

SOUND
DIPLOMACY

East Tennessee Music Census

Tennessee Entertainment Commission

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1. Introduction

1.1 About the Project

East Tennessee, located in the state's eastern grand division, is defined by the Appalachian Mountains, including the iconic Great Smoky Mountains National Park. Characterized by a blend of natural beauty and historical significance, the region is formed of unique counties, cities and towns ranging from rural Morgan County to the metropolis of the city of Knoxville.

The music scene in East Tennessee is deeply intertwined with its Appalachian heritage, establishing the region as a vital birthplace and long-standing home for American roots music. Genres such as country, singer/songwriter, and rock are some of the most widely played in the region. The ecosystem is anchored by Knoxville, with its diverse venues, studios, and festivals that support a wide spectrum of musicians. Music culture remains vibrant, honoring its deep historical roots while actively fostering a contemporary scene that embraces a variety of modern genres.

In 2025, Sound Diplomacy was commissioned by the Tennessee Entertainment Commission to work across the state of Tennessee to deliver an extensive analysis and comprehensive census of the music industry in specific regions. East Tennessee, the pilot region for the 2-year long study, has opened its doors to support the research and stakeholder engagement that was crucial to the creation of this report.

Tennessee's music industry is a powerful economic engine, contributing an estimated \$7 billion to the state's economy and supporting over 23,700 jobs in 2025. Ranking number 1 nationally for employment concentration in the music industry, the sector has demonstrated remarkable growth, increasing 95% since 2014. Given its statewide significance and the concentration of activity across nearly 1,500 business locations¹ a deeper understanding of the music industry's regional impact is now required to strengthen existing clusters of activity, which is the foundational purpose of this report.

The East Tennessee music industry is a significant economic driver, supporting 14,035 jobs (1.77% of regional employment). It generates a total of \$2.95 billion in output and \$1.69 billion in gross value added. The impact is substantial:

¹ Tennessee Entertainment Commission. Impact of the Creative Economy in Tennessee 2025. Report. Accessed https://www.tnentertainment.com/lib/file/manager/TEC_Ent_Econ_Impact_2025.pdf

- Output Multiplier (1.94): Every \$1,000 of direct music-related output generates an additional \$935 in economic activity across the region.
- Employment Multiplier (2.05): Every direct job in the music sector supports more than one (1.05) additional job elsewhere.
- Fiscal Contribution: The sector provides \$364.4 million in tax revenue across all levels of government.

Beyond this, stakeholder conversations revealed a music scene that is deeply collaborative and creatively rich, with strong cooperation across genres. Yet key gaps exist in the region, from limited funding to a lack of business-focused professional development, low artist wages to a need for clear branding linked to music that celebrates East Tennessee whilst connecting it to the wider Tennessee music brand.

A strong music ecosystem is an asset to any region, providing opportunities for social inclusion, cognitive development, creative expression, and careers for East Tennessee residents, as well as attracting visitors, business and investment to the area.

The following report, resulting from comprehensive desk research, data analysis and in depth conversations with local stakeholders, is a strategy for East Tennessee. The objectives for the implementation of the recommendations in the Action Plan are:

- Increase economic opportunities and foster sustainable growth for the music sector
 - Nurture and support music entrepreneurs and organizations
 - Provide guidance and resources to support and grow the local music industry
 - Strengthen musicians' financial stability and professionalization
 - Improve access to funding and financial support for music organizations, especially in rural areas
 - Improve communication and collaboration within the music ecosystem, and with other sectors/industries
- Increase music offerings and programming
 - Improve access to music spaces
 - Foster broader participation and community engagement in local music offerings
- Establish a nationally recognized music identity for East Tennessee
 - Improve music brand for the region
 - Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination
 - Showcase talent and raise awareness for the regional music sector at a national/international scale
- Improve diversity, equity, inclusion, and accessibility in the local music sector

- Improve regional cohesion

With strategic focus, state support, and intentional planning from the perspective of the music industry being a driver of economic growth, social and cultural development, East Tennessee can leverage and strengthen what already exists for a sustainable future.

1.2 About the Tennessee Entertainment Commission

The Tennessee Entertainment Commission (TEC) promotes and facilitates economic development of the film and music community through the recruitment of business to Tennessee. In addition, TEC promotes Tennessee as a location, builds infrastructure and supports the growth of the state's film and music community.

1.3 About Sound Diplomacy

We are a global music, culture and creative economy consultancy. We use research and data to demonstrate the economic and social value of the creative industries, and provide strategic planning for cities, places and communities to maximise their impact. Our work unlocks new opportunities, fosters sustainable development and builds more dynamic, inclusive environments.

Composed of consultants and experts worldwide, Sound Diplomacy has advised over 150 clients in over 30 countries, including the public sector such as cities, municipalities, governments, and international governmental organisations, and private entities in the real estate, investment and cultural and creative sectors.

We are creating the global standard demonstrating how investing in culture – and the people who make it – is the best path to economic and social growth. We provide world-class data and evidence so that culture, in all its forms, is incorporated into how we build, govern, and make decisions to invest in ourselves and our communities.

Sound Diplomacy owns and operates world-leading business conferences on music, culture and policy and produces insights and thought leadership with renowned partners.

1.4 Commitment to Sustainable Development Goals

Figure 1. The UN's SDGs



In 2015, through the United Nations, world leaders agreed to the Sustainable Development Goals (SDGs): 17 commitments and 169 targets with the aim of building a better world by 2030. These goals have the power to end poverty, fight inequality and address the urgency of climate change. Guided by these goals, it is now up to governments, businesses, civil society and the general public to work together to build a better future for everyone.² While culture is not explicitly mentioned in the SDGs, it is viewed as a key element of all SDGs. The UN has conducted research to better understand the role culture can play in meeting sustainable development goals.

1.5 Commitment to Inclusion, Equity and Diversity

Sound Diplomacy embraces Inclusion, Equity and Diversity:

- Inclusion involves ensuring that all are represented, engaged with, and have access to music and cultural life. Sound Diplomacy endeavors to be inclusive of the communities we work for and that these voices inform our proposals. Inclusion is about ensuring that no group is deliberately excluded from our research process, and that our conclusions and recommendations have the broadest possible impact, particularly for historically marginalized or underrepresented communities.
- Equity involves distributing resources to ensure diversity while combating economic and social inequalities. Sound Diplomacy works to embed cultural equity within our research methodology. We strive to propose policies and programs that challenge established inequities and level the playing field for the full spectrum of

² United Nations, "The 17 Goals," accessed January 9, 2024, <https://sdgs.un.org/goals>

music ecosystems. Equity is ensuring that every community has the same access to the power and benefits of music.

- Diversity involves ensuring that all groups are recognized as contributing to music and cultural ecosystems and supported in doing so. Sound Diplomacy places this recognition at the center of our work so that voices from a wide range of backgrounds are represented in our research and prescriptions. Diversity is about celebrating our differences and recognising the vital contribution every community makes to our cultural fabric.

1.6 Scope and Methodology

The scope of work for this report has been a process of desk research, stakeholder consultation and data analysis. This was completed in the following stages:

Regulatory Assessment: Coordinating with our partners in Tennessee, Sound Diplomacy conducted thorough research into the regulations, laws and programs that are related to the music ecosystem in Knox County. The result is a thorough analysis of 42 data points that East Tennessee can consult and expand to work towards making processes and regulations more music-friendly.

Asset Mapping Analysis: The mapping process identifies music-related assets in the region of East Tennessee. The mapping database is produced using the Tennessee Entertainment Commission private databases and publicly available sources on the web. The data is cleaned up and deduplicated to ensure that only unique and open/in operation music-related assets were considered in the analysis. The information is georeferenced with Sound Diplomacy's mapping tool and added to an online, interactive [map](#). The result is a database of music-related assets in the area, with contact information, websites, and opening hours that East Tennessee can use to identify regional music resources. Additionally, the asset map can be used to analyze music ecosystem clusters, sociodemographic variables, and access to transportation. The map is also a useful tool for identifying gaps and areas of concentration when determining new developments.

Economic Impact Assessment: The economic impact calculation is based on the Input-Output Model (I-O), which explains how production is determined by the total amount of products and services demanded in the economy. The model identifies how individual industries rely on inputs from other sectors, generating a chain reaction that produces multiplier effects throughout the region. Through this structure, intersectoral impacts are estimated, along with the way sales and purchases circulate across economic activity. For the direct impact, data on the workforce, number of establishments, and average output per worker are used to calculate output, Gross Value Added (GVA), and employment. The result is a full impact analysis that shows the economic value of music in

the region, and supports policymakers, industry stakeholders, and communities in understanding the broader economic implications of the music ecosystem. This, in turn, will facilitate informed decision-making, strategic planning, and investment initiatives to support the growth and sustainability of the ecosystem.

Stakeholder Engagement: Sound Diplomacy engaged with stakeholders through an online survey, and roundtables.

The sampling method of the online survey was non-probabilistic, involving volunteers³ who responded to the survey distributed by partners across East Tennessee.

The survey had an approximate duration of 15 minutes and was open for responses from August - September 2025. When considering all responses, a total of 703 were collected (413 complete, 165 partial and usable for some sections, and 125 disqualified).⁴

4 online roundtables were organized and held in September 2025, gathering 28 stakeholders across multiple areas of the music ecosystem (recorded music, live music, local government, education, and tourism) to discuss their lived experiences as part of the industry.

SWOT Analysis: All findings were assessed and summarized into a SWOT analysis, highlighting the key strengths, weaknesses, opportunities and threats based on each stage of research. This SWOT analysis is used to assess the main aspects that need to be addressed in the Action Plan and support the definition of the recommendations.

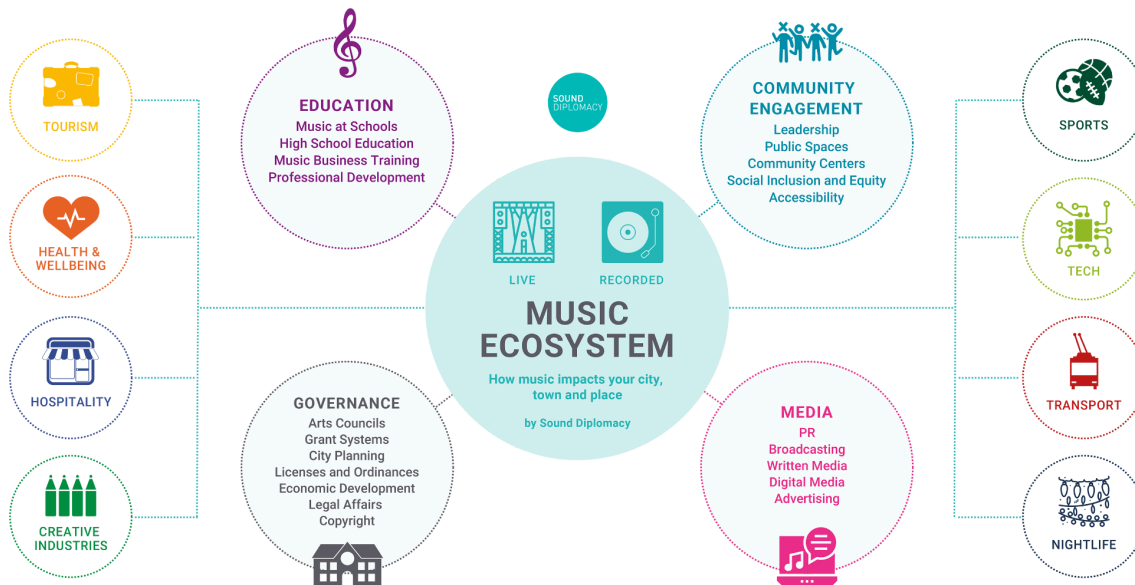
Action Plan: A set of 16 actionable recommendations form the Action Plan for East Tennessee to take forward. These are categorized into 5 areas of focus, and arranged by proposed timeline for establishing the recommendation, how to implement it, any further considerations to take into account, and, where relevant, a best case example of another location, organization or partnership that is leading on a similar initiative. All recommendations were informed by the research and stakeholder conversations.

³ Individuals were selected based on non-random criteria, and not every individual had a chance to be included due to the approach of an online survey, where people volunteer themselves to respond. As a result, there is a higher risk of bias in the sampling. Nonetheless, each survey respondent was classified as part of one of the 3 segments: musicians, music-related businesses and organizations, and music fans.

⁴ The sample for creatives and artists was made up of 163 observations (considering complete and partial usable responses). The sample of businesses and organizations was made up of 83 observations (considering complete and partial usable responses). The sample of music fans was made up of 332 observations (considering complete responses).

1.7. Definitions

The Music Ecosystem



Definition of the Music Ecosystem

Music in a place is part of an ecosystem. Like in nature, this ecosystem is formed by a group of stakeholders, a set of resources and an environment where they develop their activities and they connect with each other and with other ecosystems. Like in all ecosystems, these relationships are interdependent. Some stakeholders exist because others exist, and because there is a sustainable environment that favors their survival.

In the case of music, these agents are responsible for everything related to music, starting from the artists and going all the way to the audience. Some of its elements, like music venues or labels, are obvious. But some others aren't like IT suppliers, police officers or government organizations. But they are all relevant, and play an important role in the chain.

As stated above, for the ecosystem to be healthy and thrive, all the agents must be resourced, connected and supported by the institutions. This is done by developing a music strategy and implementing it through policies and regulations that take into account every step of the chain, eases the operations, and facilitates the relationships between all of them.

Economic Impact Definitions

Table 1. Economic Impact Dimensions

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic value and employment directly generated by the economic activity of the music ecosystem.
Indirect Economic Impact	The indirect economic impact measures the ripple effects on the economy, focusing on value and job creation in sectors that form part of the music ecosystem's supply chain. It encapsulates the demand-driven benefits for supporting industries, such as advertising, legal services, and food and beverage suppliers, which are integral to the music ecosystem's operations.
Induced Economic Impact	Induced impact refers to the economic effects generated when the ecosystem's direct and indirect employees spend their wages on goods and services such as food, transportation, and entertainment in their daily lives. This spending stimulates further economic activity within the broader community.

The variables evaluated as part of the Economic Impact Assessment include the ecosystem's output, employment and GVA, with definitions of each measure below.

Table 2. Variables Evaluated in the Economic Impact

VARIABLE	DEFINITION
Output⁵	The economic value produced by the sales of goods and services in the ecosystem. For example, concert ticket sales, broadcasting services, etc.
Employment⁶	The number of active jobs producing goods and services in the ecosystem.
Gross value added (GVA)⁷	The output minus intermediate consumption (the costs of all inputs – food and beverage suppliers, legal services, transportation, equipment, etc.).

⁵ Bureau of Economic Analysis (2020)

⁶ Ibid.

⁷ Ibid.

2. SWOT Analysis

Table 3. SWOT Analysis

STRENGTHS	WEAKNESSES
Music Ecosystem - The regional music ecosystem supports a total of 14,035 jobs across East Tennessee, and generates \$2.95 billion in total output and \$1.69 billion in gross value added (GVA). - The regional music ecosystem has strong multiplier effects (1.94 total output multiplier, and 2.05 employment multiplier).⁸ Music Community - The region is home to a rich music scene, with a strong sense of collaboration across genres. Music Education - UT Knoxville's College of Music offers undergraduate, graduate and certificate programs for students and professional musicians. - Strong after-school education exists via different organizations and programs (Knoxville Symphony Orchestra, School of Rock, Joy of Music School etc.).	Professional Development - Creators face severe financial instability. 69% of professional musicians and 91% of semi-professionals cannot meet their basic financial needs through music alone. - Less than half of the musicians who responded to the survey register works. Licensing/IP and digital revenues are minimal. Collaboration & Networking - Network building (national/international) was identified among the top needs for musicians. Export & Music Circulation - There is a lack of national and international promotion of the local music scene. Value Chain & Intermediation - Creation and production are identified as having the greatest structural frailty and offer the clearest opportunities for targeted investment and capacity development. - The industry is heavily skewed geographically. 41% of all mapped physical music infrastructure is concentrated solely in Knox County, leaving peripheral counties without the critical mass needed to sustain local musical economies.

⁸ This indicates that every \$1 of direct output generates an additional \$0.94 in the wider regional economy, and that each direct job supports just over one additional job through indirect and induced effects.

Professional Development

- The "Fair Wage Stage" initiative encourages venues to fair pay standard.

Collaboration & Networking

- The Knoxville Chapter of the Nashville Songwriters Association International hosts regular programs for music stakeholders to connect and learn.

Value Chain & Intermediation

- Transversal services (e.g., music education, retail) demonstrate a high relative concentration, with LQs that closely match the overall ecosystem average (establishment LQ of 0.90 and employment LQ of 0.76).⁹
- Live Music is the physical core of the ecosystem, accounting for 53% of all mapped physical assets.
- This is heavily supported by grassroots venues (bars, cafes, restaurants) and is backed by strong audience demand, with nearly 80% of surveyed fans expressing a desire for more live music events.

Audience Development & Community Engagement

- There is a high level of demand and engagement from audiences,

- There is a lack of businesses supporting the music sector, and existing managers/booking agents and record labels received the lowest ratings by musicians in terms of relevance, quality and availability, with over half of musicians reporting no engagement with them.
- Peripheral counties often center around a few subcategories, which can lead to the development of narrow local identities and music-related offerings, underscoring a need for regional coordination.
- The overall ecosystem operates below national concentration levels, with an establishment LQ of 0.89 and an employment LQ of 0.73, indicating considerable space for growth.¹⁰
 - Creation activities have one of the lowest concentrations (employment LQ of 0.21), representing a limited presence of artists and composers.
 - Production shows similarly low specialization (employment LQ of 0.07), highlighting a very narrow local base of recording and production services.
 - While Distribution's establishment LQ exceeds 1.0, the employment LQ (0.58) and the employment LQs for Exhibition (0.51) and Transversal (0.76) are still below the national level of concentration.
- Assets are heavily concentrated in Exhibition (53%) and Transversal (28%), while Production (8%) and Distribution (11%) functions, which typically support commercial growth, remain limited.

⁹ Location Quotients (LQs) are calculated by comparing the share of an industry within the regional economy to the same share at the national level. An LQ of 1 indicates that the industry's presence in East Tennessee is proportionate to its presence in the national economy, meaning the region is neither more nor less concentrated in that activity. An LQ below 1 reflects a lower concentration than the national average, which may suggest limited local specialization or fewer regional resources supporting that activity. An LQ above 1 signals a higher concentration than the national benchmark, pointing to areas where the region may hold a competitive advantage due to factors such as workforce skills, specific assets, or long-standing cultural or economic traditions.

¹⁰ Ibid

and a strong alignment between creators and audiences around rock, country, and singer-songwriter.

Music Branding & Tourism

- Knox County has a strong historical branding as the "Birthplace of Country Music" and "Cradle of Country Music", and Visit Knoxville and the Arts & Culture Alliance manage several music tourism initiatives.
- Events like the Big Ears Festival draw international audiences and drive significant economic impact.

Financial Resources

- There are no local economic development incentives dedicated solely to the music sector, and no music-dedicated budget line for Knox County.
- Rural counties often struggle to access state grants (like ABC or RAFT grants) because they lack the necessary local funds to provide the required financial match.

Live Music Sector & Infrastructure

- There is a lack of mid-sized venues (400–700 capacity) for developing artists and attracting touring artists.
- The region lacks major performance infrastructure, with only 2 arenas, 12 dedicated live venues, and 23 performing arts centers identified, indicating a lack of high-capacity, purpose-built facilities for large audiences.
- There is no dedicated physical music hub for co-working, rehearsal, and production.

Policy & Governance

- There is no formal local structure for the music sector.
- Some licensing and permitting processes currently do not effectively support the music sector (events guide, street performance program, sound ordinance, etc.).

Audience Development, Communication & Marketing

- Survey respondents noted a lack of resources to support music

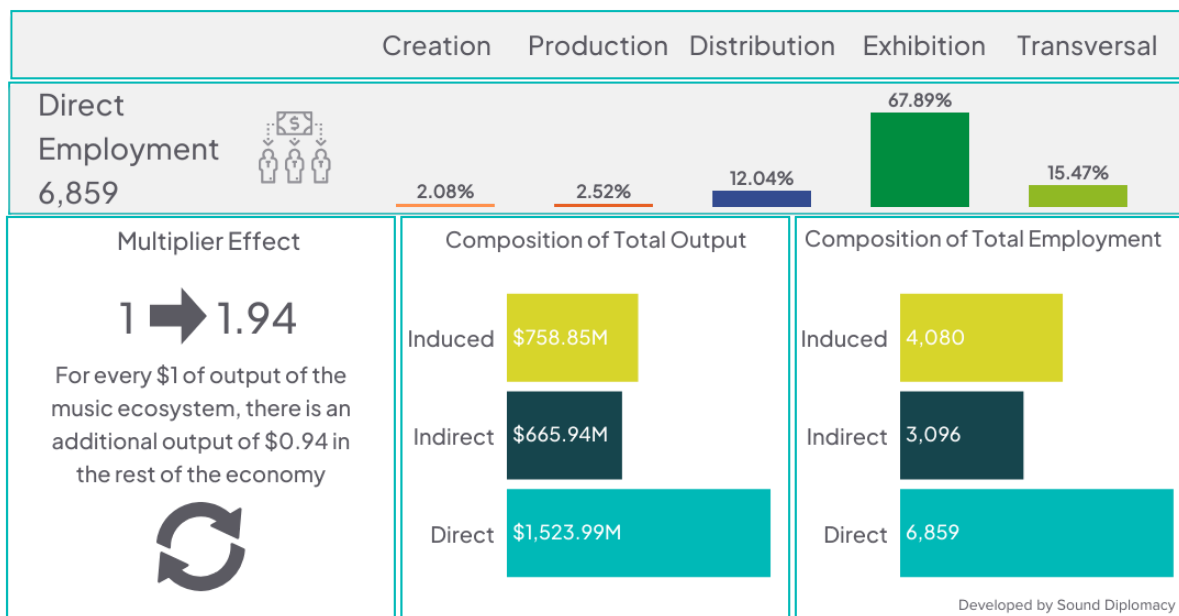
	promotion. • There is a need for music audience development strategies. Music Branding & Tourism • The region lacks a unified music brand and music tourism strategy.
OPPORTUNITIES	THREATS
Communication & Marketing • Visit Knoxville's calendar is the main calendar for arts and culture events in Knox County, including music events. Developing Regional Touring Circuits: • Given the strong local demand for live music but the high concentration of venues in Knox County, there is an opportunity to develop coordinated regional touring networks. This would pull economic impact into peripheral counties and provide local artists with more routing options. Audience Development & Community Engagement • The "Penny4Arts" and library "Explorer Passes" programs provide free or discounted access to cultural events that can include music programs.	Real Estate & Cost of Living • Cost of living is among the top 2 most pressing challenges identified by musicians, directly affecting their ability to sustain a career in music. • Approximately 47% of music organizations that responded to the survey see real estate as a challenge. Financial Support • Musicians and music businesses face a lack of support from local banks and accountants who do not understand the industry's business model, complicating access to loans and capital. • Securing corporate sponsorship and municipal investment is difficult because the music scene competes directly with UT athletics/football. Transportation • While several transportation services are offered at night or for live entertainment, there is a lack of regular night transportation service. • Parking is a challenge affecting music audiences and venues.

3. Action Plan

This section summarizes our research and provides recommended actions to address challenges and leverage opportunities, all with the aim of strengthening and growing the music economy in East Tennessee.

East Tennessee has a rich music heritage and scene, with a strong sense of community, and celebrated talent and authenticity. Overall, the ecosystem supports 14,035 jobs across the region through direct, indirect, and induced effects. The ecosystem generates \$2.95 billion in total output. Figure 1 summarizes the total economic impact of the music ecosystem in East Tennessee. The results also indicate strong multiplier effects: for every \$1 of direct output, an additional \$0.94 is generated in the wider regional economy.

Figure 1. East Tennessee Music Ecosystem Total Economic Impact, 2023

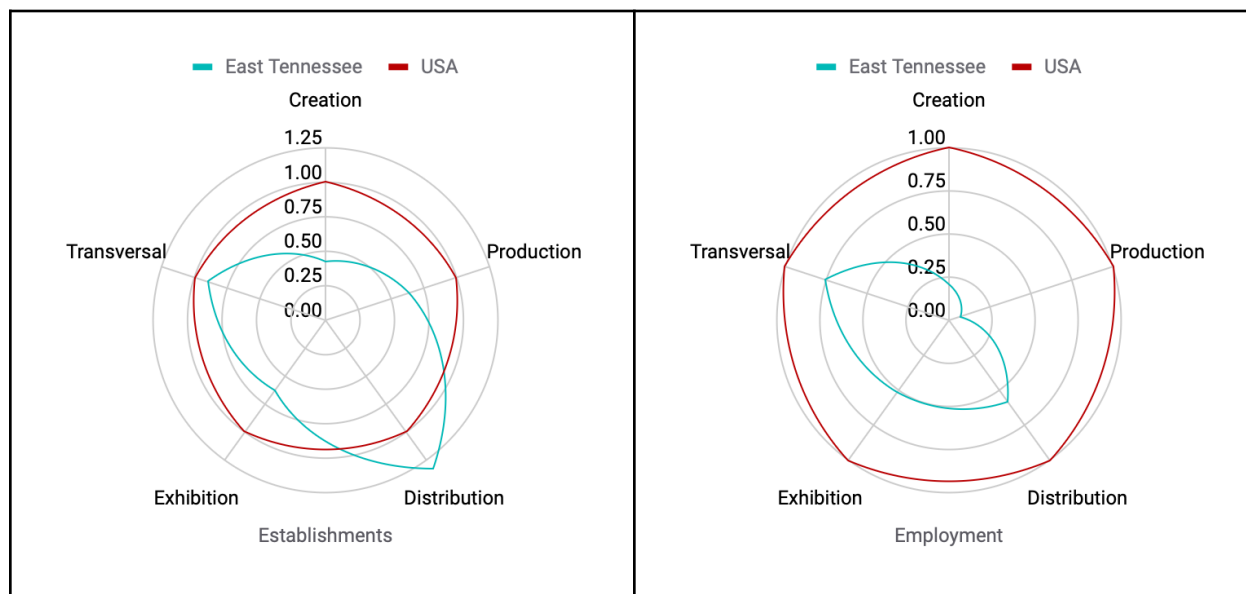


Source: County Business Patterns 2023, IMPLAN, Sound Diplomacy Research

However, the region's music ecosystem remains below national concentration levels in both establishments and employment, indicating considerable space for growth. Distribution is the only link that approaches a relative concentration, while transversal activities are close to the national benchmark but still underrepresented. The most critical gaps appear in creation and production, where the ecosystem shows the lowest presence.

These areas represent the greatest structural frailty and offer the clearest opportunities for targeted investment and capacity development.

Figure 2. Location Quotients East Tennessee



Source: Quarterly Census of Employment and Wages

Creation activities present one of the lowest concentrations in the region, with an establishment LQ of 0.42 and an employment LQ of 0.21. Both figures fall substantially below the overall ecosystem averages (0.89 and 0.73), indicating a limited presence of artists, composers, and other creator-oriented occupations. This positions creation as a key area with ample room for development and strategic support.

Production shows similarly low specialization, with an establishment LQ of 0.64 and an employment LQ of 0.07. These values fall below the ecosystem's overall LQ and highlight a very narrow local base of recording and production services. The extremely low employment LQ suggests a structural gap, pointing to the need for investment in infrastructure, talent development, and professional services to strengthen this link.

Although creation and production represent a smaller share of the current employment structure, they remain essential components of the music value chain and signal clear areas with potential for further development, capacity-building, and investment to strengthen the overall ecosystem.

There is a need for structured government support to fill those gaps and increase the music sector's economic impact in the region.

3.1 Policy & Governance

3.1.2 Governance & Leadership

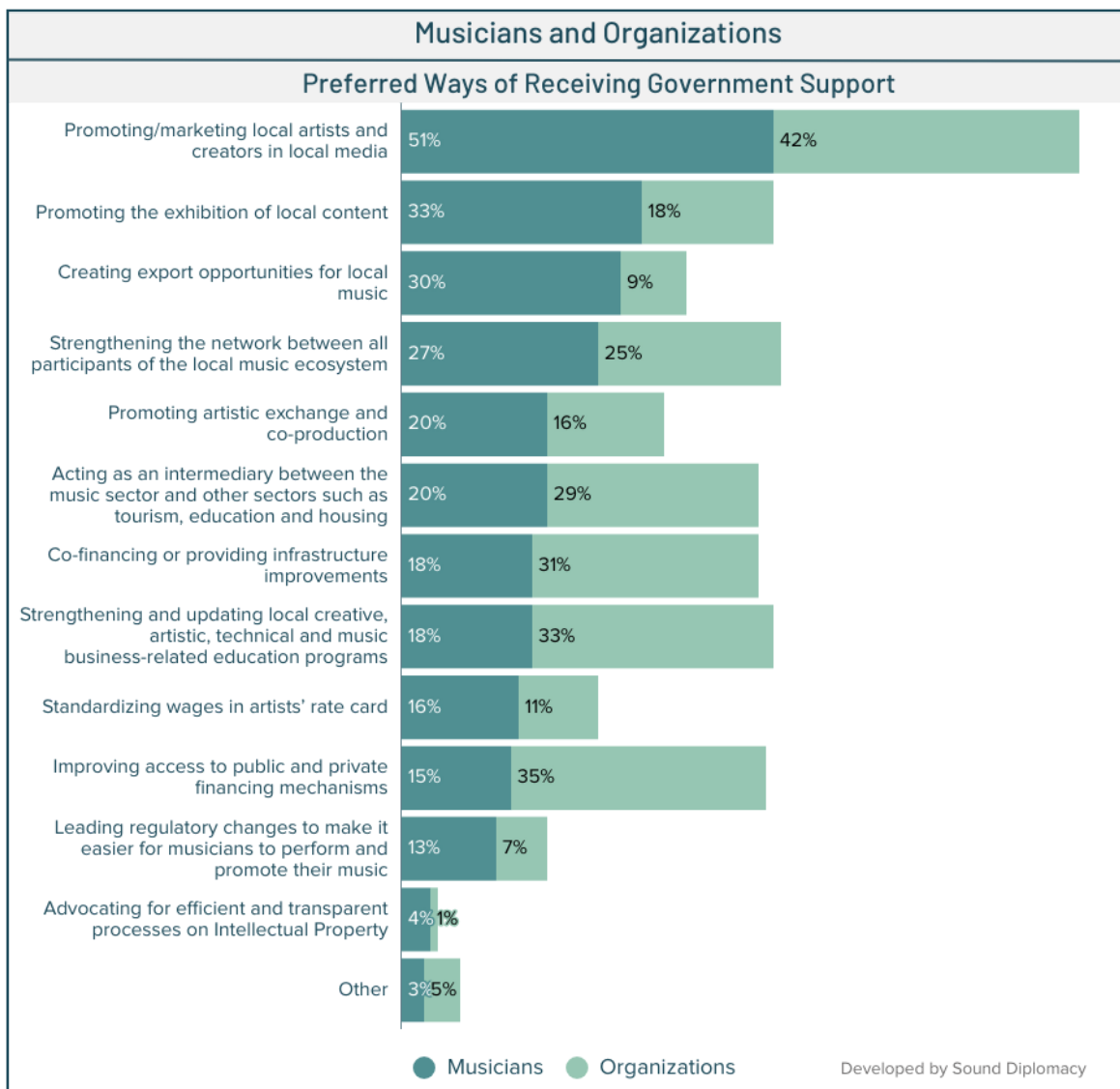
Several organizations serve as leaders and advocates for the music sector at the local and state levels. These include the Knox Music Coalition, the Arts & Culture Alliance of Greater Knoxville, and the Tennessee Entertainment Commission (while not dedicated to the music sector). However, there is a lack of formal structure to support the music ecosystem in the region, with no Music Office nor Music Advisory Council.

Musicians and music industry participants (including organizations and businesses) in the region were asked to identify the key players they consider most relevant to achieving their professional goals, and to rate the quality and availability of these players on a scale from 1 to 5. Local authorities and government were rated 3.52 for relevance and 3.21 for availability by organizations, and 2.50 for relevance and 2.27 for availability by musicians. These results suggest that governance and leadership initiatives may need to be strengthened or expanded to better support the music sector, and particularly musicians.

Working together, and with local organizations supporting the music sector, a Music Officer and Music Advisory Council would have the potential to identify the needs of the regional music ecosystem and develop targeted initiatives that support its growth. By aligning their efforts with broader regional and state objectives, and collaborating with other sectors, they can help foster a thriving cultural landscape and contribute to regional economic development.

The survey also asked how government support for the music sector could be enhanced. Musicians and organizations were asked to rank the areas they believe local government and institutional support could have the greatest impact.

Figure 3. Priority Areas of Government Support Selected by Participants of the Music Ecosystem



For musicians, the top areas of desired government support are:

- Promoting and marketing local artists and creators in local media (51%)
- Promoting the exhibition of local content (33%)
- Creating export opportunities for local music (30%)
- Strengthening the network between all participants of the local music ecosystem (27%)

For organizations, the leading priorities include:

- Promoting and marketing local artists and creators in local media (42%)
- Improving access to public and private financing mechanisms (35%)
- Strengthening and updating local creative, artistic, technical, and music business-related education programs (33%)
- Co-financing or providing infrastructure improvements (31%)

These are areas that can be supported either by expanding the current actions of regional organizations supporting the music sector, or that could be undertaken by a regional Music Advisory Council and Music Office.

Recommendation 1. Establish a regional Music Advisory Council

Initiators	Regional county governments, Downtown and Main Street organizations
Supporting Stakeholders	Local music stakeholders, stakeholders from the night time economy, tourism, education, planning, licensing, hospitality, transport sectors etc.
Timeframe	Short term (0–12 months)
Goals	• Provide guidance and resources to support and grow the local music industry • Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Improve diversity, equity, inclusion, and accessibility in the local music sector • Improve regional cohesion

A Music Advisory Council or Music Board is a working commission that includes a wide range of members from all sides of a local music ecosystem and adjacent industries including but not limited to, night time economy, tourism, education, planning, licensing, health, hospitality and transport. A Music Advisory Council can change policies, adopt new measures and impact county councils and governmental objectives. They also act as

advocates for the broad music ecosystem, raising concerns and demanding solutions from the municipal government and other governing entities.

A regional Music Advisory Council should be established to allow music stakeholders to share knowledge and work together to advocate for the music industry, supporting the creation of new initiatives aimed at addressing challenges identified by its members and the broader music community. Such initiatives should aim to mobilize resources to better meet the needs of the music sector, leading to a thriving music scene and improved planning, policies and regulations both in more established music hubs and rural communities. It would also help bring stakeholders together to improve regional cohesion and collaboration. This recommendation is designed to align with the Tennessee Entertainment Commission's plans for a Music Advisory Council. Additionally, the Music Advisory Council could pave the way for the establishment of a Music Office for the region ([recommendation 2](#)).

To ensure the Music Advisory Council reflects the reality of the region, it should include representatives from the rural communities. Each council member should have a clearly defined role when they join, related to their specific perspective, experience or organizational affiliation. The Music Advisory Council should meet monthly for the first year of operations. A Chair should be tasked with confirming the agenda and leading the meetings.

The Music Advisory Council's objectives should include:

- Providing a voice for the music ecosystem in front of the local and regional councils.
- Supporting the Music Office in advocating for the importance of the music industry.
- Act as the leading advocates for any changes the sector needs across the region including, for instance, better, more comprehensive and consistent music related regulations in the county ([recommendation 3](#)).
- Champion the regional music ecosystem, helping it grow and promoting it locally and internationally.
- Supporting the Music Office in conducting research and implementing the music strategy.
- Supporting the Music Office in connecting the music ecosystem, including linking with other music entities across the region.
- Support music tourism, the night time economy, music education and community engagement in music.

Implementation Actions:

- Identify where the Music Advisory Council should sit and define its objectives.
- Identify prospective members of the Council, to include actors from all areas of the industry, and create an online open call for members from across the region, including rural communities.

- Council members should be selected based on their level of expertise and should include representation from:
 - Artists
 - Music professionals (managers, venue owners, labels, studio owners)
 - Regional county governments
 - Night time economy, transportation and tourism sectors
 - Educational institutions and student representatives
 - Regional organizations supporting the music sector
 - TEC
- Care must be taken to ensure that diversity, accessibility and environmental/low impact practices are followed, and that the diverse sub-sectors of the music industry are represented.
- Once established, the Music Officer should be responsible for chairing the Music Advisory Council.
- The Music Advisory Council would be volunteer-led and consist of up to 16 members, split between 60–70% music professionals and 30–40% government and other industries. It should maintain a 50/50 gender split.
- Members would serve for 2 years. After tenure, members would be expected to step down and new members selected. Members should agree to a set of Terms of Reference and declare any conflict of interest before being accepted onto the Council.
- Invite a variety of guests (i.e county and city council members, local stakeholders or citizens) to participate on a meeting by meeting basis, either to present on a topic or to observe. This will ensure the Council remains inclusive and accessible to the music ecosystem at large.
- Stakeholders from other industries should be invited to meetings to encourage cross-sector collaborations.
- The Music Advisory Council can be divided into working sub-groups or committees to address specific topics, either permanent or eventual, based on the current and changing needs of the sector or the stage of implementation of the strategy. They could include:
 - Music education and career pipeline, supporting the implementation of [recommendation 9](#), with the opportunity for student representatives to join the Council.
 - Artist support and professional development, to help support the implementation of recommendations [7](#), [8](#) and [10](#).
 - Licensing and music-friendly regulations ([recommendation 3](#)).
 - Transportation and parking.
 - Music branding and tourism (recommendations [14](#), [15](#) and [16](#)).
 - Diversity and accessibility in the music ecosystem.
 - Night time economy (NTE), working on topics such as assessing NTE regulations, advocating to make them more NTE/music friendly, addressing potential NTE issues such as sound management, hours of operation of

- music venues and restaurants, safety, increasing transportation options during night time events, etc.
- Environmental stewardship in the music industry .

Case Study: Huntsville Music Board (Huntsville, Alabama)

What Is It: Sound Diplomacy's music audit of the City of Huntsville led to the establishment of the Huntsville Music Board in 2019. This governing body is a volunteer citizen advisory committee.¹¹ It aims to cultivate a diverse and vibrant music ecosystem, providing opportunities to the community through the implementation of the strategy developed by Sound Diplomacy. Its goals include:

- Establishing, promoting and maintaining Huntsville as a music-friendly city.
- Connecting with other cities to share best practices.
- Advocating for the sustainability and future growth of the music sector in Huntsville. This includes guidance in attracting music industry related jobs, music venue guidelines and standards, promotion of music related festivals, and affordability of living and working spaces.
- Supporting the overall development of a music economy in Huntsville and increasing the profile of the local music scene.
- Connecting with other cities to share best practices, information and talent exchange.
- Supporting music education within the community.
- Helping establish, promote, and assist with music related commerce (festivals, conferences, etc.)¹²

The Huntsville Music Board is composed of nine regular members appointed by the Mayor and two ex office members from various parts of the local music industry and community. Of the regular members first appointed, four serve initial terms of one year, and five serve initial terms of two years. While members do not receive any compensation for their services, necessary expenses incurred in the performance of their duties may be paid.¹³

The Music Board also oversees four subcommittees in the outreach and marketing,

¹¹ Huntsville Alabama Granicus, "Huntsville Music Board of the City of Huntsville", accessed February 17, 2026, <https://huntsvilleal.granicus.com/boards/w/575d18c0bafa263e/boards/34970>

¹² City of Huntsville "ORDINANCE NO. 19- 1051", accessed February 17, 2026 <https://mcclibraryfunctions.azurewebsites.us/api/ordinanceDownload/12962/1033404/pdf?forceDownload=true>

¹³ Ibid.

industry, education and events areas.¹⁴

The Huntsville Music Board meets regularly, with a minimum of one meeting every 90 days.¹⁵

Who Is Responsible: The City of Huntsville.

What Has It Done: In 2022, Matt Mandrella was hired as Huntsville's full-time Music Officer thanks to the efforts of the Music Board, and the Huntsville Music Office was created. The Huntsville Music Board also led the research and development of the Huntsville Music Month (see the Huntsville Music Office case study).

The Huntsville Music Board provides ongoing research and guidance to the City and the Music Office on policies and projects to support the local music industry. It supports local authorities, communities, and development to protect existing music spaces and the creation of new music opportunities; conducts strategic planning exercises for various music initiatives; reviews licensing and legislation, and recommends updates. Additionally, the Board participates in marketing and promotion efforts for the regional music scene. Finally, it helps provide music education within the community, in partnership with local organizations.¹⁶

Relevance for East Tennessee: The Huntsville Music Board was created to help implement Sound Diplomacy's recommendations in Huntsville and can serve as a source of inspiration for the development of East Tennessee's Music Advisory Council. The Huntsville Music Board was established in Huntsville before the music industry had become a major economic driver for the city, helping to lay the foundation for later initiatives and key accomplishments such as the creation of the Music Office and Huntsville Music Month. In East Tennessee, as the music sector already is a key industry, the Music Advisory Council would not only guide the implementation of the music strategy but also strengthen an already existing ecosystem and its initiatives, further positioning the region as a music destination and hub. Inspiration can be taken from the Huntsville Music Office's events and ongoing research, along with licensing and legislative reviews. These would also be

¹⁴ Lucy Berry DeButy, "Making history: meet Huntsville's new Music Board", HuntsvilleCityBlog.com, accessed February 17, 2026,

<https://cityblog.huntsvilleal.gov/making-history-meet-huntsvilles-new-music-advisory-board/>

¹⁵ Ibid.

¹⁶ Huntsville Alabama, "Huntsville Music Board of the City of Huntsville", accessed February 17, 2026

<https://huntsvilleal.granicus.com/boards/w/6a09835bbf1d512a/boards/34970> and City of

Huntsville "ORDINANCE NO. 19-1051", accessed February 17, 2026

<https://mcclibraryfunctions.azurewebsites.us/api/ordinanceDownload/12962/1033404/pdf?forceDownload=true>

valuable in East Tennessee to foster a music-friendly environment, supporting local music stakeholders and attracting talent, visitors, and businesses.

Recommendation 2. Advocate for the establishment of a region-wide Music Office

Initiators	Regional county governments, Downtown and Main Street organizations, proposed Music Advisory Council
Supporting Stakeholders	Local music stakeholders, Tennessee Entertainment Commission
Timeframe	Long term (2–3 years)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Strengthen musicians' financial stability and professionalization • Improve access to funding and financial support for music organizations, especially in rural areas • Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Increase music offerings and programming • Improve access to music spaces • Foster broader participation and community engagement in local music offerings • Establish a nationally recognized music identity for East Tennessee • Improve music brand for the region • Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination • Showcase talent and raise awareness for the regional music sector at a national/international scale

	• Improve diversity, equity, inclusion, and accessibility in the local music sector • Improve regional cohesion
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Regional county governments, Downtown and Main Street organizations, and the proposed Music Advisory Council, with support from the Tennessee Entertainment Commission and regional music stakeholders should advocate for the establishment of a Music Office for the region. This could be placed in a city location, such as Knoxville, but support the region's music industry.

The establishment of an East Tennessee Music Office, including a Music Officer role, would provide significant support for the regional music ecosystem, while making a clear statement that the region recognizes music as one of their target industries. Sitting between regional county and city governments and industry, the Music Office would be responsible for advocating and negotiating better conditions for actors in the music industry in terms of licensing, permits, funding, and other government-related aspects. Its main missions should include:

- Responsibility for overseeing and coordinating the implementation of recommendations within the music strategy, with the support of both the local music ecosystems and the regional county governments.
- Advocating for the music ecosystem.
- Negotiating policies to better support the music ecosystem ([recommendation 3](#)).
- Providing the music sector with easier access to any resources and support from local government, and guidance on how to navigate regional bureaucratic processes ([recommendation 4](#)).
- Promoting the music scene ([recommendation 13](#)).
- Identifying opportunities and implementing initiatives to nurture, attract and develop new music businesses and entrepreneurs in the region.
- Acting as the first point of contact for the music sector when addressing other government agencies and departments.
- Identifying new revenue streams and advocating for incentives for the music sector, and liaising with government agencies, nonprofits, baking institutions, philanthropists and foundations to assess the potential for music grants, sponsorships, and other funding avenues (recommendations [5](#) and [6](#)).
- Coordinating music branding and marketing strategies and campaigns (recommendations [14](#) and [15](#)).

To effectively serve the entire regional music ecosystem, the Music Office should equally consider the opportunities and gaps in both established music hubs, such as Knoxville, and more rural communities. It should support the regional music sector as a whole while

addressing specific local needs. This implementation will also need to reflect the diversity of budgets within the region, recognizing that smaller communities have limited capacity for financial commitments, which may require more major communities such as Knoxville to potentially compensate. Addressing specific needs can be achieved most efficiently by collaborating closely with the proposed Music Advisory Council ([recommendation 1](#)), whose diverse membership from across music and other industries should aim to reflect the regional reality.

Implementation Actions:

The proposed Music Advisory Council, regional county governments and Downtown and Main Street organizations should collaborate with the Tennessee Entertainment Commission and:

- Use Sound Diplomacy’s research and the recommendations of this strategy to highlight the regional music industry’s needs, and how a Music Office could further support the sector.
- Build trust and alliances within local government agencies and private organizations to garner support. The more informed stakeholders are about the benefits a Music Office can provide, the easier it is to advocate for and build the resources needed to create it. By developing a receptive audience, it will be easier to build a case for the economic and social return an office can create, justifying the monetary investment required from the government.
 - Hold meetings and presentations with relevant stakeholders to gather feedback, align on goals, and answer potential questions and concerns.
 - Identify relevant individuals or organizations to champion the idea. These could include nonprofit organizations supporting the music sector such as the Arts & Culture Alliance of Greater Knoxville and Knox Music Coalition, which already serve as advocates for the sector.
 - Communicate regularly with all relevant stakeholders.
- Define the potential mission, vision and objectives of the Office, including the framework around which the Music Office will be developed.
- Identify staff needs, the management structure and a budget.
 - The budget allocation should take into account any available county funding or alternative funding sources that can be utilized for administrative and program costs.
- Identify a potential host for the regional Music Office .It could be an Economic Development department or a regional organization supporting the music sector.
- Advocate for a fixed budget to be secured in order to ensure the longevity of the Office.
 - Redirecting a portion of the hotel tax (5% tax for overnight accommodations, and an additional 4% in Knoxville) could provide a dedicated funding source

for establishing the Music Office and supporting its initiatives. A portion of these \$12 million funds is already allocated to cultural organizations, including the Arts & Culture Alliance of Greater Knoxville (\$425,000). This tax could also be increased, for instance by 25¢ more per night to fund music initiatives. As arts and culture are an important draw for tourists, the contribution they make towards tourism can be augmented by improving the quality and availability of local arts and culture.

Further Considerations:

If the establishment of a regional Music Office is not feasible in the short term or requires a longer development process, the proposed Music Advisory Council, regional county governments, and Downtown and Main Street organizations could instead collaborate with existing organizations that already support the regional music sector. By strengthening partnerships and expanding current initiatives, these stakeholders could advance key objectives while laying the groundwork for a more formal structure in the future.

To ensure the sustainability of these efforts, regional county governments and the Tennessee Entertainment Commission should work together to establish a funding mechanism, such as a dedicated grants program, to compensate existing nonprofits supporting the music sector (e.g. Arts & Culture Alliance of Greater Knoxville, Knox Music Coalition, etc.) for the costs associated with implementing the recommendations outlined in this strategy.

Recommendations of this strategy should then be assigned to the organization responsible for their implementation, based on its functional expertise. Initiatives can include:

- Defining IP and copyrights education programs and engaging with experts ([recommendation 7](#))
- Advocating for the expansion of the fair wage stage initiative at the region level ([recommendation 8](#))
- Supporting the higher education and entrepreneurial pipeline ([recommendation 9](#))
- Hosting training, professional development and networking sessions and workshops ([recommendation 10](#))

Case Study: Huntsville Music Office (Huntsville, Alabama)

What Is It: The Huntsville Music Office falls under the purview of the Mayor's Office, and aims to nurture and support Huntsville's music ecosystem to strengthen the city's economy, attract more visitors and enhance the residents' quality of life. The office aims to help the city's music industry reach its full potential through advocacy, policy and strategic planning initiatives.¹⁷

The objectives of the Huntsville's Music Office are as follows:

- Bridge the gap between the public and private sectors within the music ecosystem.
- Connect different sectors (both across government and the overall economy) with the music sector.
- Facilitate connections across the entire music ecosystem, including among diverse musical genres, industry sectors, and demographic characteristics.
- Improve communication across the music sector.
- Act as the first point of contact for the music sector when addressing the public institutions.
- Improve the music sector's access to resources and support from the city.
- Provide guidance on how to navigate the city's bureaucratic processes.
- Advocate for the music ecosystem.
- Build relationships that can benefit the music sector.
- Oversee and reinforce the implementation of the city's music strategy.
- Promote the music sector locally, nationally and internationally, and increase the export of Huntsville's music to other markets.

Who Is Responsible: The Huntsville Music Office was created in 2022 with the hiring of Huntsville Music Officer Matt Mandrella. A full-time Music Office Programs Coordinator role was created in early 2024.¹⁸

What Has It Done: The Huntsville Music Office serves as an information center, providing resources for artists, music businesses, industry professionals, and music fans alike. It offers guides and resources for music stakeholders, music

¹⁷ Huntsville Music Office, "About us", accessed February 3, 2026, <https://huntsvillemusic.com/about/>

¹⁸ Government Jobs, "Music Office Programs Coordinator", accessed February 3, 2026, <https://www.governmentjobs.com/careers/huntsville/classspecs/newprint/1627315>

industry directories, business development support, music education and workforce development programs, as well as grants.¹⁹

Its key programs include the Music Ambassador Program and the Music Export & Exchange Programs, as well as music events:

The Huntsville Music Ambassador Program (MAP) aims to leverage local musicians as ambassadors for the city at the national and international level. The program provides financial support to Huntsville-based musicians during their tours, so long as they promote Huntsville to their audiences. The initiative provides funding ranging from \$750 to \$1,500 per tour, with an annual cap of \$4,500. Eligibility criteria include residency in the Huntsville area and having five or more tour dates outside a 100-mile radius of Huntsville. The program supported 70 tours in 2025.²⁰

The Huntsville Music Office's music export and exchange program aims to showcase local talent to new audiences while also fostering connections with artists from other cities. It brings in artists from outside the area to collaborate and perform in the city, particularly during Huntsville Music Month. This program provides a unique opportunity for local talent to reach a broader audience, while also promoting Huntsville's growing reputation as a hub for music and creativity.²¹

¹⁹ Huntsville Music Office, "Arts & Entertainment Districts", accessed February 3, 2026, <https://www.huntsvilleal.gov/development/building-construction/planning/zoning/arts-entertainment-districts/> and Huntsville Music Office, "Noise", accessed February 3, 2026, <https://www.huntsvilleal.gov/environment/noise/> and Municode, "Huntsville, Alabama - Code of Ordinances Chapter 12 - ENVIRONMENTAL MANAGEMENT ARTICLE V. - NOISE", accessed February 3, 2026, https://library.municode.com/al/huntsville/codes/code_of_ordinances?nodeId=COOR_CH12ENMA_ARTVN

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And Huntsville Music Office, "Special Event Permits", accessed February 3, 2026, <https://www.huntsvilleal.gov/business/licensing-permits/special-event-permits/>
And Huntsville Music Office, "Music Education", accessed February 3, 2026, <https://huntsvillemusic.com/resources/education/>
And Huntsville Music Office, "Venues and Performances Spaces", accessed February 3, 2026, <https://huntsvillemusic.com/venues-and-performance-spaces/>
And Huntsville Music Office, "What we do", accessed February 3, 2026, <https://huntsvillemusic.com/what-we-do/>

²⁰ Huntsville City Blog, "Huntsville Music Office: 2025 Rewind", accessed April 21, 2026, <https://cityblog.huntsvilleal.gov/huntsville-music-office-2025-rewind/>

²¹ Huntsville Music Office, "What we do", accessed February 3, 2026, <https://huntsvillemusic.com/what-we-do/>

The Huntsville Music Office organizes several events aiming to celebrate Huntsville's music ecosystem and brand the city as a music destination. All events are open to the public and free to attend. Key initiatives include:

- Huntsville Music Month²²
- Make Music Day²³
- Festivals and concert series throughout the year.²⁴
- Quarterly meetings providing members of the music community a platform to network with stakeholders.²⁵

Operational/Financial Information: The Huntsville Music Office is staffed by two people: the Music Officer and a Programs Manager. The Office operates with an annual budget of approximately \$400,000. This budget includes \$50,000 allocated for the Music Ambassador Program.²⁶

The Office's budget leverages larger, city-wide infrastructure investments. For instance, the \$50 million Orion Amphitheater was funded by the Economic Development department and not the Music Office. This approach of coordinating existing city resources has proven that a Music Office can be effective with a minimal budget, which has, in turn, motivated the Office to prioritize community and stakeholder engagement.²⁷

Relevance for East Tennessee: East Tennessee can draw inspiration from the Huntsville example when establishing its regional Music Office and defining clear goals, an operational structure, and tangible achievements. Like Huntsville, East Tennessee can focus on high-impact, low-cost initiatives in the early stages of the Music Office.

This case study also shows how garnering top-down support, investment from the local government, and support and feedback from the local community have been critical to the success of the Huntsville Music Office and could be one of the first steps for East Tennessee to establish a Music Office.

²² Huntsville Music Office, "Huntsville Music Month", accessed February 3, 2026, <https://huntsvillemusic.com/musicmonth/>

²³ Make Music Huntsville, "Homepage", accessed February 3, 2026, <https://makemusicday.org/huntsville/>

²⁴ Huntsville Music Office, "What we do", accessed February 3, 2026, <https://huntsvillemusic.com/what-we-do/>

²⁵ Huntsville Music Office, "What we do", accessed February 3, 2026, <https://huntsvillemusic.com/what-we-do/>

²⁶ Information received from Huntsville Music Office Matt Mandrella in March 2026

²⁷ Ibid.

Case Study: Austin Live Music Fund, an Increased and Redirected Hotel Occupancy Tax for the Music Industry (Austin, Texas)²⁸

What Is It: In Fall 2019, the City of Austin's Economic Development Department reassessed the Department's Hotel Occupancy Tax-funded programs, which led to the creation of the city's Live Music Fund. Austin City Council established the Live Music Fund in 2019, through a city Ordinance. The Live Music Fund aims to support Austin's diverse live music industry: professional music businesses, organizations, musicians and bands performing live and virtual shows, recording studio production, video production and merchandise.

What Has It Done: Since the city created the Live Music Fund in 2019, it has grown to more than \$3 million.²⁹ The disbursement of the funds collected is planned for mid-2023. The reasons for this delay are assumed to be because the fund is the first of its kind; therefore, there is no concrete plan to govern how to distribute it. In addition, Austin is suffering from a shortage of city staffers, including 20 positions in the Economic Development Department. Consequently, management of the fund has been shifted to a third-party contractor. Eventually, the program will include between 250 and 500 contracts issued, disbursing between \$5,000 and \$10,000 in funding to Austin-based musicians and independent promoters to help support events³⁰. The funds will be used towards venue rentals, performance fees, equipment rentals, or other costs associated with hosting a live performance.³¹

In 2023, the program had a nearly \$4 million budget, to which \$525,000 in funds have been added to cover administrative fees paid to the Long Center for the

²⁸ City of Austin, "Cultural Funding Review: Arts, Heritage, Music", [austintexas.gov](https://www.austintexas.gov/department/cultural-funding-review-arts-heritage-music), accessed February 20, 2026, <https://www.austintexas.gov/department/cultural-funding-review-arts-heritage-music>

²⁹ McQueen, E. & Bloxson, M, "The city has millions of dollars to support the Austin music scene. But who gets the money?" NPR, accessed February 20, 2026, <https://www.kut.org/austin/2022-03-01/the-city-has-millions-of-dollars-to-support-the-austin-music-scene-but-who-gets-the-money>

³⁰ Music and Entertainment Division, City of Austin Economic Development, "Live Music Fund Event Program", [services.austintexas.gov](https://services.austintexas.gov/edims/document.cfm?id=382331), accessed February 20, 2026, <https://services.austintexas.gov/edims/document.cfm?id=382331>

³¹ Austin Monitor, "city staffing shortages to delay Live Music Fund deployment until mid-2023", [austinmonitor.com](https://www.austinmonitor.com/stories/2022/05/city-staffing-shortages-to-delay-live-music-fund-deployment-until-mid-2023/), accessed February 20, 2026, <https://www.austinmonitor.com/stories/2022/05/city-staffing-shortages-to-delay-live-music-fund-deployment-until-mid-2023/>

Performing Arts,³² the organization approved to oversee the program.³³

Operational/Financial Information: The Live Music Fund was created through a 2019 increase in hotel occupancy taxes. The City of Austin's Hotel Occupancy Tax rate is 9%, comprising a 7% hotel occupancy tax and an additional 2% venue project tax.³⁴ The city tax is levied in addition to the 6% rate imposed by the State of Texas, which must be remitted separately to the State. Since the Live Music Fund is funded through the Hotel Occupancy Tax (HOT) revenues, all activities supported by the fund should encourage, promote, improve, and showcase Austin's live music industry. The ultimate goal of the fund is to sustainably develop infrastructure and experiences that attract tourism and develop Austin's convention and hotel industries.³⁵ The Live Music Fund is specifically financed by dedicating 15% from a supplementary 2% Hotel Occupancy Tax.³⁶

The Austin Live Music Fund provides \$7.14 million in support of 399 musicians, promoters, and live music venues across Austin in 2026.³⁷

Relevance for East Tennessee: Allocating a portion of hotel occupancy taxes presents a funding opportunity to support the regional music sector. Given East Tennessee's existing tourism appeal, this initiative could significantly enhance the region's support to the music community. Such an approach would also foster a collaboration between the tourism and music sectors, creating a mutually beneficial partnership that could inspire future projects and initiatives. By positioning music as a key element of East Tennessee's strategy to attract tourists, as suggested in recommendations [14](#) and [15](#), this would not only enrich the region's cultural landscape but also contribute to increased hotel occupancy and overall tourism revenue.

³² Long Center for the Performing Arts, "About Us", longpac.org, accessed February 20, 2026, <https://longpac.org/about>

³³ Swiatecki, C, "Council votes clear path for April rollout of Live Music Fund". AustinMonitor.com, accessed February 20, 2026, <https://www.austinmonitor.com/stories/2023/02/council-votes-clear-path-for-april-rollout-of-live-music-fund/>

³⁴ City of Austin, "What is the City of Austin's Hotel Occupancy Tax rate?", austintexas.gov, accessed February 20, 2026, <https://www.austintexas.gov/financial-services/hotel-occupancy-taxes-faq>

³⁵ Speak Up Austin, "Live Music Fund Community Engagement", speakupaustin.us, accessed February 20, 2026, <https://speakupaustin.us/engagementhq.com/live-music-fund?tool=qanda>

³⁶ Services Austin Texas, "ORDINANCE NO. 20190919-149", accessed April 21, 2026, <https://services.austintexas.gov/edims/document.cfm?id=328565>

³⁷ Austin Widen, "2026 ACME Funding Program Award List Austin Live Music Fund", accessed April 21, 2026, https://austin.widen.net/s/hhgtndnigmn/almf_acme-2026-funding-program-award-list

3.1.3 Licensing & Regulations

The regulatory assessment revealed some issues concerning the definition of certain regulations and licenses that apply to the music sector, as well as a lack of guidance. Organizations and musicians who responded to the survey rated the procedures required to operate in the music sector as slightly challenging, with average scores of 2.2 for musicians and 2.6 for organizations (on a scale from 1 to 5). While these administrative barriers were not flagged as the most pressing challenges for the music industry, some regulations and licensing processes could be improved to better support the sector.

Sound regulations: In Knox County, night time (between 10pm and 7am) sound limits are capped at 80 dB(A) for both continuous and impulsive sounds across residential, commercial, and industrial areas, with lower thresholds applying to certain uses. Special noise permits can be issued for events, when the sound emitted from the premises can exceed the regular standards of up to 10db(A). However, those special noise permits can be issued only for events occurring on Friday, Saturday or a federally recognized holiday, and are effective only between 7am and 10pm. This restriction can prevent venues from legally hosting amplified performances in the evening, which is typically when audiences are most likely to attend live music events. Special noise permits are also limited to a single day, and no more than two permits can be issued to any premises in any twelve-month period, regardless of any change in ownership of the premises.³⁸ This further constrains the ability of music event organizers to develop regular outdoor programming, limiting opportunities for audience growth and economic sustainability. Additionally, no sound management standards or guidance for music venues could be found during research. Finally, the Agent of Change Principle, which holds the entity that creates a change in an area responsible for the impact this change can have in that area, is not in place, potentially leading to complaints. These regulations and the lack of guidance can create a challenging environment for event organizers and music venues.

Music events: Event permits are required in Knox County to organize events that meet certain criteria, including being open to the general public, taking place in parks, involving vendors or food trucks, requiring road closures or significant parking use, using temporary infrastructure, using amplified sound, accessing utilities, or hosting more than 100 attendees.³⁹

Applications can be filed online, and fees include \$500 for a monetized special event permit, and \$100 for a non-monetized special event permit, plus potential other fees such

³⁸ Knox County, "Ordinance", accessed September 10, 2025, <https://www.knoxcounty.org/codes/pdfs/ordinance.pdf>

³⁹ Knox County, "Is this event happening on Knox County Park property?", accessed September 9, 2025, <https://www.knoxcounty.org/parks/pdfs/KCPREventPermittingChart.pdf>

as pavilion rental, gate fee, cleaning fees etc.⁴⁰ Knox County's website includes a document summarizing other requirements for special events such as insurance coverages, amenities, vendors and food trucks regulations etc.⁴¹

The City of Knoxville provides a separate event guide, detailing permit processes, event regulations, rules, and logistics, alcohol sales, with online application also available.⁴²

While these processes and guidance are relatively structured and accessible, cohesive processes for the entire region, with detailed information depending on the location and type of event, could further encourage and support the organization of music events, especially outside of established music hubs such as Knoxville.

All ages: There are no local ordinances or licensing processes regulating whether cultural events or venues can admit all ages. This suggests that decisions regarding age restrictions are primarily determined by venue operators or event organizers, often in relation to alcohol service policies, and may result in fewer all-ages events, limiting young people's access to live music, both as audience members and performers.

Street performance: There are no regulations or licensing processes regarding street performance in Knox County. However, Nourish Knoxville, Inc., a Knoxville-based 501(c)(3) nonprofit organization supporting relationships between local farmers, producers, and the public, runs a busking program at its farmers markets. Buskers may perform for tips in designated zones during market hours (Wednesdays and Saturdays, with seasonal variations) and must follow certain rules regarding the duration of the performances, amplified sound, designated zones, sale of merchandise etc. More broadly, no guidelines, regulations or licensing processes regarding street performance were identified in the region. The lack of regulation may create uncertainty regarding where and under what conditions street performance is permitted, which can limit the development of busking as a visible and accessible platform for local artists and particularly emerging musicians, as well as the quality of performance for showcasing local talent to visitors and residents, and cause potential conflict between performers and local businesses.

Entertainment/creative districts: While Knoxville has an area with a high concentration of galleries, referred to as the Arts District, and a Theatre District, hosting four theaters, there

⁴⁰ Knox County, "Special Event Application", accessed September 9, 2025, https://www.knoxcounty.org/parks/special_event_application.php and Knox County, "Special Event Fees", accessed September 9, 2025, <https://www.knoxcounty.org/parks/pdfs/KCPRSpecialEventFees.pdf>

⁴¹ Knox County, "Requirements for a Special Event", accessed September 9, 2025, <https://www.knoxcounty.org/parks/pdfs/KCPREventPermittingRequest.pdf>

⁴² City of Knoxville, "Office of Special Events Event Guide", accessed September 9, 2025, https://cdnsm5-hosted.civiclive.com/UserFiles/Servers/Server_109478/File/SpecialEvents/Special%20Event%20Guide%202023%20rev%203.13.2023.pdf

And City of Knoxville, "Special Event Application", accessed September 9, 2025, <https://www.knoxvilletn.gov/cms/One.aspx?portalId=109562&pageId=10276689>

are no official entertainment or creative districts in Knox County.⁴³ Entertainment districts are vibrant areas within cities that are dedicated to cultural uses, and are often designed to be more walkable. These districts generally house a variety of music venues, theatres, restaurants, and other entertainment-related establishments. They are governed by specific policies, tailored to support the music industry and other creative sectors, while also ensuring the well-being of residents. These policies may regulate the hours of operation for events, businesses, and sound, as well as liquor sale and consumption, thus helping to strike a balance between providing a robust entertainment offering while respecting local residents' needs. Entertainment districts contribute to the economic growth of an area by attracting tourists, creating jobs, and enhancing the cultural activity.

The absence of officially designated entertainment or creative districts in Knox County suggests that cultural and nightlife activity is not currently supported through a coordinated policy framework. This may limit opportunities for creative events and economic development. There are ongoing discussions about permitting open containers of alcohol in Market Square in Knoxville. The proposal is largely driven by competition from the new downtown stadium district, which is drawing increased foot traffic and activity away from the Square. While the City has already pedestrianized a portion of South Central Street on weekends, it has not authorized open containers in that area.⁴⁴ These discussions illustrate growing interest in strengthening downtown activity and public space activation, which could also create additional opportunities for live music and cultural programming at the regional scale.

Liquor licenses for performance: Event organizers in Knox County must obtain licenses from different authorities to sell alcoholic beverages at events. The type of license required depends on the business's structure and the nature of the event.⁴⁵ For example, for-profit entities can obtain a festival license from the TABC to sell alcoholic beverages at festivals for a limited period, while nonprofit organizations may apply for a special occasion license for fundraising events. Additional permits may also be required for beer sales, and staff serving alcohol in certain areas must complete approved training programs.⁴⁶ However, the processes involve multiple authorities and do not include specific provisions tailored to cultural venues. In addition, no centralized guidance (such as a one-stop shop or online guide) explaining the full licensing process was identified. This may create administrative

⁴³ Visit Knoxville, "Arts District", accessed September 5, 2025, <https://www.visitknoxville.com/things-to-do/arts-culture/arts-district/> and "Theatre District", <https://www.visitknoxville.com/things-to-do/arts-culture/theatre-district/>

⁴⁴ Knox News, "Another Mardi Gras with no open container. Will Knoxville ever allow it?", accessed February 23, 2026, <https://eu.knoxnews.com/story/entertainment/dining/2026/02/17/market-square-open-container-debate-over-public-beer-alcohol-back-this-mardi-gras-downtown-knoxville/88612485007/>

⁴⁵ City of Knoxville, "Office of Special Events Event Guide", accessed September 9, 2025, https://cdnsm5-hosted.civiclive.com/UserFiles/Servers/Server_109478/File/SpecialEvents/Special%20Event%20Guide%202023%20rev%203.13.2023.pdf

⁴⁶ Knox County Clerk, "Beer Permits", accessed September 10, 2025, https://www.knoxcounty.org/clerk/permits_beer.php

complexity for venues, promoters, and festival organizers planning events that include alcohol sales.

Business licensing: Music businesses in Knox County must apply for a business license with the County Clerk. Businesses located within the municipal boundaries of the City of Knoxville must also register with the City of Knoxville Department of Finance. No specific rules for music-related businesses could be identified.⁴⁷ This suggests that music industry specificities such as live performance, sound management, operating hours and more are not specifically addressed within the regulatory ecosystem. This may hinder the development of music businesses and impact the regional music industry.

Parking & transportation

While Knoxville's Special Events Guide outlines some parking and circulation rules during special events, Knox County's zoning ordinance does not include provisions regarding parking and loading and unloading zones specific to venues.⁴⁸ The absence of venue-specific provisions may create operational challenges for music venues for activities such as equipment load-in and load-out, bus access, and artist or crew parking. These challenges can affect the efficiency and cost of hosting performances.

Furthermore, while Knoxville Area Transit (KAT) has several bus lines operating during the evening until around midnight across the city, there is a lack of regular night transportation service in the region.⁴⁹

Stakeholder engagement revealed a significant parking challenge for music events and venues. Parking and the lack of regular night transportation represent barriers limiting artists' ability to perform and to gather audiences. There is a need to advocate for solutions such as dedicated, free, or lower-rate parking for music events and for new venue developments to incorporate these considerations.

Industry guides & resources

The regional music community currently lacks dedicated industry guides and resources addressing topics such as safety and emergency preparedness, environmental sustainability, and diversity, equity, inclusion and accessibility in the music sector.

While the Knoxville-Knox County Emergency Management Agency (KEMA) coordinates local efforts to prepare for, respond to, and recover from major emergencies and

⁴⁷ Knox County, "Business License", accessed September 9, 2025, <https://www.knoxcounty.org/clerk/business-tax.php>

⁴⁸ Knox County, Tennessee, "Zoning Ordinance", accessed September 9, 2025, <https://knoxplanning.org/resources/zoning/ordinances/county/2023-08-28.pdf>

⁴⁹ KatBus, "Schedules & Maps", accessed September 9, 2025, <https://katbus.com/schedules-maps/#>

disasters, it does not have any program specific to the live music sector.⁵⁰ Knox County has a “Green Event Planning Help: Waste Reduction or Zero Waste” webpage encouraging event planners to contact the Knox County Solid Waste Office and a Recycling Coordinator to help them reduce their ecological footprint. No other resource is available online.⁵¹ Resources for sustainable event planning exist via the University of Tennessee Office of Sustainability’s Zero Waste Event Planning Guide, but there is no equivalent comprehensive resource tailored to cultural or music events at the regional level or dedicated to the music sector. Similarly, no accessibility initiatives specific to the music sector were identified.

The absence of tailored guidance and resources can lead to barriers for music businesses and event organizers seeking to follow best practices in safety, sustainability, and accessibility topics, for instance. Without guidelines, music stakeholders may struggle to adopt consistent standards, limiting the potential support to musicians, music professionals and audiences. This also limits overall regulation of the industry from a city/government perspective.

Recommendation 3. Advocate for the implementation of music-friendly regulations and guides

Initiators	Proposed Music Advisory Council and Music Office (or regional organizations supporting the music sector).
Supporting Stakeholders	Regional county governments, regional city councils, TEC
Timeframe	Medium term (1–2 years)
Goals	• Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Increase music offerings and programming • Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination

⁵⁰ City of Knoxville, “What is KEMA?”, accessed September 10, 2025, https://www.knoxvilletn.gov/government/city_departments_offices/knoxville-knox_co_emergency_management_agency

⁵¹ Knox County, “Green Event Planning Help: Waste Reduction or Zero Waste”, accessed September 10, 2025, https://www.knoxcounty.org/solid_waste/event_planning_help.php

The proposed Music Advisory Council and Music Office should advocate to East Tennessee's county governments and city councils for the implementation of regulations and licensing processes that align more closely with the specific needs of the music sector in the region. By doing so, it can create a supportive environment that not only empowers artists, but also facilitates the growth and success of cultural events, ultimately fostering a thriving and vibrant music community.

They should then advocate for the implementation of those reviewed/new processes in each county and city of the region to support greater regional integration, reduce confusion for artists, venues, businesses and event organizers operating across municipal and county boundaries, and foster a more cohesive environment for music-related activity.

Implementation Actions:

- Use Sound Diplomacy's work to determine which regulations and permitting processes need modifications and/or clearer guidelines. These would include, but are not limited to:
 - Sound regulations: create sound management standards and guidance for music venues, and potentially implement the Agent of Change Principle. Inspiration can be taken from [Boulder's sound ordinance](#), detailing specifications for concerts and music festivals.
 - Event permits: extend Knoxville's event guide to the region with detailed information depending on the location and type of event. [Seattle's special event handbook](#) can also serve as a model when expanding the guide.
 - All ages events: ensure music venues can admit all ages by implementing all ages events licenses similar to [Milwaukee's ordinance](#).
 - Street performance: develop a busking program in specific areas to increase music programming ([recommendation 12](#)) and contribute to brand the region as a place for music creation and experiences ([recommendation 14](#)). See the Asheville case study below for an example of guidelines.
 - Parking: advocate for solutions such as dedicated, free, or lower-rate parking for music events and for new venue developments to incorporate these considerations.
 - Entertainment districts: establish entertainment districts with specific policies, tailored to support the music industry and other creative sectors in relevant communities. Inspiration can be taken from [Austin's entertainment districts](#).
 - Liquor licensing: add a specific section for cultural events and venues to local liquor regulations, and develop a guide for music event organizers. Inspiration can also be drawn from [Lafayette's liquor licensing](#) simplified processes for music stakeholders.

- Music business licensing: develop specific guidelines for music business licensing. This can be done similarly to [New Orleans' creative business licensing guide](#).
- Draft policy proposals based on this information and on the following benchmarks.
- Gain feedback from, and provide updates to local music stakeholders throughout the definition phase.
- Consult with stakeholders in other cities in the state, such as Memphis (the city has also undertaken a full music strategy), to understand best practices, lessons learned, and identify opportunities for alignment outside of the region.
- Once implemented, ensure all the regulations and permitting processes relevant to the arts sector are included and easily accessible in the proposed one-stop shop ([recommendation 4](#)).
- Create guides to navigate certain processes, which should also be added to the one-stop shop, and potentially to the Music Office's website, along with other potential guidelines.
- Raise awareness around the reviewed regulations, licensing processes, and the guides by running sessions with the local community to explain what changes have been made and how it applies to them.
- Monitor the number of applications and permits granted for music events.

Further Considerations:

In addition to reviewing regulations and licensing processes and creating guides for them, the proposed Music Advisory Council and Music Office could develop resource guides on a broader range of industry priorities. These may include guidance on environmental sustainability for music events; Diversity, Equity, Inclusion, and Accessibility (DEIA) standards for music activities; and emergency preparedness frameworks tailored to music and cultural organizations.

Case Study: Street Performers Guidelines (Asheville, North Carolina)⁵²

What Is It: Asheville's street performance guide provides clear guidelines for performers. Permits are not required for sidewalk performers who wish to busk downtown during times when sidewalks, streets, and parks are not otherwise reserved for outdoor special events. The Asheville Buskers Collective provides a number of guidelines for overall busking etiquette, such as using two-hour turns, managing crowd size, and keeping volumes low, especially around businesses, offices, and residences.

Buskers are expected to adhere to a set of city rules including: avoid obstructing sidewalks, doorways or streets and provide a minimum of 6 feet of pedestrian passageway; no selling or displays of any tangible goods in exchange for money or donation; performances may only be between the hours of 10.00 a.m. and 10:00 p.m. Performers must also keep their setup minimal, leave their space cleaner than they found it, and avoid repetitive songs or ignoring requests to turn down. Performers must not be under the influence of alcohol or controlled substances, and inherently dangerous acts such as fire, blades, or acrobatics are prohibited unless part of a permitted event.

The guide includes the noise ordinance. The city has also established High Impact Areas, where only one audible performance is allowed per 120 feet, and non-audible performances must be at least 40 feet away. In all areas, performers must maintain at least 40 feet distance from each other.⁵³

Who Is Responsible: City of Asheville

What Has It Done: The guidelines make busking easy for local performers, and as such benefits residents and local business owners with a bustling downtown. Asheville's open approach to busking has produced a music-filled downtown, and

⁵² The City of Asheville, "Street performers make downtown a fun and exciting place to be.", accessed February 19, 2026, <https://drive.google.com/file/d/13hWP6zBPbr2geqbYqwbhZNcJebCk9jX3/view>.

⁵³ City of Asheville, "Street Performers Guide", accessed February 19, 2026, <https://drive.google.com/file/d/12QKXzDZD5lropPJeGJzMY6feXfeEjwus/view>

while problems persist, such as unclear sound ordinances and an occasional violation of guidelines, the program has been deemed an overall success.⁵⁴

Operational/Financial Information: Asheville does not require a busking permit, meaning that busking implementation requires no administrative costs. The Asheville Busker's Collective has lobbied for a self-regulatory model. The only financial burden was the cost going into composing and printing the Street Performers Guide.

Relevance for East Tennessee: The promotion of street performance, especially in lively areas, can provide an opportunity for residents and visitors to enjoy the regional music scene, thus expanding exposure to musicians. This would not only ensure an all encompassing experience but would also represent an opportunity for local artists to showcase their music, directly contributing to the goal of branding the region as a music destination.

Recommendation 4. Establish a one-stop shop for music regulations

Initiators	Regional organizations supporting the music sector (or proposed Music Advisory Council/Music Office)
Supporting Stakeholders	Regional county governments and city councils
Timeframe	Short term (0–12 months)
Goals	• Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Improve access to funding and financial support for music organizations, especially in rural areas • Improve communication and collaboration within the music ecosystem, and with other sectors/industries

⁵⁴ John Boyle, "Answer Man: Guidelines for Buskers? City Regulations for Busking?," Citizen-Times.com, accessed February 19, 2026, <https://www.citizen-times.com/story/entertainment/events/asheville-scene/2020/02/11/answer-man-rules-buskers-city-regulations-busking/4711893002/>.

	• Increase music offerings and programming • Improve regional cohesion
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The proposed Music Advisory Council and Music Office should work with regional and county governments and city councils to review the regulations and licensing processes that impact the music industry ([recommendation 3](#)), and to include them in a one-stop shop platform for the region.

A one-stop shop is a digital platform that those wanting to organize and promote special events will use in order to browse regulations and licensing processes, as well as financial support and other resources and opportunities. The portal can also include local and state financial incentives such as grants and tax rebates that event organizers may be eligible for, and guides on how to apply for them. The one-stop shop should be hosted on the Music Office website, or on any other relevant organization's website such as the Arts & Cultural Alliance website.

Implementation Considerations:

- Run a user experience test on the existing systems and processes to understand current gaps and identify areas for improvement and streamlining.
- Use Sound Diplomacy's regulatory assessment to include information on regulations, permitting and licensing processes related to the music sector, such as:
 - Permitting and licensing requirements related to the creation of music businesses, and to the organization of music and cultural events (permits and license requirements and costs to organize events, permits to play live music and amplified music, for busking, for liquor sales, etc.). It should also include links to application forms/pages.
 - Information on regulations applying to the music sector, including sound regulations, hours of operation, curfews, busking regulations, etc.
 - All the resources and opportunities available for the music sector, such as professional development opportunities and resources ([recommendation 7](#)), fair pay ([recommendation 8](#)), potential environmental and low impact guidelines, Diversity, Equity, Inclusion and accessibility guidelines, and emergency preparedness guidelines ([recommendation 3](#)).
 - It should also include a link to the TEC directory ([recommendation 10](#)).
- Create the platform on the most relevant website (Music Office or Arts & Culture Alliance website for instance).
- Promote the platform to the music and cultural community by running online and in person sessions to showcase guidance and resources to the sector, allowing opportunities for Q&A and networking. These sessions will also provide an

opportunity for the regional county governments to be better connected to the music industry.

- Collect feedback on usability and proposed improvements for the platform.

Case Study: One Stop Shop (New Orleans, Louisiana)

What Is It: Events and liquor licensing are run by New Orleans' one-stop shop for permits and licensing. In addition to a dedicated webpage, the site offers a search engine to ease user navigation to different licensing information and forms. The one-stop shop is also available via an app, which allows users to find licensing information and apply for permits from their mobile devices.⁵⁵ Each permit type has its own drop-down menu including:

- Business permits and licenses
- Event/film permits and licenses
- Building permits and licenses
- Residential permits
- Hazard permits

Beneath each specific permit or license, there is information regarding what the document is for, who should apply for it, how to successfully complete the application process, and what to expect following submission. The summary also indicates whether or not the permit or license can be completed online.⁵⁶

Fillable PDF applications can be downloaded directly from the app.⁵⁷

Who Is Responsible: The City of New Orleans

What Has It Done: The one-stop shop's data is publicly available online, providing a monthly breakdown of the number and types of permits issued. In June 2025 for instance, the dashboard shows permits issued for events such as the "New Orleans Wine & Food Experience" (June 5–9) and "Crescent City

⁵⁵ City of New Orleans, "City of New Orleans One Stop Permits & Licenses", accessed February 20, 2026, <https://onestopapp.nola.gov/>

⁵⁶ Ibid.

⁵⁷ One stop app, "Get started", accessed February 20, 2026, <https://onestopapp.nola.gov/>

PrideFest” (June 21–22), with documentation covering tents, street closures, sound permits, and temporary structures.⁵⁸

Operational/Financial Information: A budget of \$299,000 was adopted by the city government to establish the one-stop shop in 2011.⁵⁹

Relevance for East Tennessee: A one-stop shop similar to New Orleans’ example can be a cost-effective way for East Tennessee to significantly reduce administrative barriers and encourage the organization of more music events by facilitating the access to music-related regulations, licensing processes, and guidance. Creating a single place for all relevant information would also make it easier for agents like event promoters to comply with the regulations and industry standards for their musical activity, supporting a thriving environment for the music community.

3.1.4 Financial Resources

The cultural sector benefits from budget lines as part of the Social, Cultural, and Recreational sector (\$8,120,725⁶⁰) in Knox County. Most local governments in the region also support events and tourism efforts through charitable or discretionary line items. In smaller counties, events and tourism initiatives are largely volunteer-driven.

Several grants and funding mechanisms are also available for the arts sector at the local, regional and state levels. They include grants from the Arts & Culture Alliance of Greater Knoxville, the Arts Fund for East Tennessee, the Tennessee Arts Commission, and the Levitt Foundation. These grants are utilized to support festivals in the region, particularly to pay for bands and covering sound engineering costs. Additionally, the Tennessee Entertainment Commission (TEC) runs several economic development incentive programs that are open to the music industry, including the Music Scoring Grant, the 25% Grant Rebate, and the FastTrack Economic Development Grant. However, none of these financial resources and funding mechanisms are dedicated solely to the music sector.

Research revealed that musicians and music organizations face challenges in terms of funding, finance and fundraising. Organizations that responded to the survey mentioned

⁵⁸ One stop app, “Open Data”, accessed February 20, 2026,,

<https://onestopapp.nola.gov/Dashboard.aspx?report=monthPrmtListTableDiv&utm>

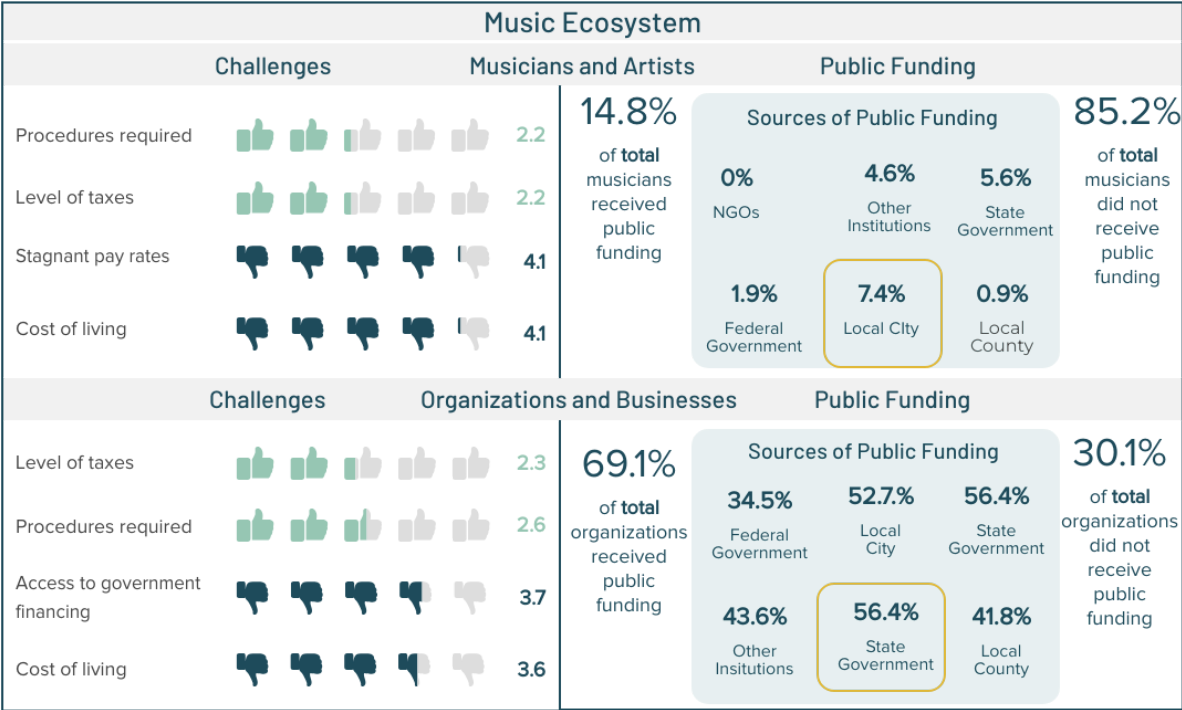
⁵⁹ New Orleans Mayor’s Office, “Adopted 2011 Operating Budget”, accessed February 20, 2026,,
https://nola.gov/nola/media/Mayor-s-Office/Budget/2011/2011_NOLA_ADOPTED_Budget-FINAL.pdf

⁶⁰ Knox County Tennessee, “FY2026 Proposed Budget”, accessed September 1, 2025,
https://www.knoxcounty.org/finance/pdfs/2025_2026_budget/FY26_Proposed_Budget.pdf

finance and fundraising among their top needs, signaling a push for operational resilience. Stakeholders identified a financial tools gap in the music industry, and a lack of support from local banks and accountants, misunderstanding the industry’s business model, thus complicating access to loans and capital. Securing corporate sponsorship and municipal investment was also identified as a challenge because of the music sector’s direct competition with the sports sector. Furthermore, stakeholder engagement revealed that rural counties often struggle to access state grants because they lack the necessary local funds to provide the required financial match.

Music businesses, organizations, and musicians and artists in East Tennessee’s music ecosystem were asked a series of questions about the challenges of accessing funding, the procedures required to carry out their music-related activities, and the level of institutional and regulatory support they receive. Figure 4 summarizes the main findings.

Figure 4. Music Ecosystem Challenges: Key Findings⁶¹



⁶¹ The icons in the “Challenges” section represent the degree to which each factor is perceived as a challenge. Thumbs pointing downward indicate greater difficulty or a stronger negative impact, while thumbs pointing upward indicate fewer challenges or more favorable conditions.

Organizations identified the cost of living (3.6) and access to government financing (3.7) as slightly more significant barriers, but not to the extent of being considered operational obstacles. Overall, the results suggest that the main economic pressures are related to income sustainability rather than bureaucratic hurdles.

Over half of musicians (52.8%) expressed interest in receiving aid, highlighting a substantial gap between existing needs and access to available funding, as well as a reflection of a market that doesn't provide enough opportunities, or suitable pay, for gigging musicians.

The disparity between musicians and organizations points to unequal access to public resources. While organizations appear better equipped to navigate institutional processes, individual musicians remain largely excluded, either due to lack of information, administrative capacity, or tailored funding mechanisms. This highlights a need for clearer communication, simplified application procedures, and targeted programs for individual creatives to bridge the gap and ensure a more equitable distribution of public support within East Tennessee's music ecosystem.

Figure 5. Music Ecosystem: Public Funding Relevance

Music Ecosystem	
Importance of Receiving Public Funding	
Musicians	Organizations
75% think receiving public funding was extremely important for their music-related work	84.2% think receiving public funding was extremely important for their music-related work

Respondents who have received public funding in the past were asked how crucial this funding was for their music-related work (rating on a scale of 1 to 5, where 1 is 'not important at all' and 5 is 'extremely important'). The results demonstrate that, when available, public funding plays a critical role in strengthening the local music ecosystem, not only by helping sustain existing activity but also by enabling creative and organizational growth. They also reinforce previous findings that the main barrier is not the perceived value of aid, but rather

limited access and outreach, particularly for individual musicians, many of whom remain unaware of or unable to access existing opportunities.

While local arts agencies make efforts to promote funding resources to the communities they serve, there is a need to broaden access to public funding and financial resources across the music sector. This can be achieved by leveraging Tennessee Arts Commission (TAC) funding to better support music organizations and events, particularly in rural communities, while also strengthening financial literacy and improving access to capital for creative enterprises.

Recommendation 5. Leverage TAC funding for music organizations and events

Initiators	Regional organizations supporting the music sector (or proposed Music Advisory Council/Music Office), regional county governments
Supporting Stakeholders	Tennessee Arts Commission, Tennessee Entertainment Commission, regional organizations supporting the music sector
Timeframe	Short term (0–12 months)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Improve access to funding and financial support for music organizations, especially in rural areas • Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Increase music offerings and programming • Foster broader participation and community engagement in local music offerings • Improve diversity, equity, inclusion, and accessibility in the local music sector • Improve regional cohesion

Many potential live music, festival and placemaking initiatives in the region qualify for Tennessee Arts Commission (TAC) funding. TAC support can play a catalytic role in developing new programming, particularly in rural communities. Regional county governments, with support from local organizations supporting the arts, should ask the TAC for a list of organizations currently receiving these funds so they can raise awareness among smaller organizations and festivals, ensuring they can apply.

Implementation Actions:

- Engage with the TAC to request a list of organizations in the region currently receiving funding. Documentation on eligibility criteria and funding priorities could also be relevant to obtain.
- Compare the TAC recipient list with the broader ecosystem of live-music venues, festivals, promoters, and placemaking initiatives in the region.
- Identify underrepresented counties, rural communities, and organizations not currently accessing TAC funds.
- Develop materials to promote TAC funding targeting those underrepresented areas and organizations, describing what TAC grants support, eligibility criteria, and application details.
- Distribute information online and at relevant events.
- Collaborate with the TAC to organize workshops supporting underfunded organizations in their application processes. Those could be held in rural communities.
- Collect numbers of TAC funding applicants and recipients and evaluate increases.

Recommendation 6. Improve financial literacy and access for creative enterprises

Initiators	Proposed Music Office (or regional organizations supporting the music sector)
Supporting Stakeholders	Local banking institutions and professionals, TEC, regional organizations supporting the music sector
Timeframe	Medium term (1–2 years)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector

	• Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Strengthen musicians' financial stability and professionalization • Improve access to funding and financial support for music organizations, especially in rural areas • Improve communication and collaboration within the music ecosystem, and with other sectors/industries
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Local banks, private investors, and business support organizations often lack familiarity with creative-sector models. Stakeholders should promote information sharing that help cultural enterprises understand how to access general SME financing, while encouraging financial institutions to adapt or clarify eligibility criteria for creative businesses.

Implementation Actions:

- Design sector-specific financial literacy programs tailored to music businesses, artists and entrepreneurs.
 - Organize workshops and one-on-one clinics.
 - Develop toolkits, guides, templates and online resources for the local music community. These should clarify financing eligibility criteria, and help music professionals assess their financial capacities. The online resources could be added to the one-stop shop ([recommendation 4](#)).
- Develop briefing papers for financial institutions to understand music-specific revenue models and costs, plus the value of the industry (economic, social and cultural). The documentation could also include case studies of successful, bank-financed creative enterprises.
- Facilitate the dialogue between music professionals and local financial institutions by developing relationships and potential partnerships with banking establishments, and hosting roundtables and events.
 - Partnerships could be developed by having lenders sponsor music events, projects and support initiatives.
 - This could also include having bank professionals giving lectures or panel discussions at music events and networking sessions ([recommendations 7](#) and [10](#)).
- Encourage local financial institutions and private investors to have a liaison specific to the music or creative sector.

Case Study: ORNL Federal Credit Union Creative Economy Support (Tennessee)

What Is It: ORNL Federal Credit Union (FCU) is one of the largest credit unions in Tennessee and provides support to the local community, including creative stakeholders through funding and diverse initiatives.⁶²

Initiatives supporting the creative community include:

- Summer Sessions Concerts, a free concert series presented by ORNL FCU, that features bluegrass and Americana bands from throughout the region.⁶³
- Dogwood Arts, presented by ORNL FCU, which is an organization promoting and celebrating the art, culture and natural beauty of East Tennessee, providing arts advocacy, environmental stewardship, and economic impact in the region. It produces 20 year-round events and programs in Knoxville.⁶⁴
- Financial support for Friends of Knox County Public Library, Rose Center Council of the Arts and Zoo Knoxville.⁶⁵
- It also supported the Oak Ridge Street Painting Festival, among others.⁶⁶

Who Is Responsible: ORNL Federal Credit Union (FCU) is a not-for-profit, member-owned financial cooperative.⁶⁷

What Has It Done: In 2022, ORNL FCU had over 189,000 memberships across 19 counties in East Tennessee.⁶⁸

Operational/Financial Information: In 2022, ORNL FCU spent over \$500,000 in community investment.⁶⁹

Relevance for East Tennessee: ORNL Federal Credit Union could be a strong potential partner in developing a program focused on improving financial literacy

⁶² ORNL, "About us", accessed February 27, 2026, <https://ornlfcu.com/about/why-bank-us>

⁶³ Tennessee League, "ORNL FCU Announces Return of Summer Sessions Concerts to Oak Ridge this Summer", accessed February 27, 2026, <https://www.yourleague.org/ornl-fcu-announces-summer-sessions/>

⁶⁴ Dogwood Arts, "About", accessed February 27, 2026, <https://www.dogwoodarts.com/about>

⁶⁵ ORNL, "Community Impact", accessed February 27, 2026, <https://ornlfcu.com/about/community>

⁶⁶ Upper Cumberland Business Journal, "ORNL Federal Credit Union builds on history of community support with Street Painting Festival donation", accessed February 27, 2026, <https://www.ucbjournal.com/ornl-federal-credit-union-builds-on-history-of-community-support-with-street-painting-festival-donation/>

⁶⁷ ORNL, "About us", accessed February 27, 2026, <https://ornlfcu.com/about/why-bank-us>

⁶⁸ ORNL, "Annual report", accessed February 27, 2026, https://ornlfcu.com/docs/default-source/annual-report/2022-report-at-a-glance.pdf?sfvrsn=7e589b1d_3

⁶⁹ Ibid.

and access to capital for creative enterprises. As a community-oriented financial institution committed to supporting regional economic development, including the creative sector and educational initiatives, this type of program aligns with its mission and expertise. In addition, such a partnership could create opportunities to support or co-fund other initiatives of this strategy. This case study is an example of existing support in the state where music and culture are recognized for their value, and need for support, by businesses that have financial capital to invest in their local community.

3.2 Talent and Creative Ecosystem

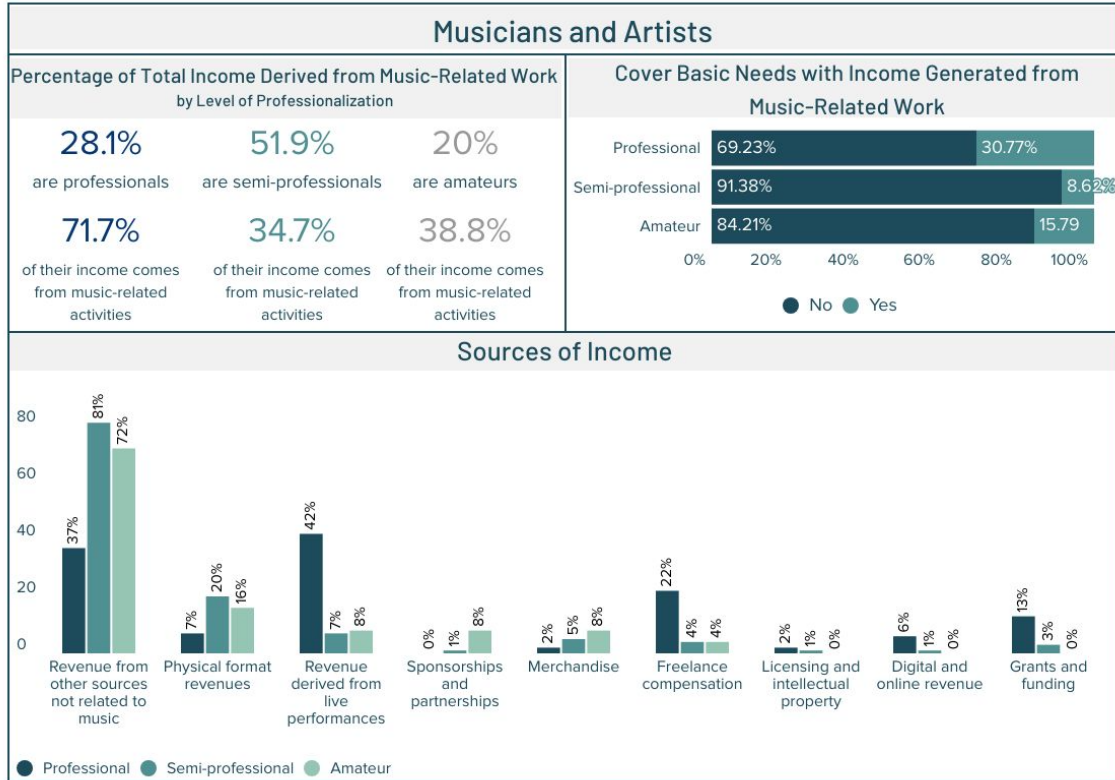
3.2.1 Professional Development

Musicians and artists: level of professionalization and sources of income

For the survey, Sound Diplomacy classified musicians and artists in East Tennessee by level of professionalization. The majority of respondents identify as semi-professionals (51.9%), meaning they receive payment for music-related work, but it is not their main source of income. Professionals represent 28.1%, earning most of their income from musical activity, while amateurs account for 20.0%, generating little or no income from their artistic practice. Among those who are not yet professionals, 27.0% are already pursuing music as a full-time career, 18.9% plan to do so in the future, and 54.1% have no plans to do so. This distribution suggests that while a significant share of artists aspire to professionalize, over half see music primarily as a complementary or recreational activity rather than a primary source of livelihood.

Figure 6 presents the main findings on the professionalization of local musicians and artists, their sources of income, and whether their music-related income is sufficient to cover basic needs. The data confirms that non-professionals remain financially dependent on income from other fields.

Figure 6. Musicians and Artists: Professionalization and Sources of Income.



As previously mentioned, the most pressing challenges identified by musicians are stagnant pay rates (4.1) and cost of living (4.1), both of which directly affect their ability to sustain a career in music. These factors, while external to the creative process, limit financial stability and long-term professionalization.

The wide majority of musicians (69.23% of professionals, 91.38% of semi-professionals, and 84.21% of amateurs) reported being unable to cover their basic needs with income from music-related activities. This indicates that even those who rely primarily on music for their livelihood face significant economic precarity - rooted in low diversification of income streams, limited market reach, and the near absence of professional intermediaries such as managers, booking agents, and record labels.

Revenue from live performances (42%) is the primary music-related income source for professional musicians, followed by freelance compensation (22%). To strengthen this critical revenue stream, the "Fair Wage Stage" initiative, launched by the Knox Music

Coalition (KMC) to ensure fair pay at Knoxville venues, should be expanded across the entire East Tennessee region. This regional push would encourage more venues and businesses to sign the fair pay pledge, thereby raising the standard for local music scenes.

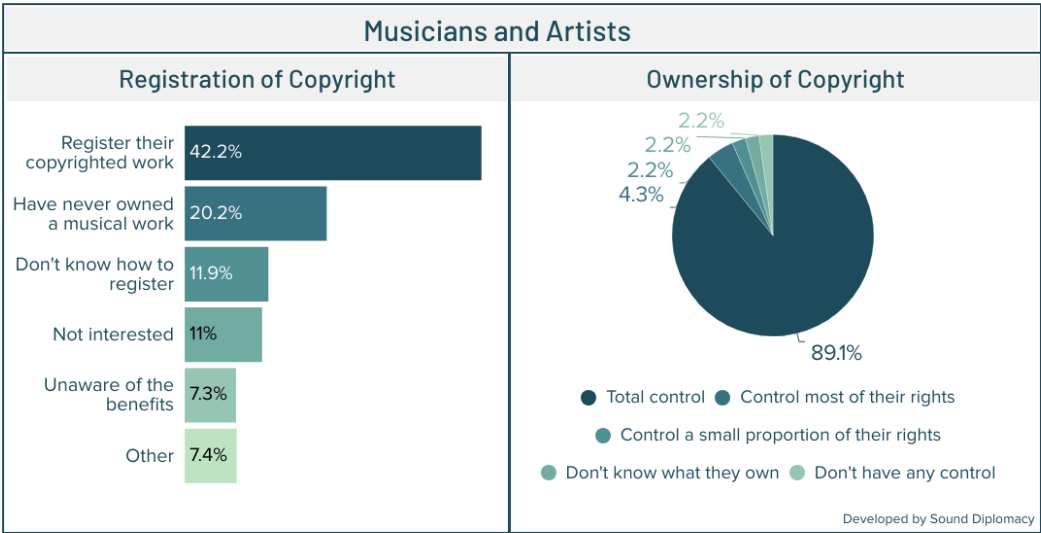
Licensing, intellectual property, and digital or online revenues remain marginal, representing no more than 8% combined for professionals and near-zero for the rest, underscoring the limited monetization of recorded or streamed music in the local ecosystem.

Copyrights registration and ownership

As shown in Figure 7, 42.2% of musicians in East Tennessee register their copyrighted works, while the remaining majority either have not registered or have limited awareness of the process. Among those who have not registered, 11.9% report not knowing how to do so, 11% say they are not interested, and 7.3% are unaware of the benefits. Additionally, 20.2% note they have never owned a musical work, which may reflect the prevalence of performers over songwriters, collaboration-based creation, or early career stages within the local ecosystem.

Regarding ownership, 89.1% of musicians report having total control over their rights, while only small proportions control most (4.3%), a small part (2.2%), or none (2.2%) of their rights, and 2.2% are unsure of what they own. This suggests that while most respondents who create original works retain ownership, formal registration and protection mechanisms remain underused, and could in part explain why the overall income gained from IP is so low.

Figure 7. Music Ecosystem: Copyright Registration and Ownership



The relatively low rate of copyright registration is consistent with earlier findings showing limited income from licensing, intellectual property, and digital revenues. This pattern indicates that many artists may not be leveraging the full economic potential of their creative assets, not necessarily due to lack of interest but because of information gaps, limited access to legal resources, and low institutional support. Strengthening education around copyright registration, through targeted workshops, local partnerships, and clearer guidance, could help ensure that musicians in East Tennessee are better equipped to protect and monetize their work.

Value chain

Research revealed a gap in industry-facing and intermediary businesses and professionals in the area, including producers, managers, booking agents, record labels and distributors. Industry-facing and intermediary assets registered with physical spaces are almost absent: only 6 music managers, 3 record labels, and 3 publishers (<1%), plus one music PR.⁷⁰ Managers/booking agents and record labels received the lowest ratings by musicians in terms of relevance, quality and availability, with over half of musicians reporting no engagement with them.

As a consequence, artists self-manage marketing, booking, and distribution, constraining growth, export potential, and the sector's ability to scale commercially. Many artists record from home or rely on free digital platforms for distribution but lack marketing knowledge to maximize their reach.

Skills training

Several organizations provide music industry education to local professionals and stakeholders:

The TEC FastTrack Job Training Assistance Program assists businesses in Tennessee with the cost of training new employees, offering support for skill development and onboarding, enhancing the workforce and increasing employment opportunities.

The Knoxville Music Coalition offers music industry stakeholders monthly meet-ups, artist showcases, and educational panels.⁷¹ KMC panels and meetups are open to artists, promoters, venue owners, radio hosts and music fans, and cover topics from music marketing and social media strategies to recording tips and networking in the industry.⁷²

⁷⁰ While the mapping process is comprehensive, it's not exhaustive. Those who are doing these jobs but don't have a physical space registered to their company are not included in the measurement

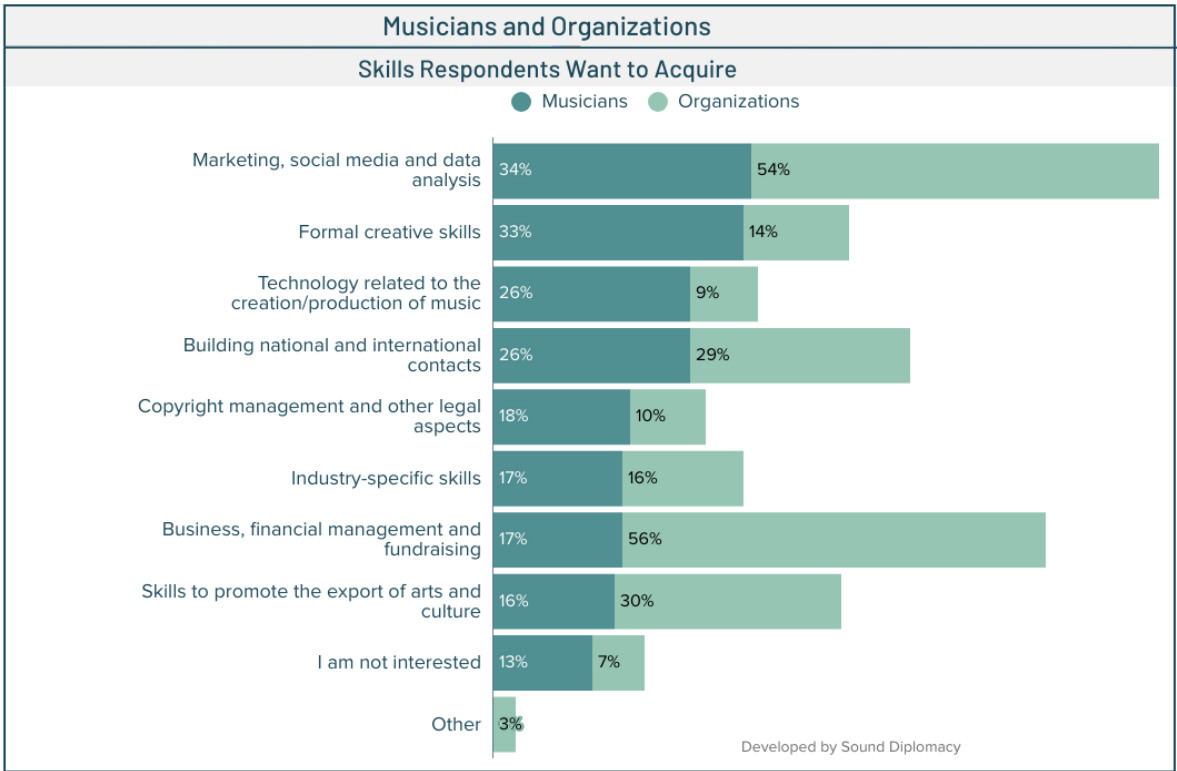
⁷¹ Knox Music Coalition, "About", accessed September 4, 2025, <https://www.knoxmusiccoalition.org/about>

⁷² Knox Music Coalition, "Programs", accessed September 4, 2025, <https://www.knoxmusiccoalition.org/programs>

The Knoxville Music Teachers Association (KMTA) supports local music educators by offering workshops, instructional programs, and social connections for teachers, musicians, performers, and clinicians.⁷³

However, when asked about the skills they would like to acquire or strengthen to support their music-related work, musicians tend to focus on self-promotion and creative development, while organizations emphasize management, financing, and strategic growth. As shown by figure 8, there is a need to increase skills development opportunities in marketing, social media, and data analysis, formal creative skills, technology related to the creation or production of music, and building national and international contacts for musicians.

Figure 8. Skills or Knowledge Gaps in the Music Ecosystem



The predominance of marketing and communication-related skills is particularly relevant, as these are typically the domain of intermediaries such as managers, booking agents, and

⁷³ Knoxville Music Teachers Association, “About”, accessed September 4, 2025, <https://knoxvillemta.org/about/>

record labels - roles that, as noted earlier, remain underdeveloped in East Tennessee’s music ecosystem. This indicates that many musicians are assuming self-management responsibilities to professionalize their careers in the absence of dedicated industry intermediaries.

Organizations emphasize management, financing, and strategic growth, prioritizing skills in business, financial management, and fundraising, marketing, social media, and data analysis, export of arts and culture, and building national and international contacts.

Both groups also show interest in copyright management and other legal aspects (18% among musicians; 10% among organizations), reflecting some awareness of the importance of protecting creative rights, though formal registration remains limited.

These findings highlight a shared trend toward greater self-sufficiency among both musicians and organizations. The strong demand for marketing, financial management, and export-related skills reflects a response to the lack of intermediaries and institutional infrastructure in the region. This points to an adaptive but fragile ecosystem where creatives must perform multiple professional roles - underscoring the need for capacity-building initiatives and targeted public support to enable more sustainable professional growth across East Tennessee’s music industry.

Recommendation 7. Develop an IP and copyright education program

Initiators	Regional organizations supporting the music sector, including Arts & Culture Alliance of Greater Knoxville and Knox Music Coalition
Supporting Stakeholders	IP and copyrights professionals, regional county governments, TEC, University of Tennessee, local radio networks
Timeframe	Medium term (1–2 years)
Goals	● Increase economic opportunities and foster sustainable growth for the music sector ● Provide guidance and resources to support and grow the local music industry ● Strengthen musicians’ financial stability and professionalization

Strengthening rights management is essential to increasing artist income and supporting long-term professional development. There is a need to develop practical, hands-on support in these areas, through targeted workshops, local partnerships, and clearer guidance.

Implementation Actions:

Regional organizations supporting the music sectors should:

- Connect with existing programs to learn from established initiatives (see the following case study).
- Collaborate with regional universities, and IP and copyrights experts to curate a program based on the local needs and what is offered in other places.
- Potential partners or resources to develop the program can include:
 - Educational institutions such as the University of Tennessee
 - Rights management organizations such as the Mechanical Licensing Collective (MLC), American Society of Composers, Authors, and Publishers (ASCAP), and Broadcast Music Inc. (BMI) as well as other Performing Rights and Collective Management Organizations.
 - Government bodies such as the United States Copyright Office.
 - Professional or advocacy organizations such as the Copyright Alliance and The Copyright Society.⁷⁴
- Support could include online resources and tools, and one-to-one clinics to help artists register their works, set up accounts with collection societies, and better understand revenue flows.
 - Some workshops and educational events could be held at the University of Tennessee and open to the broader community.
 - A biannual workshop could be developed in the region with experts.
- Promote the program. This could be supported by local radio stations.

Further Considerations: Regional county governments in East Tennessee should also implement a policy requiring government and nonprofit organizations (NPO) entities to prioritize artists who have registered their work when offering performance opportunities, in order to incentivize copyright registration.

⁷⁴ US Copyright Office, “homepage”, <https://www.copyright.gov/> and ASCAP “About us”, <https://www.ascap.com/about-us> and BMI “licensing”, <https://www.bmi.com/licensing>, and MLC, “homepage”, <https://www.themlc.com/>, and Copyright Alliance, “About”, <https://copyrightalliance.org/about/>, and Copyright Society, “homepage”, <https://copyrightsociety.org/>, and Collective Management of Copyright and Related Rights, “homepage”, <https://www.wipo.int/en/web/copyright/collective-management>, accessed February 12, 2026

Case Study: Crosstown Arts' Musician and Artist Services Program (Memphis, Tennessee)

What Is It: Crosstown Arts is a nonprofit dedicated to cultivating the creative community in Memphis and providing resources and creating opportunities and experiences to support and connect a diverse range of creative people, projects, and audiences.⁷⁵

The Crosstown Arts' Music Publishing Coordinator offers Memphis-based musicians and music industry professionals (including producers, songwriters, engineers, and composers) free administrative support and guidance to manage their music catalog's publishing and receive all royalties for their original work.⁷⁶

This programs benefits artists and musicians by providing them with:

- Individualized assistance organizing their own publishing catalog
- Personalized support identifying and understanding all music revenue streams relevant to their catalog
- Music publishing templates (catalog management and split sheets)
- Ongoing access to the Music Publishing Specialist who helps the artist/musician stay updated and informed on how the music publishing industry relates to their catalog.⁷⁷

Requirements for artists and musicians to benefit from the program include:

- Being raised in Memphis, currently living in Memphis, or having created music in Memphis.
- Willing to participate in a minimum of two in-depth meetings with the Music Publishing Coordinator during the first two weeks of participation.⁷⁸

The Crosstown Sync program licenses music created by Memphis artists and musicians, as well as music recorded in Memphis by non-Memphians, for use in movies, television shows, commercials, video games, and other on-screen opportunities via its inclusive catalog.⁷⁹

⁷⁵ Crosstown Arts "Vision", accessed February 12, 2026, <https://crosstownarts.org/about/vision/>

⁷⁶ Ibid.

⁷⁷ Ibid.

⁷⁸ Ibid.

⁷⁹ Crosstown Arts "About Crosstown Sync", accessed February 12, 2026, <https://crosstownsync.org/>

Who Is Responsible: Crosstown Arts has the dedicated role (filled by Charles Seaton). The Crosstown Arts' Music Publishing Coordinator is a dedicated role within Crosstown Arts' music department.⁸⁰

What Has It Done: Charles Seaton specializes in assisting independent Memphis music creators in copyright management and sync licensing opportunities in order to empower their careers within the Memphis music community and music industry as a whole. Charles's contributions at Crosstown Arts have facilitated the collection of unpaid publishing and neighboring rights royalties for over 200 Memphis-affiliated musicians during its inaugural year as a one-stop catalog for sync opportunities. Through the Publishing Administration Support program at Crosstown Arts, he established a clear pipeline for creatives to receive the developmental resources needed for protecting their copyrights and leverage their catalog to pursue sync licensing opportunities.⁸¹

Operational/Financial Information: This collection of unpaid publishing and neighboring rights royalties were instrumental in generating over \$50,000 in gross income for Crosstown Sync during its first year.⁸²

In 2024, Crosstown Arts reported \$4.86m in revenue and \$5.49m in expenses, with 31 employees.⁸³

Relevance for East Tennessee: This case study provides a key example of the importance of IP registration and increased education from an economic point of view for the local economy and the development and sustainability of music industry careers. East Tennessee could draw inspiration from Crosstown Arts' Music Publishing and Crosstown Sync programs when developing its own IP and copyright education initiative. The East Tennessee region benefits from existing successful nonprofit organizations that could learn from this. Additionally, Crosstown Arts and its publishing/sync services connect with multiple parts of the Memphis music ecosystem including the Memphis Music Initiative, Music Export Memphis, Recording Academy Memphis Chapter, Stax Music Academy, and other

⁸⁰ Crosstown Arts "Vision", accessed February 12, 2026, <https://crosstownarts.org/about/vision/>

⁸¹ Sound Diplomacy, "Memphis Music Strategy", accessed February 12, 2026, <https://static1.squarespace.com/static/64027e6e0c7a3644433839b7/t/67bcc9641142893ac0b4c974/1740425581567/Memphis%2BMusic%2BStrategy%2BFinal%2BFULL.pdf>

⁸² Ibid.

⁸³ Cause IQ, "Crosstown Arts", accessed February 12, 2026, https://www.causeiq.com/organizations/crosstown-arts,27187671/?utm_source=copilot.com#programs

industry stakeholders, particularly in professionalization of music careers and publishing literacy.⁸⁴ These organizations and initiatives could represent potential partners or contacts for East Tennessee when curating its IP and copyright education program.

Recommendation 8. Expand the “Fair Wage Stage” initiative to the regional level

Initiators	Knox Music Coalition
Supporting Stakeholders	Regional county governments, nonprofits supporting the music sector, local music venues and businesses, TEC, proposed Music Office
Timeframe	Short term (0–12 months)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Strengthen musicians’ financial stability and professionalization • Improve regional cohesion

The Knox Music Coalition (KMC) should expand its “Fair Wage Stage” initiative to the East Tennessee region to ensure all musicians receive fair pay for their performances at venues across the region.

Fair pay guidelines should aim to:

- Set industry standards for fair pay.
- Lead to increases in artist wages.
- Improve perceptions of the economic value of music.

⁸⁴ Sound Diplomacy, “Memphis Music Strategy”, accessed February 12, 2026, <https://static1.squarespace.com/static/64027e6e0c7a3644433839b7/t/67bcc9641142893ac0b4c974/1740425581567/Memphis%2BMusic%2BStrategy%2BFinal%2BFULL.pdf>

- Raise public awareness for the importance of fair compensation through tailored educational campaigns.
- Reduce the likelihood of exploitation by promoting the development of professional standards.
- Foster a more respectful and supportive environment for musicians.
- Provide an example of good practices for hiring artists.
- Contribute to musicians' financial stability, allowing them to pursue their work as a full-time career.
- Support the work of individuals and organizations leveraging economic equity for artists.
- Guarantee equitable compensation across all demographics, addressing disparities and ensuring that all musicians, regardless of background, are paid fairly.

Implementation Actions:

- The KMC should identify regional county governments and nonprofits supporting the music sector in the region to describe the initiative to them and get their support. Support could include:
 - Promoting the initiative through government agencies in the region.
 - Showcasing participating venues in promotional and marketing campaigns.
 - Helping to develop and share a Fair Wage Stage guide.
 - Favorizing participating venues for public events.
 - Developing financial incentives to encourage participation. The Independent Music Fund, created by the TEC, presents an opportunity to financially support the initiative.
- Use Sound Diplomacy's mapping database to identify venues in the region. Partner with these venues and promoters in the region to get their buy-in and encourage them to sign a pledge to follow fair pay standards, helping to raise the bar for local music scenes whilst learning about venue and promoter perspectives (e.g. challenges they face to ensure fair wages).
- Adapt the "Fair Wage Stage" for local needs by collaborating with local music stakeholders including event organizers, venues and artists.
 - Fair pay guidelines should give direction and suggestions to event organizers regarding how much they should be paying artists and performers.
 - Guidance could be offered with graded pay scales for differing levels of experience for musicians.
 - Other factors considered should include the size of the event, the length of the performance, and other relevant metrics. Regional venues should be included in the conversation to share their potential challenges.
- Promote the program throughout the region and feature it prominently at industry events like educational sessions and live music events.
- Liaise with artists to educate them on the guidelines in an effort to establish an understanding of fair pay for various types of performance.

Case Study: UK Fair Play Venue Scheme (UK)

What Is It: The Fair Play Venue Scheme invites venues across the UK to “declare their support for the fair treatment of musicians and their opposition to pay-to-play and unfair ticketing deals” by signing up to the scheme.⁸⁵ Fair Play Venues receive a sticker that can be displayed on the premises and they are also added to the Fair Play Venue database. In order for venues to qualify as a Fair Play Venue they must endorse the principles of the Fair Play Guide (see below). Venues can also be nominated by artists.

Who Is Responsible: The scheme was set up by the Musicians’ Union (MU) in 2013. The MU is a trade union in the UK that represents over 36,000 musicians across all sectors of the music business. The MU lobbies the government and major employers on behalf of its members and offers advice, support and legal assistance for musicians.⁸⁶

The MU offers a variety of annual membership options ranging from £1 to £25.⁸⁷

What Has It Done: The Fair Play Venue database enables musicians to look up venues that are sure to give them a fair deal. Venue profiles include a description, address, contact information, socials, the kind of artist they are looking to showcase and how to go about getting a gig. As of June 2025, the database has 129 venues registered across the UK.⁸⁸ The MU is open to communication and encourages artists that play at a Fair Play Venue to get in touch via email to let the MU know any feedback, or if they need any help or advice. Similarly, the MU encourages artists who played a gig at a venue where they were fairly treated and had a positive experience to nominate the venue to be added to the Fair Play Venue database.

The MU’s Fair Play Guide is a 16–page booklet that can be accessed online for free. It explains how musicians can recognize and negotiate fair deals with venues and promoters, and ultimately ensure their shows are successful and that they are paid appropriately. The guide contains a list of factors to consider and things to avoid when negotiating a gig and things to consider before committing to a

⁸⁵ Musicians’ Union, “Fair Play Venue Scheme”, accessed February 12, 2026,

<https://musiciansunion.org.uk/working-performing/gigs-and-live-performances/fair-play-venue-scheme>

⁸⁶ Musicians’ Union, “About the MU”, accessed February 12, 2026,

<https://musiciansunion.org.uk/about-the-mu>

⁸⁷ Musicians’ Union, “Membership Rates”, accessed February 12, 2026, <https://musiciansunion.org.uk/join>

⁸⁸ Musicians’ Union, “Find a Fair Play Music Venue”, accessed February 12, 2026,

<https://musiciansunion.org.uk/fair-play-music-venues>

competition-style gig or showcase event and when submitting artist applications. The guide also contains information and advice on repeat bookings, merchandise, data capture and royalties.⁸⁹

The MU and the Fair Play Scheme are categorically against ‘pay-to-play’ gigs and work to expose their dangers. ‘Pay-to-play’ is when emerging and unsigned artists are solely responsible for the promotion or financing of their gig by buying and selling their own tickets, often ending up with considerable financial loss if they can’t sell them all. The MU argues that with social media, the most common deals now are co-promotion deals where the artists assist in the promotion of their shows but are appropriately rewarded for their efforts with a fair cut of the price of each ticket.⁹⁰

As well as the Fair Play Guide, the MU also produces lists of recommended minimum rates of pay for live music performances to help artists and venues when booking a gig. The lists include the National Gig Rates, Casual Stage Rates, Accompanist Rates, Residency Rates, and Organists and Ceremonies Rates. The lists include details on setting up time, overtime, distance fees and travel expenses, portage, breaks, late fees, overnight stay, and subsistence, to name just a few.⁹¹

Alongside the rates of pay lists, the MU provides live engagement standard contracts that serve as written confirmation of the terms of the gig and ensures both sides know what is expected e.g. what time to arrive and how much they’re going to get paid.⁹² Contract templates include:

- Hiring a band
- Hiring a solo musician
- Band continuing engagement
- Solo musician continuing engagement
- Profit sharing engagement

⁸⁹ Musicians’ Union, “Fair Play Guide”, accessed February 12, 2026, <https://musiciansunion.org.uk/working-performing/gigs-and-live-performance/fair-play-guide>

⁹⁰ Ibid.

⁹¹ The Musicians Union, “Live Engagement Rates of Pay”, accessed February 12, 2026, <https://musiciansunion.org.uk/working-performing/gigs-and-live-performances/live-engagement-rates-of-pay>

⁹² The Musicians Union, “Live Engagement Standard Contracts”, accessed February 12, 2026, <https://musiciansunion.org.uk/legal-money/job-contracts-and-business-agreements/standard-contracts/live-engagement-standard-contracts>

The MU also has a guide on Engagement Booking for Unsigned and Emerging Artists⁹³ and a guide on Performing and Touring with Featured Artists.⁹⁴ Both contain information on negotiating a fair fee and what should be agreed and then confirmed as part of the performance contract.

Relevance for East Tennessee: East Tennessee could draw inspiration from the UK Fair Play Venue Scheme while expanding the Fair Wage Stage Initiative at the region level, considering local needs and providing additional resources and guidelines. While this example has been developed at a larger national scale, its principles are widely transferable. It demonstrates how guidelines, resources and venue recognition can further support emerging artists to negotiate fair deals and find venues that are guaranteed to offer fair compensation.

3.2.2 Music Education

A regional strength of East Tennessee is its strong music education sector, anchored by UT Knoxville's College of Music and complemented by robust after-school programs from organizations like the Knoxville Symphony Orchestra and School of Rock. This was also represented in the Economic Impact Assessment, showing that transversal activities demonstrate the highest relative concentration after distribution, with an establishment LQ of 0.90 and an employment LQ of 0.76. These values closely match the overall ecosystem LQ, indicating that transversal services such as music education, retail, and other enabling functions form a relatively solid and balanced foundation for the region's music economy.

When asked about the relevance, quality and availability of local suppliers of the music ecosystem, organization survey respondents rated education highly across all three dimensions (relevance 3.92, quality 4.05, availability 3.68 – supporting the findings above regarding the education LQ), while musicians gave moderate scores (relevance 2.96, availability 3.06). This asymmetry implies that while education assets are established, their direct utility is clearer to institutions than to artists, with more links existing between

⁹³ The Musicians Union, “Engagement Booking for Unsigned and Emerging Artists”, accessed February 12, 2026, <https://musiciansunion.org.uk/working-performing/gigs-and-live-performances/engagement-booking-for-unsigned-and-emerging-artists>

⁹⁴ The Musicians Union, “Performing and Touring with Featured Artists”, accessed February 12, 2026, <https://musiciansunion.org.uk/working-performing/gigs-and-live-performances/performing-and-touring-with-featured-artists>

businesses and educational institutions, and suggests there are fewer pathways from music education to performance-based careers.

School-based and extra curricular music education

East Tennessee has strong school-based music education, with music classes embedded across all school levels (elementary school, middle school and high school), a dedicated “Music and Performing Arts” budget of \$776,722 for all Knox County Schools in FY2025, and state standards.⁹⁵

The State of Tennessee also established K–12 fine arts academic standards covering music, amongst others, aligned with national standards and organized around 11 foundations and four topics. Additionally, the state offers a range of teaching resources, including downloadable standards by discipline and online professional learning tools.⁹⁶ These ensure consistency in teaching and learning outcomes.

Many organizations provide after-school music education programs in Knox County, including the Knoxville Symphony Orchestra, the Knoxville School of Rock, the Joy of Music School, the University of Tennessee Community Music School and more. Together, these provide multiple opportunities and pathways for music participation and progression.

Post-secondary education

The University of Tennessee Natalie L. Haslam College of Music, located in Knoxville, is one of the few standalone music colleges in the nation. It offers strong undergraduate, graduate and certificate programs for students and professional musicians, including Bachelor of Music, Bachelor of Arts in Music, Undergraduate Music Minor options, and Master of Music.⁹⁷ Together, these programs offer a comprehensive post-secondary music education, covering music performance, music education, music advertising, music business, music technology and more.

Internships and apprenticeship programs

Several internship, apprenticeship and mentorship programs exist for the music sector in Knox County, demonstrating local efforts towards workforce development and talent pipeline support.

⁹⁵ Knox County School, “PROPOSED FY 2026 BUDGET”, accessed December 18, 2025, https://resources.finalsite.net/images/v1747162935/knoxschoolsorg/krqv3gppt6tvkupp5arg/FY26BudgetBook_Final.pdf

⁹⁶ Tennessee Department of Education, “Fine Arts: Dance, Music, Theatre, Visual Art”, accessed September 3, 2025, <https://www.tn.gov/education/districts/academic-standards/arts-education.html>

⁹⁷ The University of Tennessee, “Natalie L. Haslam College of Music”, accessed September 3, 2025, <https://music.utk.edu/>

They include the Vol Edge program, managed by the University of Tennessee to offer career-ready experiences to all University of Tennessee students; the Knoxville Symphony Orchestra's Side-by-Side program, providing a mentoring experience for high school orchestra programs; and the Knoxville Opera Studio, providing music industry education by connecting the Knoxville Opera with the University of Tennessee's graduate vocal performance program.⁹⁸

While these programs provide valuable opportunities for music students and professionals, stakeholder engagement highlighted gaps in connecting local organizations with interns and apprentices and a need to encourage their hiring at the regional level.

Higher education and entrepreneurial pipeline

As explained previously, there are gaps in the regional music ecosystem, particularly in music business, production, booking, promotion, and tour management. These gaps could be filled by developing and further positioning the universities and colleges as the crucial pipeline for the next generation of music-sector entrepreneurs and intermediaries.

⁹⁸ Knoxville Opera, "About the Knoxville Opera Studio", accessed September 4, 2025, <https://www.knoxvilleopera.org/opera-studio/> and Knoxville Symphony Orchestra, "Education & Community", accessed September 4, 2025, <https://knoxvillesymphony.com/education-community/> and University of Tennessee, "Voledge", accessed September 4, 2025, <https://voledge.utk.edu/program-details/>

Recommendation 9. Develop the higher education and entrepreneurial pipeline

Initiators	Regional organizations supporting the music sector (or proposed Music Office), local universities and colleges (including University of Tennessee Natalie L. Haslam, College of Music, Middle Tennessee State University, Vanderbilt University)
Supporting Stakeholders	Regional county governments
Timeframe	Medium term (1–2 years)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Nurture and support music entrepreneurs and organizations • Provide guidance and resources to support and grow the local music industry • Improve communication and collaboration within the music ecosystem, and with other sectors/industries

The proposed Music Office, with potential support from regional county governments, should develop partnerships with local universities and colleges, and with other universities in Tennessee such as Middle Tennessee State University and Vanderbilt University to strengthen the professional pipeline for students in the music industry in the region. The aim would be to fill the gap in music business roles, and to increase knowledge amongst musicians.

To clearly define the pipeline, development should include:

- Targeted training and education: creating specialized, short-term courses, masterclasses, or certificate programs.
- Professional placements: encouraging universities to partner with regional businesses like venues, events, record labels, and managers to offer tangible internship opportunities.
- Mentorship and industry connections: establishing mentorship programs and inviting experienced music professionals to serve as guest lecturers to build direct relationships between students and industry stakeholders.

Implementation Actions:

Contact local universities and colleges, and particularly the University of Tennessee Natalie L. Haslam College of Music to develop partnerships to strengthen the higher education and entrepreneurial pipeline by sharing resources and expertise. Work jointly to:

- Develop or adapt programs focused on music industry entrepreneurial skills and business topics. These could include:
 - Music business and entrepreneurial skills (business planning, budgeting, grant writing, partnership development)
 - Legal rights and copyrights knowledge ([recommendation 7](#))
 - Marketing and communication
 - Technology (music tech tools, production, distribution)
 - Artist management (contract negotiations, booking gigs, liaising with record labels and touring managers)⁹⁹
 - Tour management (tour budgeting, venue coordination, transportation and lodging planning, media interactions, event production, safety)¹⁰⁰
- For long term sustainability and development of the local industry, put in place commitments to:
 - Employ experienced music professionals as guest lecturers.
 - Partner with regional businesses including venues, events, record labels, artists managers and touring professionals for internships opportunities.
- Utilize the universities and colleges' contacts and networks to develop a mentorship program so mentors can provide guidance, advice, and support in areas such as performance, networking, career development, and navigating the local industry.
- Help build direct relationships between students and music industry stakeholders including businesses and musicians:
 - List businesses in the region that could be interested in training, mentoring or hiring music students. This can be supported by the music directory expansion ([recommendation 10](#)).
 - Develop relationships with them, for instance by inviting them to regular networking events ([recommendation 10](#)) to meet other professionals and students.
 - Collaborate with businesses and professionals to develop collaborative projects between industry stakeholders and music students, such as live music event production, music recording and production etc.

⁹⁹ ICMP, "The Role of Music Managers in an Artist's Career?", accessed February 23, 2026, <https://www.icmp.ac.uk/blog/role-music-managers-artists-career#:~:text=Managers%20handle%20the%20business%20aspects,and%20liaising%20with%20record%20labels.%22>

¹⁰⁰ Berklee College of Music, "What does a tour manager do?", accessed February 23, 2026, <https://www.berklee.edu/careers/roles/tour-manager#:~:text=Their%20job%20is%20to%20make.service%20at%20each%20tour%20stop.>

- Jointly develop internship and mentorship programs.

Case Study: Brown University's ArtsCrew Program (Providence, Rhode Island)

What Is It: The ArtsCrew program at Brown University, launched by the Brown Arts Institute, is a workforce development program offering local artists and Brown students opportunities for training, freelance jobs, and career development.¹⁰¹

The program supports the creation of a pipeline of local arts professionals by hiring and training them on artistic, administrative and technical skills for performances at the Lindemann Performing Arts Center and other Brown arts facilities. These facilities are premier arts destinations, staging a mix of events, concerts, theater productions, dance performances and visual arts exhibits, which requires multiple highly-skilled teams. The ArtsCrew tackles this challenge by providing hands-on training, skills development, employment opportunities and a supportive community for aspiring arts professionals in various part-time roles, such as stage management, marketing, and technical design. ArtsCrew members receive cross-training across multiple roles, enabling them to work in various capacities such as exhibition assistants, preparators, producing assistants, production assistants, and visitor services staff, allowing the program to adapt to the needs of Brown's arts programming.¹⁰²

Open to local residents and students with a high school diploma, the ArtsCrew program was created not only to connect workers with employment but also to foster a sense of community and introduce young people and emerging artists to a variety of job opportunities in the arts. The program offers entry-level roles with wages ranging from \$18 to \$22 per hour and flexible schedules that align with the academic calendar.¹⁰³

Who Is Responsible: Brown University's Brown Arts Institute.¹⁰⁴

What Has It Done: Between fall 2023 and May 2024, nearly 100 new Brown ArtsCrew members were hired and trained to fill a variety of part-time positions, including in areas such as box office and front-of-house management, stage

¹⁰¹ Brown University, "ArtsCrew program at Brown offers training, flexible jobs and career development for local artists", Brown.edu, May 31, 2024, accessed January 27, 2025, <https://www.brown.edu/news/2024-05-31/artscrew>

¹⁰² Ibid.

¹⁰³ Ibid.

¹⁰⁴ Ibid.

management, visitor services, producing, marketing, exhibit preparation, and sound and lighting design. According to program leaders, more than half of the new hires are budding Rhode Island-based artists, dancers, musicians and performers, along with other local arts educators, administrators and production staff.¹⁰⁵

The ArtsCrew program aligns with Brown University's commitment to fostering local partnerships that benefit the Providence community by offering flexible work opportunities in the arts. The program serves the employment needs of both Brown students and local creative professionals, enabling young and local artists to focus on their craft while earning an income, thereby reducing the burden of gig work. Long term goals are to offer paid training, including certification programs and workshops on soft skills like resume building and interview preparation, tailored specifically to career paths in the arts.¹⁰⁶

Operational/Financial Information: While the University subsidizes the overall program funding 100 employees at hourly rates between \$18 and \$22, it also recovers costs through external operational fees for events held at BAI venues. These include ArtsCrew fees of \$40 for arts departments and students, and \$60 for non-arts departments and external users.¹⁰⁷

Brown University reports a contribution of \$80,619 to the ArtsCrew program as part of in-kind support.¹⁰⁸

Relevance for East Tennessee: The ArtsCrew program demonstrates the significance of professional development opportunities, and local partnerships in cultivating the artistic workforce in a city. Providing career pipelines reinforce the local economy, and, in this case, are proven to reduce brain drain following graduation. This is particularly relevant to East Tennessee, where more creative professionals and entrepreneurs are needed.

¹⁰⁵ Ibid.

¹⁰⁶ Ibid.

¹⁰⁷ Ibid and Brown Arts Institute, "Budgeting considerations for planning your event at a BAI venue.", accessed April 21, 2026, <https://arts.brown.edu/spaces/request-space/charges>

¹⁰⁸ City of Providence, "City Pilot Programs", accessed April 21, 2026, <https://controlpanel.opengov.com/transparency-reporting/providenceri/118b6ab2-31c8-40b3-9084-a7728793b24b/34b910fd-f907-4257-8a7e-f0dad4d98b5e?savedViewId=c4b55b08-95ed-4cad-9554-a8cedaf9108d>

3.2.3 Collaboration & Networking

Several initiatives provide networking opportunities for music stakeholders in East Tennessee. The Knoxville Chapter of the Nashville Songwriters Association International welcomes songwriters of all levels and genres and hosts regular meetups and special events for creatives to connect, share songs, receive feedback, and learn about the music industry. The Knoxville Music Coalition (KMC) offers monthly music industry meet-ups, artist showcases, and educational panels, and networking opportunities.¹⁰⁹ KMC panels and meetups are open to artists, promoters, venue owners, radio hosts and music fans, and cover topics from music marketing and social media strategies to recording tips and networking in the industry.¹¹⁰ The Knoxville Music Teachers Association (KMTA) supports local music educators by offering workshops, instructional programs, and social connections for teachers, musicians, performers, and clinicians.¹¹¹

Relevance, availability & quality of local suppliers of the music ecosystem

Via the survey, musicians and music industry participants (including organizations and businesses) were asked to identify the key players they consider most relevant to achieving their professional goals, and to rate the quality and availability of these players on a scale from 1 to 5. Figure 9 summarizes these findings, presenting stakeholder relevance, quality, and availability.

Survey respondents consider musicians and artists to be the most relevant, of the highest quality, and most available in the region. The quality of local talent was also highlighted during roundtable conversations.

Recording studios, producers, and engineers were generally rated as being of mid-to-high relevance with acceptable quality and availability across the music sector. Overall, production capacity is present in the region, but it is not considered abundant.

¹⁰⁹ Knox Music Coalition, “About”, accessed September 4, 2025, <https://www.knoxmusiccoalition.org/about>

¹¹⁰ Knox Music Coalition, “Programs”, accessed September 4, 2025, <https://www.knoxmusiccoalition.org/programs>

¹¹¹ Knoxville Music Teachers Association, “About”, accessed September 4, 2025, <https://knoxvillemta.org/about/>

Figure 9. Music Ecosystem Value Chain: Relevance, Quality and Availability

Local Suppliers of the Music Ecosystem		Musicians – Relevance	Musicians – Quality	Musicians – Availability		Organizations – Relevance	Organizations – Quality	Organizations – Availability
Musicians and artists	★	4.52	4.22	3.67	★	4.87	4.32	3.95
Rehearsal spaces		2.94	3.03	2.67		3.64	3.31	2.86
Recording studios, music producers, engineers		3.75	3.55	3.06		3.31	3.73	3.14
Record labels		2.41	2.44	2.02		3.5	2.54	1.91
Physical retail stores		3.02	3.19	2.79		2.73	3.69	3.22
Music-related media		3.47	3.13	2.9		3.85	3.45	3.15
Music venues	★	4.27	3.65	2.87	★	4.22	4.23	3.53
Managers and booking agents		2.88	2.35	2.12		3.91	3.16	2.84
Local authorities or state and national governments		2.50	2.45	2.27		3.52	3.39	3.21
Copyright management organizations		2.87	2.94	2.82		2.97	2.91	2.71
Education		2.96	3.31	3.06	★	3.92	4.05	3.68

Conventions

● Creation ● Production ● Distribution ● Exhibition ● Transversal ● Top three lowest ratings ● Top three highest ratings ★ High dependency

Perception gaps between musicians and organizations

The stakeholder survey revealed significant perception gaps between musicians and music organizations regarding key support structures. For Local Authorities and Government, organizations report a much higher relevance (3.52) compared to musicians (2.50). Organizations also perceive better availability (3.21 versus 2.27), indicating that policy and public interfaces are more visible and accessible, and have more closely linked goals and interactions to institutions than to individual artists. Whilst this is often seen in many locations around the US, it highlights a disconnect between decision makers and the local industry.

In terms of music-related media, organizations assign higher relevance (3.85) than musicians (3.47). However, both groups rate availability only moderately (3.15 for organizations and 2.90 for musicians). This suggests that visibility and communication of the music scene is an area in need of improvements. It also results in limited collaborations between music stakeholders and music-related media.

Lastly, rehearsal spaces are considered more relevant by organizations (3.64) than by musicians (2.94). Despite this difference in perceived importance, both groups report limited availability (2.67 for musicians and 2.86 for organizations). This disparity in relevance,

coupled with low availability for both, points to uneven access and potential scheduling frictions for shared rehearsal resources.

Local suppliers of the music ecosystem's geographic location

All survey respondents were asked to indicate the geographic location of their clients and suppliers (both individuals and organizations) to better understand how much of their professional activity is anchored within East Tennessee or extends beyond it. When analyzing the suppliers and collaborators of musicians and organizations in East Tennessee, a clear pattern emerges: most professional relationships take place within the same county or region. Musicians' main partners are music venues (86.8%), other musicians and artists (63.2%), and physical retail stores (57.2%), with the majority of these collaborations occurring locally. This suggests a closely connected creative community, centered on live performance and direct peer interaction rather than wider industry structures.

However, engagement drops sharply beyond local boundaries. Only 34.2% of musicians collaborate with suppliers elsewhere in Tennessee, 32.2% across the U.S., and just 11.2% internationally. This limited external reach reflects the low presence of intermediaries, such as managers, booking agents, and record labels, within the ecosystem, as well as suggesting limited export opportunities or awareness within the region. More than half of musicians (54.3%) report not working with managers or agents, and nearly two-thirds (64.9%) do not collaborate with record labels. These gaps indicate that most artists remain self-managed and rely on informal, local networks rather than professional intermediaries to access new markets or opportunities.

For organizations, collaboration patterns are slightly broader but still predominantly local. The majority work with musicians and artists (80.8%), music venues (80.8%), and production and logistics services (68.5%), again with most of these partners located within their county or region. A smaller share – between 26% and 34% – maintain connections outside Tennessee or abroad, suggesting some capacity for national and international outreach.

Both groups show limited collaboration with educational institutions, media outlets, and management professionals, which are key drivers of long-term development and professionalization.

As education is one of the transversal location quotients (LQs) in which the region performs strongly, and it is also rated highly in terms of availability, suggesting significant potential to better leverage this asset to support the music ecosystem, there is currently a missed opportunity to strengthen connections between the music industry and educational institutions.

The limited collaborations with media outlets and management professionals highlight a music ecosystem that is strongly community-based and performance-driven, but still lacking the intermediary and institutional support necessary to expand its visibility and economic sustainability beyond the local level.

A region-wide music directory would offer a potential solution to the perception gaps and resource visibility challenges within the music ecosystem by serving as a centralized hub of information comprehensively mapping and highlighting all existing music assets. Furthermore, it could serve as a fundamental business referral network, fostering targeted networking opportunities between artists, organizations, and industry professionals. This increased transparency and ease of connection would promote collaboration, bridge the gap between institutions and individual artists, and ultimately strengthen regional cohesion, allowing the music sector to realize its full economic and cultural potential.

Recommendation 10. Develop networking opportunities within the music sector

Initiators	Tennessee Entertainment Commission
Supporting Stakeholders	Regional county governments, regional organizations supporting the music sector, including Arts & Culture Alliance of Greater Knoxville, proposed Music Office, local radio stations including WDVX.
Timeframe	Short term (0–12 months)
Goals	• Improve communication within the music ecosystem, and with other sectors/industries • Improve access to music spaces • Improve regional cohesion

The TEC, alongside nonprofit organizations supporting the music sector and potentially the proposed Music Office, should organize networking sessions for the music sector to meet, share experiences and knowledge, and collaborate. Some of these sessions could also be open to other sectors that could be related to the music industry, such as other creative industries or tourism. Ultimately, these sessions would foster improved communication

and collaboration within the music community and related industries. Via networking, there is also an opportunity to offer music stakeholders additional avenues for funding and support by connecting them with potential clients and collaborators, while providing the business community increased access to creative and innovative thinkers.

Networking opportunities for the music sector could also be increased via a comprehensive online database of music stakeholders. The TEC has a music directory for users to search for musicians, music venues, recording studios and music businesses across the state. It currently lists 16 musicians and 18 music businesses located in Knox County. The TEC should collaborate with the regional county governments, the proposed Music Office, and nonprofits supporting the music sector to complete this directory with local stakeholders and raise awareness around it and its potential. By centralizing all stakeholders' information, the directory can serve as a business referral network tool, helping musicians connect with businesses, venues, industry professionals, and fostering collaborations and professional opportunities in the music ecosystem.

Implementation Actions:

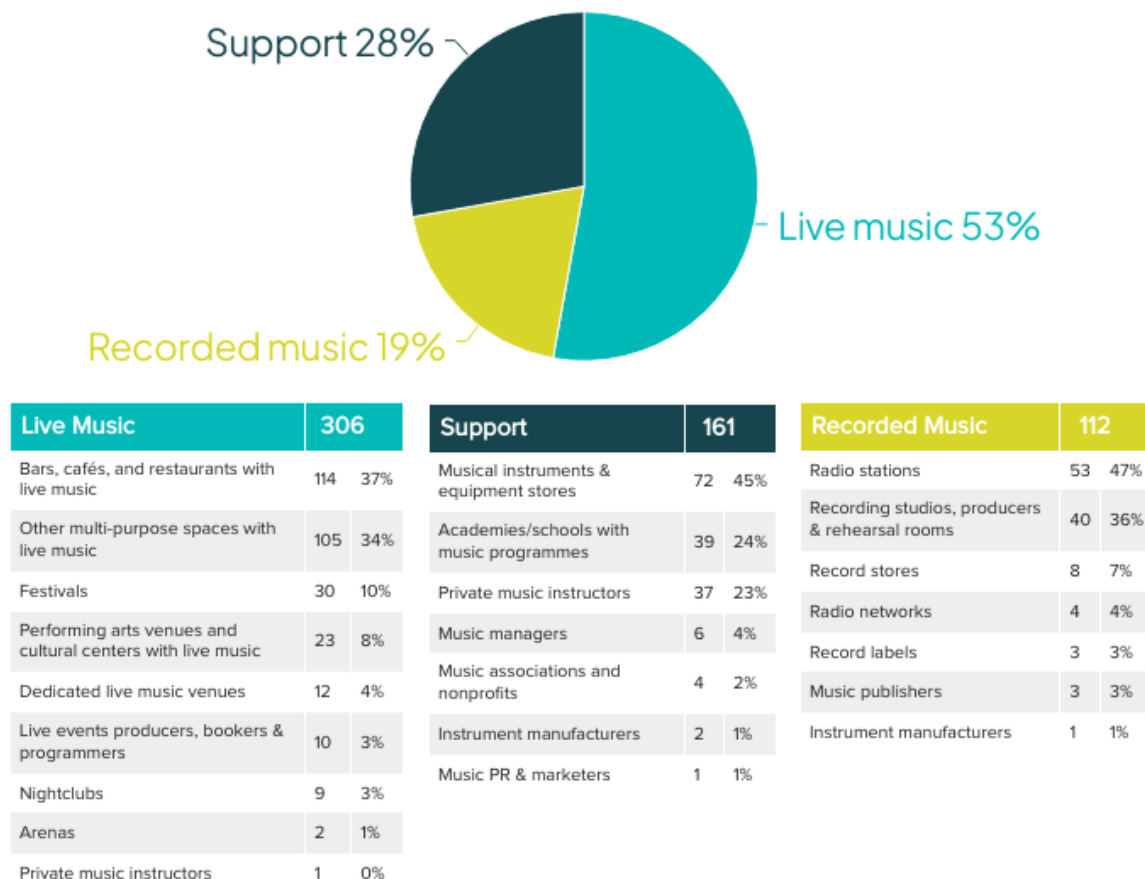
- Collaborate with organizations supporting the music sector to design the structure of networking sessions.
 - They should be based on relevant topics for the local music sector such as IP and copyright education ([recommendation 7](#)) or financial literacy and access ([recommendation 6](#)). They could also include showcases, and technical visits to creative spaces.
 - When possible, networking meetups should be planned around large events such as Big Ears and Make Music Day Knoxville in order to draw a variety of professionals.
 - These meetings should be free and open to the public.
- Work with universities and partners to identify and invite panelists or experts to hold and participate in the sessions.
- Establish a schedule suiting the availability of participants and speakers.
- Promote the program and invite key stakeholders.
- Facilitate participation during the sessions and collect feedback.
- Track attendance and participant satisfaction.
- Liaise with the Arts & Culture Alliance to integrate stakeholder listings they already have.
- Create a form asking for basic information and share it with local music stakeholders so they can fill it in.
 - The form should feature the benefits of being included in the directory to encourage participation, such as increased visibility and collaboration and networking opportunities.
 - Ask participating stakeholders to share it to their network.
- Raise awareness around the directory and its potential.

- Promote the directory using online channels and physical materials, such as posters and flyers, at music events and venues frequented by the regional music community.
- This may require the development of partnerships with local music stakeholders.
- Engage local radio stations, providing them with key information to help promote the tool to wider audiences.
- Promote the directory during networking sessions, positioning it as the region's primary map of the ecosystem. Participating stakeholders could be asked to fill in their information during the networking sessions.
- Once expanded and promoted, the directory should also be maintained as a searchable promotional tool for collaboration and visibility.

3.3 Infrastructure

Sound Diplomacy's mapping analysis provides an overview of the composition of music-related assets in East Tennessee, grouped by their main functional categories and by link in the value chain. It shows how assets are distributed across three broad areas: live music, recorded music, and support, highlighting the relative weight of each within the regional ecosystem.

Figure 10. Overview of the Music Assets in East Tennessee: By Category



Live music

The live music landscape is broad and active but primarily rooted in smaller, community-based spaces rather than major performance infrastructure. The majority of music assets in East Tennessee are related to live music (306 assets, 53%). Much of the region's music activity occurs through spaces such as bars, cafés, and restaurants with live music (114; 37%) and multi-purpose spaces (105; 34%), while the region only hosts 12 dedicated live venues (4%). This indicates that performances are primarily hosted in establishments not solely dedicated to music programming, which can limit career pathways for musicians looking to perform in more professional settings. There is also limited large-capacity infrastructure, with 23 performing arts centers (8%) and 2 arenas (1%) identified.

Survey responses support these findings. Music venues were rated as very relevant by surveyed musicians (4.27), but availability is an issue, and was rated 2.87. This points to a supply constraint from the artist perspective. According to local stakeholders, this shortage of mid-sized venues (400–700 capacity) limits local artists' ability to scale their audiences. This “venue gap” also potentially makes Knoxville and other East Tennessee cities less attractive to touring artists looking for intermediate stops between Nashville, Atlanta, and Asheville. Whilst Knoxville doesn't need to become the “next Nashville”, identifying and leveraging its unique selling point will be key to the success of the local music industry.

Recorded music

Recorded music assets represent a smaller share of the ecosystem (112 assets, 19%), with radio stations (47%) and recording studios (36%) forming the largest portions of this category. There is also a modest commercial presence: record stores (8 / 7%), radio networks (4 / 4%), record labels (3 / 3%) and music publishers (3 / 3%). Recorded music activity is defined by a strong base in radio and studio work, offering production and dissemination capacity but limited in its commercial or industry-facing scope. While this provides artists with opportunities to record and share their work locally, there are fewer structures supporting the commercial distribution of recorded music. As a result, artists may face challenges when trying to get broader industry engagement and opportunities.

Support assets

Support assets (161 / 28%) include a mix of music education, training, and retail services, with instrument and musical instruments & equipment stores (45%) and academies/schools with music programmes (47% combined) as the main components.

Musical instrument and equipment stores are the largest subcategory, indicating broad access to music-related goods and services across the region. The remaining assets - music managers (6 / 4%), associations and nonprofits (4 / 2%), instrument manufacturers (2 / 1%), and PR and marketing (1 / <1%) remain limited in scale.

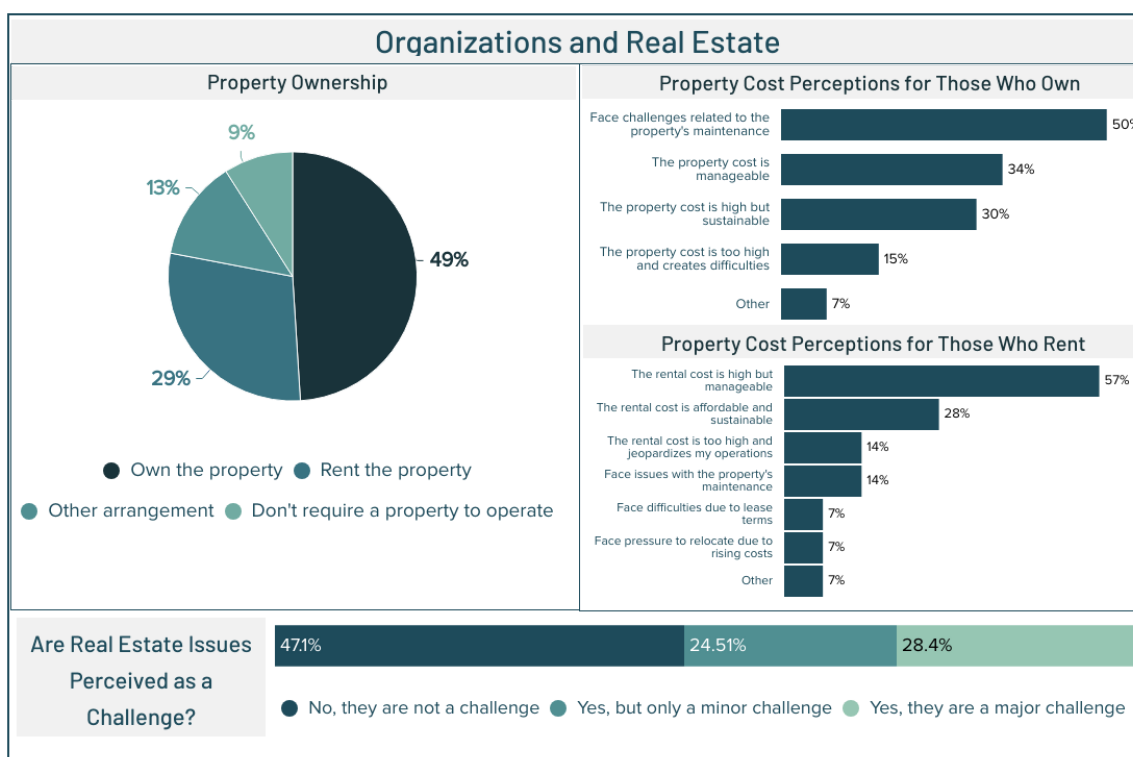
Music infrastructure

Survey findings around the availability of music spaces suggest a need to further identify and promote existing music assets to raise awareness around them and increase their availability to the music community. A comprehensive listing would also further identify precise gaps and could lead to the creation of additional spaces. Stakeholders also noted that the East Tennessee region is home to many underutilized spaces or non-traditional music venues such as distillery tasting rooms, particularly in Sevier County. These represent an opportunity to develop additional spaces for the music sector.

Property status and real estate

Organizations were asked about their experience owning or renting the spaces where they operate, such as venues, studios, and rehearsal spaces, and whether these conditions represent a challenge.

Figure 11. Property Status and Real Estate for Organizations from the Music Ecosystem



Nearly half (49%) of the organizations surveyed own their property, while 29% rent and 13% rely on alternative arrangements such as shared, temporary, or donated spaces. Only 9% reported not requiring a physical property to operate.

In general, property owners find the most common challenge is the cost of maintenance for their establishment. A smaller share described their property expenses as creating operational difficulties, although findings show that two third of owners aren't priced out of the market, but some do note that costs are high. Similar disparities between those who find property affordable and those who don't exist amongst renters. Near identical proportions of respondents (15% owners / 14% renters) indicated that costs are jeopardizing their operations while another 14% say that they face maintenance issues or lease-term difficulties.

When asked more broadly about whether real estate represents a challenge, nearly 47% said it does, with 28% identifying it as a *major challenge* and 24% as a *minor one*. This highlights a general sense of economic vulnerability even among organizations that currently own their spaces. Rising costs, maintenance burdens, and limited access to stable, affordable venues suggest that the sustainability of many cultural spaces remains

precarious. These findings show that infrastructure constraints, especially related to affordability and accessibility, pose one of the key structural challenges to the region's music ecosystem.

Coordination and collaboration

As venue operators face financial constraints, staffing challenges, and difficulty balancing artists' fair wages with rising costs, many are interested in exploring shared spaces or partnerships to diversify programming and reduce risk. This could be achieved thanks to a comprehensive directory of music spaces, allowing improved communication and coordination.

Recommendation 11. Create a regional inventory of potential spaces for the music sector

Initiators	Tennessee Entertainment Commission
Supporting Stakeholders	Regional county governments, local municipalities, local music stakeholders including artists and organizations, proposed Music Office
Timeframe	Short term (0–12 months)
Goals	• Provide guidance and resources to support and grow the local music industry • Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Improve access to music spaces • Improve diversity, equity, inclusion, and accessibility in the local music sector • Improve regional cohesion

An online tool such as the Tennessee Entertainment Commission directory represents a valuable opportunity to address the identified infrastructure challenges in the region. By listing all music spaces, it can help raise awareness around them and increase their

availability. It can also identify gaps and lead to the creation of additional spaces. Furthermore, it would allow for increased communication between industry stakeholders, providing opportunities to discuss the coordination of schedules, and potentially share spaces and reduce costs.

The TEC should collaborate with local stakeholders and owners to complete its directory with all music spaces, including facilities for live performance and working spaces. It should also include non-music-related spaces that could be adapted and used by the music community.

Implementation Actions:

- The mapping database developed by Sound Diplomacy and any existing lists, including the TEC music directory, should be the starting point for this work.
- Further information can be gathered via a simple Google Form that allows music stakeholders and building owners to fill out and submit their information.
- Complete the directory. It should include information on:
 - Music businesses with a physical location
 - Venues
 - Rehearsal spaces
 - Record labels with a physical location
 - Publishers with a physical location
 - Producers with a physical location
 - Promoters with a physical location
 - Music educators and schools
 - Music associations and foundations
 - Music tech with a physical location
 - Music media with a physical location
 - Entertainment lawyers
 - Collection societies
 - Music suppliers (web, design, accountants, equipment rentals, etc.) with a physical location
 - Sponsors and partners
 - Musical instrument and equipment stores
 - Bars, cafes, restaurants with live music
 - Office spaces
 - Major music events and festivals such as Make Music Day and Big Ears
 - Underutilized spaces that could be adapted and used by the music community.
- Include the following contact information, if available: name, email, phone, address, website, services offered for each asset.

- For spaces, ideally, the directory would describe each place indicating name, location, dimension, facilities and equipment, audio capability, which organization owns it and how to book it, with direct links if applicable.
- Ensure the directory is regularly updated.
- Promote the directory and the option to submit entries to the local community.
- Use the directory to identify gaps and advocate for the creation of additional infrastructure for the music sector.

Further Considerations:

In the case of the need for additional infrastructural developments, there is an opportunity to benefit from the Tennessee Tourism Enhancement grant. This grant's purpose is to support tourism development projects and the creation or expansion of physical attractions, facilities, or events that are available and open to the public, that improve the appeal of the destinations to tourists, and that enhance tourist experiences that are primarily promoted to or used by tourists.¹¹²

3.4 Audience & Community Engagement

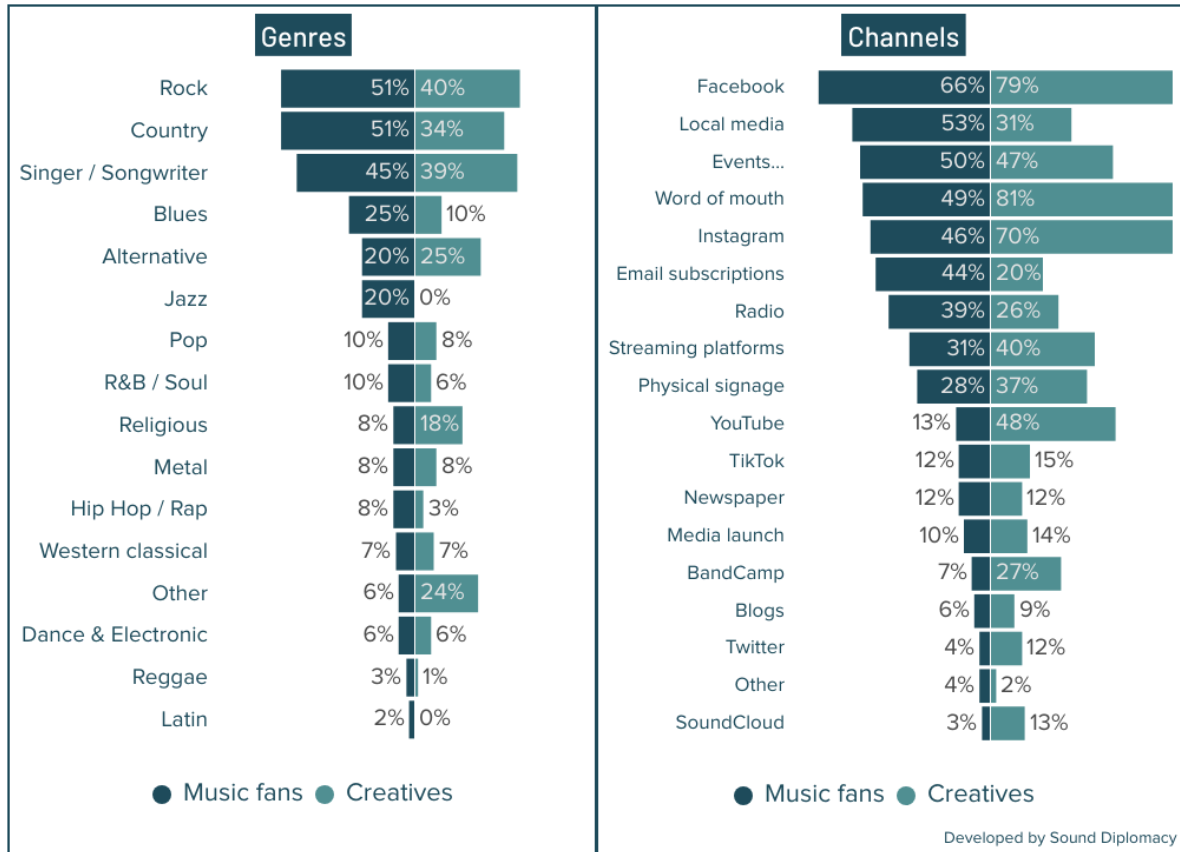
3.4.1 Audience Development

Live music is central to East Tennessee's cultural identity. The regional music scene also shows a broad range of musical styles. Among creators, the most common genres are rock (40.4%), singer/songwriter (39.4%), country (34.6%), alternative (25.0%), and other (24.0%). When considering audience preferences, the most popular genres are rock (51.4%), country (51.4%), singer/songwriter (45.5%), blues (25.3%), alternative (20.1%), and jazz (20%).

These results reveal a strong alignment between creators and audiences around traditional and roots-based genres such as rock, country, and singer-songwriter. The findings also show, however, that there is local demand for blues and jazz music that isn't being met.

¹¹² Tennessee Vacation, "Tourism Enhancement", accessed February 26, 2026, <https://industry.tnvacation.com/industryresourcestourism-grants-and-scholarships/tourism-enhancement>

Figure 12. Musicians and Artists: Media and Music Genres



Local music-related demand

Survey results show a strong appetite among East Tennessee audiences for more music events and experiences. Nearly three-quarters (73.8%) of respondents said they would love to see more live music activity in the area. This proportion was notably higher among fans from rural counties, rising to 78.7% when excluding respondents from Knox, Sevier, and Blount counties, compared to 71.3% among fans in those more urban areas. 22.8% of all respondents said their interest depends on the type or quality of events. Only 3.1% felt that the current offering is sufficient, indicating that there is high demand from residents to see an expanded music scene, and that those in rural communities feel they're missing out on live music experiences.

When asked what kinds of music experiences they would like to see more of, audiences expressed a diverse range of preferences. The most popular options were concerts featuring artists playing original music (68.1%), community-oriented festivals and events

(53.4%), and music festivals (49.8%). There is also considerable interest in concerts by international touring artists (33.3%) and radio stations that play local music (25.1%). Less frequently mentioned options include cover-band concerts (14.3%), record stores (11.5%), and digital broadcasting platforms (9.7%).

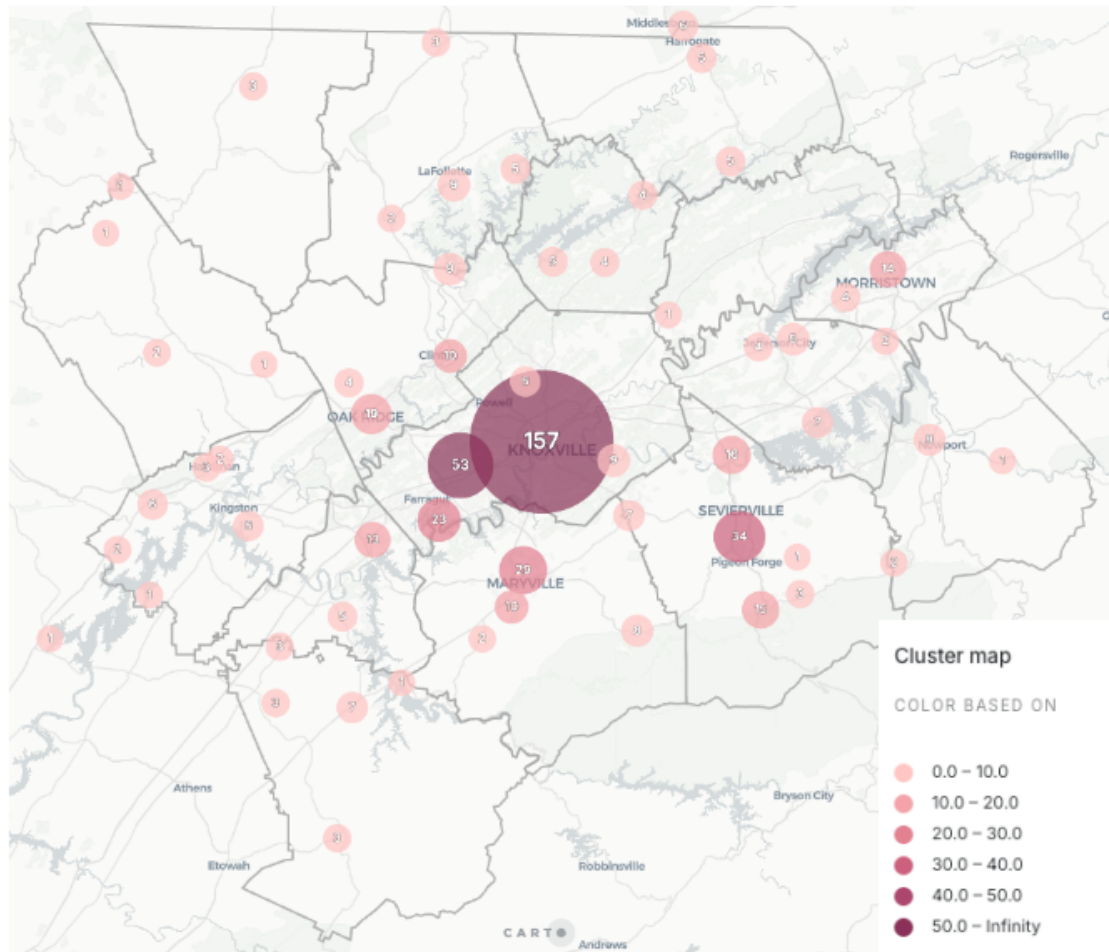
A few respondents provided additional suggestions under “Other,” such as classical music on local radio, small live venues for independent national artists, and spaces dedicated to original compositions, reflecting the value placed on local cultural infrastructure and creative diversity.

There is an opportunity to align with audience tastes and desire for more music events by developing additional programming, particularly outside of major events.

Geographic concentration

Spatial analysis identifies Knox County as the central hub, with Sevier and Blount serving as secondary nodes, while most other counties make small contributions. Peripheral counties tend to center around subcategories present in their regions, leading to the development of narrow local identities and music-related offerings.

Figure 13. East Tennessee Music Assets Cluster Map



Bars, cafés, and restaurants with live music are among the most geographically widespread assets, present in 13 counties, and serve as the foundation for local performance life. Their consistent presence — from urban Knoxville (17%) to smaller counties like Cocke (40%) and Monroe (31%) — underscores their role as accessible, informal venues that anchor live music throughout the region.

Other multi-purpose spaces with live music appear in 11 counties, often as the primary or only music-related infrastructure in rural areas such as Campbell (63%), Claiborne (47%), and Union (36%). These spaces highlight adaptive reuse and community-based cultural delivery, where dedicated music venues are limited.

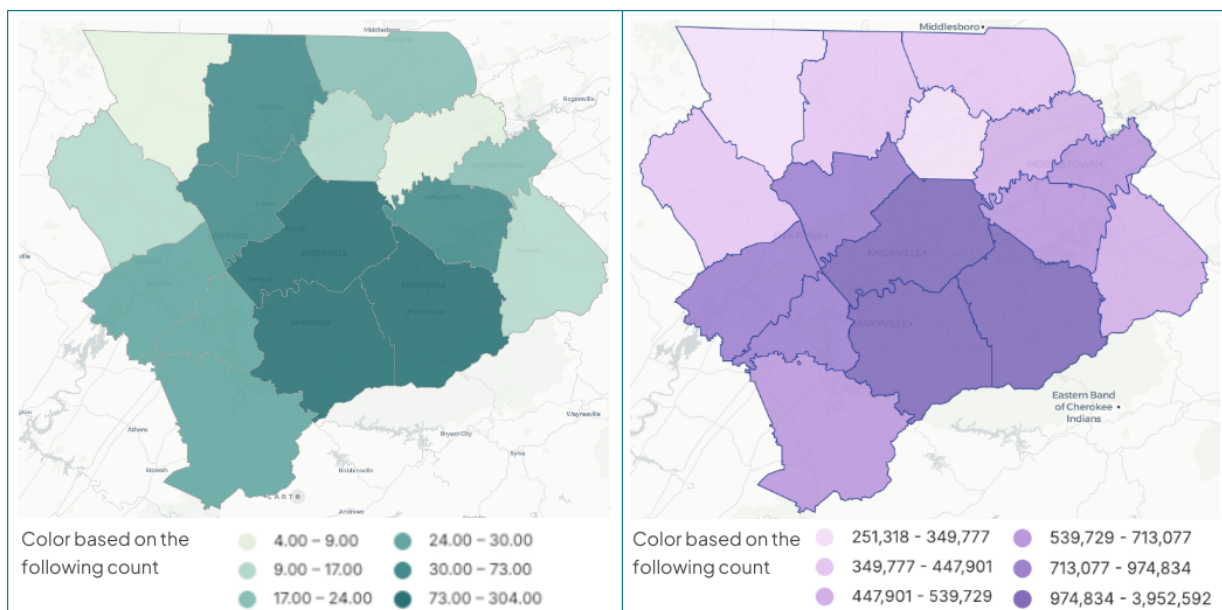
Festivals are mapped in 8 counties, notably in Sevier (14%), Blount (13%), and Anderson (8%), illustrating how temporary, high-impact events strengthen cultural presence and tourism across localities.

Other assets such as performing arts venues and dedicated live music venues are limited in number and mostly located in larger or more connected areas, reflecting capacity constraints outside urban centers.

Music asset concentration and population

Counties with larger populations, such as Knox, Sevier, and Blount, show the highest concentrations of music assets. Figure 14 visualizes this relationship. The map on the left shows the number of music-related assets per county, while the map on the right represents total population. The visual overlap is clear: Knox, Sevier, and Blount counties, which host the largest populations, also contain the highest concentration of assets. In contrast, less populated counties such as Grainger, Morgan, and Rhea hold far fewer, indicating a direct relationship between demographic size and cultural infrastructure density.

Figure 14. Comparison of Music Asset Concentration and Population by County in East Tennessee



This alignment indicates that access to music spaces, services, and activities broadly follows where people live, not necessarily where music industries are most developed. From a planning perspective, this points to both strengths and gaps. On one hand, it

indicates a balanced geographic alignment between people and available assets, supporting equitable access to cultural participation. On the other hand, it also shows that less populated counties may lack the critical mass to sustain diverse music activities, potentially requiring targeted regional support strategies with nearby counties.

Audience development strategies

An audience development strategy creates an intentional focus on the cultivation and expansion of audiences and communities associated and engaged with the music sector. It includes comprehending the audience's needs, preferences, and behaviors, and customizing offerings to make culture more accessible and in alignment with expectations. Some audience development initiatives already exist in the region. Knox County Public Library cardholders can use the Read City Explorer Pass program to get free or discounted admission to local museums and cultural institutions. Explorer Pass partners include:

- Clarence Brown Theatre
- Knoxville Children's Theatre
- Knoxville Opera
- Knoxville Symphony Orchestra
- Muse Knoxville
- Museum of Appalachia
- Museum of East Tennessee History¹¹³

Penny4Arts is a Knoxville Arts & Cultural Alliance program that allows children in Knox County and surrounding areas to attend arts and cultural events for free or at a nominal cost of one penny when accompanied by a paying adult. Participating performances include classical music and symphony concerts.¹¹⁴

However, while these initiatives include music activities, there are no music-specific audience development programs. Additionally, stakeholder engagement revealed that many promoters and artists struggle with the logistics of event planning and audience engagement, and that each show requires a tailored strategy to reach different audiences. They also expressed a desire for more intentional outreach, partnerships with diverse communities, and event programming that reflects the full range of East Tennessee's cultural identity. Affordability, including ticket prices and general cost of living, was raised as another challenge creating barriers to audience participation.

¹¹³ Knox County Tennessee Public Library, "Read City Explorer Pass", accessed September 10, 2025, <https://www.knoxcountylibrary.org/read-city-explorer-pass>

¹¹⁴ Knox Arts & Culture Alliance, "Penny4Arts", accessed September 10, 2025, <https://www.knoxalliance.com/penny-4-arts/>

An audience development strategy taking these challenges into consideration should be established for the region, along with new music programming.

Recommendation 12. Expand music programming and establish a regional audience development strategy

Initiators	Regional county governments, proposed Music Advisory Council and Music Office (or regional organizations supporting the music sector)
Supporting Stakeholders	Local music artists and organizations
Timeframe	Medium term (1–2 years)
Goals	• Increase music offerings and programming • Foster broader participation and community engagement in local music offerings • Establish a nationally recognized music identity for East Tennessee • Showcase talent and raise awareness for the regional music sector at a national/international scale • Improve diversity, equity, inclusion, and accessibility in the local music sector • Improve regional cohesion

A collaborative process between the proposed Music Office, the Music Advisory Council, regional county governments and local artists and organizations should be undertaken to lead the development and implementation of a music audience development strategy for the region.

This strategy should explore initiatives that activate different types of spaces in low-visitor seasons or at less activated times. One of East Tennessee’s strengths is its access to rural spaces. With this in mind, it could also include developing new festivals in these locations to expand access across the region. Additionally, offering segmented music programming, by age or interest for example, as well as inclusive pricing will be key to wider

engagement. Furthermore, with a strong sports culture in the region, the strategy could include adding music to different types of activities, such as sports events.

Implementation Actions:

- Use Sound Diplomacy’s research and conduct further research to understand the demographics, preferences, and behaviors of the regional audiences.
 - Bring together artists, venues, event organizers and other relevant music stakeholders to share insights on current music offerings and potential gaps in terms of genres, audience segments, seasonality etc.
- Develop additional music programming and initiatives based on these insights.
 - Offerings should be inclusive of diverse interests and preferences, considering different cultural backgrounds, genders, and age groups.
 - Activate the public realm with installations such as street pianos, interactive sound sculptures, walking tours, etc. to encourage spontaneous musical engagement.
 - Music performed or played should be local and preferably original to truly showcase the local talent and meet the demand of music fans in the region.
 - These programs should be held especially in rural areas and during off-peak tourism seasons to further engage audiences.
- Collaborate with other sectors to determine the potential to include live music or music programming in non-related spaces and at events.
 - These could include sports events (at the new baseball stadium in Knoxville for instance), farmers markets, public spaces, existing institutions, tourism assets ([recommendation 15](#)), etc..
- Consider spatial distribution and available transportation options when developing new initiatives and programming, ensuring they are accessible to everyone, and distributed across the region.
 - Shuttles to take people between locations could be established.
 - Parking availability should be assessed.
- Develop partnerships with event organizers, venues, music businesses and potential sponsors to identify affordable pricing strategies for music events.
- Utilize a mix of marketing channels to reach the audience, including digital marketing, social media, print advertising, and email campaigns.
- Gather feedback from local audiences on their engagement with new music activities and define key performance indicators (KPIs) to measure the success of the audience development efforts.

Further Considerations:

In addition to engaging local and regional audiences, this strategy has the potential to contribute to further positioning East Tennessee as a music destination for national and international audiences (recommendations [14](#) and [15](#)).

3.4.2 Communication & Marketing

Communications and marketing are essential to supporting the music scene. Promoting music professionals and artists helps them build audiences and develop professional networks. Strong communication around a music scene can increase visibility for local stakeholders, strengthen attendance at events, and attract visitors, talent, investment, and new opportunities to the region.

There are some initiatives to support music promotion in the region. The Knoxville Arts & Culture Alliance has a free online Publicity Guide for arts and culture workers and organizations. The guide has downloadable contact information for print, digital, television, and radio outlets in Knoxville and other locations. Users are encouraged to use this resource to promote their events and make large-scale announcements.¹¹⁵ By centralizing media contacts in one accessible place, the guide is an opportunity to support cultural stakeholders, particularly smaller organizations and independent artists who may have limited marketing capacity, reach local media more easily.

Visit Knoxville's calendar is the main calendar for arts and culture events in Knox County. Users can look for events in the following categories:

- This weekend
- Concerts and live music
- Annual festivals (summer, fall, Halloween Holiday, international festivals)
- Community events

There is also a category to submit events and subscribe to the events newsletter.¹¹⁶

By functioning as a central hub for cultural listings, the calendar is an opportunity to improve the visibility and accessibility of events across the county. This type of centralized calendar can support audience development by being accessible to audiences and visitors, while providing arts organizations and event organizers with a platform to promote their programming.

However, stakeholder engagement revealed that many promoters and artists struggle with audience engagement and that marketing remains a key challenge. Stakeholders stated that many artists lack resources to reach wider audiences. They also highlighted a lack of media presence to promote the music scene that is also represented in mapping and survey findings. As previously explained, for musicians, the top areas of desired government support are promoting and marketing local artists and creators in local media (51%), and promoting the exhibition of local content (33%). For organizations, the leading priority is also promoting and marketing local artists and creators in local media (42%). This reflects a disconnect between the music industry and how it views its existing role within government and tourism's promotional channels and support. There is high demand for the

¹¹⁵ Arts & Culture Alliance, "Media Resources", accessed September 4, 2025, <https://www.knoxalliance.com/resources/>

¹¹⁶ Visit Knoxville, "Events", accessed September 11, 2025, <https://www.visitknoxville.com/events/>

public sector to promote music as a driver of regional identity and economic development, rather than viewing it as secondary to other entertainment sectors.

These results reveal a clear convergence around two core needs: visibility and structural capacity. Both groups agree that stronger promotion of local artists and content is essential, but their priorities diverge in focus. Musicians emphasize the need for greater visibility and circulation, while organizations highlight systemic and institutional improvements that ensure long-term sustainability.

Regarding channels of promotion and communication, musicians and artists in East Tennessee rely on word of mouth (81.0%), Facebook (79.0%), and Instagram (70.0%) to share their work and stay connected with audiences. Other relevant tools include YouTube (48.0%), event websites and apps (47.0%), and streaming platforms (40.0%), reflecting a balance between digital strategies and local community networks within the regional scene.

Music fans, on the other hand, most often discover local music through Facebook (66.3%), local media (53.5%), event websites and apps (50.3%), and word of mouth (49.3%). Other channels such as radio (39.9%) and email subscriptions (44.1%) remain important, while newer platforms like TikTok (12.8%) and YouTube (13.9%) play a more limited role among local audiences.

There is a need to educate musicians and event organizers on audience-preferred communication channels so they can align their outreach strategies. There is also an opportunity to offer more music promotion support at the regional level. As Visit Knoxville’s list is focused on Knox County, there is an opportunity to develop a similar platform for the entire region. Stakeholder conversations revealed that Knoxville Ooze live music calendar could be a potential host for such a platform. The Knoxville Ooze music calendar provides a regularly updated listing of live music events taking place across venues in Knoxville.

Recommendation 13. Increase government-level music promotion

Initiators	Regional county governments
Supporting Stakeholders	Regional organizations supporting the music sector, tourism agencies, nonprofits supporting the music sector, Tennessee Entertainment Commission, proposed and Music Office

Timeframe	Short term (0–12 months)
Goals	• Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Foster broader participation and community engagement in local music offerings • Establish a nationally recognized music identity for East Tennessee • Improve music brand for the region • Showcase talent and raise awareness for the regional music sector at a national/international scale

There is a need to leverage information from the survey about communication channels and messaging strategies that resonate most with local audiences, and to provide targeted promotional support to music stakeholders and organizations.

Implementation Actions:

- Hire a marketing strategist to develop music dedicated marketing and promotional campaigns. Local music stakeholders should be involved in the process to get their buy-in and develop potential content.
- Promote the music scene in government, Music Office, and TEC social media and newsletters.
 - This could include promoting upcoming concerts and festivals, sharing new releases from local artists, spotlighting music professionals or organizations, and highlighting achievements such as awards, tours, or national media coverage. It can also include promoting funding opportunities and professional development resources.
- Partner with local radio stations and media agencies to further spotlight and promote regional artists, strengthening community support and visibility for the regional music scene.
- Raise awareness around and educate about existing marketing and communication resources, and offer marketing and communications training and/or tools for artists and organizations.
- Offer data collection and audience research to music venues, event organizers and music professionals.
- Develop relationships with local media and marketing professionals and organizations to facilitate partnerships with the local music community. This can be done by inviting them to networking sessions and live music programming ([recommendation 10](#)).

- Gather feedback on how to improve current communication such as the Knoxville Arts & Culture Alliance online Publicity Guide and Visit Knoxville’s calendar and expand them to the region.
 - A centralized calendar could be developed for the region. Knoxville Ooze could be in charge of this.
 - This may require coordinating cross-promotion between venues, festivals, and organizations (shared mailing lists, reciprocal social sharing, etc.).

Further Considerations:

Recognizing the diverse budgets within the region, where smaller communities have limited capacity for financial commitments, larger communities may need to compensate for the implementation costs of this recommendation.

As the proposed Music Office grows, a communications and marketing specialist role could be created to support regional music industry promotion.

3.5 Brand & Music Tourism

3.5.1 Music Branding

Defining and promoting a region’s music identity as part of a music branding strategy has strong potential to attract visitors, talent and professionals, while strengthening a sense of pride and community locally. Several initiatives contribute to branding East Tennessee (and particularly Knoxville) as a music place. Many webpages, particularly on the Visit Knoxville website describe Knoxville as “one of America’s more dynamically musical cities”. There is strong historical branding for the region as the “Birthplace of Country Music” and “Cradle of Country Music”. The “Cradle of Country Music Spotify Playlist” promotes the music scene. The Tennessee Department of Tourist Development actively markets the state with the “Sounds Perfect” campaign. Knoxville is also home to many murals that visually tell the story of the city. Many of them represent local music artists such as Dolly Parton, or music scenes.¹¹⁷

However, stakeholder engagement revealed the need for more efforts to further establish the region as a music destination as part of a unified brand identity, and differentiate itself from Nashville or Memphis, which dominate the perception of Tennessee’s music. A regional music brand would highlight the diversity of the wider area, help strengthen collaboration among counties, cities and organizations, and create a more recognizable

¹¹⁷ VisitKnoxville, “Knoxville Murals”, accessed September 1, 2025, <https://www.visitknoxville.com/things-to-do/tours/knoxville-murals/>

identity to attract visitors, talent, and investment, while spreading cultural and economic benefits beyond Knoxville.

Recommendation 14. Identify and promote the music brand for the region

Initiators	Local tourism agencies
Supporting Stakeholders	Local artists and music organizations, Tennessee Entertainment Commission, proposed Music Office, dedicated marketing strategist
Timeframe	Medium term (1–2 years)
Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Foster broader participation and community engagement in local music offerings • Establish a nationally recognized music identity for East Tennessee • Improve music brand for the region • Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination • Showcase talent and raise awareness for the regional music sector at a national/international scale • Improve regional cohesion

To strengthen and promote the region’s music brand, local tourism agencies should adopt a strategic approach that would consist of evaluating the existing music scene and talking points, defining key elements that East Tennessee wants to be known for, and promoting it as part of the music destination development. A dedicated marketing strategist should be contracted to support this and build on existing branding and taglines. Programming, events, marketing and partnerships will need to follow suit. This could include expanding music programming ([recommendation 12](#)), developing a street performance program ([recommendation 3](#)), featuring local artists in hotels, transportation hubs etc.

Local music needs to be included in all City and region community communications and events, while evaluating current assets will ensure consistent messaging and targeted growth.

Implementation Actions:

- Engage a brand and marketing specialist with experience in the music sector to define/expand the music brand and marketing strategy for East Tennessee.
 - Ensure the consultant is aware of the region's musical heritage, genres, cultural diversity and businesses.
- The music sector needs to be involved in brand development, including the post-consulting phase to support implementation and promotion.
 - This could include holding roundtable conversations or engaging the music community through a survey.
 - The local music community could also be part of promotional content, both as creators and ambassadors of the regional musical identity. This could involve local artists composing and performing music for campaigns, contributing to soundtracks for videos, and more. Artists and music professionals could also be featured in digital and physical promotional materials.
- Implement the branding strategy by utilizing digital channels, and social media, and create engaging content including videos, interviews and playlists to highlight the local music scene.
- Coordinate efforts with regional and state tourism authorities to align the music brand and strategy with the overall destination marketing.
- Ensure music branding is available in selected places through QR codes to the "Cradle of Country Music Spotify Playlist", interactive maps of venues, events and activities.
- Set clear KPIs to measure success of the branding strategy.

Further considerations:

As previously explained, larger communities may need to compensate for the implementation costs of this recommendation.

There is an opportunity to collaborate with the Tennessee Department of Tourist Development to support their effort of promoting Tennessee as a whole as a "music state" beyond major music hubs.

3.5.2 Music Tourism

Music tourism strategy

While no formal tourism strategy could be found, there are many initiatives aiming to promote music tourism in Knox County.

Visit Knoxville is the official Convention and Visitors Bureau for Knoxville and Knox County.¹¹⁸ The Visit Knoxville website showcases the local music scene and heritage, local performance groups, venues, a calendar of events with a music category, and guides and walking tours.¹¹⁹ Walking tours include the “Guide to Things to Do in Knoxville's Music Scene” showcasing the local music scene for tourists, and the “The Cradle of Country Music Walking Tour”.¹²⁰

The Knoxville History Project published the “Knoxville: A Walking Music Guide”, emphasizing downtown sites associated with songwriters, composers and musicians.¹²¹ This includes the Cradle of Country Music Park, which was created to recognize East Tennessee's music heritage. The park has been home to public art since its conception in 1986, including art related to music such as the Treble Clef sculpture. The park is also included in the “Cradle of Country Music Walking Tour”, explaining Knoxville's ties to renowned artists such as Hank Williams, Elvis Presley, Howard Armstrong, Dolly Parton, the Everly Brothers, and Roy Acuff.¹²²

Additionally, the Arts & Culture Alliance manages partnerships between Knox County and 24 local arts and culture groups. Together, these organizations host over 4,000 events and activities (including festivals and live performances) each year that attract tourists to the region. The Alliance also published a Guide to Arts and Culture, inviting visitors to follow itineraries to discover arts and music activities across the county.¹²³

Finally, Dollywood is a world-class themed park developed by Dolly Parton in partnership with the Herschend family to celebrate the culture and music of the Smoky Mountains.¹²⁴ The park hosts many music activities, including seasonal music series, live music at spas

¹¹⁸ Visit Knoxville, “About”, accessed August 27, 2025, <https://www.visitknoxville.com/about/>

¹¹⁹ Visit Knoxville, “Guide to Things to Do in Knoxville's Music Scene”, accessed August 27, 2025, <https://www.visitknoxville.com/blog/post/guide-to-things-to-do-in-knoxvilles-music-scene/> and “The Cradle of Country Music Walking Tour”, <https://www.visitknoxville.com/things-to-do/tours/quided/>

¹²⁰ Visit Knoxville, “Events”, accessed August 27, 2025, <https://www.visitknoxville.com/events/>

¹²¹ Knoxville History Project, “Knoxville Music Guide”, accessed August 27, 2025, <https://knoxvillehistoryproject.org/knoxville-music-guide/>

¹²² Visit Knoxville, “The Cradle of Country Music Park”, accessed August 27, 2025, <https://www.visitknoxville.com/cradle-of-country-music/>

¹²³ Ibid.

¹²⁴ Dolly Parton, “Dollywood Theme Park”, accessed March 13, 2026, <https://dollyparton.com/dollywood-theme-park#:~:text=In%201986%2C%20Dolly%20partnered%20with,celebrated%20and%20enjoyed%20by%20everyone.> And Dollywood, “About us”, accessed March 13, 2026, <https://www.dollywood.com/about-us/>

and resorts, entertainment shows, festivals and more. As the largest ticketed attraction in Tennessee, the park is also the largest provider of jobs in Sevier County and attracts visitors from all over the world (over 3 million visitors in 2024).¹²⁵

Internationalization

There are no music export or internationalization programs in East Tennessee. Stakeholder engagement highlighted that touring artists face high travel and lodging costs. Incentive programs or partnerships with local hotels could reduce these barriers and help attract more performers to the region.

As already explained, the survey reveals that musicians and organizations in East Tennessee primarily operate within a local and regional scope, with limited connections beyond state borders and only 29.5% reported connections outside the state and just 7.8% had activity beyond the U.S.

This limited out-of-state and international reach may be linked to the low professionalization and weak intermediation capacity observed earlier in the report. The scarcity of managers, agents, and record labels, combined with the fact that nearly 70% of professional musicians cannot meet their basic needs from music income, suggests structural constraints that prevent many from expanding their networks or accessing broader markets.

A Music Ambassador program has the potential to both support local artists in reaching new audiences and expanding their careers, and promoting the regional music scene nationally and internationally, attracting visitors.

Recommendation 15. Develop a music tourism strategy

Initiators	Local tourism agencies
Supporting Stakeholders	Local artists and music organizations willing to participate in music tourism programs and marketing content, regional county governments
Timeframe	Medium term (1–2 years)

¹²⁵ Ibid. and Theme Park Tribune, “Dollywood joins list of most-visited North American theme parks”, accessed March 13, 2026, Dollywood joins list of most-visited North American theme parks, <https://www.themeparktribune.com/dollywood-joins-list-of-most-visited-north-american-theme-parks/>

Goals	• Increase economic opportunities and foster sustainable growth for the music sector • Improve communication and collaboration within the music ecosystem, and with other sectors/industries • Increase music offerings and programming • Foster broader participation and community engagement in local music offerings • Establish a nationally recognized music identity for East Tennessee • Improve music brand for the region • Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination • Showcase talent and raise awareness for the regional music sector at a national/international scale • Improve regional cohesion
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Local music and tourism stakeholders should work together to develop a regional music tourism strategy for East Tennessee. This should include creating a music strategy plan, music tourism marketing strategies and campaigns, and targeted initiatives and programs to increase music tourism offers.

Implementation Actions:

The local tourism agencies of the region should collaborate to:

- Evaluate existing tourism trends, assets, and visitor demographics for the region.
- Conduct market research and define audience segments.
- Collaborate with music stakeholders to develop a music tourism strategy and write a plan. Specific initiatives could include:
 - Integrating music with existing assets, such as outdoor tourism assets.
 - Showcasing artists and hosting live performances at key venues and events associated with the tourism sector.
 - Identifying key markets to target during a campaign to launch the strategy, looking at visitor data and working with businesses across the country.
 - Improving connectivity and joint communication with major music hubs such as Nashville and Memphis to leverage their networks, while developing an international promotion strategy particularly targeting European markets, to promote East Tennessee's unique musical

heritage, and encourage international visitors to extend their stays in the region.

- Ensuring a seamless experience upon arrival by offering information about nightly events and cultural activities at hotels and transport hubs. This involves implementing a system for hotels to provide guests with curated event calendars, local recommendations, and potential partnerships with local venues to offer exclusive experiences.
- Developing music tourism marketing strategies and campaigns, with a social media plan and video content of the local live music scene and of major events. This should promote the defined music brand ([recommendation 14](#)).
 - The campaigns should be shared on any relevant stakeholders' websites and social media channels. It could incorporate multimedia elements such as videos, virtual tours, and playlists featuring local artists.
 - Utilize local resources such as the calendar of events proposed in [recommendation 13](#) for tourism purposes
- Collaborate with tourism agencies to officially publish the cultural tourism plan, ensuring that all strategies, objectives, and initiatives are clearly outlined and formally established.
- Monitor and evaluate the impact of these initiatives, and publish yearly reports recording annual visitor numbers to music spaces and activities so that updates of the strategy can evaluate the data to understand whether there are fluctuations in visitor numbers year on year, and what the opportunities are to increase numbers.

Further Considerations:

As previously explained, larger communities may need to compensate for the implementation costs of this recommendation.

Whatever strategy is developed should be informed by the context and get local buy-in. A tagline and marketing frame should be based on how locals understand and see the region and community, and what makes it unique. The region will need to ensure it is supporting its music ecosystem in a holistic way if it wants music to be a draw for visitors.

Tourism efforts do not exist in a vacuum, and the other recommendations of this strategy, particularly investing in music activities, will play a crucial role in general music ecosystem marketing efforts while encouraging more people to visit.

Recommendation 16. Develop a Music Ambassador program

Initiators	Local tourism agencies, proposed Music Office
Supporting Stakeholders	Local artists, tourism agencies of other regions/states/countries, regional county governments, TEC
Timeframe	Long term (2–3 years)
Goals	• Provide guidance and resources to support and grow the local music industry • Strengthen musicians' financial stability and professionalization • Establish a nationally recognized music identity for East Tennessee • Improve music brand for the region • Increase the role that music plays in the regional tourism offer and cultivate a reputation for East Tennessee as a music destination • Showcase talent and raise awareness for the regional music sector at a national/international scale

Local tourism agencies should collaborate with the proposed Music Office, local music stakeholders and regional county governments to develop a Music Ambassador Program, as a strategic initiative to leverage local musical talent to promote the region's music scene, heritage and tourism assets to attract external audiences.

A Music Ambassador Program would aim to harness the artistic potential of East Tennessee's music ecosystem, through promoting and showcasing regional music on the national and global stage, and cultivating opportunities to bring artists and businesses to the region. Initiatives will aim to increase the competitiveness and revenues of East Tennessee's music artists, while fostering global cultural diversity. It would also further contribute to branding the region as a place for music creation and experiences (recommendations [14](#) and [15](#)).

Implementing this program would involve providing financial support such as travel funds and branded promotional merchandise to musicians who perform at qualifying events

outside of their home region, and connecting them with performance opportunities, new audiences, artists and industry professionals.

Implementation Actions:

- Identify national and international music events and conferences relevant to the local music industry and assess opportunities for participation. These could include SXSW, Music Biz, NAMM, IndieWeek, Mondo, ESNS, Reeperbahn Festival, WOMEX.¹²⁶ Partnerships can be negotiated for ticket discounts or preferential showcase slots.
- Define the required budget for the implementation of the delegation or music ambassador scheme, and an annual budget to support local stakeholders' participation, and identify and secure funding sources.
- Organize conversations with established organizations in the rest of the state, such as Music Export Memphis, to identify ways in which an East Tennessee Music Ambassador Program can be initiated (see case study below).
 - Sponsor East Tennessee artists and bands to go on tour or play in professional showcase events outside of the region/the state, by providing funds to cover travel, accommodation, per diems and/or visa costs. Requirements could include:
 - At least 5 tour dates booked in cities outside of the region
 - Only public events are eligible
 - Artists must reside in East Tennessee
 - Artists/bands must perform original music
 - East Tennessee branding/logos must be on show and shared as part of social media during performances
 - Images must be provided for marketing purposes to local tourism agencies and the Music Office
 - Establish a selection process with eligibility guidelines for potential participants. The selection process should consider diversity factors.
- Promote the initiatives and put out an open call for representatives to volunteer to attend conferences on behalf of East Tennessee
- Gather feedback and data from participants and event organizers to monitor the program's impact.

¹²⁶ SXSW, "homepage", <https://www.sxsw.com/> and Music Biz, "homepage", <https://musicbiz.media/>, and NAMM, "homepage", <https://www.namm.org/>, and IndieWeek, "homepage", <https://a2imindiweek.org/> and Mondo, "homepage", <https://www.mondofest.org/festival/> and ESNS "homepage", <https://esns.nl/en/> and Reeperbahn Festival "homepage", <https://www.reeperbahnfestival.com/en> and WOMEX, "homepage", <https://www.womex.com/> accessed July 28, 2025

Further Considerations:

As previously explained, larger communities may need to compensate for the implementation costs of this recommendation. The South Arts performance grant program could represent a potential funding source to bring in artists from other states.

Case Study: Music Export Memphis Ambassadors (Memphis, Tennessee)

What Is It: The Music Export Memphis Ambassador Program is designed to support Memphis-based musicians who are already touring nationally and internationally by formally engaging them as paid brand ambassadors for the city. By performing in venues across the country and abroad, these artists help promote Memphis as a cultural destination, potentially encouraging tourism, relocation, and professional interest in the city.¹²⁷

The program recognizes touring as an essential component of an artist's career development and revenue generation, and positions this support as part of a broader strategy to make Memphis a competitive and attractive city for musicians.

¹²⁸ It offers four main types of support:

- Ambassador Grants: Unrestricted cash grants for artists who meet minimum touring requirements. Ambassadors can receive between \$500 – \$2,500 per request. While there is no limit to funding opportunities, there is an annual cap of \$5,000 per artist.¹²⁹
- Ambassador Industry Scholarship: Scholarships covering conference badges or passes for artists and music industry professionals attending professional development events.
- The Merch Fund: Grants for merchandise or physical music production, to be spent with Memphis-based businesses. Applicants can receive up to \$1,000 in this grant, with an annual cap of \$2,000 per artist.¹³⁰
- Ambassador Access: A year-long cohort program for first-time touring artists from under-resourced backgrounds, providing mentorship, education, booking and marketing support, and cash grants. One cohort is selected per calendar year.¹³¹

¹²⁷ Music Export Memphis, “Ambassadors”, accessed February 27, 2026, <https://musicexportmemphis.org/about/ambassadors/>

¹²⁸ Ibid.

¹²⁹ Music Export Memphis, “Submit”, accessed February 27, 2026, <https://musicexportmemphis.submittable.com/submit>

¹³⁰ Ibid.

¹³¹ Music Export Memphis, “Ambassadors”, accessed February 27, 2026, <https://musicexportmemphis.org/about/ambassadors/>

Applications are submitted online through the creation of an artist profile. To qualify for any opportunity, applicants must reside within the Greater Memphis area (Memphis plus 25 miles), record music in Memphis, primarily create and perform original music, and be either a permanent resident or a college student with a secondary residence.¹³²

Who Is Responsible: Music Export Memphis, a nonprofit export office for Memphis music, creating opportunities for Memphis artists to showcase their music outside the city, building their careers and building Memphis's international reputation as a music mecca.¹³³

What Has It Done: Music Export Memphis has awarded more than \$225,000 in tour grants to Memphis artists between the launch of its Ambassador program in 2018, and 2023. In 2025 MEM Ambassadors played a total of 506 performances across 250 cities worldwide, including 50 more shows outside the U.S. than in 2024.¹³⁴

Operational/Financial Information: In 2024, Music Export Memphis reported a contribution-based revenue of \$412,991 and \$476,975 in expenses.¹³⁵

The Executive Director is paid an annual salary of \$90,857.¹³⁶

Relevance for East Tennessee: There is an opportunity for East Tennessee to reach out to Music Export Memphis and draw inspiration from the Export Memphis Ambassadors program when developing its own. While the region has an established music scene and a growing ecosystem to support the industry, many artists operate primarily within local or regional markets and have limited access to national or international industry networks. An export-focused program like the one in Memphis, a strongly established music ecosystem, could support the regional music scene's need for international promotion and network development, by supporting artists in touring outside the region, building professional relationships, and increasing visibility in new markets.

¹³² Ibid

¹³³ Music Export Memphis, "Homepage", accessed February 27, 2026, <https://musicexportmemphis.org/>

¹³⁴ Arts Memphis, "Experience the Arts", accessed February 27, 2026, <https://www.artsmemphis.org/experiencethearts> and Facebook, "Music Export Memphis", accessed March 13, 2026, <https://www.facebook.com/MusicExportMEM>

¹³⁵ ProPublica, "Music Export Memphis", accessed April 21, 2026, <https://projects.propublica.org/nonprofits/organizations/822214830>

¹³⁶ Ibid.

Implementation Timeline

	Short term	Medium term	Long term
Policy & Governance			
Governance & Leadership			
1. Establish a regional Music Advisory Council			
2. Advocate for the establishment of a region-wide Music Office			
Licensing & Regulations			
3. Advocate for the implementation of music-friendly regulations & guides			
4. Establish a one-stop shop for music regulations			
Financial Resources			
5. Leverage TAC funding for music organizations and events			
6. Improve financial literacy & access for creative enterprises			
Talent & Creative Ecosystem			
Professional Development			
7. Develop an IP & copyright education program			
8. Expand the “Fair Wage Stage” initiative to the regional level			
Music Education			
9. Develop the higher education & entrepreneurial pipeline			
Collaboration & Networking			
10. Develop networking opportunities			

within the music sector			
Infrastructure			
11. Create a regional inventory of potential spaces for the music sector			
Audiences & Community Engagement			
Audience development			
12. Expand music programming & establish a regional audience development strategy			
Communication & marketing			
13. Increase government-level music promotion			
Brand & music tourism			
Music branding			
14. Identify & promote the music brand for the region			
Music tourism			
15. Develop a music tourism strategy			
16. Develop a Music Ambassador program			

4. Conclusion

East Tennessee is home to a music ecosystem that is profoundly vibrant but currently structurally challenged. The region confirms its status as having a rich, active, and community-focused music scene, deeply rooted in live performance and traditional genres, and boasting a wealth of local talent. The passion and demand for music are undeniable across East Tennessee, with audiences overwhelmingly desiring more music events, and a creative community eager for career opportunities.

However, the analysis highlights several key areas where structural intentionality is needed across East Tennessee's music sector. Chief among the challenges is the high economic precarity faced by musicians, who largely cannot sustain themselves on music income alone, alongside a significant scarcity of vital intermediary structures such as managers, agents, and record labels operating in the region. Furthermore, communication and professionalization are also constrained by a lack of cohesive, region-wide directories and limited collaboration between individual artists and larger institutions or media outlets.

The 16 strategic recommendations outlined in this report collectively offer a comprehensive path forward for East Tennessee. By moving the sector beyond informal, community-based operations toward an intentional, professionalized structure, East Tennessee can unlock the full cultural and economic potential inherent in its music talent.

In conclusion, this detailed analysis is not merely a diagnostic tool; it is a blueprint for action for the entire region. The future success of East Tennessee's Music Census depends on the commitment of its regional stakeholders – government, organizations, and the private sector – to embrace these findings and implement the recommendations. East Tennessee can transform its strong musical foundation into a robust, sustainable, and nationally recognized ecosystem.