NORTHWEST ARKANSAS
MUSIC ECOSYSTEM STRATEGY AND ACTION PLAN

March 2020
Dear Northwest Arkansas,

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

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

While we were working on this project, the region has already launched an arts service organization, with a director and a wealth of experience to bring to the table. Last year, a delegation of Northwest Arkansas can offer the workforce talent our region needs.

A vibrant creative economy will build an environment that values creativity and entrepreneurship. It will strengthen our economy and contribute to economic growth, workforce development, artistic education and tourism.

Friends,

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

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

Yet, there’s so much more Northwest Arkansas can accomplish when it comes to its music ecosystem. It’s possible because steady investments in Northwest Arkansas’ quality of life are met with a hunger to do even more. A robust music ecosystem can help drive the economy and improve livability. To make the case, we partnered with Sound Diplomacy to conduct an assessment of Northwest Arkansas’ music sector and to solicit critical feedback from our region’s musicians, businesses, and advocates.

What we found was the region’s music ecosystem is responsible for generating a total annual economic output of $389 million and generating 3,972 jobs. This Sound Diplomacy report demonstrates the music industry’s important role in the Northwest Arkansas Council’s economic development strategy. It shows how a vibrant music economy contributes to economic growth, workforce development, artistic education and tourism. A coordinated and intentional strategy to promote arts and music and empower local artists will strengthen our economy and build an environment that values creativity and entrepreneurship.

A vibrant creative economy will develop, attract and retain the workforce talent our region needs.

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

“Music can change the world because it can change people.” – Bono

Sincerely,

Nelson Peacock
President & CEO
Northwest Arkansas Council

FOREWORD

Founder & CEO, Sound Diplomacy

Shain Shapiro, PhD

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

Photo: Bentonville Community Radio
ABOUT THE PROJECT

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

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

METHODOLOGY

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

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

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

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

ANALYSIS OF FINDINGS AND RECOMMENDATIONS
A comprehensive plan for the development of the Northwest Arkansas music ecosystem based on the analytical work previously completed.
ECONOMIC IMPACT SUMMARY

ABOUT THE PROJECT

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

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

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

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

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

MUSIC ECOSYSTEM GROSS VALUE ADDED (GVA)
The music ecosystem output minus music ecosystem intermediate consumption (the costs of all inputs, for example, backline rented by a live music promoter).
ECONOMIC IMPACT SUMMARY

Musical ecosystem 2016

Northwest Arkansas’ music ecosystem was responsible for generating a total output of $389 million, which represented 1.81% of the total output of the region, and a Gross Value Added (GVA) of $222 million to the local economy in 2016. Total music-related compensation was $125 million in 2016.

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

EMPLOYMENT

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

It was estimated that the growth of the direct output of the music ecosystem was 10.4% between 2002 and 2016. This figure is lower than the growth of the output of the region’s economy, which reached 116.8% during the same period.

MUSIC ECOSYSTEM DIRECT OUTPUT

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

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

MUSIC ECOSYSTEM OUTPUT PER CAPITA (IN US DOLLARS)

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

MUSICAL ECOSYSTEM EMPLOYMENT

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

2 The values of the time series 2002–2016 were estimated using the output growth of the music ecosystem, available at the Bureau of Economic Analysis for Benton and Washington Counties.

3 Data source: Bureau of Economic Analysis.
OVERVIEW OF MUSIC ASSETS IN NORTHWEST ARKANSAS*

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

**NORTHWEST ARKANSAS MUSIC ASSETS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music Choruses</td>
<td>94</td>
</tr>
<tr>
<td>Music Schools</td>
<td>50</td>
</tr>
<tr>
<td>Bars, Cafes and Restaurants with Music</td>
<td>47</td>
</tr>
<tr>
<td>Radio Stations</td>
<td>28</td>
</tr>
<tr>
<td>Festivals</td>
<td>24</td>
</tr>
<tr>
<td>Orchestras and Concert Bands</td>
<td>24</td>
</tr>
<tr>
<td>Recording Studios</td>
<td>23</td>
</tr>
<tr>
<td>Multi-Purpose Venues</td>
<td>21</td>
</tr>
<tr>
<td>Music Retail</td>
<td>13</td>
</tr>
<tr>
<td>Co-Working Spaces</td>
<td>13</td>
</tr>
<tr>
<td>Occasional Venues</td>
<td>13</td>
</tr>
<tr>
<td>Nightclubs (with music program)</td>
<td>11</td>
</tr>
<tr>
<td>Booking Agents &amp; Live Music Promoters</td>
<td>7</td>
</tr>
<tr>
<td>Purpose-Built Music Venues</td>
<td>6</td>
</tr>
<tr>
<td>Technical Contractors for Music</td>
<td>5</td>
</tr>
<tr>
<td>Other Music Businesses</td>
<td>5</td>
</tr>
<tr>
<td>Rehearsal Spaces (Including Studios)</td>
<td>5</td>
</tr>
<tr>
<td>Record Labels</td>
<td>3</td>
</tr>
</tbody>
</table>

*Source: Mapping tool, Sound Diplomacy research

Check out the Northwest Arkansas Music Map under www.sounddiplomacy.com/nwarkansas
# Northwest Arkansas’ Music Ecosystem Regulations at a Glance

<table>
<thead>
<tr>
<th>Topic</th>
<th>Town</th>
<th>In Place?</th>
<th>Policy</th>
<th>Best Case</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Night Transport</strong></td>
<td>Bentonville</td>
<td>No</td>
<td>No public transport</td>
<td>Philadelphia, PA has 24-hour bus lines. Houston, TX has a nocturnal form of micro-transit called a ‘jitney’.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>No</td>
<td>No public transport</td>
<td>San Francisco, CA – San Francisco’s Agent of Change law states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built within 300 feet of the venue.</td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>No</td>
<td>No public transport</td>
<td></td>
</tr>
<tr>
<td><strong>Agent of Change</strong></td>
<td>Bentonville</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>Other Regulations</strong></td>
<td>Fayetteville</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>To Protect Music Spaces</strong></td>
<td>Rogers</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Music Office</strong></td>
<td>Bentonville</td>
<td>No</td>
<td>n/a</td>
<td>Nashville, TN – The Music City Music Council is a collaboration between the Mayor’s Office, Chamber of Commerce and Convention Visitors Corp. Its focus is economic development, and it works to expand local business while attracting new businesses.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>City-Led Grants</strong></td>
<td>Bentonville</td>
<td>No</td>
<td>n/a</td>
<td>There are currently no music-specific grant programs offered by the cities or the region, although there is Arts and Events support available from the State of Arkansas, education institutions and the philanthropic sector.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>Region-Wide Grants</strong></td>
<td>Bentonville</td>
<td>No</td>
<td>n/a</td>
<td>The Colorado Music Strategy is a combination funding and tourism body, with $200,000 to give to Colorado-based artists or music businesses that will help raise the state’s profile, creating a win-win relationship.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>No</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>Event Permitting</strong></td>
<td>Bentonville</td>
<td>Yes</td>
<td>Relatively easy to obtain and inexpensive. Strict regulations on the use of public buildings with a protected heritage status.</td>
<td>Seattle, WA – Seattle’s Special Events Office has a website with extensive guidelines on how to apply and what to expect from the Office when requesting a Special Event Permit. Some of the site’s useful tools are a calendar of approved events, downloadable templates and an online handbook with all city requirements.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>Yes</td>
<td>Event applications for park and public space use can be submitted online at least 21 days in advance.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>No</td>
<td>No streamlined request procedure is in place to produce an event on public or city property</td>
<td></td>
</tr>
<tr>
<td><strong>Liquor Permitting</strong></td>
<td>Bentonville</td>
<td>Yes</td>
<td>Permits for all cities are administered by the Arkansas ABC Division. The types of permits, and license/permit application process is convoluted.</td>
<td>Lafayette, LA – Alcohol permitting procedures are all explained clearly online, from city to state requirements.</td>
</tr>
<tr>
<td></td>
<td>Fayetteville</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rogers</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Permits for all cities are administered by the Arkansas ABC Division. The types of permits, and license/permit application process is convoluted.** - A jitney is a bus or other vehicle that carries passengers for a low fare that provides a cheaper alternative to taxis and ride-sharing services.
NORTHWEST ARKANSAS MUSIC STRATEGY VISION

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

SWOT

STRENGTHS

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

WEAKNESSES

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

OPPORTUNITIES

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

THREATS

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

**TOP THREE ASSETS**

- Performance opportunities for established artists
- Quality of venues
- Variety of genres

**QUALITY OF VENUES**

- Quality of local talent
- Audience diversity
- Networking opportunities for artists and music industry

**TOP THREE CHALLENGES**

- Performance opportunities for emerging artists
- Affordability of housing
- Reputation of Northwest Arkansas as a music region

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

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| **Performance opportunities for established artists** | 🌟🌟🌟🌟🌟
| **Quality of venues** | 🌟🌟🌟🌟
| **Variety of genres** | 🌟🌟🌟
| **Quality of local talent** | 🌟🌟🌟🌟🌟
| **Audience diversity** | 🌟🌟🌟🌟🌟
| **Networking opportunities for artists and music industry** | 🌟🌟🌟🌟🌟

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| **Affordability of housing** | 🌟🌟🌟🌟🌟
| **Reputation of Northwest Arkansas as a music region** | 🌟🌟🌟🌟🌟
| **Audience diversity** | 🌟🌟🌟🌟🌟
| **Networking opportunities for artists and music industry** | 🌟🌟🌟🌟🌟
| **Media coverage** | 🌟🌟🌟🌟🌟
| **Audience’s willingness to pay for concerts** | 🌟🌟🌟🌟🌟
| **Variety of venues** | 🌟🌟🌟🌟🌟
| **Artist performance fees** | 🌟🌟🌟🌟🌟
| **Regulatory/legislative framework for live music events** | 🌟🌟🌟🌟🌟
| **Collaboration between the cities in Northwest Arkansas** | 🌟🌟🌟🌟🌟
| **Affordability of work and/or rehearsal spaces** | 🌟🌟🌟🌟🌟
| **Collaboration with the region’s tourism authorities** | 🌟🌟🌟🌟🌟
| **Parking infrastructure around music venues/festivals** | 🌟🌟🌟🌟🌟
| **Regulatory/legislative framework for live music venues** | 🌟🌟🌟🌟🌟
| **Availability of funding support** | 🌟🌟🌟🌟🌟
| **Support for music talent from labels and managers** | 🌟🌟🌟🌟🌟
| **Public transportation to music venues/festivals** | 🌟🌟🌟🌟🌟

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Photo: HomeSweetHome Festival
Photo: Springdale Civic Center/DJ FlexLatino
KEY FINDINGS

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

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

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

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

Apart from Rogers, all cities have streamlined processes for event permitting. Liquor permits for all cities are administered by the Arkansas ABC division. The types of permits and license/permit application process is convoluted. Fayetteville is the only city in Northwest Arkansas that has an entertainment district defined through zoning and different regulations. It should be noted that a new bill in favor of entertainment districts was passed by the State Legislature in April 2019. The new law (Act 812) promotes hospitality and tourism in areas permanently or temporarily designated as “entertainment districts,” allowing on-street alcohol consumption within its boundaries.

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

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

There are notable differences between the cities and how they address sound limits. Springdale is overall the most liberal city when it comes to sound. Bentonville’s earlier noise curfew could possibly impact the type of activities and nightlife currently happening there.

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

With the right support systems, the economic growth of the music ecosystem can be boosted. There are currently no grant programs directly offered by the cities, region or state to participate in music creation and/or develop music activities and/or organizations. Applicable grants are mainly led by foundations that provide support for the arts and culture at large, including individuals and organizations.

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

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

EDUCATION

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

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

ARTISTS’ AND PROFESSIONALS’ RESPONSES TO SKILLS AND COMPETENCIES GAPS

Source: Survey

Source: Survey
ARTIST DEVELOPMENT

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

The majority (82%) of artist respondents do not have any type of professional support: only five have a PR/marketing agent or a booking agent, and only two respondents have a manager. Results also show that, although venue respondents in the surveyed sample mostly produce ticketed shows, Northwest Arkansas artists performed a considerable amount of unticketed and/or free shows for their audiences. In fact, 16% of artists surveyed played exclusively free shows in the last year, and 46% of artists performed half or more of their shows for an audience that had not paid to see them.

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

ARTIST RESPONDENTS’ SELF-REPORTED EARNINGS FROM MUSIC ACTIVITIES

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The majority (82%) of artist respondents do not have any type of professional support: only five have a PR/marketing agent or a booking agent, and only two respondents have a manager. Results also show that, although venue respondents in the surveyed sample mostly produce ticketed shows, Northwest Arkansas artists performed a considerable amount of unticketed and/or free shows for their audiences. In fact, 16% of artists surveyed played exclusively free shows in the last year, and 46% of artists performed half or more of their shows for an audience that had not paid to see them.

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

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Development of the Music Industry

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

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

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

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

There is an uneven playing field for local artists to compete with the marketing power of U.S. artists who are signed by major record labels, playlisted in streaming platforms and get plenty of coverage in the general and specialized media. Regardless of the promotional challenges, the situation would likely improve if more local artists of diverse genres were covered and promoted in the local media.
The Northwest Arkansas Council, the newly created arts service organization, and possibly a regional music office, will play a pivotal role in moving forward with these recommendations and implementing the strategy. However, the success of this strategy depends on the collaboration of many different actors in the region: regional city governments, musicians, business owners and music professionals, students, tourism associations, bar- and restaurant owners, the university and other music educational providers, just to name a few. As part of this process, it will also be crucial to include stakeholders and communities who have not yet voiced their feedback.

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

TIER 1 (YEAR ONE TO TWO)

RECOMMENDATION
Establish the Northwest Arkansas music office
Action Steps
- Set up the music office website
- Appointment of a music officer
- Build and maintain a digital database of the regional music ecosystem

RECOMMENDATION
Set up the music office website
Action Steps
- Create an online overview for permits and licenses
- Create an online overview for permits and licenses
- Create an online overview for permits and licenses

RECOMMENDATION
Establish a music board
Action Steps
- Create a ‘music place’ certification
- Create music festival and event promotions
- Create an online overview for permits and licenses

RECOMMENDATION
Create an online overview for permits and licenses
Action Steps
- Designate reserved zones near venues
- Designate reserved zones near venues
- Designate reserved zones near venues

RECOMMENDATION
Create a ‘music place’ certification for cities in Northwest Arkansas
Action Steps
- Develop a ‘music place’ certification for cities in Northwest Arkansas
- Develop a ‘music place’ certification for cities in Northwest Arkansas
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TIER 2 (YEAR TWO TO THREE)

RECOMMENDATION
Set up a ‘fair play’ guide and certificate in artist booking
Action Steps
- Create a music industry training program
- Create a music industry training program
- Create a music industry training program

RECOMMENDATION
Set clear enforcement guidelines and policing for local noise ordinances
Action Steps
-评定音乐行业培训
-评定音乐行业培训
-评定音乐行业培训

RECOMMENDATION
Enable professional development opportunities for music business professionals
Action Steps
- Create a masterclass program in music business
- Host ‘music industry socials’ networking events after masterclasses

RECOMMENDATION
Establish music industry traineeship and internship programs
Action Steps
- Create a masterclass program in music business
- Host ‘music industry socials’ networking events after masterclasses
- Establish music industry traineeship and internship programs

RECOMMENDATION
Define the role of local, regional and state stakeholders in the promotion of music tourism
Action Steps
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TIER 3 (LONG-TERM GOALS)

RECOMMENDATION
Build a music hub
Action Steps
- Offer rehearsal rooms at affordable rates
- Offer shared recording studio space for producers and artists
- Offer flexible co-working and private office space for music companies and freelancers

RECOMMENDATION
Create a network to provide music education collectively across the region
Action Steps
- Develop a music education collective
- Develop a music education collective
- Develop a music education collective

RECOMMENDATION
Establish a music industry traineeship and internship programs
Action Steps
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RECOMMENDATION
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Action Steps
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- Designate reserved zones near venues
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ABOUT SOUND DIPLOMACY

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

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