECOMMENDATION #7

Explore Musician Loading Zones

DIVERSITY AND EQUITY

RECOMMENDATION #8

Engage Under-represented Musicians to Promote and Identify their Needs

AUDIENCE DEVELOPMENT

RECOMMENDATION #9

Create an Online Resource Database Platform for Concert Listings and Performances that is Inclusive and Representative of the Wider Music Scene

RECOMMENDATION #10

Encourage Cross-Promotion Arenas and Independent Venues to Show a Diverse Music Offering

FUNDING

RECOMMENDATION #11

Continue to Leverage CARES Funding and Save Our Stages Efforts

RECOMMENDATION #12

Review Funding Opportunities and Ensure Resources are Available for the Broader Music Industry

RECOMMENDATION #13

Create Incentives to Attract Businesses and Promote Fort Worth Music

ARTIST AND MUSIC INDUSTRY DEVELOPMENT

RECOMMENDATION #14

Create and Maintain a Music Industry Directory & Map

RECOMMENDATION #15

Create a Monthly Networking Event

RECOMMENDATION #16

Create a Professional Development Series

RECOMMENDATION #17

Offer an Incubator or Accelerator Program for Artists, Venues and Industry Workers and Businesses

SPACES AND PLACES

RECOMMENDATION #18

Develop a Multi-Agency Placemaking Strategy and Masterplan Around Music

RECOMMENDATION #19

Increase Affordable Music Spaces and Places Available for Music Artists and Professionals

RECOMMENDATION #20

Maximize City Spaces by Facilitating Permitting for Temporary, Daytime and Mixed-Use Activity

RECOMMENDATION #21

Support the Art Space Community Concept in Near Southside

RECOMMENDATION #22

Incorporate Local Music into the Built Environment and Infrastructure

RECOMMENDATION #23

Support Amplify 817 and Fort Worth Public Library Music Strategy

RECOMMENDATION #24

Promote Long-Term Creation of Music Spaces in Collaboration

RECOMMENDATION #25

Unify Marketing of Music and Other Night-Time Economy Offerings such as Restaurants, Shops and Other Events as Experiential Marketing through Cross-Promotion and Visitor Packages.

COVID-19 RECOVERY & RESILIENCE

RECOMMENDATION #26

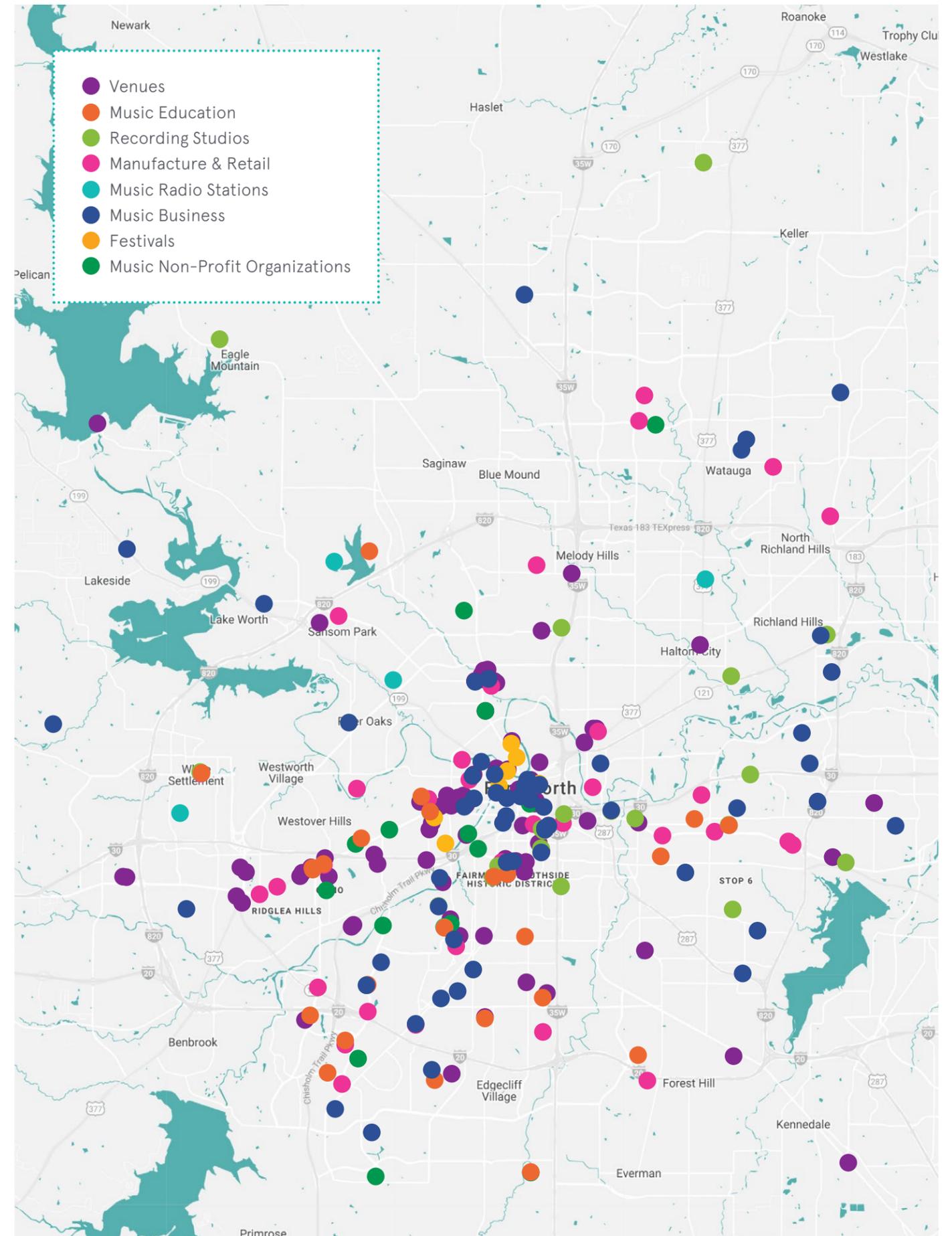
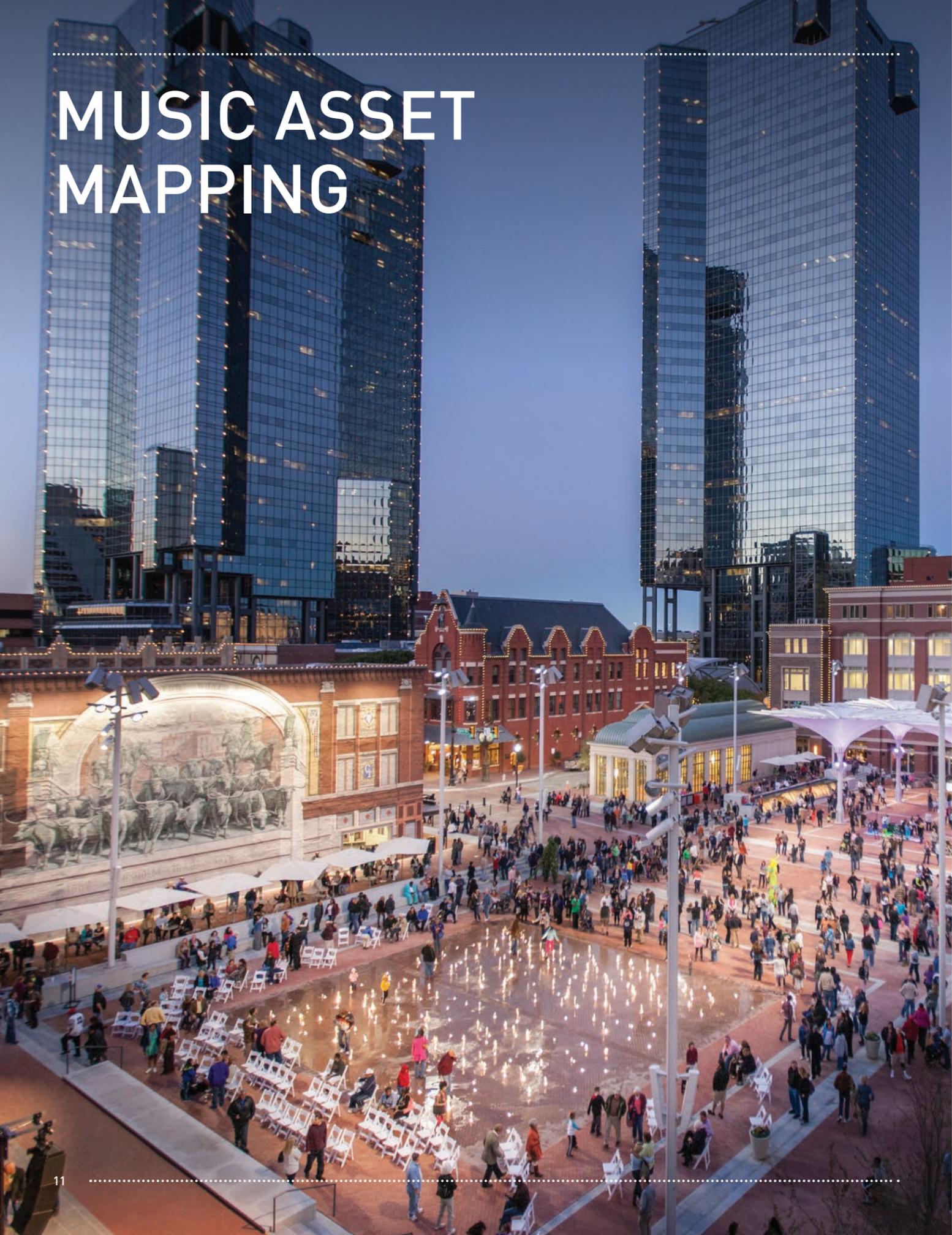
Generate Immediate Recovery Goals to Foster Long-Term Resilience

The Economic Impact Assessment of Fort Worth gives insights into the role of music as an economic driver in the city. Beyond its economic importance, the music ecosystem has an important cultural and social impact. It increases Fort Worth's attractiveness as a city, drives tourism, enhances social inclusion and improves wellness.

While these findings emphasize the role music plays in the local economy, further research is needed to better understand the opportunities and challenges faced by local stakeholders, address their needs and then develop a toolkit of actions for further growth of Fort Worth as a music city. Some of these actions may include:

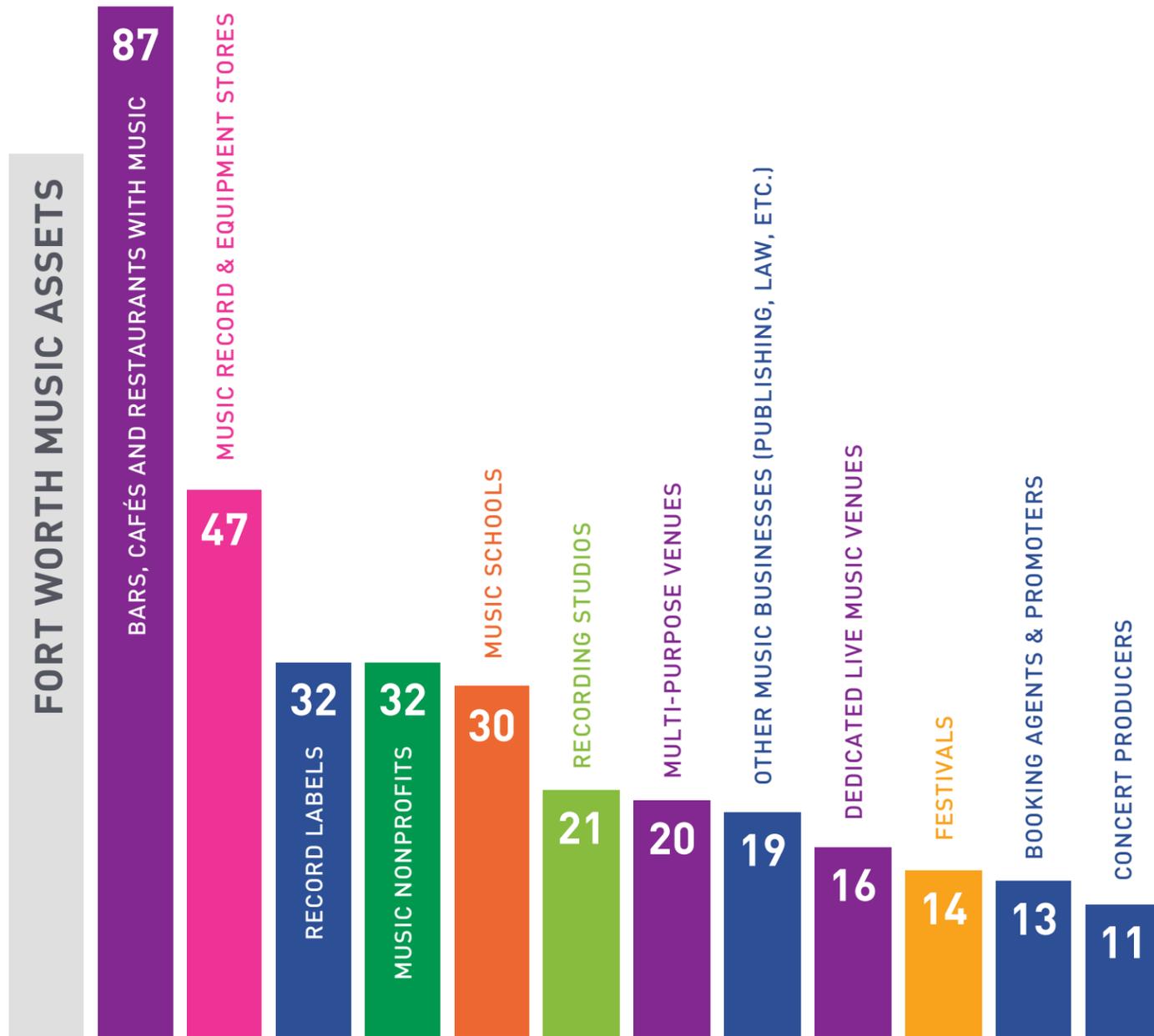


MUSIC ASSET MAPPING



MUSIC ASSET MAPPING IN FORT WORTH

Sound Diplomacy has identified music assets across Fort Worth.¹⁷ The results of this work are currently being confirmed and further populated by the public to ensure all spaces used for music-related activities are assessed.



All the mapped assets are visible, embeddable and shareable using [Google Maps](#)



These figures help calculate the number of **primary music assets per capita** in Fort Worth.¹⁸ For every 100,000 citizens, there are 16.2 music places, 7.5 music education sources and nonprofits, .97 radio stations and 12 music industry support providers.

- Venues
- Music Education
- Recording Studios
- Manufacture & Retail
- Music Radio Stations
- Music Business
- Festivals
- Music Non-Profit Organizations

¹⁷ <https://www.sounddiplomacy.com/music-asset-mapping-fort-worth>
¹⁸ Population 925,954



ECONOMIC IMPACT



ECONOMIC IMPACT ANALYSIS

The two segments of the Fort Worth music ecosystem – Artistic & Creative and Professional & Supporting – created a direct economic impact of 5,584 jobs, \$156 million in earnings and \$517 million in economic output.

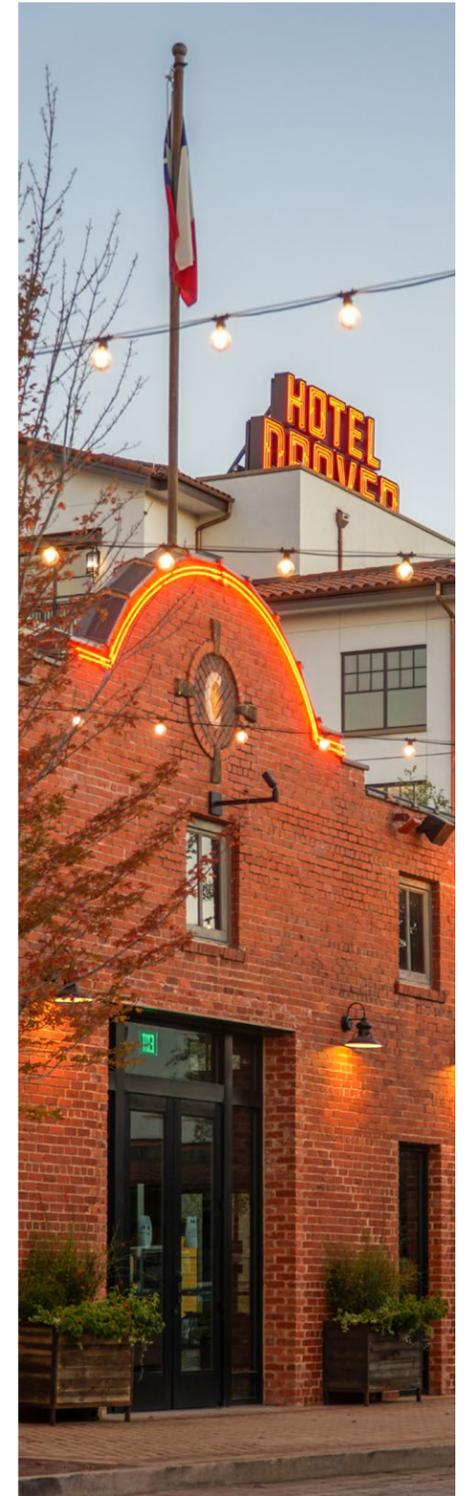
When including the indirect economic effects, Fort Worth’s music ecosystem generated an output of \$770.65 million and a Value Added (GVA) of \$355 million to the local economy in 2016. The total number of jobs generated and supported by the music sector in the area was 7,555, which accounted for 1.76% of employment in the city. The earnings generated within the Fort Worth Music Ecosystem totaled \$256.56 million.

The majority of the economic value in Fort Worth is created by the Professional and Supporting Segment, with the Artistic Segment only representing 8%

of the direct economic output and 13% of the employment of the music ecosystem. Within the Professional and Supporting Segment, 77% of the output is generated by live music, such as venues and clubs.

In the case of Fort Worth, the direct employment generated by the music sector reached 1.3% of the city’s employment, a figure that exceeds the contribution of the cities or places such as New York City (0.54%) or Huntsville, Alabama (0.99%).

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT MILLION \$	EARNINGS OR COMPENSATION (MILLION \$)
Direct	5,584	517.65	156.21
Indirect	1,971	254.00	100.35
Total Impact	7,555	770.65	256.56

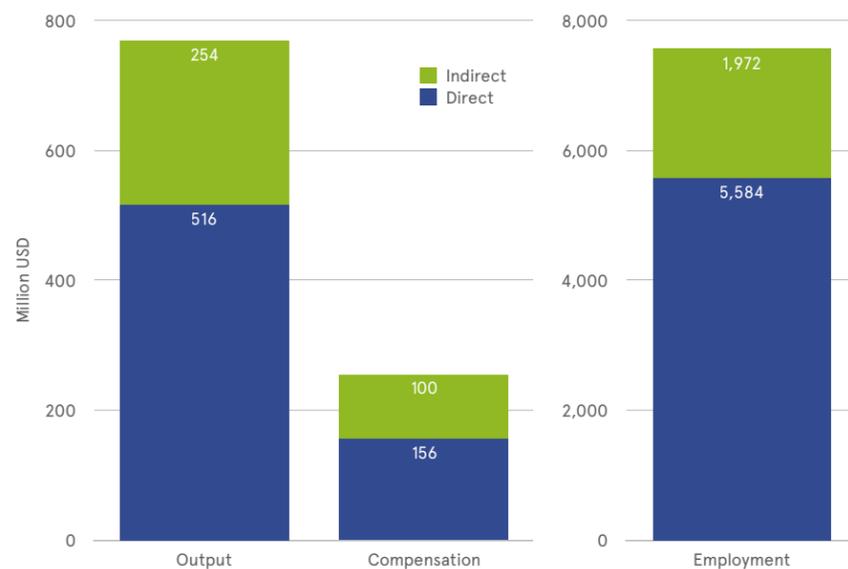


FORT WORTH'S MUSIC ECONOMIC IMPACT

Fort Worth's music ecosystem generated an output of \$770.65 million and a Value Added (GVA) of \$355 million to the local economy in 2016.

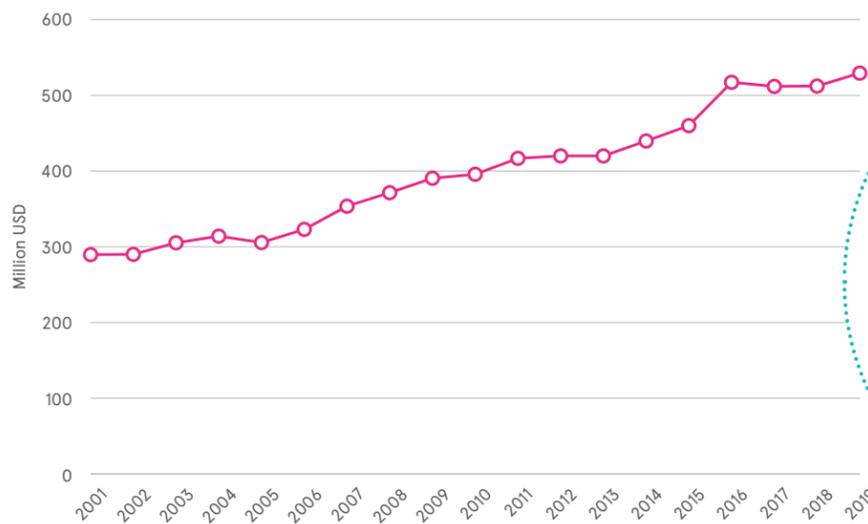
The total number of jobs generated and supported by the music sector in the area was 7,555, which accounted for 1.75% of employment in the city. The earnings within the Fort Worth Music Ecosystem totaled \$256.56 million.

FIGURE 1. FORT WORTH MUSIC ECOSYSTEM ECONOMIC IMPACT, OUTPUT AND COMPENSATION



Source: County Business Patterns (2017), RIMS II (2016)

FIGURE 2. MUSIC ECOSYSTEM DIRECT OUTPUT 2001-2019 IN MILLION USD



Source: BEA, County Business Patterns, BEA Regional Accounts, Sound Diplomacy Research

The music ecosystem produced a direct output of \$516.65 million and an estimated GVA of \$339.38 million. They were responsible for 5,584 direct jobs, and employee compensation reached \$156.2 million (a figure including professionals and artistic segments). Direct output derived from the music ecosystem is expected to grow 2.34% between 2016 and the end of 2019, reaching \$528.7 million.

FIGURE 3. MUSIC ECOSYSTEM DIRECT OUTPUT BY SEGMENT

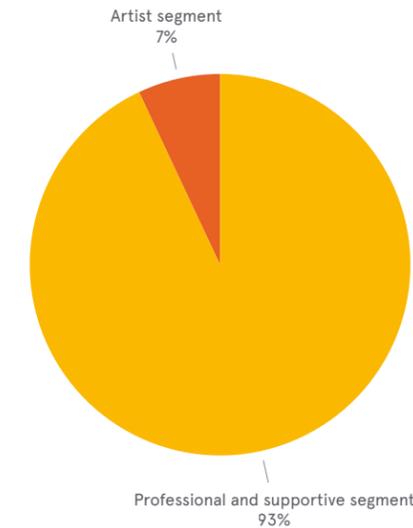
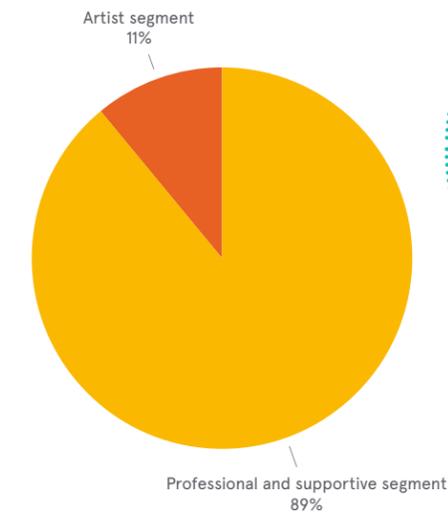


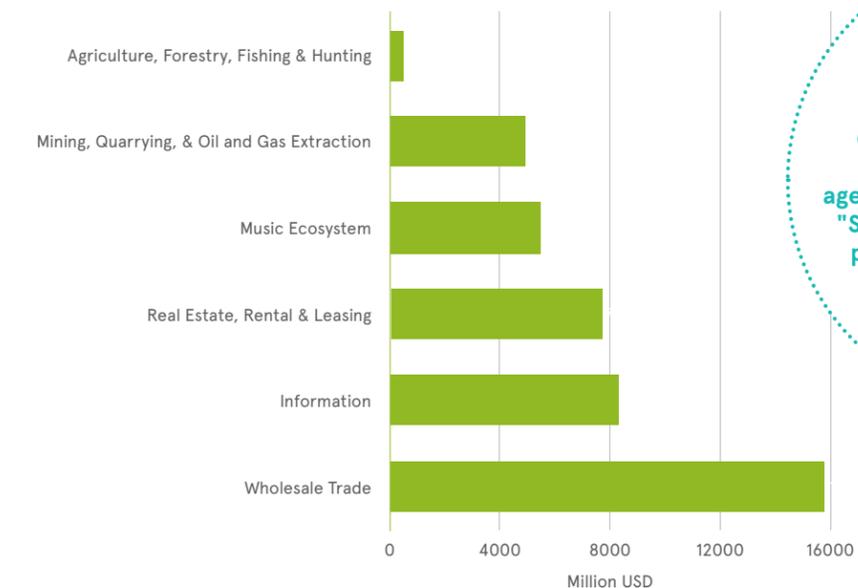
FIGURE 4. MUSIC ECOSYSTEM DIRECT EMPLOYMENT BY SEGMENT



Source: Bureau of Economic Analysis, Sound Diplomacy Research

The artistic segment of the music ecosystem¹⁴ represented 7% (\$36 million) of the direct output of the music sector and 11% (617) of total direct employment, while professional and support activities comprised 93% (\$451 million) of the direct output and 87% (4,968) of total direct employment (see figures 3 and 4).

FIGURE 5. EMPLOYMENT BY INDUSTRY, 2016



Source: American Community Survey 2016, County Business Patterns 2016, Sound Diplomacy Research

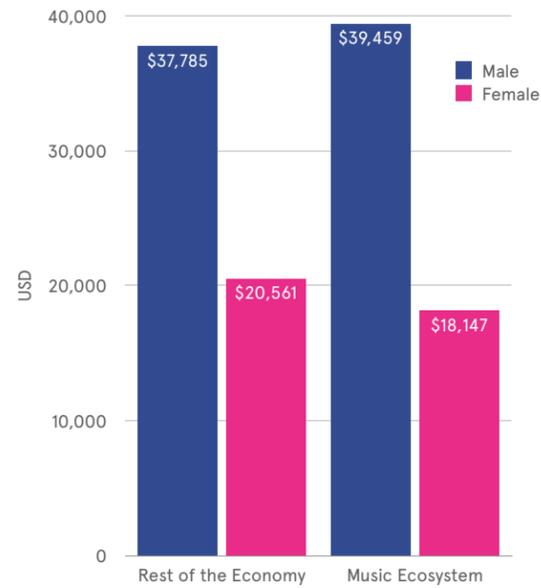
The highest share of the employment within the professional and supporting segment corresponds to "live music, such as venues, clubs and agents" (82%). This is followed by "Sound recording, production, publishing and distribution", with 5% of the number of employees in the segment.

Direct music ecosystem employment (5,584) exceeds that of sectors such as mining or agriculture (5,086 and 408 respectively), but remained below real estate (7,726) and information industries (8,320)¹⁵ (see figure 5).

¹⁴ Artistic segment of the music ecosystem: According to the NAICS 2017, this activity comprises musicians (songwriters, music composers), music groups and performers.

¹⁵ U.S. Census Bureau (2016)

FIGURE 6. MUSIC ECOSYSTEM ANNUAL AVERAGE WAGES IN USD, 2016



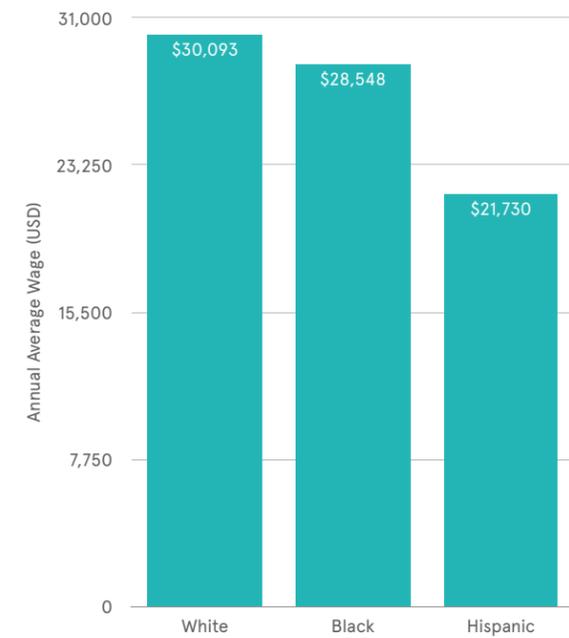
Source: American Community Survey 2013-2016, Sound Diplomacy Research

FIGURE 7. MUSIC ECOSYSTEM ANNUAL AVERAGE WAGES BY SEX AND SEGMENT IN USD, 2016



Source: American Community Survey 2013-2017, Sound Diplomacy Research

FIGURE 8. MUSIC ECOSYSTEM ANNUAL AVERAGE WAGES BY RACE IN USD, 2016



Source: American Community Survey 2013-2017, Sound Diplomacy Research

Both men and women earn considerably less in the creative segment compared to their counterparts in "Professional & Supporting activities", but men's average wages¹⁶ are higher than women's whether focusing on the music ecosystem (\$39,459 vs. \$18,147) or the whole economy (\$37,785 vs. \$20,561).

Looking at average wages by race, employees with a Hispanic background receive the lowest wages (\$21,730) compared to black (\$28,548) and white people (\$30,093), whose average salaries do not differ by much.

¹⁶ The annual average wages of the music ecosystem are calculated as the mean from 2012 to 2017 in order to achieve a sufficient number of observations in specific subcategories.

FIGURE 9. MUSIC ECOSYSTEM EMPLOYMENT, US CITIES AND AREAS

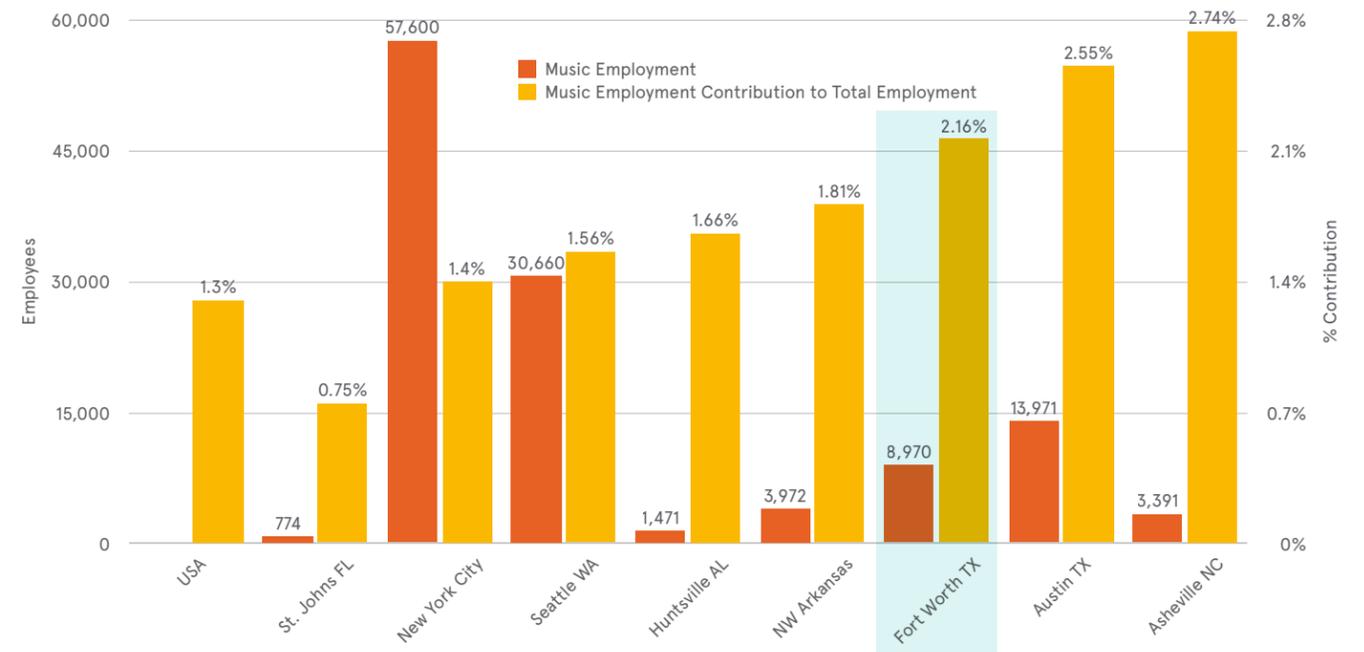
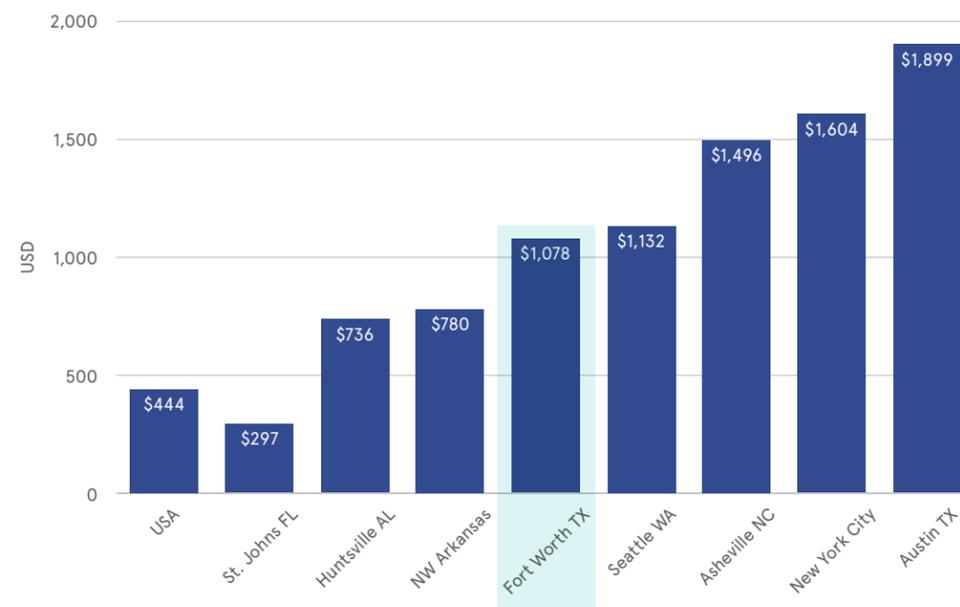


FIGURE 10. MUSIC ECOSYSTEM OUTPUT PER CAPITA IN USD, US CITIES AND AREAS



In the case of Fort Worth, the direct employment generated by the music sector reached 1.3% of the city's employment, a figure that exceeds the contribution of the cities or places such as New York City (0.54%) or Huntsville, Alabama (0.99%).

The music output per capita in Fort Worth this figure reaches \$1,078, over twice that of the national average but below those of heavy music tourism cities such as Austin and New York.

THE METHODOLOGY

STEP 1: MUSIC VISION AND REGULATORY ASSESSMENT

A long-term vision for Fort Worth's music ecosystem was established. This was followed by desk research, literature reviews and an overview of all relevant policies and strategies. We also compared the findings to best practices from all over the world from which Fort Worth can learn.

STEP 3: QUANTITATIVE RESEARCH:

A music asset map was created through our unique place-scraping tool and was supported by local input. We combined our comprehensive mapping findings with data from additional sources from Visit Fort Worth to deliver an economic impact assessment of Fort Worth's music ecosystem.

STEP 4: ANALYSIS OF KEY FINDINGS AND STRATEGIC OPPORTUNITIES:

We provided an extensive analysis of our economic findings, alongside an overview of the key strengths and challenges in Fort Worth. This was supported by a benchmarking analysis and comparison with other communities. Each area features key actions and case studies to refer to as the strategy moves forward. They have been categorized for ease of assessing priority actions and a most effective timeline.

STEP 2: STAKEHOLDER AND COMMUNITY ENGAGEMENT:

Stakeholders participated in committee meetings, roundtables and interviews to inform findings, policies, regulations and assessments. Three roundtables and several one-to-one interviews were conducted between November 2020 and January 2021.



Photo: Adobe Stock/cruzos

ECONOMIC IMPACT ANALYSIS METHODOLOGY

The economic impact analysis provides a reliable measure of the economic importance of the music ecosystem in the local economy on two different scales: direct and indirect impacts. **Direct economic impact** is the economic value created directly by music ecosystem activities. The **indirect impact** is the changes in values of the output, GVA and workforce figures of those businesses that are not directly in the music industry, but serve in its supply chain. The following variables were considered, utilizing the Classification of Economic Activities of the North American Industrial Code (NAICS) to extract music industry-specific elements.

MUSIC ECOSYSTEM OUTPUT¹⁰

All produced goods and services of the music ecosystem in Fort Worth. For example, sold concert tickets, recording studios revenue, etc.

MUSIC ECOSYSTEM COMPENSATION¹²

Remuneration (including wages and salaries, as well as benefits such as employer contributions to pension and health funds) payable to employees in return for their music ecosystem work during a given year.

MUSIC ECOSYSTEM EMPLOYMENT¹¹

The number of active jobs in the production of music ecosystem goods and services.

GROSS VALUE ADDED (GVA)¹³

The music ecosystem output minus music ecosystem intermediate consumption (the costs of all inputs, for example, backline rented by a live music promoter).

¹⁰ Bureau of Economic Analysis (2016)

¹¹ Ibid.

¹² Ibid.

¹³ Ibid.

MUSIC ECOSYSTEM ANALYSIS



REGULATORY ASSESSMENT AND COMPARATIVE ANALYSIS

Fort Worth’s music-friendly policies were highlighted in its designation as a music-friendly community, and can continue to improve. Visit Fort Worth’s Hear Fort Worth campaign has provided even greater awareness of Fort Worth as a place for music by focusing on promotion and opportunity creation of artists.

Collectively, these promotional efforts with a new focus on improving regulations, will set up Fort Worth for even greater success. To determine what is needed, we looked at what exists and compared Fort Worth with best practices from around the world along with our own custom recommendations for Fort Worth.

Notably, Fort Worth does not have a local music office or music officer. Although some of the responsibility held by such an entity, including championing and promotion, is currently carried out by the Hear Fort Worth initiative, having a dedicated representative can support the local industry’s unique needs better than a statewide office and can leverage and strengthen the existing efforts of Visit Fort Worth. Demand is there, as proven by Austin’s introduction of its own office and the Seattle Music Commission.

While city policy is not uniquely restrictive, there are certainly opportunities to make it more music friendly by extending alcohol sales hours, utilizing mixed-use permitting and easing zoning restrictions around churches, schools, etc., which are prohibitive to venues or other music businesses seeking to responsibly hold a liquor license. Event planning has overall received positive feedback from those who have hosted large events in Fort Worth as being an experienced office to work with, but it remains unclear how accessible the resources are to smaller event planners lacking the capital of big-name promoters. Special attention should be paid to these efforts as Fort Worth looks to COVID-19 recovery and easing barriers for event promoters to host live music events when safe.

In terms of growth and development, Fort Worth can implement business incentives as a local government, but does not currently have any incentives in place which focus on attracting or expanding those within the music and creative industries. Such decisions are usually made at a state level, with Georgia¹⁹ and Louisiana²⁰ being prime examples, but Texas Local Government Code allows cities to set their own measurements in place, presenting an attractive opportunity for Fort Worth to differentiate itself from its competitors.

Finally, funding in Fort Worth has been historically limited. The variety of schemes put into place to mitigate the impact of COVID-19, such as CARES funds and the Creative Industries Relief Fund, greatly outshine previous opportunities for funding and highlights an industry need that will continue to exist beyond the immediate impact of the

pandemic. Funding is not an issue unique to Fort Worth or even the music industry, but some cities have highlighted ways to ease the strain, a prime example being San Francisco’s Proposition E,²¹ which pulls from existing tax revenue.

Overall, Fort Worth’s regulatory infrastructure and resources reflect those of most cities, but the music industry is dynamic, as are the opportunities and challenges presented by the level of growth the city is facing. The successful introduction of music spaces such as the Stockyards and Dickies Arena has proven the existence of a unique music market unencumbered by surrounding areas. In order to cultivate its reputation as a music city and boost its attraction to creatives, professionals and audiences, Fort Worth must continue to strengthen its existing policies while looking to other cities for best practices to implement.



19 Georgia Music Partners (2017) "GA Music Investment Act". Online at <https://georgiamusicpartners.org/georgia-music-investment-act/> accessed 12-1-2021

20 Louisiana Economic Development (2020) "Business Incentives". Online at <https://www.opportunitylouisiana.com/business-incentives> accessed 12-1-2021

21 Ballotpedia (2018) "San Francisco, California, Proposition E, Partial Allocation of Hotel Tax for Arts and Culture (November 2018)". Online at [https://ballotpedia.org/San_Francisco,_California,_Proposition_E,_Partial_Allocation_of_Hotel_Tax_for_Arts_and_Culture_\(November_2018\)](https://ballotpedia.org/San_Francisco,_California,_Proposition_E,_Partial_Allocation_of_Hotel_Tax_for_Arts_and_Culture_(November_2018)) accessed 12-1-2021

SWOT ANALYSIS

Sound Diplomacy discussions resulted in the following observations from mapping, stakeholder interviews, roundtables and the economic impact analysis:

STRENGTHS

- Strong sense of community.
- Dickies is uniquely built for good acoustics and has a wide open calendar for events.
- Visit Fort Worth's work is held in high regard by all industry stakeholders.
- Fort Worth is an eclectic music town, with strong scenes in singer-songwriter, Americana, rock and jazz genres.
- The city has a strong music history in genres from jazz to western swing.
- Visit Fort Worth's music initiative, **Hear Fort Worth**, has brought positive momentum to the music ecosystem and is broadly positively received by musicians and the music industry. Its town hall meetings provide an opportunity for artists to be heard and its work is elevating the profile of Fort Worth music.
- There is strong support for Fort Worth music from City Hall.

WEAKNESSES

- Lack of musical diversity.
- Fort Worth is seen as the town to settle rather than go out.
- Lack of supporting professional roles for musicians to turn to.
- External branding of the city is "Cowboys and Culture," and There is not a strong or widely understood external music brand.
- Lack of networking infrastructure to facilitate artists and industry connecting .
- The average person in Fort Worth would not consider Fort Worth a "Music City."
- Lack of awareness among the general public of the city's rich music history.

OPPORTUNITIES

- Smaller mid-sized venue for touring acts not ready for Dickie's.
- The local industry could use a networking opportunity.
- Fort Worth is one of the youngest cities in Texas, with an average age of 31.5.
- Better collaboration among promoters or event producers could lead to increased public awareness and decreased competition between music events.
- Better public transport options could connect downtown to cultural districts .
- There is a strong venue offering but audience development is needed.
- Fort Worth should be a distinct tour stop.

THREATS

- Rate of growth pricing out artists.
- The city being unwelcome to change.
- Complacency from audiences that the music offering will always be there.
- Without intentionality, Fort Worth risks being swallowed up in the larger Texas music story rather than having a unique value proposition or identity for both visitors and musicians/music industry.
- Fort Worth is one of the fastest growing cities in the country. Dallas-Fort Worth is the fourth-largest metro area in the country and was the fastest growing metro area in the nation in 2018.²² This growth means that development is happening rapidly in areas around music venues in the city core, which could mean that sound mitigation will become a challenge as more residents locate next to live entertainment hubs.



22 US News (2019)

CONCLUSION

Today, Fort Worth is on the rise and drawing its competitive edge from a proud music history and a burgeoning future as a truly diverse, modern music community. Development in the Stockyards, Sundance Square and Cultural District has made important strides, and the friendliness of Fort Worth further positions the city to attract and retain music makers of all kinds and grow the industry and economy.

While many other communities are only now scrambling to try and understand how to recover from the COVID-19 pandemic, Fort Worth has the potential for a sustainable recovery trajectory with this music strategy framework.

But if the community is to move forward, Fort Worth needs your help. Raise your hand and offer to help work on one or more of these recommendations.

In many ways, Fort Worth has momentum, not only in its music-friendly approach by becoming the first Texas Music Friendly Community and in recognizing the positive impact of music, but in its recognition and work in addressing the need to better study and support music.



ABOUT SOUND DIPLOMACY



Sound Diplomacy is the leading global consultancy advising cities, governments, tourism boards and large organizations on music and night time economy policy. Their work has helped define the 'music cities movement' and been delivered in over 20 countries and 50 cities around the world.

www.sounddiplomacy.com

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- Fort Worth City Council
- Fort Worth Hispanic Chamber of Commerce
- Fort Worth Metropolitan Black Chamber of Commerce
- Fort Worth Now
- Fort Worth Opera
- Fort Worth Public Library

- Fort Worth Stock Show & Rodeo
- Fort Worth Symphony Orchestra
- Near Southside
- Performing Arts Fort Worth
- River East
- Stockyards Heritage
- Sundance Square
- Texas Music Office, Office of the Governor
- The Cliburn
- Will Rogers Memorial Center
- And the countless talented artists, producers, festivals and venue operators who create here and call Fort Worth home.





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