SOUND MUSIC CITIES

The Charlotte Music Ecosystem Study and Action Plan

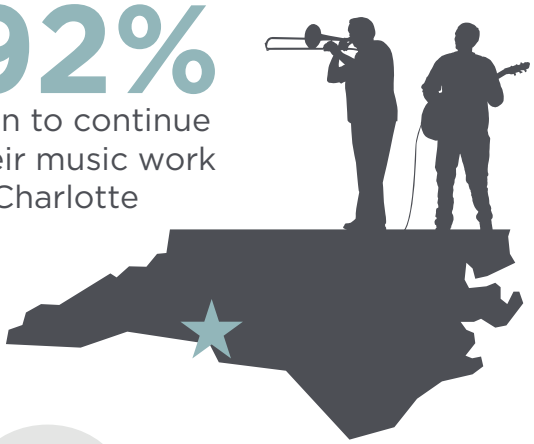
Both Charlotte Music Makers **and** Music Fans are hungry to grow the scene!

"I need the music community more consolidated and working to help cultivate the local scene."

– Music Professional

92%

plan to continue their music work in Charlotte



81%

of venues and presenters are planning to book more local music in the future

27%

of CharMeck's general population is **very interested** in discovering new music

That's almost 300,000 people!

"Music is the soul of the city and ours should sing!"

– Music Fan

"There are musicians here and people who like music, so I get confused why it's not a bigger scene."

– Music Fan

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We greatly appreciate the time and passion that so many people brought to this work both from the music world in Charlotte and from fans, during interviews, focus groups, or completing the online survey (including completing all the questions and providing lengthy comments).

We thank you for your trust and patience, especially the long-time builders of Charlotte's professional music scene. The programs and accomplishments of these extraordinary individuals and groups will go unmentioned herein not as a judgement of their impact but because we can't pretend to know everything that is going on. There would be glaring omissions. At the same time, we believe music community builders share a no-nonsense focus on making

tomorrow's music scene better. In that spirit we've chosen to present this work with a focus on action moving forward.

That said, we'd be remiss not to specifically thank The UNC Charlotte Urban Institute for use of Your VoiceCLT for our general population survey, the CRVA for sharing their data, The Underground, Evening Muse for hosting many work sessions, and the following individuals who helped in a variety of ways including Clarke Allen, Shawn Allison II, Tony Arreaza, Rick Ballew, Eddie Bibbs, Ivi Bilich, Lisa Bishop, Tariq Bokhari, Rick Booth, Ron Brendle, Eric Brice, Kyle Bridges, David Britt, Alexis Bruce, Cathy Buchhofer, Robert Bush, Stephanie Cantrell, Jeff Cheen, Sara Colee, Dave Collier, Troy Conn, Daniel Coston, Arturo Coto, Ty Crockett, Harvey Cummings, Dae-Lee, Doug Daniel, Micah Davidson, Brandon Davis, Lonnie Davis, Mary Deissler, Joni Deutsch, Heath Dillard, Kate Dordick, Bob Durkin, Mark Eckert, Le Anna Eden, Larken Egleston, Justin Faircloth, Larry Farber, Perry Fowler, Randy Franklin, Tom Gabbard, Davita Galloway, Chris Garges, Caroline Garry, Diane Gavarkavich, Tina Gibson, Simon Gordon, Laura Graff, Tammy Greene, Steve Harkins, Donnie Haulk, Bruce Hazel, Lavonte Helms, Paul Hendershot, Hanoch Hickman, Josh Higgins, DeAnthony Hill, Derrick Hines, Brandon Hinson, Melissa Hovey, Danny Hurley, Jesse Hyde, Mohammad Jenatian, Jason Jett, Stefan Kallander, Mike Kitchen, Joe Kuhlmann, Cameron Lee, Diondre Lewis, Taylor LoGrasso, Jody Mace, Willa Mamet, Byron McClendon, Gregg McCraw, Howard McNair, Chuck McShane, Tim Miner, Tracy Montross, Tom Murray, Joe O'Connor, Matt Olin, Chris Ozment, Dane Page, Chris Peace, Archie Pearson, Ernest Priester, Dolphus Ramseur, Dennis Reed, Josh Robbins, Jake Rothwell, Mariah Scott, Michael Seman, Corri Smith, Wes Smith, Jermaine Spencer, Walt Stewart, Mike Strauss, Brandon Sutton, Daniel Sutton, Sam Tayloe, Ken Thomas, Jay Tilyard, John Tosco, Doak Turner, Laramey Watson, Meg Whalen, Laura White, Charles Whitfield, Paul Whitley, Anne Wiberg, Mark Williams, Taylor Winchester, Brandon Winston, Scott Wishart, Brandon Young and Eddie Z.

SURROUNDED BY THE SOUND
JUL 31
@ 9:00 PM
HARBOR
PINK POTS
(the last show)
blanket fort
taxing
josh cotterino
THE CREATIVE
A R B
SOUL GIRL
BRIGADE
CHARLOTTE ART LEAGUE PRESENTS
SUMMER AT THE STATION HOUSE
JULY 28 2018
ARTS + CULTURE FESTIVAL
SHOP/EAT/CREATE
CHARLOTTEARTLEAGUE.ORG
PARTY
Stars
28, 2018 • 9PM
NEIGHBORHOOD THEATRE
36TH ST, CHARLOTTE NC 28205
Meowmode
Album Release
Aug 10th
FREE TACO AUTENTICO
TRASH
TWINVASION
OCTOBER
SATURDAY

Executive Summary

Charlotte's music scene is full of energy and poised for rapid growth thanks to its diverse talent and tireless advocates. This work provides tools for acting on this momentum, specifically data, frameworks and suggested programs and initiatives. It is a call to action for music people to step up and lead with greater coordination, and for the larger community to support and interface with this effort.

Music ecosystems are interconnected networks of creative and business professionals producing music-related outputs within a city or region. The focus of this work is two-fold: First, it collects and provides insight on a range of data from this music ecosystem as well as from music consumers, and second, it provides an action plan with a range of suggested pathways for a collective effort to build a more robust and vibrant music scene.

The recommended framework for developing music-based leadership and organization is ad-hoc and autonomous grassroots working groups. We strongly encourage music people to enlist through musiceverywhereclt.com, attend early meetings and take initiative in shaping this next chapter, based on these five actions:

ACTION PLAN A:

Audience Development

There is widespread belief that Charlotte's population lacks interest in live music. This was not supported by the data. In fact, 27% of the general population is very interested in discovering new music. Music fans especially want more, giving a tepid response when asked how well Charlotte's music scene currently serves their needs. **Recommendations include** more local music journalism support, a local music awareness campaign, a Give to Charlotte Music Day, more music patronage tools and a Charlotte Up Close festival.

A separate Charlotte Audience Development Guide is provided as an addendum to this action plan, which provides a wider presentation and analysis of the audience data.

ACTION PLAN B:

Resources for Creative Musicians

Musicians in Charlotte are not doing well economically. A majority have full-time jobs in another industry, and this is deeply dissatisfying for them. Median income from music is less than $10,000, 80% work as freelancers, and half haven't even completed basic royalty registrations to collect from their work. However, they are committed and optimistic about continuing in music and staying in Charlotte. **Recommendations include** a Charlotte musician's league to serve as the working group for this initiative with consideration of actions such as a music resources expo, mid-level continuing education sessions, more formalized mentorships, a music creative economy workforce study, and mini-grants and working capital loans for music creatives.

ACTION PLAN C:

Music Industry Development

Commercial music economies grow in cities with music-friendly regulatory policies. The loss of legacy music venues and the pace of land development and new residential growth were strong concerns in the data. The Charlotte music industry – the many small businesses that support and produce music creativity, such as music venues, booking agents, publicists and studios, lack confidence despite their skills and experience. **Recommendations include** holding a live music venue summit, forming a music venue alliance, conducting a land use technical assistance panel, suggesting updates to the City's current noise ordinance, hosting a regional music industry conference, supporting more live music at Charlotte Douglas Airport, developing music exchanges with nearby music cities, helping the city endorse local music providers to the business community, and encouraging hiring of professional live music event designers.

ACTION PLAN D:

The Charlotte Music Coalition

Economic challenges for Charlotte's music makers will increase as the vibrancy of the city grows. Already 28% are reporting recent increases to housing costs. Now is the time to structure how music leaders across the various working groups will coordinate their entire ecosystem, and at the same time maximize the collaboration with community, philanthropy and government in order to contribute real responses to these big issues. **Recommendations include** engaging a staff position at Music Everywhere CLT to support all working group activity, developing and communicating philanthropic champions to sustain the first three years of activities, structuring and launching a Charlotte Music Coalition and long-term advocacy for systemic changes to better support the music ecosystem.

ACTION PLAN E:

Music's role in Diversity, Equity and Inclusion Initiatives

Charlotte's communities of color were not adequately represented in this work, especially the online survey. We, as music people, can do better on this by getting more involved in initiatives currently underway city-wide to bring about new access to opportunities. This starts with a working group led by musicians and music industry leaders of color who can advocate for music's crucial role in systems change. They can also help the music scene internally prioritize equity and inclusivity across all working group initiatives. **Recommendations include** a summit to attract interested organizations to the table, a paid internship program specifically for disadvantaged talent to get access to industry experience, a song workshop to showcase how Charlotte's diverse community of creatives collaborate, a music education mapping and inclusion initiative with CharMeck Schools and ultimately a new census to collect a fairer representation of Charlotte's music ecosystem.

" … Support weird, support different, and support uncomfortable, because that's what makes our music scene great. We need to be ourselves, not imitate whatever Pitchfork or NPR is pushing at the time."

– Comment from online respondent

Introduction

Charlotte's music scene, like Charlotte itself, is growing and changing rapidly.

"I didn't expect to want to stay here. And, I started really falling in love with Charlotte, and as soon as I decided I'd really like to start investing in the creative community here and bring people together, is really when I started feeling connected to the city."

– Emily Sage/Amplifier/WFAE [1]

Charlotte possesses an impressive combination of inspiring spaces, diverse creative talent and passionate advocates. The data collected herein shows that music people are optimistic, they see momentum, and they intend to continue their efforts in Charlotte over the next three years. Venues and presenters expect their revenues and bookings of local artists to continue on their current path of growth.

Therefore, our primary goal is to connect the data we collected with simple strategies for grassroots development. This will help the vast network of freelancing music people in Charlotte to grow further, connect and lead themselves as a community and an industry, and to prepare for the challenges of a fast-growing urban landscape with greater ownership and accountability for their own future.

But even so, music people can't do it alone. So, we'll also explore how the larger community can best be of service; to learn, work through and even in some cases to let go of some of the roles and perceptions that are discouraging leadership within the music world. Municipal and civic leadership, charitable supporters, community investors and music fans are key partners in widening the road for Charlotte's music people.

Therefore, a significant portion of the work herein focuses on helping partners "pick a lane" in partnership with the music scene.[2]

The data and perspectives provided by Charlotte citizens for this work were extensive. Interviews, group discussions and in-depth surveys provided a combination of real numbers and lived experience that help us dig into deep and systemic issues not just of the makers but also for consumers of live music. The audience told us they desire more from Charlotte as a music city. They are "somewhat" satisfied, they want to help, and their insights are useful for designing better music experiences.

The basis for this analysis is Charlotte data by Charlotte people. Included are case studies from elsewhere to inspire ideas, but the intent is not to prescribe external solutions but to empower processes that are music-led and armed with internal knowledge so they can hit the ground running. For that reason, we refrain from benchmarking to other cities, in part because comparable data on music ecosystems is just emerging, but more importantly, Charlotte music people recognize the value of building a better version of their own scene rather than trying to copy or compete with other music scenes.

This action plan focuses on five main themes for specific work groups to organize around: audience development; the needs of music creatives; how industry, especially place-based music businesses, can help government, nonprofits and the private sector become more effective partners; the role music can play for improving outcomes in Charlotte as an inclusive and equitable community; and finally the structural resources necessary to help the music ecosystem become accountable for its own future.

Action Plan Roadmap

IMMEDIATE

Small Wins/ Connecting

- Working groups form
- Summits and Expo
- Champions secured
- Support staff hired

1-2 YEARS

Working Groups Align and Act

- Programs in five areas become operational
- Working groups begin collaborating
- Coalition launches with steering committee

3+ YEARS

Coalition Drives Agenda

- Music industry sustains action
- Re-measurement, accountability, adaptation
- Advocacy for long-term public support and policy change

We define a music ecosystem as an interconnected network of creative and business professionals producing music-related outputs within a city or region.[3] It can be very helpful for music people to see that despite all their different activities there is a common interest. It's also very helpful for the larger community to understand their own music culture as one interdependent effort. Finally, it compels us all to consider why a hybrid commercial creative activity deserves community support.

We believe Charlotte's advantage as a music city is its diversity. Charlotte isn't just one genre, culture, ethnicity, tradition or cool neighborhood. It is numerous clusters of vibrant music scenes, many of which currently thrive underground. New original music expression is a powerful reminder, in very real terms, of how diversity drives innovation.[4] You can hear it, and it sounds fresh and interesting. Even better, when it comes from within one's own community, you can't help but feel pride and a greater sense of purpose and belonging.

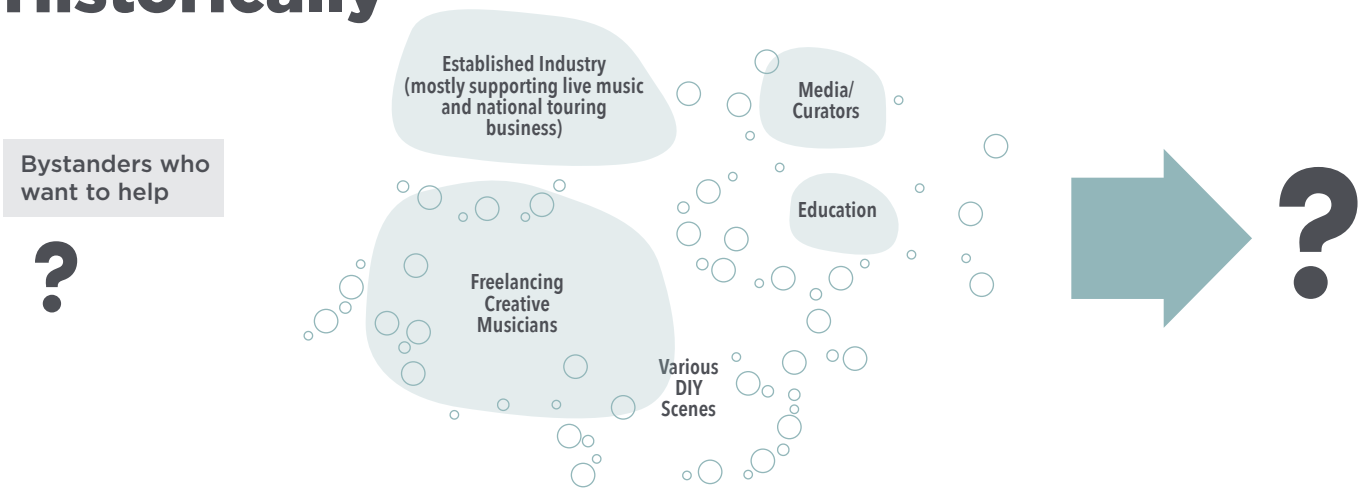
Creatives understand how to turn this concept into action, by writing songs and getting on stage together. As a wise participant (and Charlotte native) stated,

"Charlotte music sounds like home."[5]

This can be true and still be inclusive of so many different sounds. For in the same way that thousands of people live different experiences in the same urban space in Charlotte, its music can be many different sounds and still sound like home. This is the fuel that is driving growth and energy in Charlotte music today.
This is what helps to make Charlotte a distinct place, and this is why it is so vitally important to nurture its growth.

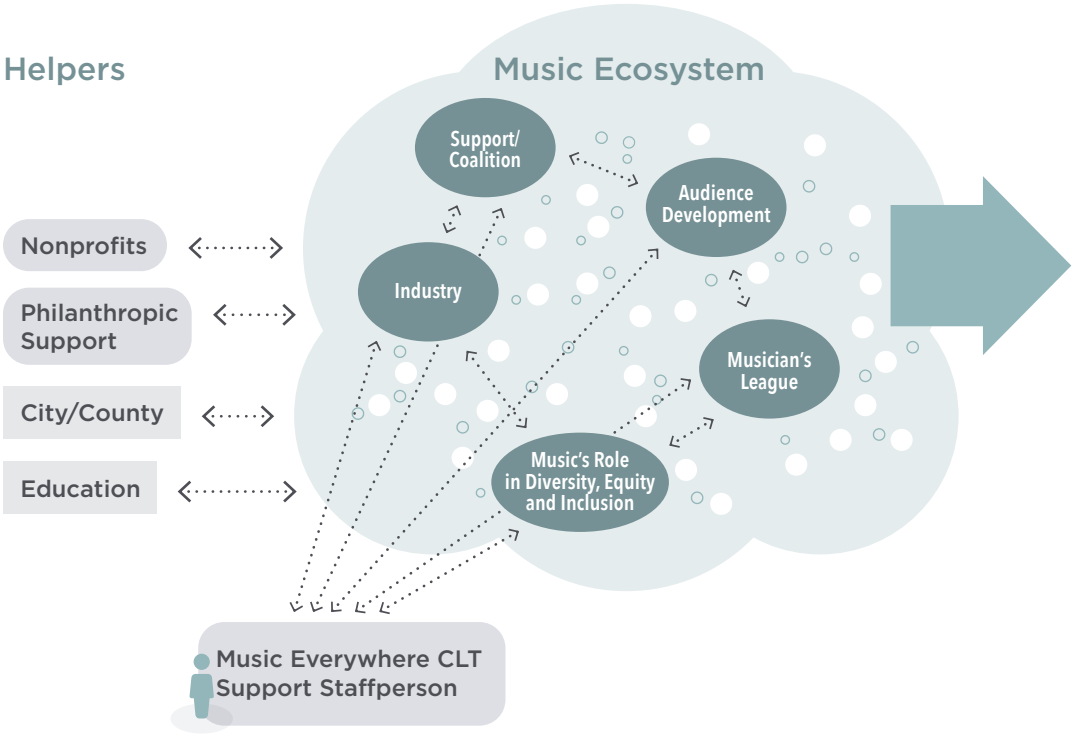
Considering all of Charlotte's music activity as one thing, an ecosystem, helps us envision how to start connecting and aligning!

Historically



2019:

Activism and Autonomous Working Groups Emerge



Small Wins

- Music Resource Expo
- Support Staffperson
- Venue Summit
- Equity Summit
- Audience Development Guide

Programs/Initiatives

AUDIENCE
- Buy Local Music Campaign
- Give To Charlotte Music Day
- Journalism Funding
- Charlotte Up Close Festival

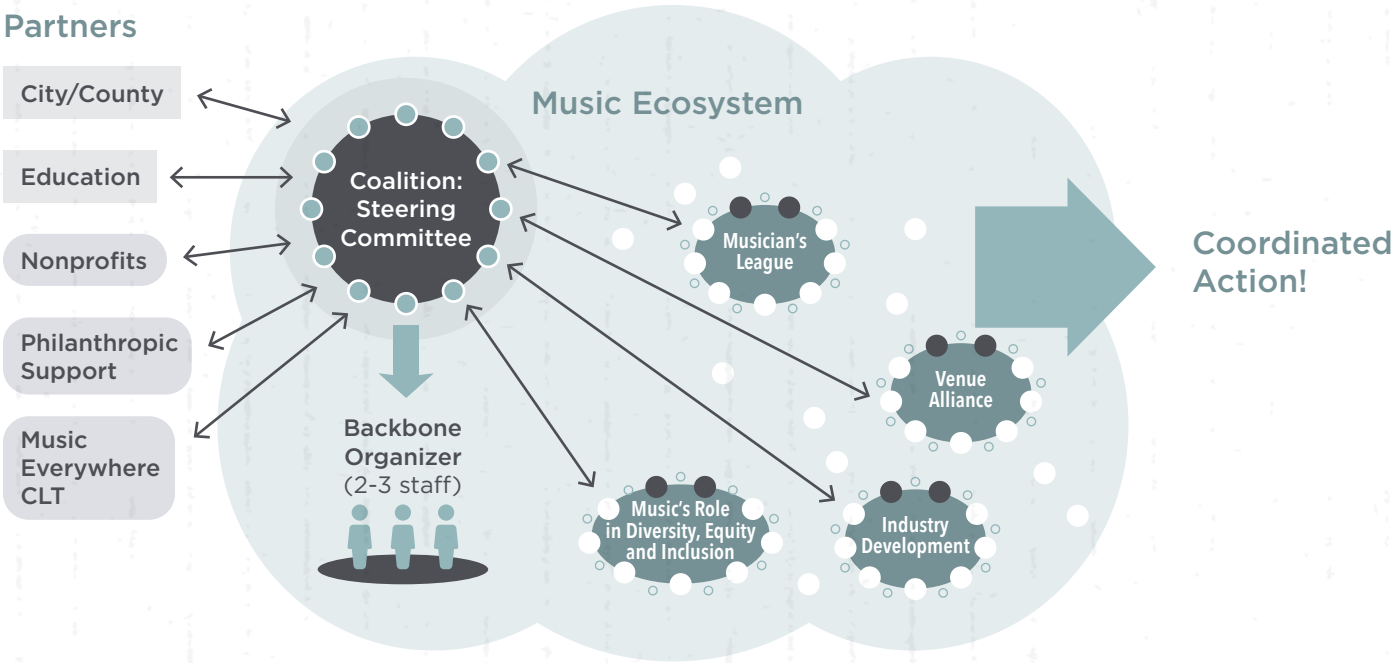
MUSICIAN'S LEAGUE
- DIY Training Seminars
- Mentorship Program
- Mini-Grants and Working Capital

INDUSTRY
- Land Development TAP
- Airport Music and Exchange
- Venue Alliance
- Policy Review

MUSIC'S ROLE IN DIVERSITY, EQUITY AND INCLUSION
- Paid Internship
- Song Workshop Launch
- Music Education Mapping

SUPPORT
- Champion commitments
- Coalition Structure
- Long-Term Funding and Advocacy

2020–Beyond: Industry-Owned Coalition[6]



What are Autonomous Working Groups?

We believe music people are the most appropriate and effective leaders of their own industry, deserving of support and recognition by civic partners. The call-to-action of this plan begins with activist music people assembling in at least five key areas to figure out a more connected and coordinated path forward. Working groups should not be confused with terms such as "committee meetings" or "task forces." This is about launching effective action-oriented decision-making bodies. Music Everywhere CLT can help guide the early emergence of these groups with an organizational staff person (to call meetings, send out regular communication, suggest milestones for development and governance, and other support). However, it is crucial that these groups build trust within the music community as free and independent representation. For this reason, the specific programs and initiatives within this plan are offered as potential pathways. These are decisions for the working groups to debate and own.

Suggested Action Plan for Autonomous Working Groups

A. Audience Development

- The Charlotte Audience Development Work Group
- Support for Local Music Journalism and Curation
- Local Music Imaging Campaign
- Give to Charlotte Music Day
- The Charlotte Live Music Club
- Only in Charlotte – Music Up Close Festival

B. Creative Music Makers Support

- Formation and Development of a Musician's League
- Charlotte Music Resources Expo
- Mid-Level DIY Training Seminars
- Music Mentors Program
- Music in Charlotte's Creative Economy
- Short-Term Grant and Financing

C. Music Industry Development

- Music Industry Work Group
- Venue Summit
- Venue Alliance
- Land Development Technical Assistance Panel
- Noise Ordinance Update
- CLT as Regional Industry Hub
- Export and Music Tourism
- City of Charlotte Endorsement of Music Scene
- Support Professional Music Presentation

D. The Charlotte Music Coalition/Support

- Music Everywhere CLT Backbone Support Staff
- Champions of the Charlotte Music Scene
- The Charlotte Music Coalition
- Advocacy for Public Long-Term Support

E. Music's Role in Diversity, Equity and Inclusion Initiatives

- Community Engagement Work Group
- Paid Internship Program
- The Charlotte Song Workshop
- Music Inclusion Summit
- The Charlotte Music Ecosystem Engagement Survey

Music's Role in Diversity, Equity and Inclusion intersects with every component

Action Plan: A

Audience Development

This was the top issue for focus group participants.

With that direction we were able to develop two separate surveys to collect both music fan and general population input, and it revealed a complex range of concerns (results and analysis are included in the attached Audience Development Guide).

61%

In both the music fan and general population surveys, interest in discovering new music was strong

61% of fans were "definitely interested," 27% of general population was "very interested"

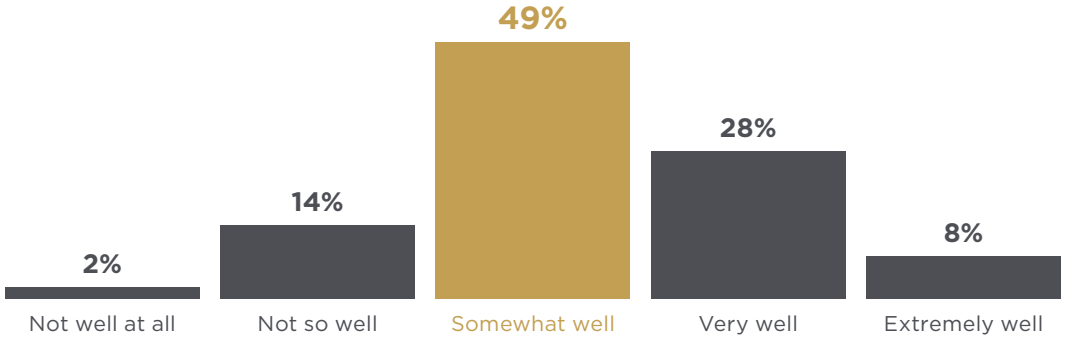
16%

of music fans experience a live music event at least once a week

drops to 10% for the general population

Q71: How well does the Charlotte music scene meet needs?

Answered: 861



Music people in Charlotte focus on developing local audience for live music if only because it would help alleviate their economic hardship. If more people came out to their shows, they could afford to keep doing what they love...

... but many in this study expressed a deeper concern that Charlotte people are not interested or appreciative of live music. They have traveled and experienced other music scenes and they can't help but see the difference. This is a common sentiment that we hear elsewhere, but is it true?[7]

Given the data collected, we don't think this belief is true. **The following recommendations are designed to help Charlotte "turn the ship around" on a false but widely held community perception, and instead begin to tap into the enormous economic potential of current interest in music.** It starts by convening a working group specifically tasked with developing and managing this discussion. We suggest the following initiatives, such as developing new resources to help local music journalism and curation, a city-wide local music advertising campaign (that includes specific learning tools for a supportive general population to get involved), a Give to Charlotte Music Day and a Charlotte Up Close Festival.

Specific Recommendations

The Charlotte Audience Development Working Group

Leadership and membership of this ad-hoc group should consist of leaders from local music venues, local TV, radio, and print/online media, working independent musicians, marketing executives with local music industry affinity or experience, and at-large representatives from other supporting organizational partners.

"Things such as the Tosco Music Party, WFAE's Amplifier podcast has introduced a lot of local talent, so I'm more likely to go out on a Tuesday night to check out someone I've become familiar with."

Support for local music journalism and curation

Charlotte's music scene is not followed by local media as an important civic issue. As with many cities, support for local music writers has dramatically decreased.[8]

At the same time, 85% of Charlotte consumers indicate "knowledge of the band or artist" is their primary path to decide to attend a music event. Music Everywhere CLT identified earlier in this process a need for a central web calendar to provide basic info on all the music events going on around town. The next step is to specifically fund and support curation, especially to help local music artists tell their story.

Musicians are desperate for this access. Joni Deutsch of WFAE's Amplifier podcast series was inundated with over 400 submissions when she launched this podcast in 2018. Charlotte musician Dane Page credits his feature on Amplifier as the single best exposure he's received from local media. Charlotte audiences want to know more than just "what" is happening, they want to know "why" they should care about a particular artist's performance.

Specific recommendations include a short-term grant to fund two music journalism positions with a participating media partner. Support could also provide micro-payments to independent music writers who submit show reviews, artist profiles, picks of the week and photographs to a platform that is shared amongst all the media partners.

In collaboration with education partners this working group could develop college-level radio and music journalism opportunities and coverage of diverse underground music scenes that flourish around Charlotte and haven't traditionally enjoyed media attention.

The data show just how constrained local media is in driving interest in music. Only 16% of Mecklenburg County's general population access music through local radio and TV and only 5% look to media for live music event recommendations. Music fans are somewhat more accessible: 49% rely on local press for information about music events and 26% rely on local radio.

This is the grim news that media professionals have been struggling with. A major concert promoter in Charlotte reports $0 marketing spend with local radio for their shows.

In order to reestablish a trusted curatorial role with music fans and the larger population, local media will need support from the community. Over time professional music journalism can re-establish its unique understanding of local interest music coverage with the local audience and begin to attract local music advertising dollars again.

"Does Charlotte need a (student) radio station dedicated to progressive new and local music? Duh!"

"Wish I knew about more Charlotte-based artists."

GENERAL POPULATION

5%
agreed that better recommendations from media would inspire more attendance of live music events

16%
of Mecklenburg County residents say they listen to music on local radio and TV

MUSIC FANS

49%
of music fans rely on local press for information about music events

26%
of music fans rely on local radio

Local Music Imaging Campaign

27% of CharMeck's general population is very interested in discovering new music, 16% say they attend live music events. CRVA has collected promising results on the impact that paid and earned media can have on public perception of Charlotte's Live Music.[9] This enormous potential can be tapped by designing and implementing an advertising campaign that stimulates the local population's interest in Charlotte's live music scene.

27%
are interested in discovering new music

16%
attend live music events

Considerations should include:

+ an episodic campaign of postings on paid social media that suggest specific actions that can be taken to support local artists (such as detailed in the attached "How To Be A Hero For Independent Music" in the Audience Development Guide)

+ focus on locally or regionally made music

+ segmentation of messaging to align with the differing types of support that different age groups are exhibiting for live music in Charlotte (see Audience Development Guide for more information such as going out to shows vs. charitable giving patterns)

+ activate local sports heroes as influencers who can recommend playlists of local music on major subscription services

+ it is important to partner with creative agencies who understand the unique look and feel of live local music scenes and who are committed to promoting the experiential appeal of music performance in different traditional and non-traditional settings (in other words, let it stay gritty)

+ only 24% of music fans consider themselves Charlotte natives yet they spend twice what non-native music fans spend on music, which could provide an interesting theme when it comes to getting newer residents in sync with local knowledge

"What will it take to get good talent together and get people in this town to support original music, especially since many of them are transplants...wouldn't they like to support a new, organic music scene?"

"We need more opportunities for local musicians to engage with active "music listeners" in a more intimate fashion to help build interest and future fan base."

Give to Charlotte Music Day

Individual giving specific to the needs of Charlotte's local and independent musicians is still emerging. Most music peole are freelancers without full-time employment or benefits, earning less than $10,000 a year from music, yet very few have directly appealed for assistance (only 9% indicated they used crowdfunding to support their needs versus 78% using their own cash). And, very few fans (9%) report supporting musicians through donations or nonprofit support.

Most musicians earn < $10,000 per year from music

Charlotte enjoys a vibrant cultural arts and music education scene with professionally-run nonprofits that employ musicians and over time have built strong relationships with supporters at the individual and corporate level. These Charlotte music nonprofits are doing highly regarded work (such as Jazz Arts Charlotte or Tosco Music). But for those local independent musicians that are not necessarily connected with music education, art education, cultural arts presenters and funding organizations like ASC, **there's room for growth of music service-oriented nonprofit support.**

Charlotte music fans want more ways to help. The age groups 55 and older spend far more money each month on music than any other age group even though they go out less. It isn't just about stimulating consumption. In survey comments, many simply asked **"Tell me how I can help!"**

Charlotte already has significant momentum when it comes to assistance for new nonprofit initiatives. Organizations such as ShareCharlotte register nonprofits and get them valuable resources, training, access to volunteer help and other year-round support engagement with the community.

Specific recommendations for charitable giving include development of a "Give to Charlotte Music" day, where independent local musicians perform in all types of locations throughout the city throughout the day and leverage corporate and individual donations that can all be directed to a general fund that would be disseminated to new and emerging nonprofit services for this specific music community.[10]

88%
of music professionals expressed a desire for a "high profile music event"

"We need options in neighborhoods that are easy to access and have many amenities."

The Charlotte Live Music Club

Patronage for local live music scenes is on the rise in music cities around the world.[11] This reflects an increased interest in local independent music as well as a strong civic commitment to support local creative expression. But patrons have also discovered the added benefit of connecting socially through this commitment. Stimulation of demand for live music can result from activity as simple as using social media or group texts to invite friends to particular performances. 81% of music fans report discovering new music because of a friend's recommendation. Within a relatively short period of time, this type of activity by individuals can be built into more formal clubs.

"Other larger cities have live music EVERYWHERE. There are musicians here and people who like music, so I get confused why it's not a bigger scene."

Only in Charlotte – Music Up Close Festival

Charlotte music fans strongly prefer small intimate music venues. Only 20% suggested festivals as a third choice of a favorite venue for music. Sofar Sounds has validated interest and the power of music up close, especially for younger music fans. On the other hand, 88% of music professionals expressed a desire for a "high profile music event." As experienced in cities across the country, big festivals can negatively impact a local music scene, diverting entertainment dollars away from local venues and local artists and lock the most desirable talent into "non-compete" clauses over long periods of time regionally.[12] Therefore, it is important to consider a range of options for developing signature music events for Charlotte in the future. An interconnected city-wide, venue-driven music festival is worth exploring. For example, many comments have lauded Charlotte's emerging tradition of loft sessions and listening parties. **A music up close festival would be unique to Charlotte, especially if it developed into a showcase for regional talent.** Additionally, as audience demand matures for local music, a trusted curator such as WFAE's Amplifier can utilize excellent venue spaces such as the McGlohon Theater to program local music concert series.

Goals:
Increase the percentage of CharMeck's population that attends live music events from its current 16% to 25% over the next 5 years. This would inject an additional $200-300 million in direct receipts to the local music industry (not including the 2-3% projected growth rate of the industry in general). Within 3-5 years re-measure music fan opinion on how well the Charlotte music scene meets their needs.

Suggested Partners (Not Exclusive):
Local media (Examples: WFAE/Amplifier, WEND, WRFX, WSGE, WPEG, FoxTV, QCNerve), ListenLocal, Carolina Tix, Tosco Music, Music With Friends, Sofar Sounds, Charlotte Regional Visitors Authority, ShareCharlotte, Arts & Science Council, Blumenthal Arts and Charlotte Folk Society.

Case Studies to research:

The Open Club Day // www.openclubday.com
On the same day across Europe live music venues coordinate opening during the daytime for audience to discover what happens behind the scenes.

ListenLocalFirstDC // www.listenlocalfirst.com
This initiative creates connections between locally owned businesses, local artists, cultural institutions and government officials to better navigate its own music economy and create greater opportunities for musicians to have a say in their own success in this city.

The Festival of Small Halls // www.thefestivalofsmallhalls.com
This nonprofit coordinates 35 performances in communities off the beaten path in eastern Ontario, celebrating unique qualities of these small performance spaces with concerts by exceptional talent that attracts both locals and music tourists.

NY Music Month // www.nymusicmonth.nyc
An initiative of the NY Mayor's Office in partnership with NY is Music, June is the official month to celebrate New York's diverse music ecosystem across all five boroughs, and activities coincide with a wide range of public and industry facing events.

SPARKcon // www.sparkcon.com
The Triangle's (NC) creativity festival, with the motto "For the community, by the community," uses an open-source planning process, for an intentionally dynamic focus.

Come Hear NC // www.ncarts.org/comehearnc
The North Carolina Arts Council has developed a year-long 2019 campaign to celebrate the composers, musicians, studios, venues, instrument makers, labels, record stores, promoters, places, listeners and communities who create, support, and sustain NC music through daily web-stories, artist interviews, special commissions, NC musician stages at major festivals, educational programming and performances.

Action Plan: B

Creative Music Makers Support

Musicians and other music creatives (such as music teachers, songwriters, producers and engineers) are the center of a music ecosystem,[13] so understanding their needs is crucial.

59%

made less than $10,000 from music in 2017

only 8%

earned at or above the 2017 median household income for Mecklenburg County ($55,269)

only 15%

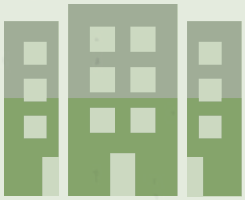
have a full-time job in music

22%

have no other income besides music

80%

reported “Freelance” as their work status in music



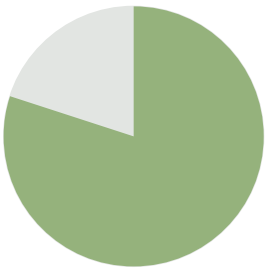
51%

have a fulltime job in another industry

Charlotte music makers are not doing well, whether it is median incomes below $10,000 per year, infrequent local performances or limited music education/industry training opportunities.

The vast majority are independent freelancers, personally assuming all the risk of developing their creative careers. They DIY (do it yourself) for a vast range of career development needs, learning digital audio software to make home recordings, booking themselves, rehearsing in their homes, creating and managing their own social media and acting as their own record label.

It can feel overwhelming: a stark contrast to the euphoric moments of creation that these artists feel all too rarely. The following recommendations emphasize real tools for steady professional advancement.



80%

are independent freelancers, personally assuming all the risk of developing their creative careers

Specific Recommendations

"As a 21-year veteran I'm not in need of any training. I need the music community more consolidated and working to help cultivate the local scene."

A Charlotte musician's league

Charlotte has ad-hoc grassroots working groups in the early stages of development, convened by working musicians to address and advocate for their needs. This is very promising, as historically very few Charlotte musicians get involved in civic issues (10%) or business networking (30%). Developing a grassroots coalition takes a lot of time, patience, and diversity of skills and experience.

Support from outside organizations can be as simple as providing meeting space, distributing meeting notices, writing up meeting agendas and minutes, providing suggestions for governance structure, and formalizing connections and coordination with the other work groups outlined in this initiative.[14] But without question, the music people initiating these efforts understand their industry and its needs and challenges and their leadership should be actively welcomed. They should be given a seat at any table where civic issues affecting their community are being considered.

10%
of Charlotte musicians get involved in civic issues

30%
get involved in business networking

Over a longer term, a musician's league can begin to fulfill guild-like functionality for music creatives in Charlotte.[15] This is the workforce that invented the "gig economy." They operate outside the social safety net. A guild led by activist leadership from within its ranks can leverage its size and importance to advocate and educate for minimum standards of musician compensation, health care needs, housing, retirement benefits, legal protections, and many more. Ultimately a Charlotte musician's league becomes a key partner in protecting and defining music people's social and economic equity in the neighborhoods they help create.

Charlotte Music Resource Expo

49% of Charlotte music people have not set up even the most basic industry affiliations (such as publishing/songwriting registrations, performance royalty registrations, Recording Academy membership, etc.). A majority rely on social media for their industry awareness. Interest in developing small business skills is relatively low at 37%. **Convening a 1-day expo will help a significant segment of musicians to collect on royalties from their song performances, including writer and publisher registrations with Performance Rights Organizations such as BMI and artist royalty collection agency SoundXchange.** With help from industry professionals, musicians can navigate this in one afternoon gathering. This is also an opportunity to invite local providers of small business development resources and cultural arts funding (especially those that focus on underserved populations) to participate.

Focus Training Resources for Mid-Level and DIY Experience

Charlotte music people expressed a desire for mid-level continuing education in areas such as booking, marketing, licensing, revenue development, and others (see data addendum for a full listing of preferred topic areas). It is important to design seminars to match the experience of music people. Charlotte musicians, especially DIYers, are skeptical that industry education will give them something they haven't already learned. Seminars should be designed for group discussion and break-out sessions, such as expected in 200-300 level college courses.

"It's tough for me to hire here because people don't even have a basic knowledge of the industry. It's just way easier for me to hire someone in Nashville."

"Within the past two years I've seen artist from all walks of life make leaps and bounds coming from Charlotte and its greater areas! International tours, press and major label offers/deal, Charlotte music heartbeat is strong; it just needs that extra push!"

Introductory-Level Mentoring

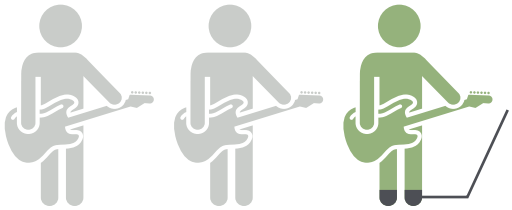
Mentoring, especially across generations, is how music people learn their business.[16] College-level music industry education providers can expand on mentorship exchanges through a musician's league.
DIY musicians would readily mentor young talent in exchange for help with social media, website development including ecommerce, publicity, merchandise development, business management, and many more.
Today's occupational educators develop a pipeline that eschews classroom instruction for on-the-job training to help build real experience and relationships that can turn into higher level job placements. We strongly encourage JWU's SEEM program and UNC Charlotte's Music Department to work with this group to help provide Charlotte's music economy with better local music industry training opportunities.

Supporting Music's Role in Charlotte's Creative Economy

There is growing interest in Charlotte to better understand and support its creative workforce as creative economies are increasingly linked to growth in economic opportunity.[17] Music is a key sector of this workforce. 75% of Charlotte music people don't work exclusively within music and they showed more interest in help getting a creative job versus "any" job or short-term temp jobs.

Also, the data reveal that satisfaction rates were much higher for music people who worked *exclusively in music*. Music people with full time jobs outside of music had dramatically lower satisfaction rates. A musician's league can work with creative economy activists (such as Arts & Science Council, who helped with the #58kCreates initiative) to develop new insights about how creatives work across disciplines. This work is essential for supporting the competitiveness of Charlotte's creative economy.

1/3
of music creatives suggest grants would help them stay in the music scene



7%
only 7% report receiving grant funding in the past

Short-term Grants and Access to Working Capital

About a third of music creatives suggest short-term grants would help them stay in the Charlotte music scene. Only about 7% report receiving grant funding in the past. Organizations have introduced micro-grant programs with great success (such as Charlotte Is Creative's Hug grants).[18] Over time, in coordination with funding partners, a musician's league could advise a simple process to award small infusions to musicians based on a selection process founded on principles of relationships rather than complex grant applications.[19] Additionally, DIY musicians may be reluctant to commit scarce resources to opportunities if only because they do not have the cash they need.[20] Whether it is wholesale tee shirt orders, flights for upcoming tours or equipment purchases, working musicians in a financial capital like Charlotte should have access to simple lines-of-credit offered by a home-grown credit union in collaboration with this group, rather than having to sign away their future royalty streams to music industry lenders.

Goals:
Establish an inclusive, diverse and stable organization that attracts broad participation and leadership from within Charlotte's musician community, to develop a voice that advocates for the interests of musicians and collaborates with other work groups noted in this initiative, on key issues affecting musician's well-being and needs into the future.

Suggested Partners (Not Exclusive):
UNC Charlotte Department of Music and Small Business and Technology Development Center, Johnson & Wales Sports Entertainment and Event Management Degree Program, Arts & Science Council, Music Everywhere CLT, Charlotte Is Creative, BMI, ASCAP, SoundExchange.

Case Studies to research:

Freelancers Hub NYC // www.freelancersunion.org
This community space provides legal and financial clinics, benefits assistance, educational workshops and co-working space, all for free.

Hear Fort Worth // www.hearfortworth.com
Hosted by Visit Fort Worth, this resource is an advocacy partner that also provides tools such as studio sessions, travel grants, social media features, and reimbursements for SxSW participants.

Denver Music Advancement Fund // www.artsandvenuesdenver.com
In 2018, this initiative awarded $100,000 to 30 organizations to support Denver's music ecosystem, including musicians and leaders in businesses, government, nonprofits, and educational institutions to advance music-centric initiatives in seven core areas.

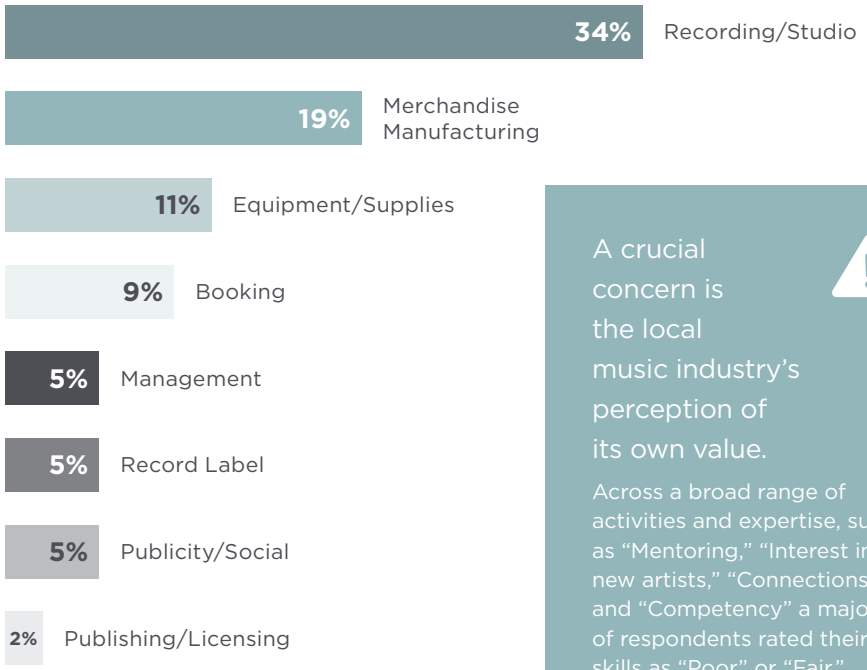
University of Colorado Denver Music Cities Course // www.ucdenver.edu
This is the world's first Music Cities course with a mission to help higher education recognize that if we want to create better, fairer music cities, we must train people to safeguard them.

Action Plan: C

Music Industry Development

In addition to its creative talent pool, Charlotte has a growing professional music industry. These leaders can push for a greater range of municipal music-friendly policies and initiatives.

Services sourced locally by CLT creatives



A crucial concern is the local music industry's perception of its own value.

Across a broad range of activities and expertise, such as "Mentoring," "Interest in new artists," "Connections," and "Competency" a majority of respondents rated their skills as "Poor" or "Fair."

58% local

32% Carolinas region

Music industry service providers report "a lot" of their clientele are either local or Carolinas region, reflecting the vital role Charlotte's music industry already plays across the region.

only 20% of venues reported concern with "noise issues with neighbors" as a disincentive for presenting live music. However, the City of Charlotte has expressed concern that population growth (at least 50% population growth in most tracts between 2010 and 2015) will present challenges for the current noise ordinance in the future.

41% of music fans list "being outdoors" as a favorite activity to combine with hearing live music.

Music fans have an interest and preference for non-traditional music spaces and music venues within walking distance.

Developers of music venues report conflict between City and County planning, design and construction permitting inspectors, which makes modification of existing structures especially costly vs. demolition plus new construction.

"Seriously, this city is lacking in places for bands to play. More venues needed to replace the Double Door and the Pterodactyl!!!"

Commercial Music economies grow in environments of music-friendly regulatory policy.[21] Charlotte's desire to build its character and sense of unique place has suffered, most symbolically with the loss of legacy music venues such as the Double Door Inn and Tremont Music Hall.

Such losses frustrate music people and fans alike. Music venues, especially the smaller capacity rooms that serve as incubators of developing local original expression, deserve special consideration as a sub-set of Charlotte's nighttime economy. This is especially true for Charlotte as center city density of population grows exponentially, and the data show strong demand for walkable neighborhoods with music venues and outdoor music presentation.

Specific Recommendations

Music Industry Working Group

Venue leaders, independent producers and other music industry business owners should convene this ad-hoc group and invite representatives from key City and County departments (such as permitting, public safety, economic development and planning) who oversee policies affecting the music industry.

"We need more, better venues, which care about sound quality."

"Find ways to preserve or restore older venues. Brand new facilities are nice but lack the feel of the well-worn venues."

Venue Summit

City and County representatives can work with leadership in the venue community to bring together an annual afternoon outreach event, present updates on right-of-way permitting, noise ordinance enforcement, public safety with nightlife activities, and other policies affecting music venues. Not only does this help music venues understand the law, it provides an opportunity to share ideas, give feedback and build relationships.

Venue Alliance

Venues can begin developing their own advocacy group and best practices. Useful tools to develop include venue ladders, mapping of venues against the populations they serve, and creation of a Charlotte-oriented Venue Best Practices Guide (see the attached guide as a starting point). This also becomes a valuable way for Charlotte venues to connect with grassroots music venues around the globe, to share information about innovative programs, especially in public-sector finance, that are being deployed to protect and stabilize venue spaces in rapidly growing urban settings.[22]

Convene a Charlotte Music Venue Technical Assistance Panel

In concert with the Charlotte Urban Land Institute, bring property owners, land developers, music venue owners and urban planners into a formal process that results in a set of recommendations regarding music venues and how their needs might be included and accommodated on big city-wide initiatives, such as the Charlotte 2040 Comprehensive Plan. Other topics include incentives for music venue preservation, adaptive reuse of legacy structures for live music activities, cultural or entertainment districts or overlays with potential tax incentives for land owners who lease to music businesses, interim occupancy permits for DIY live music spaces, agent of change principle and partnerships between music presenters and philanthropic organizations to support long-term stabilization of locations for legacy music venues.[23]

"I'd like to see more non-traditional venues. Like renovated churches, historic warehouses, things like that used as concert venues. Places where the venue is as cool as the music. That is lacking in Charlotte."

Noise Ordinance Update

Input from venue owners suggest uncertainty about enforcement. Especially with the fast growth of residential infill in many tracts of the city, the current enforcement philosophy of **"we won't bother you unless there are complaints"** does not induce confidence, especially given the high cost of developing and operating music venues. There is some interest already by the City in conducting a review of current policy and enforcement,[24] which is highly recommended as long as the music industry and residential and commercial partners are invited to participate in this process. A community partnership approach is recommended for sound management, along with standardization of noise complaint data through 311, dedicated city staff following a consistent process, sound impact plans for outdoor venues, clarifications over land use categories, a clear road map for resolution of disputes, and a transparent process for sound measurement.[25]

> *"I strongly feel that if our city were to host a music conference and festival, encompassing educational panels, speakers, label reps, a showcase, and networking event that this would put our city on the map and really show that there is support here for music growth."*

Charlotte as a Regional Music Industry Hub

As the survey data reveal, Charlotte is already a hub for music industry services regionally, and as these professionals connect, share knowledge and organize, their confidence to take on more regional business will improve. **In very little time with this self-organization, Charlotte's music industry could launch and host a Carolinas Region music industry conference.**

Additionally, economic development partners can help initiate music city exchange initiatives across the Carolinas. Unlike traditional economic development where cities compete for jobs, music economy activity is not a zero-sum game. For example, a more vibrant music scene in Greensboro is not Charlotte's loss, as this opens up additional regional touring options for Charlotte musicians.

Export and Music Tourism

37 million
visitors connect through Charlotte's airport

Charlotte's single greatest asset for expanding its visibility as a thriving live music city is the 37 million visitors who connect through Charlotte's airport. Multiple impressions across several terminal locations (not just the atrium) of low sound impact solo performances would build the impression that music is everywhere in Charlotte, and signage can be aligned with brand imaging developed in local audience development campaign. The cost of such programming goes directly to local musicians and can be an attractive candidate for airport concessions partners and local corporate brands' sponsorship dollars. Other initiatives to consider include a local music venue primer for hotel concierges, and a Charlotte music history education initiative (in alignment with public art initiatives).

"Licensing is key. I would also add building relationships through other disciplines (film, podcasts, theatre)"

City of Charlotte Endorsement of Music Scene

The City can further enhance opportunities for local music makers, at little or no cost, simply by taking a more pro-active approach in supporting local music. This study revealed that 79% of Charlotte musicians get little or no income from their songwriting, and only 2% report using a Charlotte provider for their publishing. Thus, the City could communicate a community challenge to license Charlotte music, suggesting that ad agencies and users of music for commercial purposes increase their use of music made in Charlotte, much like Mark Eckert's QueenSounds has already initiated. Additionally, local music heroes can be recognized and celebrated through the City's community engagement channels, for proclamations and other public recognition.

Support Professional Music Presentation

The experience of live music is difficult to present effectively. Sound reinforcement equipment, lighting, staging, timing and placement of performances, matching the performance with specific interests of the audience are just some of the many design skills needed to satisfy today's audience. It is the role and responsibility of Charlotte's music people (musicians, engineers, booking agents, production companies) to develop and provide these skills at a consistently high level of expertise to their buyers as well as educate and manage non-music clients on the importance of professional live music event production.
The emergence and success of turnkey live music event designers is a reliable indicator of a music scene expanding its reach beyond its traditional audience.

Goals:
Help Charlotte's music industry, especially live music venues, become better advocates for their industry, assisting municipal partners review and update policies and planning, work for greater opportunities regionally, and provide high quality music presentations.

Suggested Partners (Not Exclusive):
City of Charlotte Council Members, Various City and County departments (Permitting, Economic Development, Public Safety, Charlotte Douglas International Airport), Charlotte Regional Visitors Authority, Charlotte Urban Land Institute.

Case Studies to research:

Colorado Music Licensing Project // www.songscolorado.com
In one seven-month initiative in 2017, Colorado companies were encouraged to license music made in state, resulting in financial success and enhanced education that has led to creation of sustainable infrastructure to support this complex branch of the music industry.

Harmony in the Air (Houston) // www.fly2houston.com
In December 2018, the City of Houston funded $3 million over five years to pay performers at both Houston airports, renewing this program utilizing funds paid by airline fees.

Safe Occupancy Program (City/County of Denver) // www.denvergov.org
Denver has launched a new, conditional building occupancy program for spaces that are currently operating without permits. This is an incentive-driven program designed to improve the safety of buildings in Denver for their occupants, visitors, neighbors, and general public.

City of San Francisco Legacy Business Registry // www.sfosb.org
The Legacy Business Registry recognizes that longstanding, community-serving businesses can be valuable cultural assets that should be provided educational and promotional assistance to encourage their continued viability and success.

Toronto Property Tax Reduction for Cultural Hubs and Creative Spaces // www.toronto.ca
This 2018 City policy provides subclass designation to help sustain and grow creative enterprises. Qualifying spaces are given a 50% reduction in property tax.

Music Venue Trust and Alliance (UK) // www.musicvenuetrust.com
The Music Venue Trust acts to protect, secure and improve UK grassroots music venues for the benefit of venues, communities and upcoming artists.

Action Plan: D

The Charlotte Music Coalition/ Support

Big issues for Charlotte musicians, like affordability, are already showing up in the data. Now is the time to build structure so the music community can help drive systemic change into the future.

28%
of music people report their housing costs have increased in the last 3 years

... and 10%
have moved because of these additional costs

only 8%
of Charlotte music people own their work space

... and 51%
use their personal residence

only 15%
of venue owners or presenters own their music space

19%
of music ecosystem people do not have health insurance

This consideration is often overlooked because it is contextual and structural rather than program or initiative oriented. But it is essential. The community must tackle the questions of "who will be in charge," "who will do all of this work," and "who is going to pay for it?"

A typical study of commercial activity would challenge its industry leaders to fund and execute a plan. However, this "chamber of commerce" model isn't realistic or appropriate for music. **A music scene isn't just economic activity, it is a large social system that does not respond in predictable ways to top-down approaches and targeted investment.**[26]

On the other hand, leadership from within the ecosystem is already responding. They know what they are talking about, and they recognize the importance of the industry assuming accountability for itself. These "grass tops" are the proper and legitimate place for strategic control, especially if others can provide the support and stability to help such leaders build effective organizational processes over time (and help these activists avoid all too common burn-out or fatigue). Thus, together as a music community, with the help of outside advocates, the following initiatives are recommended.

Specific Recommendations

"I appreciate the focus... but just wonder if it all matters. When we talk music industry or music business... this is about money."

Music Everywhere CLT Backbone Support Staff

An early win is for Music Everywhere CLT to provide one full-time coordinator to assist efforts within the ecosystem to help develop and sustain the Working Groups. A full-time facilitator experienced in grassroots organizational support and social change methodologies such as Collective Impact can administer crucial duties to help busy music people stay on track to develop self-governing skills.[27] This coordinator can also weave into Working Group meetings various best practices for building effective structured collaborations (such as brief presentations by an expert on meeting design, etc.). Finally, lunch or happy hour gatherings can be initiated to help various industry subsector participants to regularly convene in smaller groups.

Champions of the Charlotte Music Scene

Commitment from at least two key underwriting champions needs to be developed in order to kick-start the range of initiatives presented herein for no less than 3-5 years. In that much of the progress will be based on the music ecosystem assuming leadership, as well as bringing new nonprofit activity and community support to bear, the intensity of funding from such champions may be lower than expected. However, highly structured collaborations of the nature suggested in this action plan require significant dedicated resources. The Collective Impact Forum provides a "3 Year Backbone Budget Scenario Analysis Tool" to help develop these expectations (see collectiveimpactforum.org for more information).

"This question and survey are pretty ridiculous. Charlotte has had a vibrant music scene for years! And the last time people tried to do what you people are doing, it brought down the music scene. It was in the nineties and they crushed it."

"The music industry is a lot of conversations with little or no action behind. It has the most unimportant people in the world who don't know music making the biggest decisions of other peoples' lives."

The CLT Music Coalition

Within one year, as the recommended working groups become established, and with proper funding, the next step can be launched, which is to provide the structure for all work in the music ecosystem to align. It would include a steering committee, led by key music leadership with experience in the original working groups, but also incorporating a wide range of supporting organizations that are playing an activist role that impacts the music ecosystem in some way (such as key leaders in municipal government, nonprofits, private industry, foundations, education institutions, and other civic activists). Working groups would begin comparing notes with each other, coordinate on overlapping issues and share in hammering out the strategic vision of the collective. Over the long term, this coalition will be especially helpful not just for issues internal to music but also as a trusted resource to advocate and negotiate the interests of the music community in larger city-wide social change initiatives (such as social mobility, affordability, tourism investment, and others).

"We need a community group of sorts. Something where all the industry professionals can work together to build a thriving music community."

Advocacy for Public Long-Term Support

Creating change within large and complex social systems like the Charlotte music ecosystem requires patience and a long-term strategy for support beyond the initial investment of champions. Within 5 years as live music becomes more organized and effective, it can turn to the big work of winning public funding support for more stable, long-term programs. This will likely require a combination of city, county and state campaigns in order to secure the policy changes. Supporters at the state level see a bright future for music's impact as evidenced by "Celebrate 2019: The Year of Music" campaign, where "The state has not given its music the level of appreciation it deserves for its contributions to the creative economy."[28] An early initiative of the Music Coalition should be advocacy for policy changes that secure real funding to address the needs and gaps of Charlotte's music ecosystem, especially its fragile small venues that incubate new talent. The State of NC withholds 4% of nonresident entertainment earnings. This could be a logical pool of money to earmark for redistribution to local North Carolina-based music support initiatives.

Goals:
Provide staffing for at least one year of support for Working Groups. Connect music leadership with potential funding champions to initiate resources for initiatives. Finally, develop a comprehensive leadership structure that can coordinate a response for the deepest issues facing Charlotte's music ecosystem over the long term.

Suggested Partners (Not Exclusive):
Charlotte Center City Partners, City & County Offices of Economic Development, Arts & Science Council, various local philanthropic supporters, ShareCharlotte.

Case Studies to research:

AllATX // www.allatx.org
This music nonprofit provides education and affordability solutions for Austin musicians as well as leads high-profile benefit events for Austin music charities that aid musicians in healthcare and income support.

Arts Access Initiative (Houston) // www.artsaccessinitiative.org
This collective impact initiative is Houston's action plan for ensuring equitable arts access for every Houston Independent School District student.

Partnership for a Competitive Workforce (Cincinnati Region) // www.competitiveworkforce.com
This tri-state partnership brings together business, workforce investment boards, chambers of commerce, educational institutions, labor, service providers and philanthropic funders to focus on meeting employer demand by growing the skills of the region's current and future workforce.

Action Plan: E

Music's Role in Diversity, Equity and Inclusion Initiatives

We believe Charlotte's music community can, and should, play a greater role in this effort.

The online survey of music professionals collected a lower percentage of responses from Charlotte's community of color than government data would have suggested.

Interviews and focus group participation helped make up for this underrepresentation. There is a need for more relationship building in order to authentically support an interest by Charlotte's established civic leadership in building a more inclusive music community. There is strong agreement that **"we can do better than this,"** and it begins by entrusting individual musicians from communities of color to lead this work. These music people can take an activist role in reaching out to community organizations with an "inclusive strategic orientation."[29]

9.6%

of the music industry online survey respondents were Black/African American

For comparison, government employment data of music creatives for African American reports 14% (SOC by occupation). Actual Black/African American population in Charlotte area is 22%.

32%

of Black/African American respondents do not have health insurance (vs. 17% of all others in survey, and 12% generally for population)

For the rest of the survey:

7% chose not to disclose
3% two or more races
2% Hispanic
1% Asian or Asian American

These correlate to government data

56% male
40% female

Sound engineering technicians were 93% male

Music can't pretend to have all the answers, but it is a powerful tool that should be at the table and included in initiatives focused on improving outcomes for economic and social mobility, race and gender diversity.

Specific Recommendations

Inclusion and Community Engagement Work Group

As with other recommendations, the development of an ad hoc working group from within the music community is a crucial first step. Such efforts are already under way, coming from music artists who understand the urgency of this initiative. This working group can explore a range of connections and partnerships to help diversify Charlotte's music ecosystem and perhaps most importantly, it can hold accountable other working groups in this action plan to prioritize inclusion.

only 15%
of music people cite formal or informal music industry training in Charlotte

"More apprentice-level production training at music venues, a rehearsal space that allows for tech crew to rehearse live production with bands!"

Paid Internship Programs

Given that only 15% of music people cite formal or informal music industry training in Charlotte, access to any form of training, especially early in professional careers or specifically for women, is crucial for career-advancing opportunities. Historically, entry-level internships in any form of entertainment business are very competitive and almost never include compensation. Yet prior experience and connections within the industry are key advantages in landing highly sought-after positions.[30] For designing such a program in Charlotte, it is important to understand that there are only a handful of Charlotte music businesses that employ five or more employees. However, music companies suffer because they don't have access to the skills they need (and that young workers often know how to do such as social media marketing and website development). Thus, we recommend a workforce development program that funds paid internships for female candidates and talented individuals interested in music careers that come from communities on the margin.

The Charlotte Song Workshop

Research on the "edge effect" in biodiversity have inspired groundbreaking music collaborations such as the Silk Road Ensemble.[31] Charlotte's cultural, racial and ethnic diversity is the fuel for its music ecosystem to explore this edge effect and begin creating interesting new music. Work with cultural arts funding to develop a simple one-day program that pairs up local music creatives who have not ordinarily worked together to write, record and perform together within a defined time period (such as one full-length album recording per year and record release concert to celebrate and promote the results this collaboration). Let artists bring their unique perspectives and life experiences together in song, and the results will be interesting performances that can be promoted.

The Diversity in Charlotte Music Summit

"How can you eliminate the clique and give everyone equal opportunity?"

Convene members of all five working groups of this initiative, along with partners working directly on social change in Charlotte for an initial discussion of how Charlotte's music scene can inspire greater participation from its diverse population of creative musicians. Such recommendations will help initiate concrete action for the Working Group.

The Charlotte Music Ecosystem Engagement Survey

Within a short timeframe (such as one year), under the direction of this working group, additional research should be conducted on Charlotte's music ecosystem. Research tools should be offered in Spanish as well as English, and as much as possible input should be collected in interviews rather than online surveying. Topics to explore could include the lived experience of musicians of color, the depth and quality of outreach efforts, what role geography and neighborhoods play, access to music education, access to venues by third-party presenters, authentic inclusion vs. tokenization, and much more.

Music Education for All

Every child in the Charlotte-Mecklenburg school system should have access to music education. As a first step this working group should partner with CMS to build a mapping tool to inventory by school what music resources are available (full-time specialized music teachers, dedicated time for music during school hours and outside of school hours, and other resources such as outside music partnerships with the school).[32] Additional steps could include developing community music programs to match music professionals with part-time employment opportunities placed in schools. A very small number of survey respondents (26) listed teaching as their primary music occupation. Funding FTEs in music education simultaneously achieves several goals of this plan and ensures increasing diversity of creative talent and music appreciation for the next generation of Charlotte's citizens.

Goals:
Support the growth of strategic partnerships between music activists and civic organizations to strengthen the diversity of Charlotte's music ecosystem, provide entry-level music career opportunities to disadvantaged community members, and provide songwriting resources for local cross-cultural creative collaborations.

Suggested Partners (Not Exclusive):
Leading on Opportunity, Playing For Others, Thrive Charlotte, Snug Harbor, Warehouse 242, Charlotte Works, Charlotte is Creative, Dupp and Swat, Inspire the Fire, Arts & Science Council, Charlotte Mecklenburg Schools.

Case Studies to research:

Sound Thinking NYC // www.creativeartsteam.org
This free program is designed to open doors for young women to explore careers in the music industry, with events during 11th and 12th grade, paid summer internships, and free college credit courses.

House of Songs // www.thehouseofsongs.com
Originating in Austin, and now in the Ozarks as well, songwriters from around the world collaborate, bridge cultures, build friendships and cultivate peace.

NY Theater Workforce Development Program // www.roundabouttheatre.org
Program for high school students from diverse backgrounds to become working theatre professionals.

Memphis Music Initiative // www.memphismusicinitiative.org
This program provides transformative music engagement, creating equitable opportunities for black and brown youth in Memphis.

Youth on Record // www.youthonrecord.org
Denver's local music community partners with public school, housing authority and philanthropists to help at-risk teens from Denver's most vulnerable communities turn their life around.

Additional Data

A massive amount of data was collected for this work.

The online survey alone included 83 questions. The following are several deeper data pieces specifically for Working Groups to help focus their initiatives. Note: all the audience-specific data is included in the separate "Audience Development Guide" which follows this section.

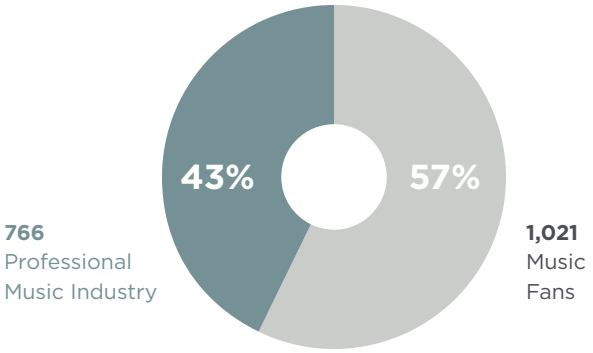
We begin with an overview of the population that took the online survey. Responses came from over 80 zip codes in the Charlotte metropolitan area (these were the top 20):

Top 20 home zip codes of respondents in the audit

Zip Code	# of Respondents
28205	249
28202	77
28209	78
28210	78
28211	63
28226	63
28277	58
28105	49
28269	48
28270	47
28203	44
28204	41
28212	40
28227	38
28078	37
28173	37
28025	29
28216	28
28079	25
28262	25

Initial screening of respondents resulted in slightly more fans than industry professionals

Answered: 1,802



Within the professional responses, 65% indicated their primary role was creative, 8% listed a primary role to be venue or programming related, and the rest (27%) have a primary role in at least a dozen industries with occupations supporting music activity.

92% of music professionals indicated at least one additional area of expertise (beyond their primary role). To dive a bit deeper, 65% of those currently focused on non-creative music work indicated creative experience in their background. This supports that music people in Charlotte (as elsewhere) have wide general industry experience and **no matter what area of the ecosystem in which they are primarily focused, they have creative experience.**

Additional Data on Music Professionals:

59%
made less than $10,000 from music in 2017

only 8%
earned at or above the 2017 median household income for Mecklenburg County ($55,269)

42%
report income increased "somewhat" or "a lot" in the last three years

43%
make more than half of their music income from live performance

only 15%
say they have a full-time job in music

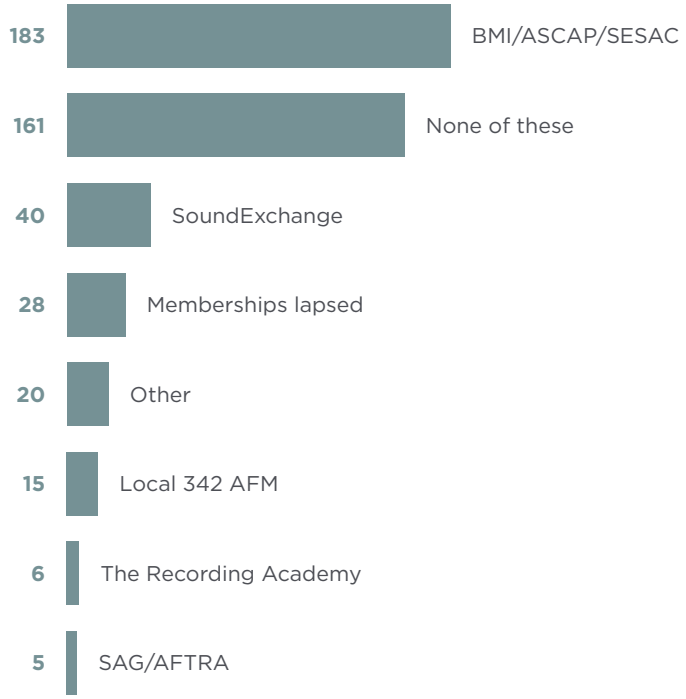
80%
reported "Freelance" as their work status in music

22%
have no other income besides music

51%
have a fulltime job in another industry

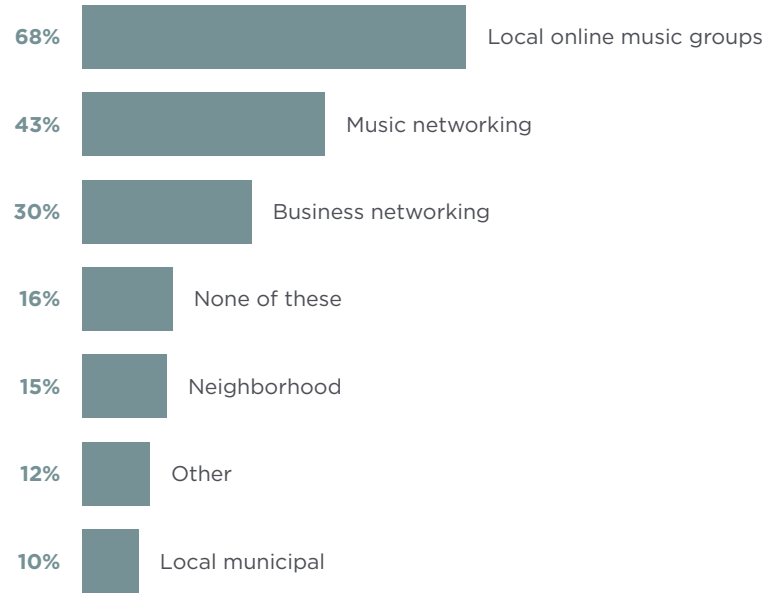
49% are not currently registered for any of the following industry affiliations or royalty organizations.

Q: Music industry registrations/affiliations?
Answered: 387



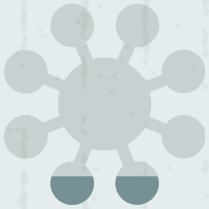
When it comes to building their community, "local online music groups" is the most popular method at 68%. Only 30% reported "business networking" activity. 16% do not participate in any sort of community activities.

Q: Community activities?
Answered: 394



only 7%

have received financial support from grants

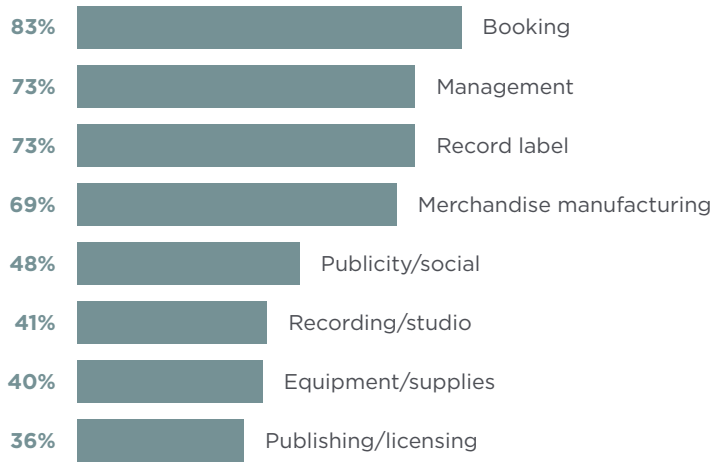


only 11%

have received financial support from crowdsourcing

CLT Music Creatives work especially hard to support their music. Do It Yourself (DIY) predominates across a range of crucial professional needs (versus hiring providers).

Services that CLT Music Creatives DIY



National music industry relationships are rare. For example,

only 2%

say they are supported by a national recording label.

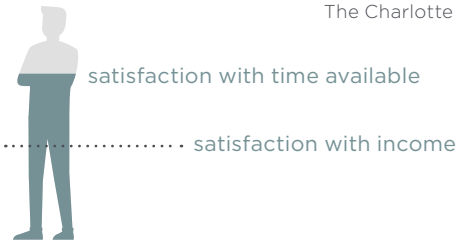
The average music creative in Charlotte spends

2x more

on recording and rehearsal costs than they spend on marketing (publicity/PR and website/paid social media).

92%

plan to continue their music efforts in Charlotte over the coming three years



71%

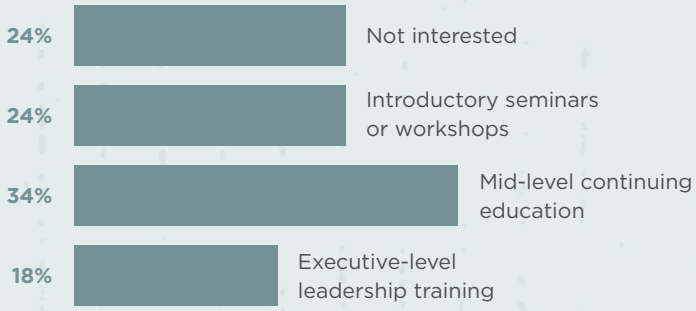
are "somewhat" or "definitely" satisfied with the time they have available for music, but this drops to 39% when the same question is asked about satisfaction regarding music income. Full-time music creatives who do not have any other job rate significantly higher levels of satisfaction (time and income) than do those who have a full-time job outside of music

58% have no music industry education or formal training. There's strong interest in additional music industry training, for the following topics.

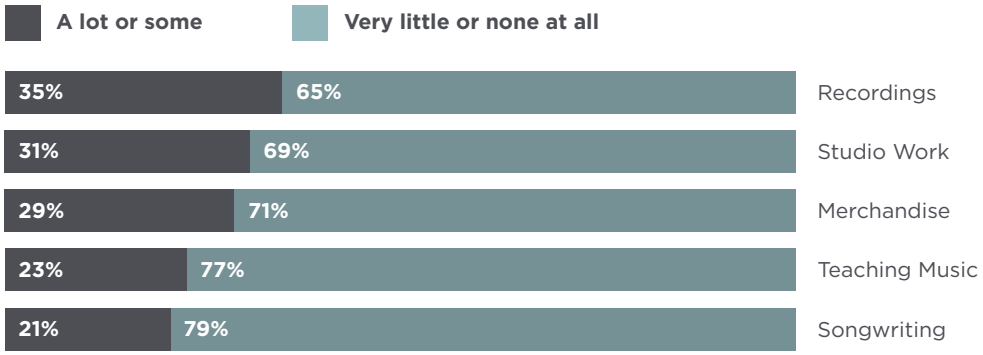
Q: What music-related training would be of greatest interest?
Answered: 550

Music creatives also showed more interest in mid-level continuing education than introductory-level or executive-level type training.

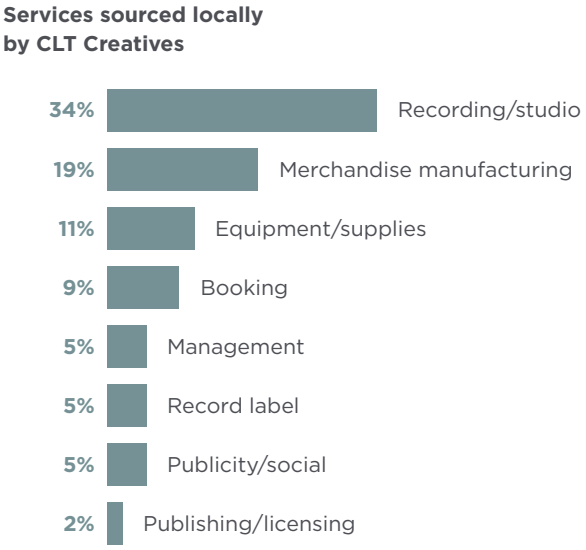
Q: What level of music industry training is of greatest interest?
Answered: 544



Other sources of income for Charlotte music creatives *besides* live performance:



Here are just some of the services that are sourced locally by Charlotte creatives:



A crucial concern is clearly the local music industry's perception of its own value. Across a broad range of activities and expertise, such as "mentoring," "Interest in new artists," "Connections," and "Competency" a majority of respondents rated their skills as "Poor" or "Fair."

Music industry service providers report "a lot" of their clientele are either local (58%) or Carolinas region (32%), reflecting the vital role Charlotte's music industry already plays across the region. This information combined with the strong desire for a "high profile music event" (88%) suggests building more regional music industry efforts, including a conference, as a potential long-term goal.

58%
local

32%
Carolinas region

88%
of music professionals expressed a desire for a "high profile music event"

In terms of the regulatory environment, several data points are crucial.

While only 20% of venues reported concern with "noise issues with neighbors" as a disincentive for presenting live music,

City of Charlotte well understands how infill and residential population growth (at least 50% population growth in most tracts between 2010 and 2015) will put the current noise ordinance to the test.[33]

Audience respondents have an interest and preference for non-traditional music spaces and music venues within walking distance. Developers of music venues report that conflict between City and County planning, design and construction permitting inspectors makes modification of existing structures especially costly vs. demolition plus new construction.

41% of audience respondents list "being outdoors" as a favorite activity to combine with hearing live music.

Research Methodology

Research for this study was conducted between July 2018 and January 2019 and included eight formal focus group sessions, several dozen interviews, an online survey designed and deployed by Sound Music Cities, and finally three larger group working sessions that included initial findings from the data and discussions of possible recommendations.

The online survey was accessed primarily through musiceverywhereclt.com and respondents could access and complete the survey through desktop computers, tablets or mobile phones. The online survey accepted entries between September 24th, 2018 and November 8, 2018.

The introductory page stated that no personal identifying information would be gathered or requested. There was no qualification screening within the survey. Home zip code was requested at the beginning of the survey, and after the survey closed, a small number of responses were disqualified for those responses that provided a home zip code outside of the Charlotte/Gastonia/Concord territory (CBSA defined by US Census). Respondents were initially segmented into three groups (music industry professional, music hobbyist or audience member/fan).

The following responses were received:

1,802 Total Responses

565 Music Industry Professionals

289 Music Hobbyists

944 Audience Member/Music Fans

Further screening of the hobbyists converted 201 to the Industry branch of questions and 77 to the Fan branch.

The survey had a 70% completion rate and the typical time spent by respondents was 11 minutes. The design of the questionnaire included short messages to indicate progress and help inspire continuation. A progress bar was not included.

Within the music industry branch, respondents were encouraged to participate in additional sections depending on their experience or to skip ahead. All sections were asked to answer demographic questions at the end.

The question formats varied. As much as possible the design accommodated respondents' desire to provide accuracy and specificity in quantitative responses (rather than broader multiple-choice segmenting of answer choices). For many questions, opportunities were provided to select "Other" as a response along with a comment box provided for open-ended text inputs. All additional text was analyzed and provides valuable context and commentary, a sample of which has been included throughout this study.

Question by question there was variation in the number of respondents who answered, as most questions did not require an answer to proceed, or there was logic applied, so that in several instances different questions were included or omitted based on prior responses. Additionally, a percentage of respondents abandoned at various points. The data presented herein includes all responses per question (not just those who completed the entire survey).

"My shoe size is about all you didn't ask."

The UNC Charlotte Urban Institute provided access to Your Voice CLT for a five-question survey of Mecklenburg's general population. For more information on this methodology, go to YourVoiceCLT.org

Charlotte Music Audience Development Guide

There's nothing more gratifying for hard-working music people than an appreciative audience. Much data has been collected to better understand the inner workings of the music ecosystem, but it is equally important to ask the fans and general public for their input.

This is especially true if we hope to develop local music ecosystems which must compete with the national/global entertainment industry that these days provides all the recorded music you could ever want at your fingertips as well as touring artists of the highest caliber performing almost nightly in any major city.

It is our hope that with greater understanding of how Charlotte people enjoy music, we can deliver more successful music experiences and in turn drive wider appreciation and support for the makers of music who also call Charlotte their home.

The insights herein are provided by two distinct surveys conducted in the fall of 2018. The first was the larger – a custom survey asking over 20 questions and fielding comments as well from a self-selected core audience of over 1,000 passionate music fans who participated anonymously. The second was a sample survey of Mecklenburg County's general population, pre-screened by YourVoiceCLT, with only five questions, each with varying numbers of responses ranging from 250-1,255 residents.

This guide is designed to help a range of interested participants, from creative musicians and music industry professionals to venue owners, programmers, music fans and civic-minded supporters who all share in the desire to further accelerate the growth of Charlotte's creative culture and economy.

The current state of the scene, from the audience perspective

Charlotte's population loves music and they include it in a number of ways in their daily lives. Less than 1% of the general population agree with the statement "I don't specifically seek out music for entertainment" and only 3% say "I prefer other types of entertainment." 16% of Mecklenburg County residents attend live music performances, which is equal to the percentage who listen to recorded music on the radio or in the background while doing other things. It is no surprise that the music fan survey was also strongly positive. Only 7 respondents noted that they never go out to hear live music. 48% of music fans listen to paid online music services a lot, and 86% spend some or a lot of time attending live performances.

On the other hand, when asked how well the Charlotte music scene meets their needs, only 36% of music fans chose "extremely" or "very" well. The rest chose "somewhat well" or "not so well." Additionally, over two-thirds of fans noted that they traveled in the past year outside of Charlotte specifically to attend music-related activities. Music fans voiced specific frustrations in comments on a range of topics including venue types, locations, genres presented, missing out on best touring shows, or lack of access to information.

"I just wished people would stop complaining about the "scene" here who do not try and go out and see shows. People seem very closed-minded about trying to go see something they might be unfamiliar with.!"

Frequency going out

16% of music fans experience a live music event at least once a week. This statistic only drops to 10% for the general population. And, when looking at how often different age groups go out to hear live music, fans in the age group of 40-54 go out just as often as younger age groups, yet they spend far more on music than younger age groups ($152 per month vs. $75).

How they're getting info

Social media is by far the most trusted source currently for fan awareness of music events (78%). Other options trail significantly, like local press (49%), local radio (26%) and posters or fliers (21%).

How they're making decisions

83% of music fans cite "knowledge of the band or artist" as their leading criteria for choosing to attend a music event. Ticket price/cost follows at 65%, Venue access/parking/travel is 46%, Time of the event is 42% and Acoustics/Amenities is 39%. Personal safety (12%) and Age restriction (3%) do not rate as significantly.

What don't they like?

The general population's top concern with music events is ticket expense (23%), followed by distance of music venues from their home (11%), expense of amenities such as food and drink (10%) and lack of favorite genre of music (8%). There was less concern for items such as all ages shows (1%), safety (2%), lower volume (5%), earlier start times (6%), better public transportation (6%) or more parking at venues (7%).

Music fans reported a number of concerns in comments, especially with loss of legacy music venues like The Double Door Inn. There was a strong aversion to the following types of venues by music fans, as represented from comments by this word cloud:

What are people interested in?

Discovering new music

In both the music fan and general population surveys, interest in discovering new music was strong (61% of fans "definitely interested," 27% of general population "very interested"). Music fans overwhelmingly seek out live performances of artists they discover as their next step (82%), versus purchase their music (57%), "following" on social media (55%), "add to their stream" (52%) or watch videos (49%).

Fans discover new music mostly through friends (81%), but seeing a band live still factors in heavily (64%), as does recommendation from another artist (50%), radio (57%), streaming service recommendation (42%), print or online media (38%), and TV (27%) still factor in significantly.

Favorite genres

45% of general population's top choice was "I like many different genres" ("Rock" was a distant second at 13%).

Favorite venue types

68% of music fans' first choice for venue type is "small music settings/venues." Seated concert halls (14%) and Larger Live Music Venues (8%) were distant second and third choice.

Accompanying activities

As expected, music fans love to have dinner/drinks (85%) as part of their live music experiences or meet up with friends (80%). Being outdoors comes in third at 41%, followed by meeting new people (32%) and dancing (29%). Also, 26% like to support a charity and 21% suggest family-oriented activities. Only 3% desire to combine fitness activities with live music.

Local and Regional artists vs. National artists

Fans have a greater interest in supporting local or regional music versus national touring artists (31% "Definitely" going out to hear more local live music that they used to, vs. 19% for national acts). The top three influencers for music fans to go see live local music are "Genre I like" (71%), "Venue I Like" (67%) and "Recommendation from a friend" (60%). Other factors rated lower like "Ticket price" (48%), "Video of live performance" (26%), "local media recommendation" (19%) and "social media profile" (19%).

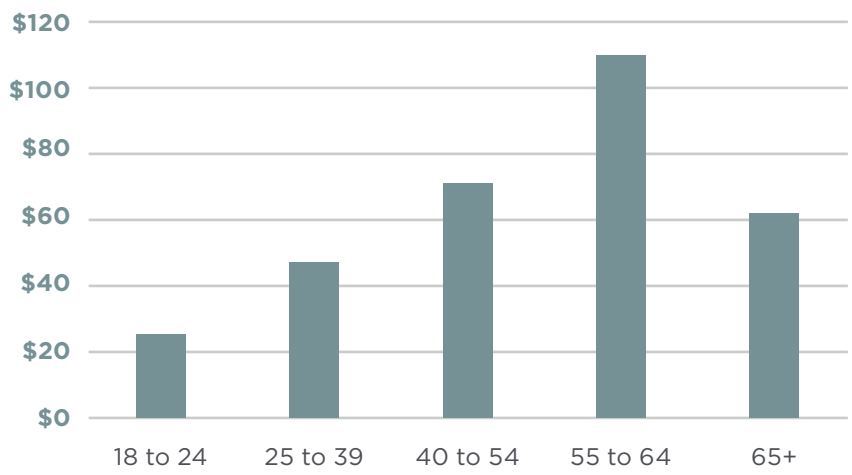
How much do they spend?

On average music fans spend $116 per month on music. And in terms of trend, music fans report spending more on music over the past three years (44% increased somewhat or increased significantly, 36% stayed the same and only 21% decreased).

By age group

As mentioned earlier, 40-54 year olds go out as frequently as younger age groups and spend more ($152 a month on music vs. $52/month for 18-24 year olds and $100/month for 25-39 year olds). Music fans 55-64 spend the most ($177/month), even though they go out to hear music less often.

Music Fans – $ Spent Per Gig Attended



What do they buy?

Tickets/cover charges are the most common expenditure (87%) followed by streaming services (62%), artist merchandise (32%), CDs/DVDs (31%). Donations to artists was only 9%.

Insights from Audience Data

The market potential is significant

The biggest surprise, and a helpful reminder has been the strength of interest in music, live music and discovering new music. This represents a much greater market potential than we might have believed earlier, and it counters a common perception voiced in comments and focus groups that interest in live music is low in Charlotte. This can serve as a focus for attracting interest and investment from outside the industry.[34]

What people want by age group

We also have a better sense of what people are looking for, and how behavior differs across age groups. For example, 85% of 18-24 age group listens "A lot" to recorded music in the background. This falls to 49% for 65+. Also, music fans 55-64 spent at least 3 times what our youngest fans spend per gig. In almost all aspects of consumption of music, millennials and post-millennials have a more intensive interaction with music, except for attending live music shows where 40-54 age group are more supportive.

Audience Development and Charitable Giving Development go hand in hand

As our understanding deepens on how different age groups engage with Charlotte's live music scene, we can improve not only attendance and consumption of local live music, but also financial support. On the one hand, we should work to get more engagement through live shows, especially from younger audiences. On the other hand, older audiences (especially 55+) may appreciate a combination of options that include attending shows AND giving opportunities. In fact, data shows that charitable giving activity in Charlotte is quite low at the individual level between music fans and independent local music makers. Very few music fans report giving to music-related causes (only 9%), and at the same time Charlotte music makers are rarely asking for support such as through crowdfunding (only 9% ask for this help). So, when designing a Charlotte local music support advertising campaign, it is important to understand that getting the general population to buy-in on local music will also bring focus and energy to donations for music-related causes. The goal is not just to get more people going to shows, but also to support new nonprofits that over the long term can distribute services to freelancing music people, especially low-income musicians, for crucial needs such as health services, housing, or work space.

Passionate music fans can help in many ways

In comments, many fans expressed a desire to help and a need for direction on how best to make a difference. Organizations such as ShareCharlotte can help young nonprofits and community volunteers connect. In addition, there are number of small actions that can greatly help music people. We highly recommend this 15 point checklist for more ideas, and include this brief summary here (used by permission of Willa Mamet and available at www.willamametmusic.com):

> *"Don't know how to get people to want to go see bands. Great live music has become background brewery music."*

How To Be A Hero For Independent Music

1. Buy music as directly as you can from your favorite artists.
2. If you listen to your favorite artists often on streaming services, buy a copy of their music from them directly. A $10 CD purchase puts the same profit in an artist's pocket as 2,500 streaming listens. Think of streaming as a "free sample."
3. Go to shows. Buy tickets in advance (very important)!
4. Invite friends to shows. If you can, buy their tickets for them and/or physically bring them with you.
5. Invite friends to shows individually via social media. (Don't just share the event.)
6. Like, follow, subscribe via social media and invite your friends to do so as well.
7. Investigate subscriptions like Patreon, where you can offer as little as a dollar.
8. If you'd like to use a song (lyrics, music, both), ask the artists permission and credit them with the correct song, album and artist information.
9. Host a house concert. See Mamet's blog for instructions, "So, You Wanna Have A House Concert."
10. Host a touring musician on your couch. Let your local musician know you can put up their touring friends. The goodwill will be reciprocated when they are on the road.
11. If you think your favorite artist would be a good fit for a particular venue, tell them (and tell the venue too)!
12. Share the crowdfunding campaigns of artists you love. Invite people individually.
13. If you make playlists on streaming services, include smaller or independent artists alongside bigger artists. It gets those artists into the algorithms that these services use to recommend music to others.
14. Suggest artists to local DJs, bloggers, etc. Curators appreciate fan enthusiasm.
15. Tip whenever you see a tip jar. (It usually means the venue is not paying the musician).

Local music activity keeps dollars in town

For the general population, the price of tickets is the single greatest disincentive to see live music. This is especially true for younger audiences. We believe this feedback is more in response to national touring artists. Local musicians are in a strong position to compete in this regard. Even at lower ticket prices, paying for local music provides significant benefits for the local economy as well. Two hundred patrons paying $5 to see a local artist will put $1,000 in that musician's pocket which will help them pay rent, buy groceries, or pay for a local recording studio. These dollars stay in circulation locally.[35] On the other hand, $50 spent for a national artist will "leak" out of town in a tour bus that same night (although the State of North Carolina does withhold 4% for nonresident entertainers for compensation in excess of $1,500).

"We spend the money we earn on gigs and sales. It all goes to making and promoting the next record."

Insights for Do It Yourself (DIY) Musicians

A large percentage of musicians forego a range of professional services, do as many things themselves, and save every penny of gig money – all for the opportunity to make new audio recordings and videos. But the data from fans suggest that fans spend no more on audio recordings that they do on merchandise (non-recorded music items). Additionally, videos do not heavily influence fans' decisions to attend a live local show (26%). Put that together with evidence that music talent buyers in Charlotte rely on live performance video less frequently when deciding on bands to hire versus their social media profile (38% versus 58%). DIY musicians might consider a shift in their spending that includes development of compelling merchandise options as well as professional publicity and paid social media. Of course, it would nice to have the money to keep putting out records and videos. However, a full house of engaged fans wearing the artist's cool t-shirt can be just as helpful to an artist in figuring out what works musically *and* in paying their bills.

Specific Insights for Venues and Presenters

Charlotte music fans have a thirst for intimate engagement with live music. Their preference for small music venues was clear in the data (68%). Coupled with the insight that proximity to live music venues is a concern for many interested patrons, there could be significant potential for developing a more geographically distributed network of small or intimate music venues to serve different concentrations of residential populations. A simple map of live music locations versus population in Charlotte would help illuminate this disconnection.

Equally important is that two-thirds of fans decide whether to go see a new local artist simply based on venue. Venues that build trust with their audience in terms of their programming taste are ideally positioned to help local musicians get the toe-hold they need, and the role that small venues play as incubators of new talent cannot be overstated.

"I've lived in Charlotte for 8 years and seen the music scene get more corporate. Please find ways to elevate advertising of the smaller/private venues so more of the public is informed about these places and who they have to play."

Venues and presenters should note as well fans' strong aversion to larger stadium-type music concerts. Similarly, local festivals were not a favorite venue choice (3.5%) but they improved as a second choice (15%) and third choice (19%). Finally, restaurants and breweries did not rate highly as a first choice but nearly 20% of fans picked them as a third choice. Fans may be more flexible to reconsider non-traditional spaces and festivals as desirable music spots, but in order to change perceptions a strong shift in messaging about concerns such as price, accessibility, cost of amenities and quality or intimacy of the performance space will need to be communicated.

New models of music consumption

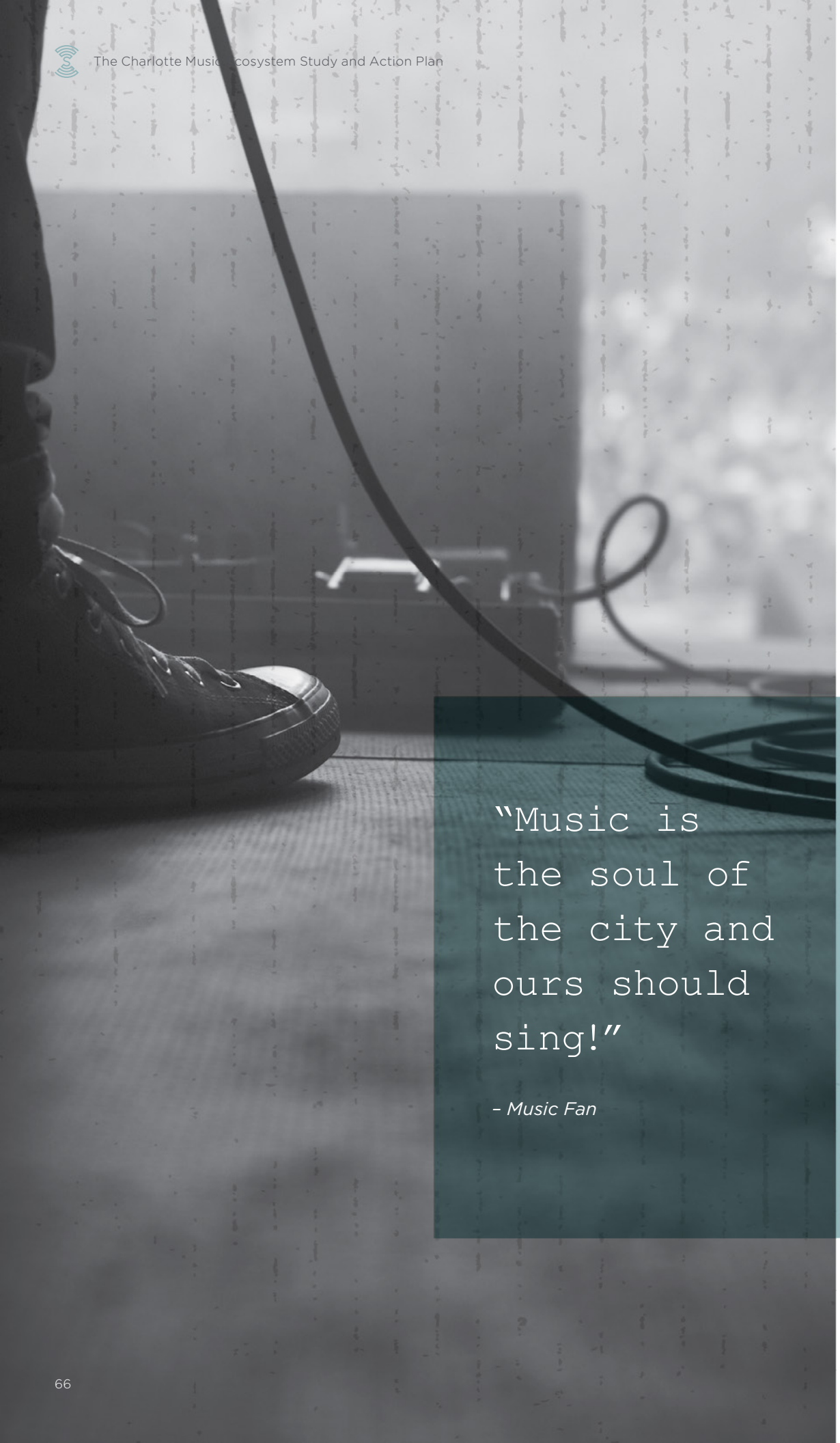
Two insights from the general population survey may be of interest for opportunities to better align live music with interests and behaviors. First, 24% of Mecklenburg County residents agree with the statement "I was more into music at other times in my life." Second, 19% said "I wish I had more time for music." This is compared to only 7% saying that they rely on friends for music recommendations (which conventional wisdom would lead us to believe). A large portion of Charlotte residents are disconnected with music, they know it and they seem to feel discontent about this. These same respondents cite ticket prices and distance from live music venues as their top concerns.

> *"How important is it to you that you feel that you have a personal or relatable connection to the performer on stage? Answer: Very"*

> *"Combining the power of our local musicians and our awesome breweries would create magic. I don't know what could be done about that, but it seems like it could be a lucrative way for a brewery to distinguish itself as the brewery of local music."*

Isn't good local music just good music?

It is not recommended to ask people to like music only because it is local. Guilt is not an effective long-term motivator to get people out to attend shows. Social scientists tell us that the way we decide what we like in music is more affected by social and community inputs than we realize.[36] Going out to a venue with people you hold dear, seeing other people sing along, recognizing a song (even subconsciously because it was playing in the background at the airport, etc.), bumping into a neighbor or colleague – all are powerful contributors to help us pay attention, listen to specific songs multiple times, and then more deeply invest in a particular artist's expression. Using the data herein, we can more consistently design these experiences for patrons, whether the music is created locally or not. Charlotte has no lack of inspiring musicianship and talent (historically or in the present). And with current population growth and new generations coming of age, it is going to keep renewing itself in the future. That is not the problem, and Charlotte's music creatives will greatly appreciate us telling them this! Giving local artists a platform to perform publicly leads to place-based experiences that patrons will recognize and value. Gradually, patrons become more comfortable thinking about originality and creative expression, rather than making comparisons to nationally popular entertainers as a means to make their own judgement of whether they like a particular performer or not. This is all music people ask for from their performance experiences...an open-minded engaged audience (without regard for identity qualifiers such as "local"). This type of engagement is already happening in Charlotte, and the people who understand this are excited about it growing. 71% of music people "definitely will continue" to participate in Charlotte's music scene. Another 29% "probably will continue" or "don't know." This is good news for music fans and the larger community in Charlotte.



"Music is the soul of the city and ours should sing!"

- Music Fan

Supporting Documents

ADDENDUM A

About the Partners and Writers

About MusicEverywhereCLT and Charlotte Center City Partners

Music Everywhere is a long-term economic development initiative that will enhance Charlotte's music scene and industry so that it becomes a force for tourism, a means of building community, a differentiating talent attractor, a significant source of new jobs, and a cultural asset of which Charlotte is proud.

Our Opus (Purpose)
With the power to break boundaries and connect cultures, music is a vehicle for, and an expression of, the creation of a unified community. A flourishing music ecosystem fuels job creation, economic growth, tourism development and strengthens a city's brand.

Our Call (Mission)
Music Everywhere is the backbeat to a thriving music scene in Charlotte. We support and protect the live music community and the brilliant minds behind it, encourage the business of music, and share the stories of Queen City sounds locally and internationally to make Charlotte synonymous with music.

Our Canon (History)
From the groundbreaking gospel of the United House of Prayer to the jazz roots of rap, from Bill Monroe's bluegrass to the rollicking rhythms of The Avett Brothers, Charlotte's history is a hotbed of music innovation. Music Everywhere will preserve Charlotte's music legacy while protecting its history in the making.

Our Chorus (Vision)
We will redefine the rhythm of Charlotte with Music Everywhere.

Charlotte Center City Partners vision is for Charlotte's Center City to be viable, livable, memorable and sustainable, with modern infrastructure, a tapestry of unique neighborhoods, and a diversity of thriving businesses. They envision and implement strategies and actions to drive the economic, social and cultural development of Charlotte's Center City. The vision is the continuation of the growth of Charlotte as pedestrian-friendly and walkable, with comfortable and interesting neighborhoods. It must have mixed growth, with balanced initiatives that are leveraged by public and private investment.

Cover photos courtesy of Rick Thurmond, Daniel Coston and David Butler.

About Sound Music Cities

Based in Austin, Texas, Sound Music Cities was born from direct experience in music-related policy, music development program implementations, and leadership of sound management initiatives. Founded by Don Pitts and Peter Schwarz in 2017, the team has extensive experience in music strategy that balances the needs of the music and nightlife industry with the needs of the community. Our growing list of clients includes WYEP Pittsburgh, The City of Pittsburgh Office of Nighttime Economy, The Pittsburgh Downtown Partnership, The City of Seattle Office of Film and Music, and the Government of the District of Columbia Office of Cable TV, Film, Music and Entertainment.

For more information, visit soundmusiccities.com

After 30 years in the music and entertainment industry, **Don Pitts** launched Sound Music Cities to help emerging and established music and entertainment cities find practical solutions to sound issues, and grow their music economy. Having garnered the nickname "The Sound Whisperer" from his tenure as the head of the City of Austin's Economic Development Department's Music and Entertainment Division where he reduced sound complaints by 70%, Don brings his experience and passion for creating vibrant music cities to Sound Music Cities and its clients. Originally from Nashville, Don has gone far and wide in the music industry, doing everything from managing bands and venues, to handling entertainment relations for Gibson Guitar, to co-founding the North American Music Cities Summit, to working in the public sector. His strategic perspective lies at the cross-section of these experiences – lending him the ability to navigate and bring together the political and industry landscapes. While with the City of Austin, Don's leadership fueled programs to increase prosperity for musicians, music businesses and music venues – all important when building a sustainable economic engine. Don values political know-how, street-smarts and active listening skills – three things that help when beginning to connect the dots over the course of a large music ecosystem project. When he's not advising cities on music-related business or devoting his time to enhancing the quality of the Austin music/musician experience, Don is adding to his collection of rare and vintage western shirts or walking the trails with his family.

Peter Schwarz brings almost four decades of experience as a musician and a business leader to the team. He recently completed a long-term commercial music industry plan for the City of Austin's Economic Development Department, Music and Entertainment Division, as well as authored research studies for "The Pittsburgh Music Ecosystem Study" and the City of Seattle's 2018 Music Industry Survey. He was previously for 14 years the executive-in-charge of all of Ray Benson's holdings, including Asleep at the Wheel and Bismeaux Records. He oversaw album releases and artist management for Carolyn Wonderland, Willie and the Wheel, Raul Malo, A Ride With Bob, Texas Tornados, Wheeler Brothers, Aaron Behrens, and the 2015 GRAMMY-winner Still The King. Earlier experience includes festival coordination, arts programming, album producing, touring musician and composer (as a member and manager of Steve Riley and the Mamou Playboys), protégé of master Cajun fiddler Dewey Balfa, and longtime musical collaborator with his father, Tracy Schwarz, of The New Lost City Ramblers. Schwarz is a graduate of Harvard College (BA) and the McCombs School of Business (MBA).

ADDENDUM B

musicsa

Best Practice Guide for Live Music Venues

The following are excerpts from an industry-leading guide that helps develop best practices for venue operators. The language has been edited in various places to align with USA-based terminology regularly used in the live music venue industry. The full guide is available here:

musicsa.com.au/best-practice-guidelines

Thank you to Lisa Bishop and Anne Wiberg for their assistance.
The following is included with the permission of Music SA.

Attracting and Booking Live Music Gigs

FINDING MUSICIANS

Firstly, think about how you want to operate as a live music venue. Do you want to specialize in a particular genre, host different genre-based nights, have resident bands, run all-ages events, add low risk acoustic music or perhaps stage touring acts?

There are a number of ways to find artists to suit your venue.

+ Get the word out to the music community via your social media
+ Go to shows at other venues
+ Talk to artists that perform in your area
+ Organize meetings with booking agents
+ Speak to people at Music SA
+ Check out online gig guides to see what musicians are playing and visit their Facebook pages for contact details
+ Read through local free music press and blogs
+ Show companies that hire out production and backline around your venue, explain your plan and discuss how you can work together
+ Contact local genre-based music associations

BOOKING MUSICIANS

Do you want to book the music yourself or contract someone else to do it? Most venues do one or a combination of the following:

Booking Yourself

- **Pros:** Direct communication with artists, can grow your network and relationships, can negotiate performance terms directly.
- **Cons:** Additional administration and time spent coordinating shows, and you'll need to grow your network yourself. It's up to you to make sure all bases are covered.

Booking Through Agents

- **Pros:** Access to a broad range of acts and industry knowledge, less administration, generally more professional and easier to talk business with than directly speaking with artists.
- **Cons:** Will cost a regular fee. Can be negotiated as part of an artist's payment, or they may request a retainer. Less direct contact with artists and no development of personal networks.

Booking As A Venue For Hire (Working With Promoters)

- **Pros:** Promotion of shows and administration is not your direct responsibility.
- **Cons:** You're open to take on a lot more risks. The promoter may select some acts that may not attract an audience to your venue. You'll need to ride out the highs and lows with them and you're giving a lot more trust over to another business. The goal is mutual gain, but there are always fluctuations in consistency.

WORKING WITH BOOKING AGENTS

As a live music venue, it's essential you build a good relationship with booking agents and agencies. They represent a roster of reputable artists and can be a great way to find music. They also manage the business and fee negotiations on behalf of the artists they represent.

1. Contact them through resources such as Pollstar, and artists' provided contact info
2. Invite them to visit and check out your venue (if they happen to be local)
3. Offer guarantees to artists to start getting more confidence in a new venue

PERFORMANCE AGREEMENTS

Once you've decided on the music act you should put the booking in writing. This is called a performance agreement. It's important to spell out the form of payment upfront. The three most common forms of payment are:

1. **A guarantee:** the venue agrees to pay an agreed fee for the show in advance. This is the most common type of payment deal in live music.
2. **A door deal:** the venue pays the artist a percentage of ticket sales for the show.
3. **A versus deal:** the venue pays a guaranteed fee to the artist plus a percentage of the door takings once a certain amount has been reached.

Go to Music SA's website for a template for a Performance Agreement.

musicsa.com.au/resources

MAKE IT PUBLIC!

Update your website or Facebook page with details of how you book artists that perform at your venue. Outline the process of how artists can get a gig. Whether it's sending in demos, links to music online or a phone call, it's much easier for the artists if they know how you like to work in advance.

Live Music Regulation

The following areas must all be addressed according to local law in order to present live music to the public.

Do your research of each of these topic areas:

+ Liquor Licensing and Live Music
+ Zoning/Use/Land Code
+ Permitting
+ Tax

SOUND MANAGEMENT TIPS

+ Use a sound level meter to take regular measurements from reference points both inside and outside during live shows and keep written records of these.
+ Educate staff on sound management principles, such as monitoring on-stage sound levels, managing patron noise and disposing of trash or recycling quietly.
+ There are a variety of construction materials you can install to better contain crowd noise in outside areas.
+ Use a PA system that is appropriate for the size of the venue. Devices such as limiters, warning lights, compressors and cut-out switches can help sound levels. Try to keep speakers facing away and as far as possible away from outside doors.
+ Install high-density acoustic insulation in the walls, ceiling and floor surrounding live music areas, particularly external walls that are close to neighbors.
+ Install sound absorbing materials such as heavy drapes and carpet in live music areas to reduce reverberation and minimize the build-up of sound.
+ Install acoustic or double doors at the entry points to your live music area, venue or other outdoor areas to limit the leakage of sound.
+ Regularly contact police and any other sound regulatory body, as well as residents and neighborhood groups in your area. Include newsletters or meetings and advise when you plan to host live events.

Setting Up and Staging Live Music

GET THE BASICS RIGHT/SIMPLE STAGE SET UP

1. A suitable set of PA speakers to amplify the music coming from the stage. A basic set up includes two speakers facing the audience and at least one speaker facing the musician as a "monitor" so they can hear their performance.
2. A basic mixing unit with at least 4 input channels, which helps manage your sound. Performers need to be able to separate the volume levels of (for example) their instruments and their vocals, to make sure that each aspect of their performance is being amplified in an appropriate and balanced way.
3. A couple of microphones, a set of microphone stands, the appropriate cords and multiple power adapters.
4. A basic lighting set up to illuminate the performance space (use LED lights to save on power bills).
5. A space, stage or riser that is big enough to comfortably fit a full band including room for a drum kit.
6. Digital mixing consoles simplify the mixing/installation process (such as with iPads etc.)

BACKLINE

If you are programming a lot of shows, consider purchasing/leasing "backline" i.e. a standard drum kit, bass speaker/amplifier, guitar amp, keyboard stands, microphone stands, cords and microphones. This will attract artists to your venue.

PARKING, LOADING AND STORING

You'll also need to ensure there are suitable parking options, or temporary options for the band to load in their equipment to your venue. Allow plenty of time for a sound check to be completed before patrons arrive. Suitable storage space for storing cases and additional equipment is also a practical necessity. Contact your local authorities if there is no loading zone.

PA SYSTEMS AND MIXING

Regardless of how good your PA system is, or how good the act is, a good show hinges on how well the sound is mixed. While a simple acoustic set up can be quick to sound check, a skilled engineer should always sound check a band. Always request a stage plot and inputs list from the artist. Consider employing a sound engineer to operate your equipment and ensure all performances at the venue sound the best. Usually the in-house operator mixes sound and lighting for artists for a small fee. Larger acts often bring their own mixer.

ARTIST RIDER

It is a strong expectation in the entertainment industry that musicians are provided with refreshments. This can be either supplied over the bar upon request or ticket tokens can be issued. At the very least water and soft drink should be available free of charge. If the performance is scheduled for early to late in the evening then it is typical to provide a meal, particularly at a private gig when others are being served as well.

INSURANCE

Check whether your business insurance policy covers you for operating live music performances before proceeding with booking shows. It's also best to check whether the musicians you book have their own general liability insurance and you may ask for a copy of their Certificate of Insurance. It should be noted that it is the responsibility of musicians to have their own musical equipment insured. If the gear belongs to your venue, then insure it through your business policy.

ALL AGES EVENTS WHERE MINORS ARE PRESENT

Expect additional legal requirements when admitting minors. Research local laws to learn more.

CROWD SAFETY, SEXUAL HARASSMENT & INCIDENTS DURING EVENTS

+ As the venue owner, make sure you understand your rights to deny service or eject patrons.
+ Consider hiring trained security providers if you are going to stage live music with large numbers of patrons. Drink spillage, sexual assault or injuries can occur. On top of preparations you've made to ensure the stage set up is neat and secure, have a security person watch things in the front, ensure that drink spillage is cleaned and that first aid is administered in a safe area.
+ Complaints may occur and it's crucial to have a system to capture this information. Take the time to record any incidents on a form when they occur. Repeat offenders should be asked for ID and blacklisted from your venue. Take complaints by female patrons seriously and train your staff in complaint handling. Consider installing security cameras at entries and waiting areas to assist in surveillance, deter antisocial behavior and to obtain evidence of complaints. If an incident is reported to a staff member, or they become aware of an incident or believe there is a likelihood of an incident occurring, all necessary steps must be taken to eject the perpetrator (and if necessary, their friends) from the venue. The perpetrator's identity must be sought and recorded in the incident log.
+ Clearly inform patrons through written policies and signs that your venue discourages sexual harassment and irresponsible drinking behavior. Develop a patron code of conduct and display it at all entry points. Create posters for bathrooms that indicate zero tolerance for sexual harassment.

COPYRIGHT LICENSING

No matter if you're hosting live music or playing music through your house speakers/television, you must obtain a license for your business from various Performance Rights Organizations (PROs). PROs are responsible for collecting and paying royalties to songwriters. Musicians will love you for being licensed so they can claim their public performance rights (it is their responsibility to submit their set lists to enable this).

AND DON'T FORGET ...

+ Have all of your administration in order; know the stage set up, playing order, set times, rider and any requests communicated from the band.
+ If the show is ticketed, have door staff and a float prepared in advance.
+ If the band wish to sell merchandise, have a table prepared.
+ Use your communication channels to share what time the show will start and when each band will perform, as well as any additional promotions.

Working with Musicians

LOCAL MUSICIANS

There is an incredible variety of musical acts available for booking. Smaller venues can host acoustic solo acts or have "Open Mic" nights to attract unsigned and emerging original artists (who will remember your venue later in their careers!). Larger venues can offer an opportunity for local emerging bands to support more accomplished bands or supplement the headline touring acts playing at larger capacity venues.

The venue will work directly with the musician if the musician is self-managed or will negotiate the booking through an Artist Manager if the local act is more established.

Covers bands are typically booked through a Booking Agent (Entertainment Agency). Booking Agents maintain a roster of acts that can be booked for functions at venues. Booking Agents act as a liaison between the Artist Manager and the venue,often negotiating performance fees for the act.

Promoters are entrepreneurs who take on the responsibility and risk of providing musical acts for venues. This will involve arranging and routing touring in suitable venues in regional locations. The Promoter often engages a Tour Manager to do all the production communication(in "advance" and day of show) with the venue regarding times and logistics.

PERFORMANCE AGREEMENTS

A performance agreement is an initial basic contact for services outlining when and what performance the artist will perform at your venue, including what the band will provide and what the venue will provide for the performance. It should be followed up with an Advancing Worksheet containing more details. A basic template is available at musicsa.com.au/resources

WORK FOR HIRE

Regardless of the deal, it's important to understand that artists are not employees of a venue. They are contracted to provide a service.

ADVANCING WORKSHEETS

An Advancing worksheet is a document that venues can provide to musicians/tour manager, the Booking Agent or the Artist Manager in the weeks leading up to a live music show. It provides more details about the upcoming event and is based upon what was agreed to in the initial performance agreement.
A worksheet can include details such as:

+ The location of the venue and the contact details of the venue manager
+ What time the musician should load their equipment into the venue and details about parking (if available)
+ What meals and drinks are provided to the musician (commonly called the 'rider')
+ What production is supplied by the venue (i.e. lighting, sound, stage)
+ Times for sound check and set times, including breaks in the performance
+ Details for where the artists can store personal belongings

MUSICIAN FEES

There is no regulated remuneration structure for contemporary musicians. There is an industry standard that Booking Agents take 10% of the musician's gross fee and Artist Managers take 10-30% of the musician's net fee (may vary for different income streams).

A venue will need to negotiate the musician fee for touring bands with Booking Agents, who will often tell the venue what the market driven fee is – the better the act with the bigger the fan base then the larger the fee will be.

These fees may vary according to a variety of factors including: night of the week, quality/reputation of the artist, capacity of the venue, how long and how many sets, whether or not production is supplied, how many tickets the band can sell, touring/travel costs that need to be recouped, the number of players in the act and the number of bands that are playing.

The venue will need to add the technical production costs of any additional equipment not provided in-house. Costs can be controlled by purchasing or leasing a backline and mixing console so that sound equipment is not needed to be brought in every time an act plays live music in your venue.

ARTIST RIDER

In addition to the hospitality mentioned previously, touring musicians will often stipulate a number of production, logistical, meal, other preferences, and even legally binding requirements in a rider attached and incorporated into their performance agreement. The more these details can be arranged ahead of the agreement signing, the better.

SELLING MERCHANDISE

One of the ways in which musicians earn additional income while playing live is by selling band merchandise – CDs, hats, t-shirts, hoodies etc. It is very helpful to have a table set-up near the mixing desk or front entry, where a band support person can sell merchandise, or the band can sign autographs for fans. This is a good opportunity for the venue to also place a "Venue Mailing List Sign-Up" on the merchandise table and collect emails of people interested in knowing what future shows are on at your venue.

EQUIPMENT STORAGE

Musical equipment and personal items belonging to musicians must be insured by the musicians. These items can be both fragile and expensive, so musicians will love the venue if it provides a lockable space to store gear while on stage.

Marketing and Promoting Live Music

GETTING INTO THE MARKET

Without beating around the bush, the live music market is highly competitive so to be a cut above the rest, you should consider at minimum getting the following things correct. Look at marketing as an investment rather than an expense and if well planned and executed, should get more music patrons through your doors.

Free Opportunities (Earned Media)

This takes time and effort to develop, but there are an increasing number of tools to help streamline your efforts.

+ **Gig guides:** Target any local services that will list your events for free. It's a start. Make a schedule so your listed information is up to date and accurate.

+ **Social media:** Choose one or two platforms (Facebook, Instagram) and be very good at it. Post regularly with interesting articles, song and video links of bands playing in your venue and give-aways. Consider small $ for advertising to boost Facebook posts.

+ **Your website:** If you've got a website, include your entertainment listings in a prominent position. Ensure they're always up to date.

+ **Ask bands to help promote their shows:** Obviously it's a good idea to have the artist tell their fans they're playing at your venue (creating a Facebook event should be a minimum requirement).

  But a word of warning – by no means make this your only strategy and put it all on the band to bring a crowd. Work together.

+ **Start a mailing list:** Collecting emails of people who are interested in knowing what's on at your venue might take you a bit of time to administer, but there is a host of online tools that can help you manage a mailing list. That way you can keep them informed of what is coming up and when their favorite act is coming through. Ensure you maintain a regular consistency of mailing (once a month is fine). Templates can be downloaded for free for most mailing list programs.

+ **Band bios and photos:** Be sure to ask your artist to send you a digital version of their brief bio and a decent band photo (colour, high res 800W pixels x 800H pixels, .eps and .jpeg formats, or whatever specs you require).

Low Cost Marketing Options

+ **Posters and flyers:** Whether they're put up in-house or distributed around the eighborhood, posters remain a relatively low cost means of promotion. Don't use Microsoft Word to design a poster ever! Get a designer to help you set up a professional template that looks good, catches the eye, is easy to edit that will reflect well on your brand.

+ **Paid social media posts:** Social media advertising, when done right, can reach a very specific audience and present a point of sale directly in front of them. Again, it's not the only strategy you should employ but it can be helpful as part of an overall marketing strategy and allows you to target your audience.

+ **Competitions and loyalty programs:** It doesn't take much to add a "Competitions" button to your website to give-away free tickets to shows. You can link the competitions to social media posts but be sure to keep abreast of rules and conditions. There's a reason why age-old strategies like promotional giveaways and loyalty programs are still included in marketing strategies to this day. Well-executed promotions linked to your venue can add value to the show experience for your customers, increase their positive association with your brand and help keeps things lively and exciting.

Higher Cost Marketing Options

+ **Regularly advertise in relevant publications or on radio:** Again, this is about knowing how to reach people who will come to your show. Media often has a broad reach that can help you grow the brand of your business. Be savvy about how frequently you invest and which media you invest in.

+ **Arrange broader distribution of your promotional material:** Poster and promotional distribution companies can help promote your shows to people sitting in coffeeshops and bars, for example, and place your brand in places where people are looking for information on things to do. Research local street team providers.

+ **Engage a graphic designer:** If you're serious about standing out from other shows, you should look to find a designer to work with to create all of the artwork you use to promote your music.

+ **Live music photography:** A picture speaks a thousand words. Spend a few hundreds dollars and engage a professional photographer to shoot a couple of your live music gigs. You will be rewarded with a good number of key images to use in all your printed and online marketing for years.

+ **Work with a ticketing company:** If you run ticketed events regularly, working with a ticketing company is a good idea. They will often add booking fees to ticket prices to pay for providing their service, but they can save you a huge amount of time in administration and also assist with data collection, growing your contact lists, and general promotion for shows.

+ **Partnering with large events:** There are always large events that your business can partner with to increase awareness, reach new audiences and generally get seen. Just because you are a venue doesn't mean you can't be part of a larger event somewhere else. Public funding may be available to support live music events in your neighborhood.

+ **Engage a publicist or marketing specialist:** Professionals who know how to attract customer's attention may cost you, but if you're really looking to succeed they can make a big difference in spreading the word to the media, reviewers and music bloggers about your venue and the acts you have performing. If you have the money engage a Social Media Influencer to spread the word on their social media channels.

Visit the Music SA website resources page for a cheat sheet on How to Write a Media Release and a list of media contacts!

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SOUND MUSIC CITIES

soundmusiccities.com