

SOUND
DIPLOMACY

NORTHWEST ARKANSAS

MUSIC ECOSYSTEM STRATEGY
AND ACTION PLAN

NORTHWEST ARKANSAS
COUNCIL

March 2020

FOREWORD

Dear Northwest Arkansas,

We feel very lucky. Over the past two years, we have spoken to many of you through our work to deliver a music ecosystem assessment for Northwest Arkansas. What you have in this music ecosystem strategy and action plan is the culmination of your thoughts & actions. This is your strategy.

In total, 376 people responded to the online survey. We personally interviewed a further 75, and over 60 musicians, businesses and advocates attended the open forum on September 25, 2018, where I met some of you. We believe the findings in these pages and the recommendations they influenced are because of each submission and every interview. But we know we didn't speak with all of you, so treat this strategy as the next step to develop a more equitable, profitable and unique music ecosystem in Northwest Arkansas.

While we were working on this project, the region has already launched an arts service organization, with a director that has a wealth of experience and knowledge to bring to the table. Last year, a delegation of regional stakeholders visited the Music Tourism Convention in Lafayette, learning more about the importance of supporting

arts and culture from the bottom up and how this can benefit the greater good of everybody. Education and empowerment will be important steps moving forward.

We know this strategy is part of a larger trend to recognize the value of music and the arts in the region. We're thrilled that the new arts service organization is in place, for example. But this is just the beginning. The recommendations we developed are based on the research we have done and our global understanding of music policies around the world. But the results, similar to the recommendations, are meant to be hyper-local. We know what Northwest Arkansas can offer the world through music. We hope this work further supports that. But as we all work to deliver these recommendations, we recognize that its success will be in how this work impacts you every day.

Our recommendations begin by creating a shared governance structure around music, a music office, and/or music officer. Our objective is to create global leading music-friendly policies that encourage the development of music spaces and protect them, create more opportunities for musicians and local creatives, ensure fair pay, and further incentivize the local creative economy. It is also about recognizing and protecting music education at all levels. Without it, none of this is possible.

Again, thank you for welcoming us into your community. We hope to remain partners for years to come, to continue to develop the music offer across Northwest Arkansas. We hope you remain engaged and supportive as this strategy moves forward.

**Kindest Regards,
Shain Shapiro, PhD
Founder & CEO, Sound Diplomacy**

Front & Back Cover Photo:
Walton Arts Center/Artosphere Trail Mix

Friends,

Northwest Arkansas is home to a long-standing, dynamic arts and music scene. Legacy venues such as Walton Arts Center, George's Majestic Lounge and Meteor Guitar Gallery offer unique experiences, and new investments are being made to expand our fast-growing region's music ecosystem – The Walmart AMP, The House of Songs Ozarks, Haxton Road Studios and the Fayetteville Roots Festival are among them.

More additions are coming. FreshGrass just announced its 2020 bluegrass and roots music festival will be held at the Momentary, a contemporary art space satellite to Crystal Bridges Museum of American Art that opened in Bentonville in February. The historic Rockwood Club in Fayetteville will soon reopen as a live music venue with design elements reminiscent of the original roadhouse.

Yet, there's so much more Northwest Arkansas can accomplish when it comes to its music ecosystem. It's possible because steady investments in Northwest Arkansas' quality of life are met with a hunger to do even more.

A robust music ecosystem can help drive the economy and improve livability. To make the case, we partnered with Sound Diplomacy to conduct an assessment of Northwest Arkansas' music sector

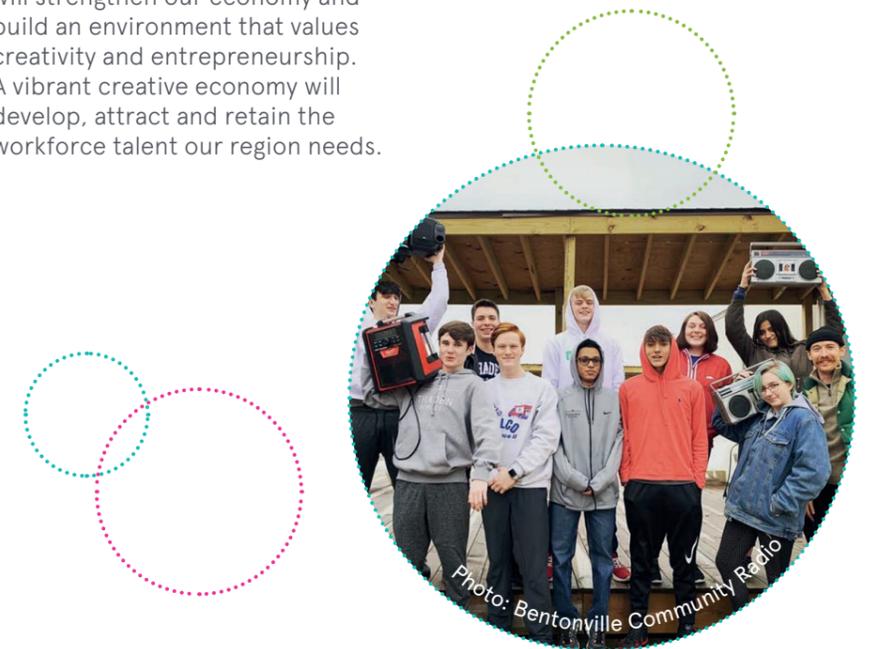
and to solicit critical feedback from our region's musicians, businesses and advocates. What we found was the region's music ecosystem is responsible for generating a total annual economic output of \$389 million and generating 3,972 jobs.

This Sound Diplomacy report demonstrates the music industry's important role in the Northwest Arkansas Council's economic development strategy. It shows how a vibrant music economy contributes to economic growth, workforce development, artistic education and tourism. A coordinated and intentional strategy to promote arts and music and empower local artists will strengthen our economy and build an environment that values creativity and entrepreneurship. A vibrant creative economy will develop, attract and retain the workforce talent our region needs.

We are thankful to the hundreds of community partners who participated in surveys, interviews and public meetings that helped in creating this comprehensive roadmap to grow Northwest Arkansas' music ecosystem.

"Music can change the world because it can change people." – Bono

**Sincerely,
Nelson Peacock
President & CEO
Northwest Arkansas Council**



ABOUT THE PROJECT

In April 2018, Sound Diplomacy started with the assessment of the Northwest Arkansas music ecosystem in order to create an encompassing music strategy for the region. For a music ecosystem to be healthy and thrive, all the agents must be resourced, connected and supported by the institutions. This music strategy and its implementation will lead to policies and regulations that take into account every step of the music ecosystem chain, eases the operations and facilitates the relationships between all of the agents in it.

The focus of this assessment was on the cities of Bentonville, Fayetteville, Rogers and Springdale and the project was carried out in several phases, including two visits to Northwest Arkansas. In total, close to 600 stakeholders of the music ecosystem were engaged throughout the process, including musicians, venue owners, music teachers, property developers and city officials.

Northwest Arkansas is rich in initiatives related to music and the context for a further development of the music ecosystem is promising. The newly established arts service organization is already another step that will continue to establish the region as a leader in the cultural- and music field. The findings of this report and the developed recommendations will help empower local stakeholders and open up new possibilities for social, cultural and economic development through music, developing Northwest Arkansas as a key region for music in the United States and globally.



METHODOLOGY

Sound Diplomacy deployed its unique four-step methodological approach to deliver a comprehensive assessment of Northwest Arkansas' music ecosystem.

ECOLOGICAL ASSESSMENT

We provided a music-specific vision for Northwest Arkansas, in line with its cultural and economic strategy. We did an assessment of Northwest Arkansas' existing music policies and regulations and a comprehensive comparative analysis of five U.S. cities and regions across a number of music-related topics, policies and regulations.

QUANTITATIVE RESEARCH

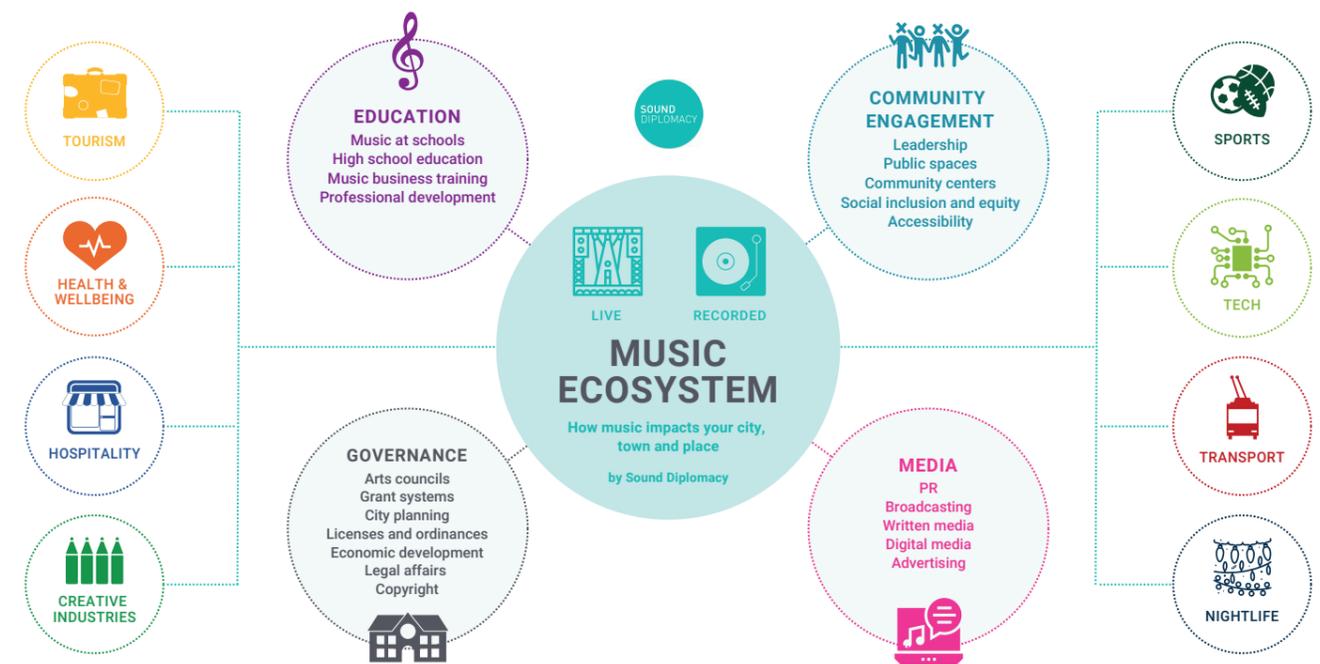
Analysis of official statistics, primary data developed by Sound Diplomacy and results from the survey enabled an in-depth study of the economic impact of the music ecosystem in Northwest Arkansas and a mapping of music infrastructure including music spaces, festivals and music education facilities.

STAKEHOLDER ENGAGEMENT

We conducted expert interviews, roundtable discussions and launched an online survey. In total, 376 people responded to the online survey. 75 people were interviewed as part of the research process. Over 60 people attended the open forum on September 25, 2018.

ANALYSIS OF FINDINGS AND RECOMMENDATIONS

A comprehensive plan for the development of the Northwest Arkansas music ecosystem based on the analytical work previously completed.



ECONOMIC IMPACT SUMMARY

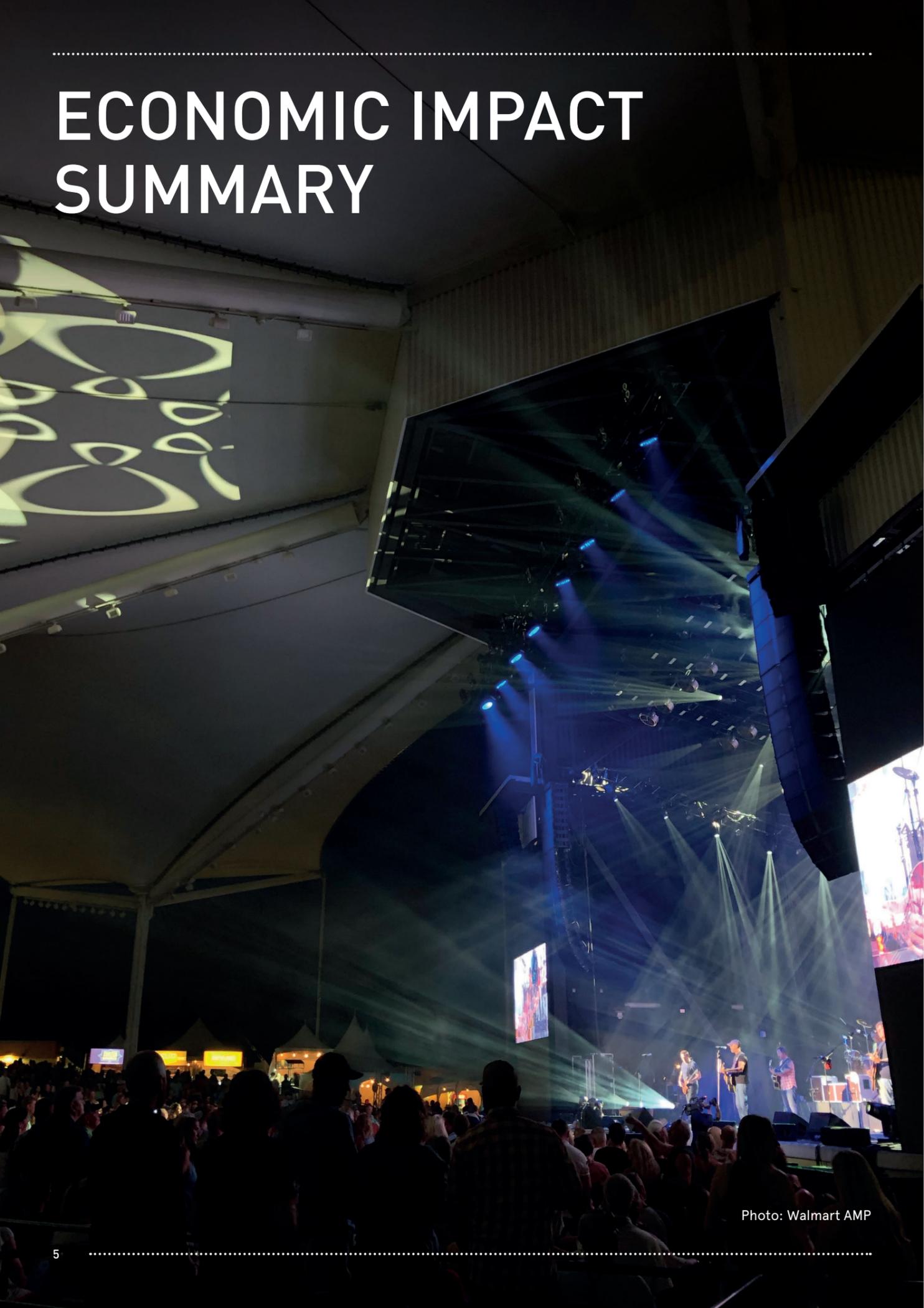


Photo: Walmart AMP

ABOUT THE PROJECT

The economic impact analysis provides a reliable measure of the economic importance of the music ecosystem in the local economy on three different scales: direct, indirect and induced impacts.

DIRECT ECONOMIC IMPACT

The direct impact is defined as the economic value created directly by the activities of the music ecosystem. Its results are the basis for calculating the indirect and induced impact.

INDUCED ECONOMIC IMPACT

The induced economic impact is defined as the economic value that results from music ecosystem workers spending their wages and income in Northwest Arkansas.

MUSIC ECOSYSTEM GROSS VALUE ADDED (GVA)

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

INDIRECT ECONOMIC IMPACT

The indirect economic impact is defined as the changes in the values of the output, gross value added (GVA), employees and wages caused by the agents of the music ecosystem in its relative supply chain. In other words, it represents the jobs and output generated by local businesses that supply goods and services to the Northwest Arkansas music ecosystem.

MUSIC ECOSYSTEM OUTPUT

All produced goods and services of the music ecosystem in Northwest Arkansas produced by music-related industries. For example, sold concert tickets, recording studios revenue, etc.



Photo: George's Majestic Lounge/First Hand Fan

ECONOMIC IMPACT SUMMARY

MUSIC ECOSYSTEM 2016

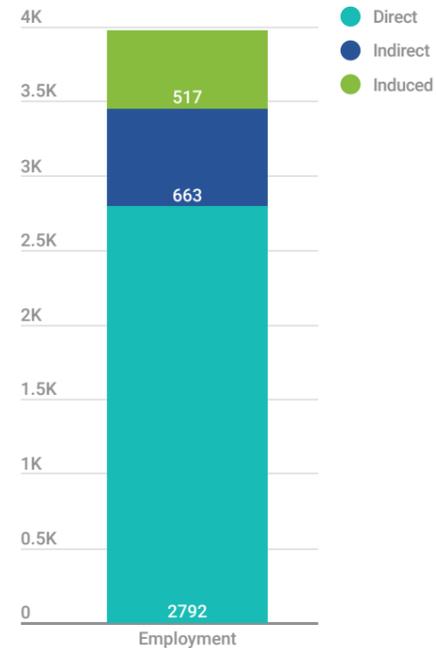
Northwest Arkansas' music ecosystem was responsible for generating a total output of \$389 million, which represented 1.51% of the total output of the area, and a Gross Value Added (GVA) of \$222 million to the local economy in 2016. Total music-related compensation was \$125 million in 2016.

The total number of jobs generated and supported by the music sector in the area was 3,972, which accounted for 1.81% of employment in the area.

ECONOMIC IMPACT (IN MILLION US DOLLARS)

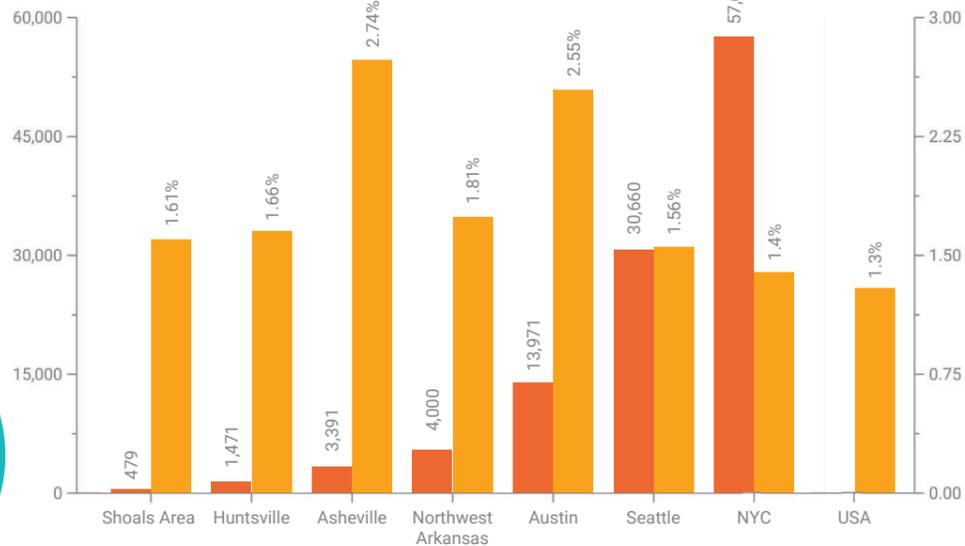


EMPLOYMENT IMPACT (NUMBER OF JOBS)



Source: County Business Patterns (2016), Sound Diplomacy Research

MUSIC ECOSYSTEM EMPLOYMENT



Source: Bureau of Economic Analysis & U.S. Census (2016), Sound Diplomacy research

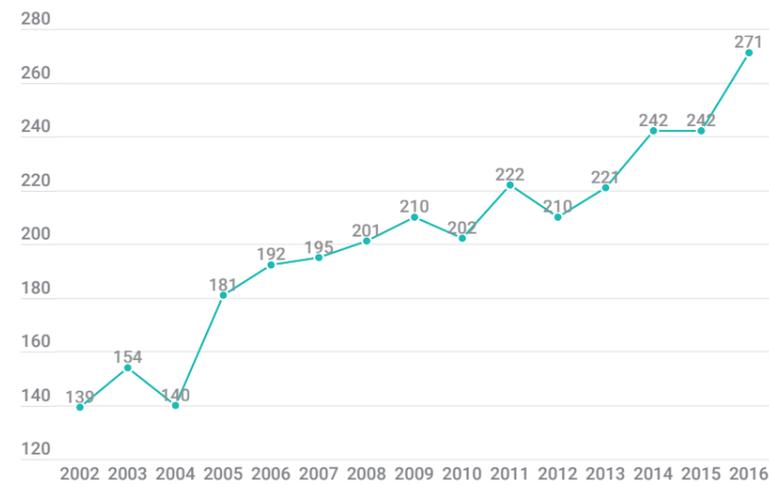
MUSIC ECOSYSTEM EMPLOYMENT

MUSIC ECOSYSTEM DIRECT OUTPUT

The economic activities related to the artistic segment of the music ecosystem¹ represented 19% (\$52.4 million) of the direct output of the music sector, while professional and support activities comprised 81% (\$218.3 million).

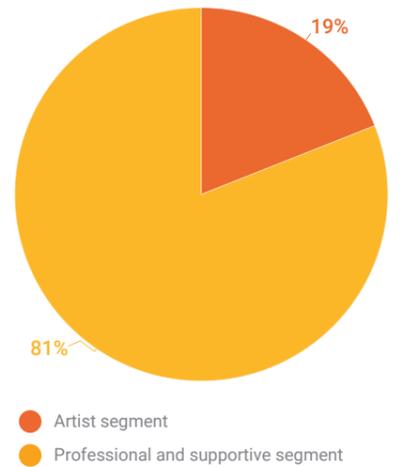
It was estimated that the growth of the direct output of the music ecosystem was 104% between 2002 and 2016.² This figure is lower than the growth of the output of the region's economy, which reached 116.8%³ during the same period.

MUSIC ECOSYSTEM OUTPUT PER CAPITA (IN US DOLLARS)



Source: County Business Patterns (2016), Sound Diplomacy Research

MUSIC ECOSYSTEM DIRECT OUTPUT



Source: County Business Patterns (2016), Sound Diplomacy Research

A variable that allows for comparing the development of the music ecosystem in different areas is the contribution of music employment to the local economy. The Northwest Arkansas music sector generates 1.81% of the region's employment, which exceeds the contribution at the national level.

This figure is still far below places with greater tradition in the music industry, such as Austin or Nashville, whose contribution to the local employment are 2.55% and 2.74%, respectively. Asheville (NC), where music employment represents over 2.7% of its overall employment at 3,400 jobs, shows how music can play a crucial role in a city's economy, regardless of its number of inhabitants or existing (or lack thereof) music industry headquarters.

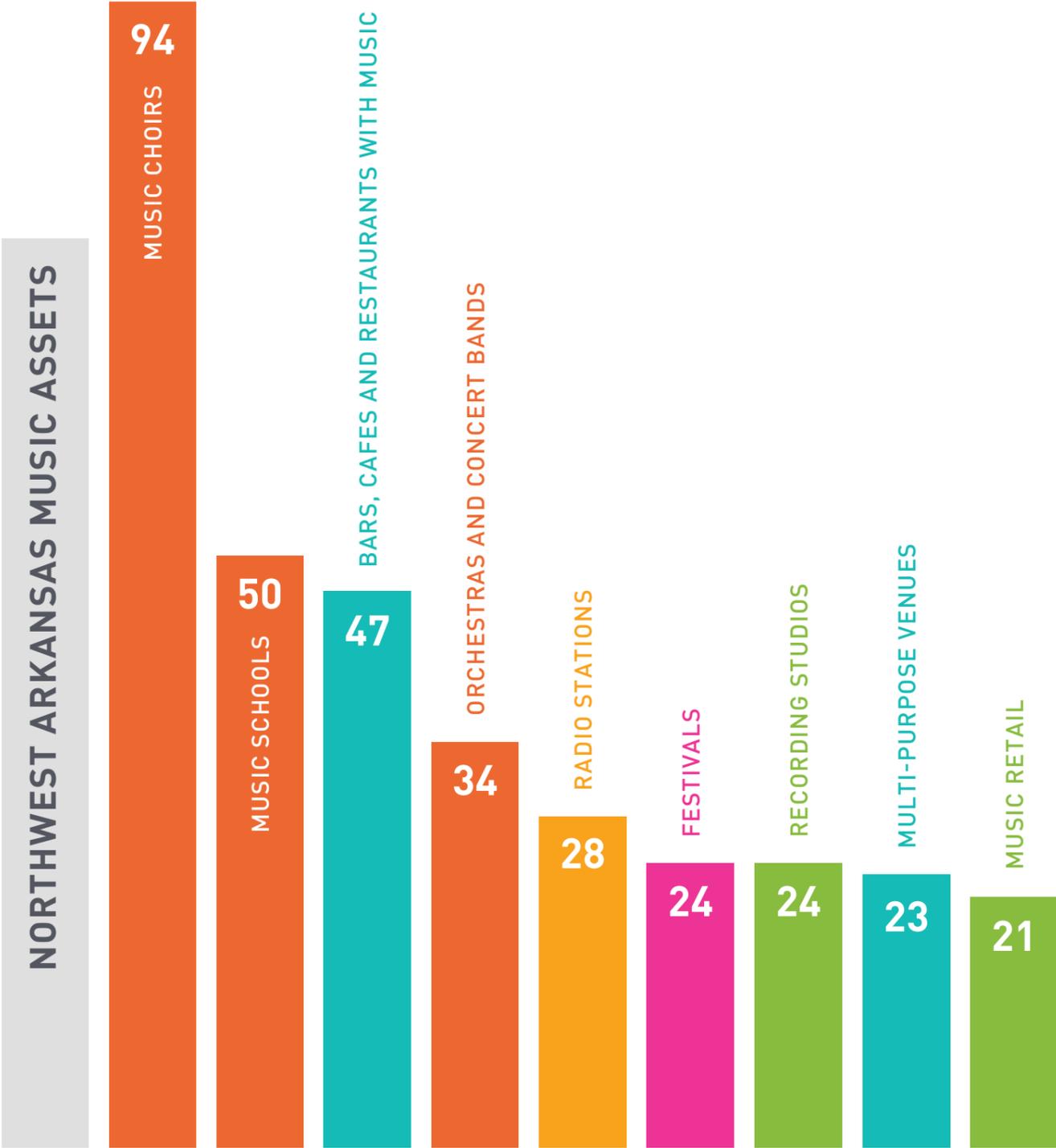
1 Artistic segment of the music ecosystem: According to the NAICS 2017 this activity comprises (1) groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions) and (2) independent (i.e., freelance) artists primarily engaged in providing live musical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

2 The values of the time series 2002-2016 were estimated using the output growth data in current dollars of the large industries related to each NAICS activity of the music ecosystem, available at the Bureau of Economic Analysis for Benton and Washington Counties.

3 Data source: Bureau of Economic Analysis

OVERVIEW OF MUSIC ASSETS IN NORTHWEST ARKANSAS⁴

Check out the Northwest Arkansas Music Map under www.sounddiplomacy.com/nwarkansas



⁴ Source: mapping tool, Sound Diplomacy research



NORTHWEST ARKANSAS' MUSIC ECOSYSTEM REGULATIONS AT A GLANCE

TOPIC	TOWN	IN PLACE?	POLICY	BEST CASE
NIGHT TRANSPORT	Bentonville	No	No public transport	Philadelphia, PA has 24-hour bus lines. Houston, TX has a nocturnal form of micro-transit called a 'jitney'. ⁵
	Fayetteville	No	No public transport	
	Springdale	No	No public transport	
	Rogers	No	No public transport	
"AGENT OF CHANGE" OR OTHER REGULATIONS TO PROTECT MUSIC SPACES	Bentonville	No	n/a	San Francisco, CA – San Francisco's Agent of Change law states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built within 300 feet of the venue.
	Fayetteville	No	n/a	
	Springdale	No	n/a	
	Rogers	Yes	The 2014 revision of the sound ordinance exempts purpose-built music venues with sound attenuation and anyone in possession of a special permit from noise complaints	
MUSIC OFFICE	Bentonville	No	n/a	Nashville, TN – The Music City Music Council is a collaboration between the Mayor's Office, Chamber of Commerce and Convention & Visitors Corp. Its focus is economic development, and it works to expand local business while attracting new businesses.
	Fayetteville	No	n/a	
	Springdale	No	n/a	
	Rogers	No	n/a	
CITY-LED GRANTS	Bentonville	No	There are currently no music-specific grant programs offered by the cities or the region, although there is Arts and Events support available from the State of Arkansas, education institutions and the philanthropic sector.	The Colorado Music Strategy is a combination funding and tourism body, with \$200,000 to give to Colorado-based artists or music businesses that will help raise the state's profile, creating a win-win relationship.
	Fayetteville	No		
	Springdale	No		
	Rogers	No		
REGION-WIDE GRANTS		No		
EVENT PERMITTING	Bentonville	Yes	Relatively easy to obtain and inexpensive. Strict regulations on the use of public buildings with a protected heritage status.	Seattle, WA – Seattle's Special Events Office has a website with extensive guidelines on how to apply and what to expect from the Office when requesting a Special Event Permit. Some of the site's useful tools are a calendar of approved events, downloadable templates and an online handbook with all city requirements.
	Fayetteville	Yes	Event applications for park and public space use can be submitted online at least 21 days in advance.	
	Springdale	Yes	There is a generic special events permit. Off-duty Police officers are required if alcohol will be consumed at the event.	
	Rogers	No	No streamlined request procedure is in place to produce an event on public or city property	
LIQUOR PERMITTING	Bentonville	Yes	Permits for all cities are administered by the Arkansas ABC division. The types of permits and license/permit application process is convoluted.	Lafayette, LA – Alcohol permitting procedures are all explained clearly online, from city to state requirements.
	Fayetteville	Yes		
	Springdale	Yes		
	Rogers	Yes		

TOPIC	TOWN	IN PLACE?	POLICY	BEST CASE
NOISE LAWS	Bentonville	Yes	Noise limit of 65 dBA during the day, 60 dBA after 11 p.m. in commercial areas	Austin, TX – The Austin Center for Events serves as an ombudsman for outdoor live music venues. It assists temporary events and venues with city-required permit processes for outdoor amplified sound and mediates between permitted venues and neighborhood groups.
	Fayetteville	Yes	Noise limit of 75 dBA during the day, 70 dBA after 11 p.m. in commercial areas	
	Springdale	Yes	Noise limit of 75 dBA during the day, 70 dBA after 11 p.m. in commercial areas	
	Rogers	Yes	Does have noise laws but no decibel limit for zoning. The AMP is exempt from noise regulations by city ordinance.	
ENTERTAINMENT DISTRICT	Bentonville	No	Although there isn't a designated entertainment district, an arts district is being developed.	Austin, TX – Austin has six entertainment districts, each with unique stipulations on noise curfews and pedestrianization. This system could be utilized in Northwest Arkansas to make each town known for its own scene and encourage locals to cross paths more.
	Fayetteville	Yes	Dickson Street is the designated entertainment district	
	Springdale	No	No designated entertainment district	
	Rogers	No	No designated entertainment district	
MUSIC WORKSPACE/HUB	Bentonville	No	No hub in the area, but other co-working spaces are available	Fort Collins, CO – The Music District in Fort Collins has 10 music-related businesses and its offices are 80% music-related. Tenants have below-market rent. The district has a rehearsal space, educational resources and networking opportunities, as well as an Airbnb for touring artists.
	Fayetteville	Yes	Guisinger Music House is a music business co-working space located in Fayetteville	
	Springdale	No	No hub in the area	
	Rogers	No	No hub in the area	
MUSIC TOURISM POLICY	Bentonville	Yes	The visitor bureau has integrated music tourism in its strategy	Chattanooga, TN – The Chattanooga Convention & Visitors Bureau has an official music marketer that makes sure music and nightlife are at the forefront of visitor platforms.
	Fayetteville	No	No policy in place yet	
	Springdale	No	No policy in place yet	
	Rogers	No	No policy in place yet, but a music events calendar is featured on the city's tourism website	

⁵ A jitney is a bus or other vehicle that carries passengers for a low fare that provides a cheaper alternative to taxis and ridesharing services.

NORTHWEST ARKANSAS MUSIC STRATEGY VISION

At the beginning of the research process, Sound Diplomacy articulated the following goals to identify how the Northwest Arkansas' music ecosystem and its stakeholders can be best supported from the bottom-up and the top-down:



Photo: Haxton Road Studios

SWOT

STRENGTHS

- **Political will** to develop the music ecosystem from the local and regional councils
- Abundant pool of aspiring **homegrown musicians** and music students
- **Supportive scene for songwriters**
- **Proximity to main music cities** in the region, including Nashville, Tulsa and Little Rock, offering good possibilities for stop destination in touring
- **Proximity to most large U.S. corporations** and service providers to the "Big 3" in the local area, driving growth and attracting businesses
- **Access to an increasing number of private funding resources**, including non-governmental and philanthropic funding, private for-profit investment (e.g. sponsorship), and crowdfunding, among others
- **Growing music economy** with a strong for-profit and nonprofit music and culture sector, although some professional areas are still underdeveloped (e.g. music PR)
- **Music activities and live music events** available seven days a week, many of them free
- **Outstanding safety standards** for live music events recognized by patrons and the government
- **Active market for music education** across the region, especially after-school activities for youth

WEAKNESSES

- **Scarce stable employment opportunities in the regional music industry**; low representation of music business roles and companies (managers, agents, etc.), and music producers to support local artists
- **Lack of structured industry training opportunities** for musicians and industry jobs within the region
- Lack of a clear framework and enforcement for **noise regulations** across the region
- **Very limited dedicated spaces for musical collaborations** and for artists to "test and fail"
- **Undeveloped night time economy**, current offer caters mainly to students in Fayetteville
- Perceived **lack of adequate and streamlined promotional channels** for regional music events
- Many artists on tour cannot be routed to the region due to a **lack of availability and appropriately-sized venues**
- **"Local" music has a negative stigma**; many local audiences would pay more than double to see national and international artists
- **Lack of public transport at night** on a local level and within the region
- **Towns tend to operate individually** (versus regionally) and music scene and professionals operate in "cliques"
- **Current hotel capacity** could not support the growth of music festivals in the region

OPPORTUNITIES

- **Widening popularity of music tourism** and music festival packages to **discover music**; appealing from a tourism development perspective and for corporate sponsorship
- Expanding opportunities to **diversify the regional music economy**, including licensing, sync, publishing and scoring
- Increasingly **diversified audiences** for music, including mid-to-high spending capacity
- Region is widely recognized as a **comfortable place to live**: inspiring outdoors, peaceful lifestyle and affordable housing
- **Constant inflow of people** to expand the music community, including University of Arkansas students and young professionals
- **New music spaces to be unveiled** in the upcoming years in different cities, including music venues, amphitheatres, and recording studios

THREATS

- Constant population growth is making **downtown increasingly unaffordable** in most cities in Northwest Arkansas, which harms artist housing in particular and **displaces other vulnerable demographics** from the area
- Increased development and density across the region **may create sound nuisances for residents** if not planned accordingly
- **Proximity to cities with more developed music industries** (e.g. Nashville, Austin, etc.) means artists leave to develop their careers in those cities
- **Disappearance of all-ages shows** and permanent venues, as they are incompatible with most liquor licenses
- **New competitors may disrupt the success of more established stakeholders** invested in the region, which may result in a more competitive and less collaborative region
- **Funding cuts** in the arts & culture section of federal and state budgets

ARTIST, MUSIC PROFESSIONAL AND COMPANY OPINION



Source: Survey; respondents were asked to rate different aspects of the regional music ecosystem. Ratings were done on a scale of one to five stars, one star meaning "this is a serious challenge", and five indicating a "great asset".



KEY FINDINGS



Photo: Bike Rack Records/Scott C. Wood

KEY FINDINGS

GOVERNANCE & LEADERSHIP

The Northwest Arkansas region continues to be one of the fastest growing regions in the U.S. Culture and music are identified as key sectors in increasing the quality of life and driving economic growth; more and more initiatives are being developed around music, both on a municipal level and from non- and for-profit stakeholders.

The local music scene operates in 'cliques' or silos formed by like-minded people, making it difficult for outsiders to join or collaborate. A **music office** is crucial in championing the industry and creating synergies for local stakeholders, but Northwest Arkansas currently lacks a representative body of this type. A central office with a regional perspective should help in fostering a greater sense of collaboration between the cities and overcome silos.

The cities in Northwest Arkansas are very communicative and collaborative with each other, holding periodical meetings, sharing resources and supporting each other in their respective issues. This creates the perfect ground for a common strategy that, at the same time, takes into account each city's idiosyncrasies.



Photo: Artosphere Festival/Walton Arts Center

LICENSING AND REGULATION

The **quality of music policies** will build the foundation for the long-term growth of the Northwest Arkansas music ecosystem and create a healthy relationship between the music ecosystem and its stakeholders, such as residents and property developers. As the region is growing in terms of population and will require more residential development, clear policies will create a fair playing field between commercial, residential and cultural development of spaces and make sure that investments in the music ecosystem are safe and long-term.

Apart from Rogers, all cities have streamlined processes for **event permitting**. **Liquor permits** for all cities are administered by the Arkansas ABC division. The types of permits and license/permit application process is convoluted. Fayetteville is the only city in Northwest Arkansas that has an **entertainment district** defined through zoning and different regulations. It should be noted that a new bill in favor of entertainment districts was passed by the State Legislature in April 2019. The new law (Act 812) promotes

hospitality and tourism in areas permanently or temporarily designated as "entertainment districts," allowing on-street alcohol consumption within its boundaries.

Most of the cities have explicitly integrated **music-related uses in their zoning codes**. However, the present zoning classification may lead to coexistence issues with nearby residents despite the non-residential classification of such zones. Only Fayetteville currently recognizes outdoor music uses in its zoning plan, despite Bentonville and Rogers strategically integrating this in their development plans through events and outdoor structures (i.e. amphitheaters, arenas).

Agent of Change is not in place in Northwest Arkansas. While this may not be a problem now, it is a good preventative measure and could become an issue as the city continues to expand up and out. Building codes in Northwest Arkansas do not specifically address sound amplification uses or restrictions. Only Fayetteville, Bentonville and Springdale set **decibel limits** on sound. Before the Arkansas Music Pavilion was completed in 2014, the sound ordinance in Rogers was revised to provide an exemption for, among others,

purpose-built music venues with sound attenuation and anyone in possession of a special permit.⁶ There are notable differences between the cities and how they address sound limits. Springdale is overall the most liberal city when it comes to sound. Bentonville's earlier noise curfew could possibly impact the type of activities and nightlife currently happening there.

Definition: The Agent of Change Principle holds the entity that creates a change in an area responsible for the impact this change can have in that area. In the case of music, usually the Agent of Change requires the building that arrives the latest (be it the music venue or the residential development) to soundproof adequately to avoid nuisances and complaints and/or inform the new residents that they are moving next to a music venue or within an entertainment area which permeates noise.

⁶ City of Rogers (2014)



Photo: The House of Songs

GRANTS AND INCENTIVIZATION

With the right support systems, the economic growth of the music ecosystem can be boosted.

There are currently **no grant programs directly offered by the cities, region or state** to participate in music creation and/or develop music activities and/or organizations. Applicable grants are mainly led by foundations that provide support for the arts and culture at large, including individuals and organizations.

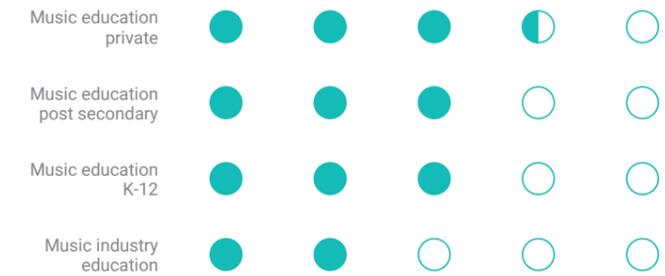
Currently **no incentive for music businesses and/or music creation** is led by cities, the region of Northwest Arkansas or the state of Arkansas. The only specialized incentive currently available is for digital productions/film, developed through the Arkansas Film Commission, which the Northwest Arkansas Film & Entertainment commission coordinates on a regional level.

Overall, only 18% of artists/professionals/companies surveyed have benefitted from a grant for their music activities, and 73% of respondents in those roles have never received a grant.

EDUCATION

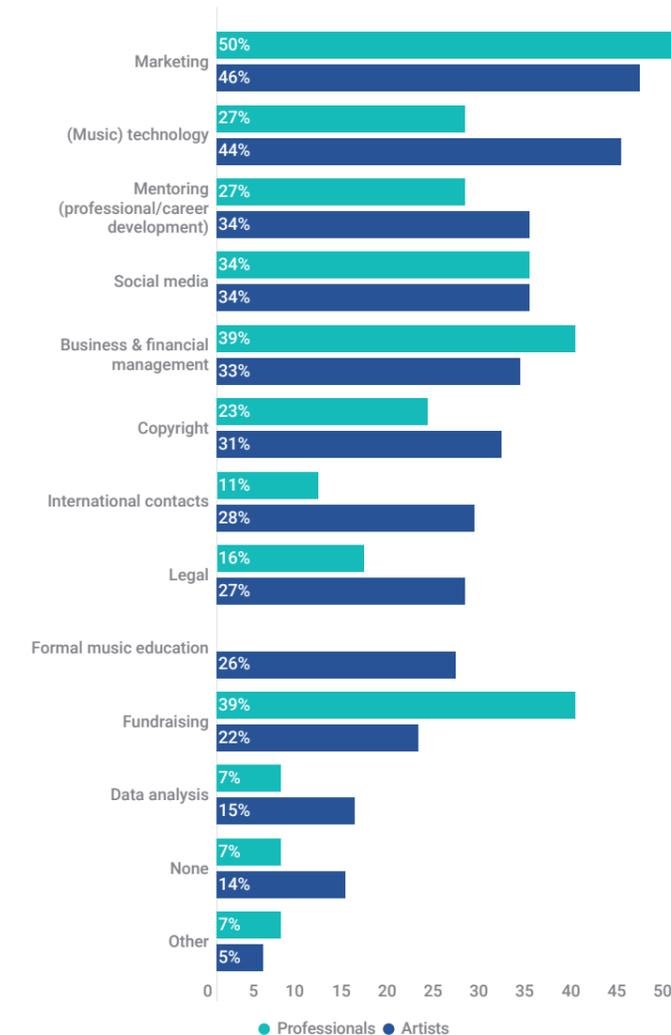
Both from a general education perspective, but also from a music ecosystem perspective, it is important to enable access to music education and create various touch points from an early age onwards. Music business and professional development training is key to create more employment opportunities in the music sector and start building music business capacities within the region.

RATINGS ON THE AVAILABILITY OF HIGH-QUALITY MUSIC EDUCATION IN NORTHWEST ARKANSAS BY ARTIST, PROFESSIONAL AND COMPANY RESPONDENTS



Source: Survey

ARTISTS' AND PROFESSIONALS' RESPONSES TO SKILLS AND COMPETENCIES GAPS



Source: Survey

ARTIST DEVELOPMENT

There is a constant influx of diverse talent coming into Northwest Arkansas through the University of Arkansas (UARK), the corporations, and those who relocated independently, with incredible potential for retention and development. Developing strong **artist support structures** would potentially attract and retain artists within the region, since it was argued that most local musicians and UARK graduates relocate elsewhere to develop their music careers.

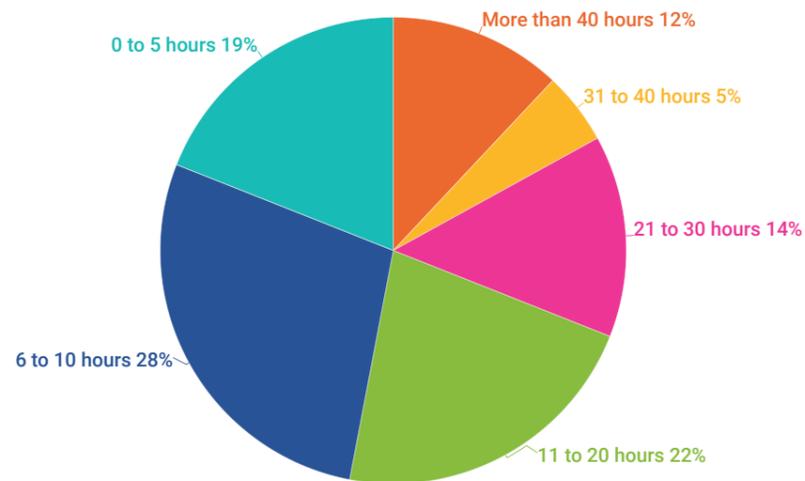
The majority (82%) of artist respondents do not have any type of **professional support**: only five have a PR/marketing agent or a booking agent, and only two respondents have a manager.

Results also show that, although venue respondents in the surveyed sample mostly produce ticketed shows, Northwest Arkansas artists performed a considerable amount of unticketed and/or free shows for their audiences. In fact, 16% of artists surveyed played exclusively free shows in the last year, and 46% of artists performed half or more of their shows for an audience that had not paid to see them.

Better and more diverse artist remuneration not only helps retain and attract artists within the region, but that money will then be reinvested into the music ecosystem by hiring other music professionals, booking recording studio sessions and rehearsal spaces, purchasing music in shops or investing in further music education, among other expenditures.

Artist respondents who provided information on their music-related activities and finances⁷ mostly work less than 20 hours per week on their music and/or in the music industry (69%), with only 12% of artists working a full-time equivalent job of 40 hours or more per week.

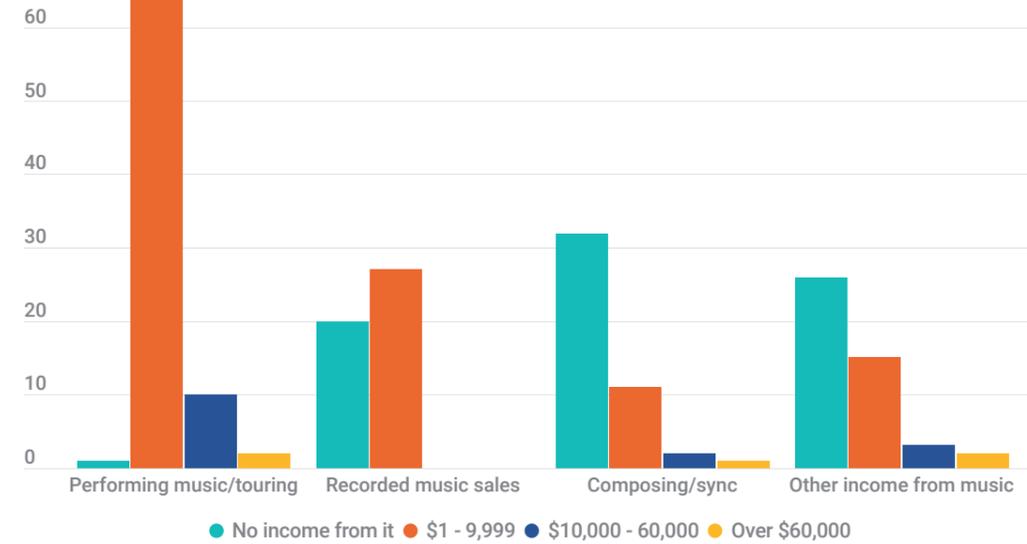
ARTIST RESPONSES ON THE HOURS PER WEEK SPENT WORKING ON MUSIC ACTIVITIES



Source: Survey

⁷ Artists who successfully provided financial information in questions (n=136) are referred to in this section as 'Artists' or 'artists surveyed'.

ARTIST RESPONDENTS' SELF-REPORTED EARNINGS FROM MUSIC ACTIVITIES



Source: Survey

DEVELOPMENT OF THE MUSIC INDUSTRY

Although the surveyed professionals and companies seem to do well despite balancing different roles, a shortage of professionals and organizations primarily dedicated to artist support, music promotion and music tech/innovation hinders the development pipeline in the music ecosystem, since the region can only expand its live-music sector so much to cover live music demands and tourism capacity in the area.

Most of the professional development opportunities target artists/music creators, with no program available for the professional development of music industry workers. Still, the variety of professional development programs for artists is limited, mostly targeting general marketing/business skills development (not music business-specific), performance opportunities and music training.

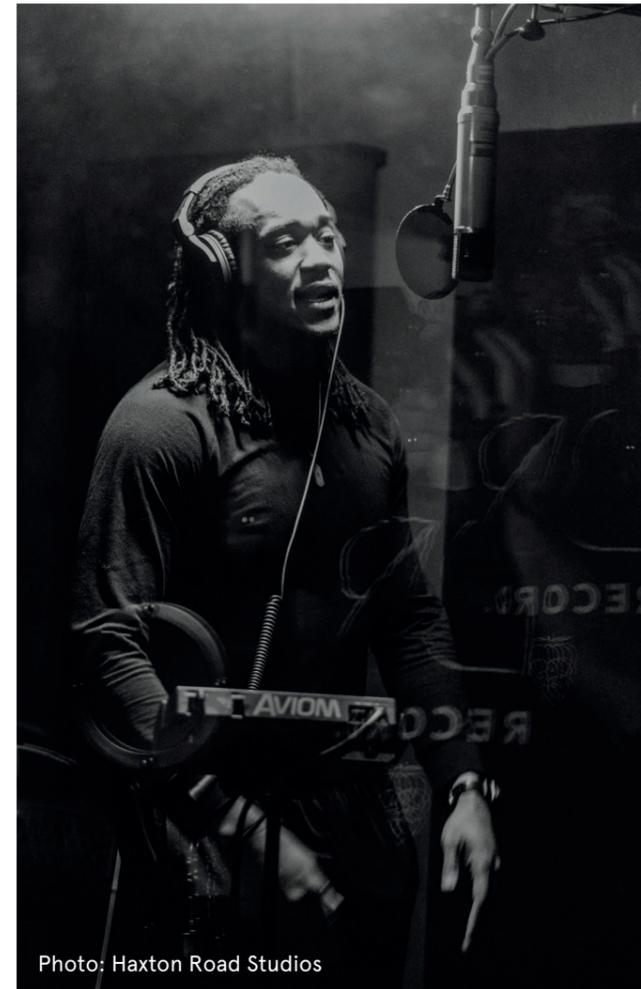


Photo: Haxton Road Studios

AUDIENCE DEVELOPMENT

Regional pride in the live-music ecosystem and its venues, in particular, is visible again in the ratings given by audience respondents. The best-rated asset in the ecosystem is by far 'safety in venues,' with an average of 4.5 stars, remarkably the only area without any 1-star rating given by a respondent. Other outstanding assets (all rated with an average of 3.5 stars) are 'ticket prices,' 'quality of live music venues,' 'sense of community' and 'quality of local talent,' all of them referring positively to the live music ecosystem in the region.

Certain audiences are noting a lack of diversity in the live music ecosystem in terms of offering, events and the music community itself. Other key challenges have to do with music-related planning and infrastructure, such as parking availability near venues and events or having late dinner options after a show.

The amount of **unticketed concerts** in Northwest Arkansas may be encouraging an unbalanced playing field for promoters, venues and artists, since audiences could get used to free live music performances and eventually undervalue the work behind putting together a show. Overall, regional audiences are interested in music events featuring local artists, with most respondents being 'interested' or 'very interested' in these types of events (73%). Although the majority thinks local artists' events are easy to find (37%), this is not a given for everyone – many still consider finding out about music events featuring local artists to be rather 'neutral' or 'difficult' (53%). The percentage is also similar for music events in general – 49% find it 'neutral' or 'difficult' to find out about concerts.

Although the region is well connected and positioned between major music cities, roundtable participants from different sectors have identified

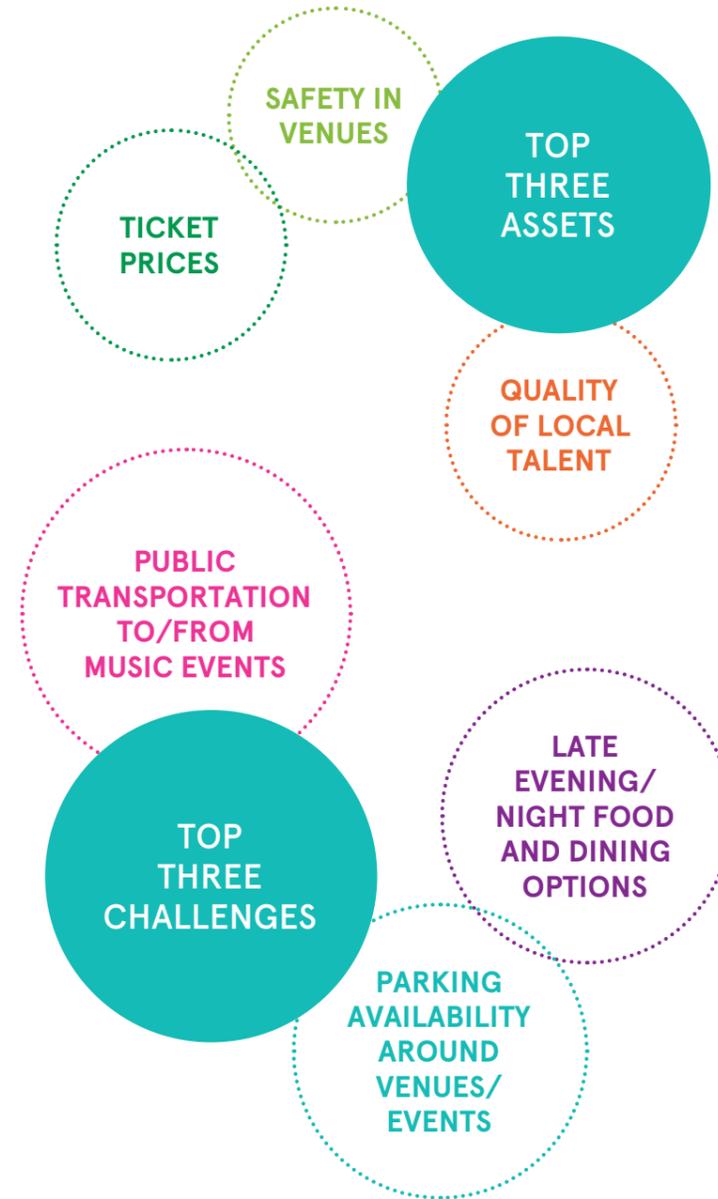
gaps in the music venue ladder that are hampering the audience development of local artists and the local touring circuit. However, building those venues is currently a challenge due to a still-developing infrastructure in some areas and cities (eg. Rogers), the lack of noise regulation standards and policing to abide by and a framework to develop licensed music activities across the region that would prevent events from shutting down or cancelling shows due to neighbor complaints.

There is an uneven playing field for local artists to compete with the marketing power of U.S. artists who are signed by major record labels, playlisted in streaming platforms and get plenty of coverage in the general and specialized media. Regardless of the promotional challenges, the situation would likely improve if more local artists of diverse genres were covered and promoted in the local media.



Photo: Mike Abb

ARTIST, MUSIC PROFESSIONAL AND COMPANY OPINION



TOURISM

Of the four cities in Northwest Arkansas, only Bentonville has a music tourism policy. Both Bentonville and Rogers integrate music in their tourism websites and as a strategic tool for tourism development.

Places and spaces with unique and diverse music offers benefit from increased tourism. Music acts as an effective marketing tool for towns, cities and developments, creating globally recognized brands. The quality of life, affordability and natural beauty of Northwest Arkansas as a region are some of the main assets that companies are using to attract tourism and talent to the region. The increasing pressure on the number and availability of music spaces and funding resources in nearby cities, including Austin, is presented as an opportunity to grow the region's talent pool and music business competitiveness. Cities in Northwest Arkansas also have the chance to join forces with lesser developed music cities, such as Huntsville and Chattanooga, and boost their music tourism offer by developing new partnerships and shared networks.

RECOMMENDATIONS AND NEXT STEPS



Photo: Roots Festival/Phil Clarkin

The Northwest Arkansas Council, the newly created arts service organization, and possibly a regional music office, will play a pivotal role in moving forward with these recommendations and implementing the strategy. However, the success of this strategy depends on the collaboration of many different actors in the region: regional city governments, musicians, business owners and music professionals, students, tourism associations, bar- and restaurant owners, the university and other music educational providers, just to name a few. As part of this process, it will also be crucial to include stakeholders and communities who have not yet voiced their feedback.

Some of the recommendations are implementable in the short-run, while others require long-term planning, coordination and lobbying efforts. These recommendations must be implemented in a certain order in order to be the most effective and realistic timeframes need to be considered. They have been classified into **TIER 1**, **TIER 2** and **TIER 3**, with **TIER 1** being a one-year implementation range, **TIER 2** being one to two years, and **TIER 3** being long-term goals.



Photo: TASC - The Station



Photo: Black Street Records/Mike Abb

RECOMMENDATIONS AND NEXT STEPS

TIER 1 (YEAR ONE TO TWO)

RECOMMENDATION

Establish the Northwest Arkansas music office

Action Steps

- Appoint a music officer
- Set up a 2-person team at the music office

RECOMMENDATION

Set up the music office website

Action Steps

- Create an online overview for permits and licenses required for live music
- Build and maintain a digital database of the regional music ecosystem

RECOMMENDATION

Establish a music board

RECOMMENDATION

Create industry guides for music professionals

RECOMMENDATION

Hold two open forums per year for the music community

RECOMMENDATION

Coordinate monthly meetings with city departments and state organizations

RECOMMENDATION

Strengthen and further develop collaborations with U.S. and international music cities

RECOMMENDATION

Assess partial reinvestment of tourist tax on a county and local level for the creation of a music fund

RECOMMENDATION

Encourage companies headquartered in Northwest Arkansas to promote music internally

RECOMMENDATION

Enable professional development opportunities for music business professionals

Action Steps

- Create a program of music business masterclasses
- Host 'music industry socials' networking events after the masterclasses

RECOMMENDATION

Establish music industry traineeship and internship programs

RECOMMENDATION

Define the role of local, regional and state stakeholders in the promotion of music tourism

RECOMMENDATION

Sponsor multi-day festivals showcasing local artists

RECOMMENDATION

Work together with local festival and event promoters to create synergies between music and tourism

Action steps

- Create the Northwest Arkansas music month
- Organize press-trips to festivals and big music events
- Create music festival and experience tourism packages

RECOMMENDATION

Create a 'music place' certification for cities in Northwest Arkansas

TIER 2 (YEAR TWO TO THREE)

RECOMMENDATION

Set up a 'fair play' guide and certificate in artist booking

RECOMMENDATION

Set clear enforcement guidelines and policing for local noise ordinances

RECOMMENDATION

Set regulatory requirements to protect music spaces and promote music use

Action steps

- Assess the implementation of the 'Agent of Change' principle in key activity areas
- Include 'music establishment' as a use category in zoning and development plans
- Designate reserved musician loading/unloading zones near venues

RECOMMENDATION

Study the impact of extending opening hours for restaurants and shops in entertainment areas

RECOMMENDATION

Assess the viability of transport partnerships in night transport provision

RECOMMENDATION

Create a music development fund for artists and organizations

Action steps

- General funding pool
- Funding to increase the capacity of songwriting camps

TIER 3 (LONG-TERM GOALS)

RECOMMENDATION

Build a music hub

Action steps

- Offer rehearsal rooms at affordable rates
- Offer shared recording studio space for producers and artists
- Offer flexible co-working and private office space for music companies and freelancers
- Have an in-house incubation program for musicians and music professionals

RECOMMENDATION

Ensure access to affordable living spaces for musicians

RECOMMENDATION

Work with the state of Arkansas to create incentivization programs for the economic development of the music ecosystem

Action steps

- Tax rebates for producing and/or recording in regional studios
- Tax rebates to subsidize local artist performances in permanent spaces (for-profit and nonprofit organizations)
- Funding and in-kind support to incentivize entertainment and music companies to relocate and expand business (for-profit and nonprofit organizations)

RECOMMENDATION

Create a network to provide music education collectively across the region

RECOMMENDATION

Implement a 'musician in residence' program in schools

RECOMMENDATION

Introduce new tools and curriculum for music education

RECOMMENDATION

Create an international music industry annual event

RECOMMENDATION

Build an aggregator of music listings

RECOMMENDATION

Start a 'Friends of Northwest Arkansas Music' membership program

RECOMMENDATION

Work with the state of Arkansas to develop a music heritage map, database and archive

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.

ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual who participated in the research, shared information, responded to the survey and spread the word about the study. Your participation and input has been invaluable and this work could not have been done without you. Thank you.



SOUND
DIPLOMACY

© Sound Diplomacy
www.sounddiplomacy.com