NWA MUSIC CENSUS

Photo Courtesy of Meredith Mashburn

SUMMARY REPORT
August 2024

SOUND MUSIC CITIES

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Executive Summary

The 2024 Northwest Arkansas (NWA) Music Census was a community-led initiative to gain a better understanding of the current needs of the NWA-area music community. The music census launched on May 10, 2024 and ran June 17, 2024 and collected 387 responses from people working in music in any capacity who are 18 years or older and living in Benton or Washington County of NWA.

The Northwest Arkansas (NWA) music ecosystem respondents are primarily Music Creatives (69%), Venue/Presenter (14%), and Industry professionals make up 17%, which is close to the 20% that keeps the ecosystem in balance. More than half of the respondents (53%) are 18-39 years old, which is predominantly younger than many other markets; and yet, 74% of respondents have over 10 years experience.

The Music Creative community in NWA is predominantly aged 25 to 39 years (42%). Key concerns include the rising cost of living (49% highest concern), stagnating pay rates (33% highest concern), and lack of music work (29% highest concern). Income is primarily derived from local live performances (46%), with teaching (31%) and studio work (20%) also significant. Annual expenses for Creatives average $6,582, 43% of which stays local for an annual spend collectively of $2M.

54% of Venue/Presenter respondents operate as nonprofits, 30% are locally owned for-profits, and 8% are public, education, or government-owned. Venue types are diverse, with live music venues being the most common at 28%, followed by hybrid performance spaces and independent promoters at 14% each. Venue capacities primarily range between 1-200 people (58%), and 89% of venues have outdoor capabilities. Respondents host an average of 91 live events annually, contributing to a total of 3,107 live events each year. Venues/Presenters face a range of regulatory challenges, with concerns around the cost of permits, sound policies, and confusion/inefficiency. There is a strong preference for an advocate inside the government (68%) and for a dedicated webpage of current music regulations (68%). Industry occupations are largely Event/Venue Workers (25%), followed by Music Marketing (15%), and Production Support (12%).

Music generates a total of $10M in income annually across all respondents, with 32% of their annual income coming from music. The average household income for respondents is $81K, and the average annual income from music is $26K. A substantial portion (63%) work outside of the music industry, with 83% of them relying on their outside job as their primary income source. Regionally, 70% of respondents traveled to Tulsa for music-related work, followed by 65% to Little Rock.

In terms of NWA music ecosystem development, 61% of respondents would like to have a place to connect and collaborate musically, 52% want a place to connect with other creative industries, and 51% want a place to connect with music services. Venue/Presenters prefer having a best practices guide for presenting live music locally (69%) and a current directory of local production providers (62%). Top sources for finding out about music opportunities within NWA are friends, family, and coworkers (76%), and local music, arts, and culture organizations (75%). 34% have been forced to look outside of NWA to find someone with a specific music-related skill set. The top platforms used to find out about music opportunities are social media (81%) and word of mouth (72%).

The NWA music ecosystem is generally livable and offers many positive experiences. The NWA music ecosystem's greatest strengths are that it is safe (85%), non-homophobic (79%), inclusive (72%), and non-sexist (70%). The NWA music ecosystem challenges are elitism (52%), and to a lesser extent, homogeneity (45%).

This report and the online dashboard at **Creative Arkansas Community Hub & Exchange** offer more in-depth data, insights, and opportunities to understand, support, and grow the NWA's vibrant music ecosystem and all the benefits it offers culturally and economically.

Introduction

The 2024 Northwest Arkansas (NWA) Music Census was a community-led initiative to gain a better understanding of the current needs of the NWA-area music community. The census captures key information about the NWA music economy to help the community make more informed, data-driven decisions to support the music ecosystem.

The music census launched on May 10, 2024 and ran for five weeks. The study was open to all people working in music in any capacity who are 18 years or older and living in Benton or Washington County of NWA, and it was offered in English and Spanish. The NWA Census gathered 378 responses, which is a statistically significant response rate, but a bit lower than desired so that the margin of error is closer to +/-5%. The census was administered by Sound Music Cities, a leading Austin-based provider of music ecosystem studies and music census work, in conjunction with Creative Arkansas Community Hub & Exchange (CACHE). NWA joined a multi-city cohort program administered by Sound Music Cities which met monthly to discuss best practices on improving music industries on a city level, allowing NWA to gain insight from other cities conducting similar research.

This summary report has been prepared by Sound Music Cities and includes an overview of the Music Ecosystem Health Assessment based on 10 key indicator areas. The report includes key findings and recommendations. Alongside this report, Sound Music Cities has provided access to an online dashboard where you can find more data at **Creative Arkansas Community Hub & Exchange** .

378 responses
May10-June 17, 2024

14% venue/presenter
17% industry
69% music creatives

Photos Courtesy of House of Songs, Northwest Arkansas Jazz Society, and CACHE

INTRODUCTION TO A MUSIC CENSUS

Any strategy to support and grow a music ecosystem begins with a basic understanding of its population. Professional music communities are not easily discoverable using traditional methods (such as through labor statistics or economic data). A music census collects key data points to better understand music people and their economic activity within a specific geography. It provides a baseline for policymakers and the larger community to understand and take action.

The value of a music census goes well beyond the data itself. Such initiatives ignite a range of activities that are conducive to more strategic and sustainable support for local music scenes over the long term, beginning with validating this economically marginalized group, sharing new learning, activating civic and community resources, and ultimately empowering music people to take ownership of change initiatives.

A Community Effort

The 2024 study was led by CAHCE and a group of 5 Lead Partners. This study took a grassroots approach that engaged local partners who hold the relationships with music people. Community Partners served as the primary means of outreach to music people and these organizations were instrumental in shaping the Census itself.

Thank you to our amazing Lead Partners and Community Partners

LEAD PARTNERS

Creative Arkansas Community Hub & Exchange (CACHE)
City of Rogers, Arkansas
City of Bentonville
City of Siloam Springs
Go Create Fay, Fayetteville Arts and Culture Plan
Springdale

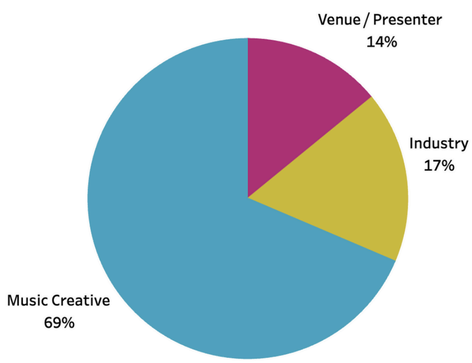
COMMUNITY PARTNERS

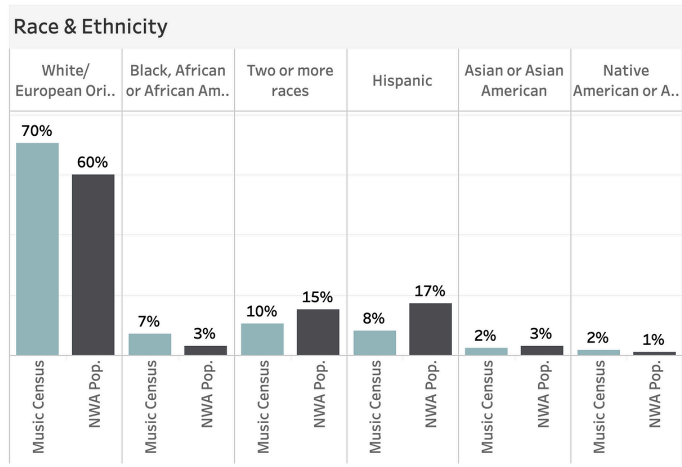
Art de Centrale
Ashtyn Barbaree
Cassandra Parks
Crisp Recording
Dale Stokes
Deadhead Productions
Downtown Fayetteville
Downtown Springdale Alliance
Eddit rodriquez
Eric Spahn
Esther Reina
Experience Fayetteville
Folk School of Fayetteville
FiNiX Reggae
Gisell Maldonado
Hip Hop Hello
JakQuer King
Jeanette Curry
Love More Records
Main Street Siloam Springs
Music Moves
Natural Threads
Northwest Arkansas Audio Theater
NWA Jazz Society
Ovations+
Preston Poindexter
Ra-Ve Cultural Foundation
Ross Macartney
Soho NWA
Symphony of Northwest Arkansas
Thaden School
The House of Songs
The Mindfulness of Singing
The Music Education Initiative
The NWA Collective
The Vibe Dance & CeCe Marie Choreo
Toni Crowder
Trillium Salon Series
Visit Bentonville
Walmart AMP

Photo Courtesy of Meredith Mashburn

Ecosystem Composition

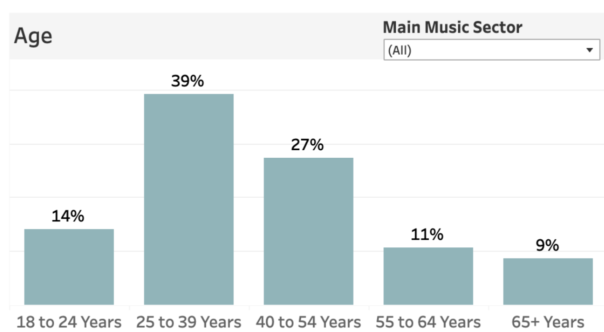
The Northwest Arkansas (NWA) music ecosystem respondents are primarily composed of Music Creatives, accounting for 69% of the total. Venue/Presenter representatives constitute a healthy 14%, and Industry professionals make up 17%, which is close to the 20% that keeps the ecosystem in balance. More than half of the respondents (53%) are 18-39 years old, which is predominantly younger than many other markets; and yet, 74% of respondents have over 10 years experience.



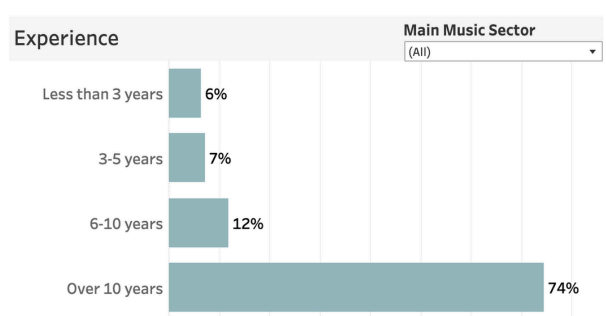


- **Race & Ethnicity** - The racial and ethnic composition of the NWA music ecosystem respondents shows a predominance of individuals identifying as White/European origin, making up 70%, which is higher than the general population at 60%. Black, African, or African American respondents constitute 7%, more than double their representation in the general population (3%). Those identifying as Two or More Races account for 10%, compared to 15% in the broader population. Hispanic respondents make up 8% of the music census, significantly below their 17% share in the general population. Asian or Asian American and Native American or Alaska Native individuals represent 2% each in the music census, closely aligned with their 3% and 1% shares in the overall population, respectively.

- **Age** - The age distribution of respondents in the NWA music ecosystem is diverse, with the largest group being 25 to 39 years old, representing 39% of the total. Those aged 40 to 54 years make up 27%, followed by the 18 to 24-year-olds at 14%. Individuals aged 55 to 64 years constitute 11%, and those 65 years and older account for 9%.

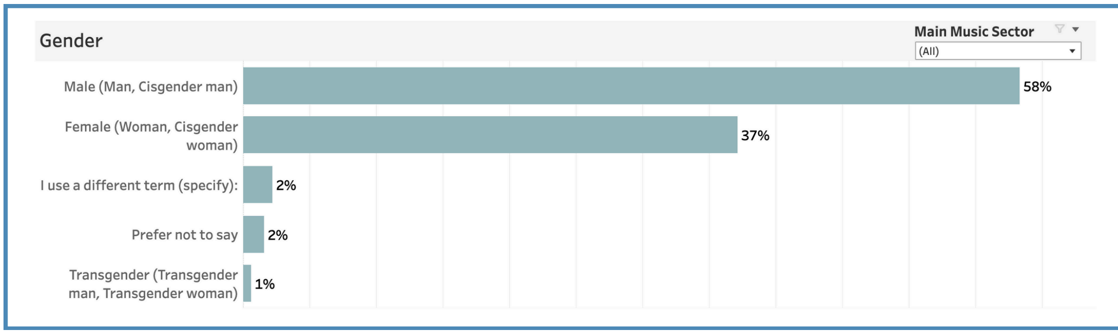


- **Experience** – NWA respondents are a highly experienced group. A significant majority, 74%, have over 10 years of experience in their respective fields. Those with 6-10 years of experience make up 12%, while 7% have 3-5 years, and 6% have less than 3 years of experience.



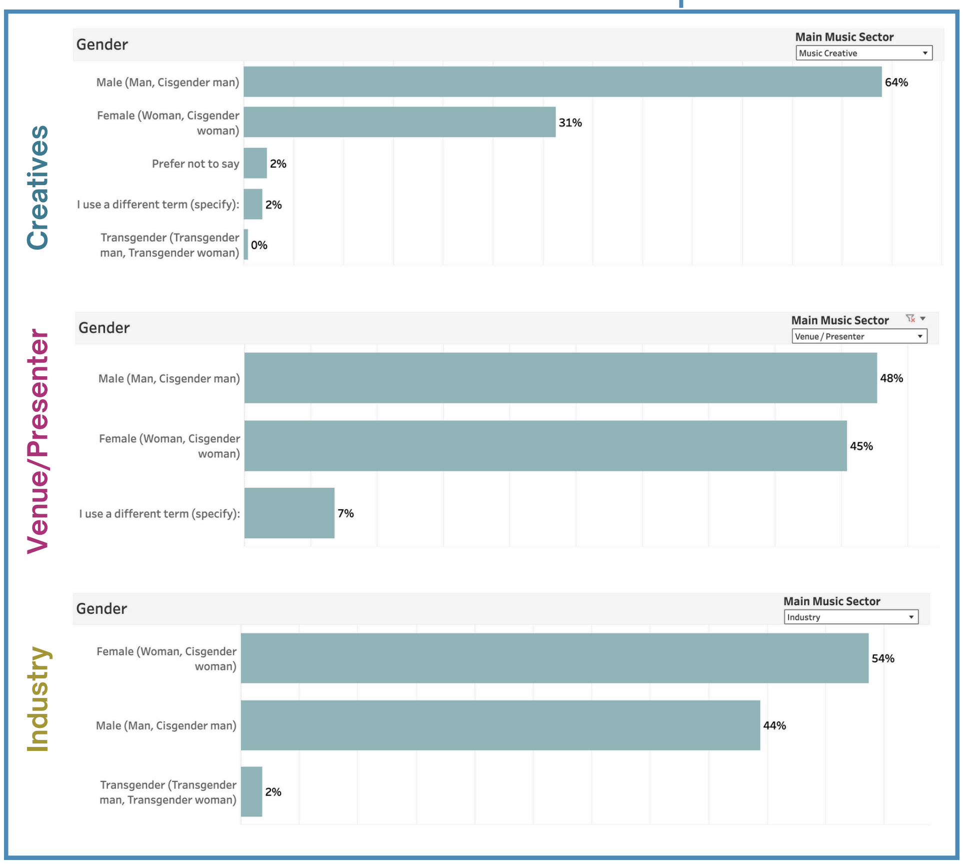
Music Ecosystem Health Assessment

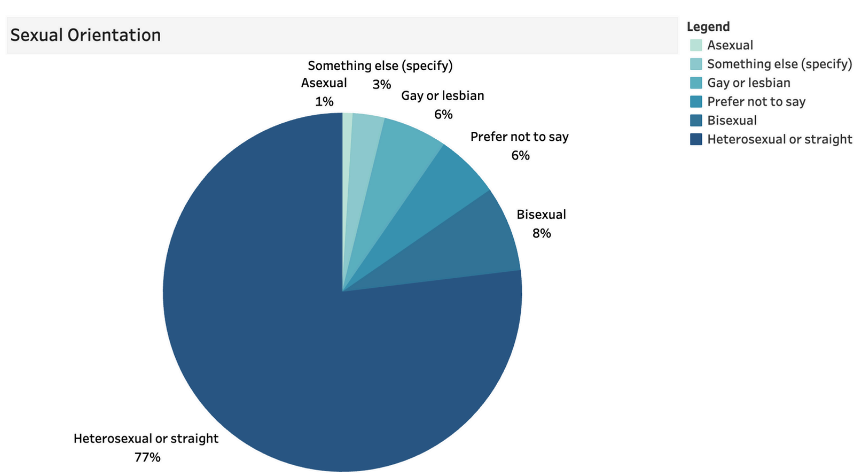
Ecosystem Composition (continued 2/3)



- **Gender** - The overall gender distribution of respondents in the Northwest Arkansas music ecosystem reveals that a majority, 58%, identify as male (cisgender man), while 37% identify as female (cisgender woman). Additionally, 2% of respondents use a different term to describe their gender, another 2% prefer not to disclose their gender, and 1% identify as transgender (transgender man or transgender woman). Notably, in the Industry segment Females (54%) lead over Males (44%).

- **Sexual Orientation** - The NWA music ecosystem displays a range of sexual orientations among its respondents. The majority, 77%, identify as heterosexual or straight. Bisexual individuals make up 8% of the respondents. Those who identify as gay or lesbian represent 6%, Asexual 1%, and 3% identify as something else not specified. Meanwhile, 6% of respondents prefer not to disclose their sexual orientation.





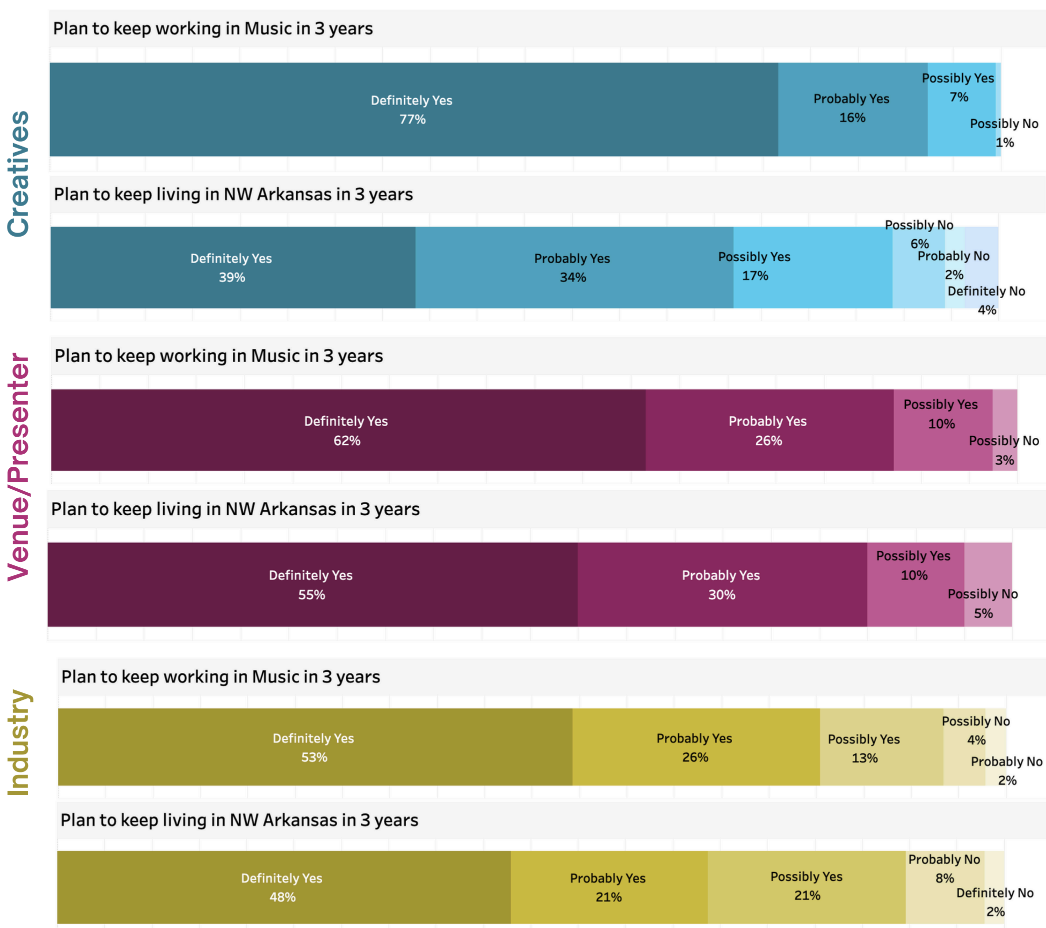
Ecosystem Composition (continued 3/3)

Plans to Stay in Music and NWA

- **Creatives** - The majority of Creative respondents in the NWA music ecosystem (93%) are confident about continuing to work in music over the next three years, with a strong 77% responding "Definitely Yes." However, there is less certainty about staying in the NWA-area, as 39% responded "Definitely Yes" and 34% “Probably Yes” to living in the NWA-area in three years.

- **Venue/Presenter** - The majority of Venue/Presenter respondents in the NWA music ecosystem (88%) are confident about continuing to work in music over the next three years. Those confident about staying in the NWA-area in three years drops only slightly to 85%. This indicates a strong professional commitment to the music industry and to staying in the NWA-area.

- **Industry** - The majority of Industry respondents in the NWA music ecosystem (79%) are confident about continuing to work in music over the next three years and most plan to stay in the NWA-area (69%).



> “The music is of a higher quality/caliber than most other regions.”

> “Friendly and collaborative ecosystem, welcoming.”

> “It seems very set on moving forward and growing.”

> “The best part about the music scene is that it’s still so new, with growing opportunities.”

> “The variety in musical genre offerings is good, leaning into the variety will be key to creating a more welcoming and broader scene.”

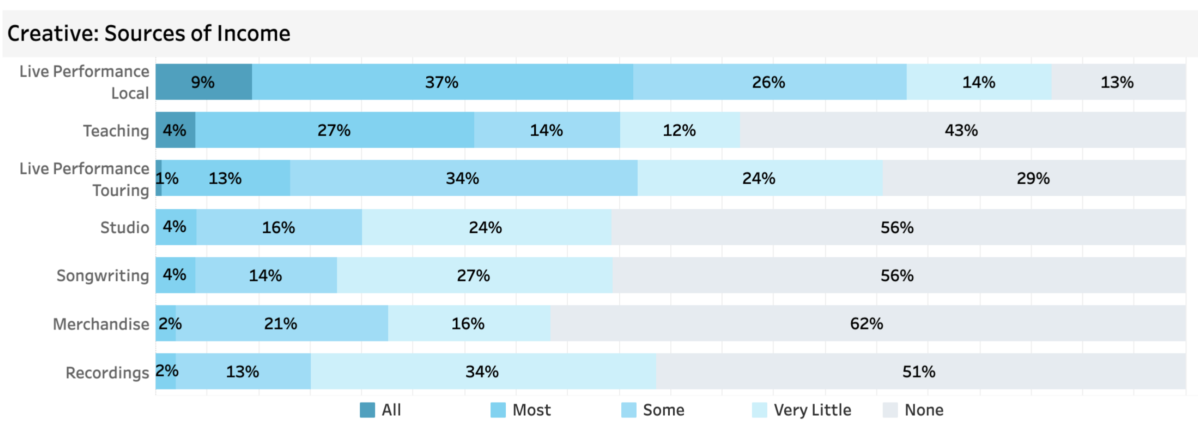
Music Ecosystem Health Assessment

Creative Profile

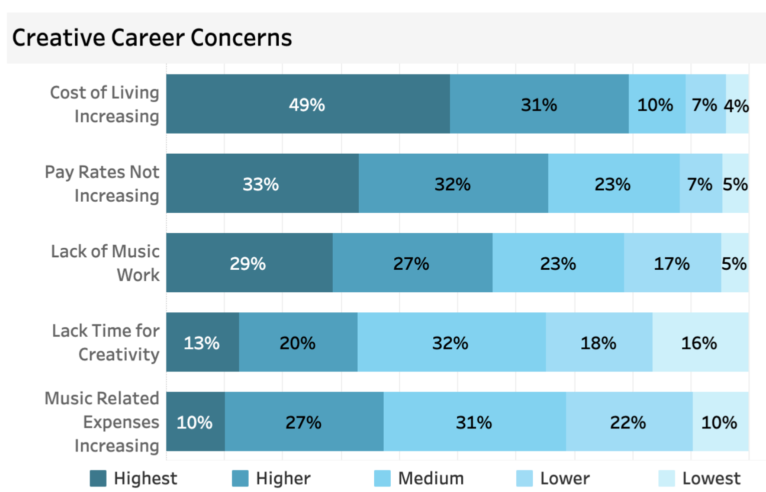
The Music Creative community in NWA is predominantly aged 25 to 39 years (42%) and highly experienced, with 79% having over 10 years in the industry. Key concerns include the rising cost of living (49% highest concern), stagnating pay rates (33% highest concern), and lack of music work (29% highest concern). Income is primarily derived from local live performances (46% 'all' or 'most'), with teaching (31%) and studio work (20%) also significant. Annual expenses for Creatives average $6,582, 43% of which stays local for an annual spend collectively of $2M. These data highlight a young, experienced, and financially invested Creative community facing significant economic challenges.

- **Sources of Income** - Creative respondents in NWA primarily derive their income from local live performances, with 46% indicating this as 'all' or 'most' of their income source. Touring performances contribute significantly less, with only 14% indicating it as 'all' or 'most'. Teaching is another important source of income, with 31% marking it as 'all' or 'most'. Other notable sources include studio work (20% 'all' or 'most'), songwriting (18% 'all' or 'most'), recordings (15% 'all' or 'most'), and merchandise sales (23% 'all' or 'most').

> Sometimes I experience other creatives doing too much self-serving in a collaborative relationship. I think artists and creatives should support each other more, help elevate each other and their craft.



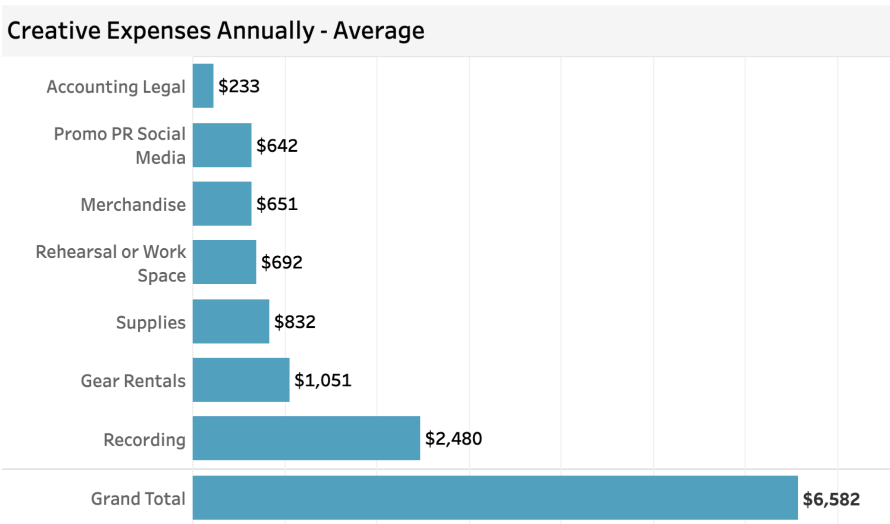
- **Career Concerns** - The primary concerns for creative respondents in NWA revolve around the cost of living, with 49% rating it as the highest concern and 31% as a higher concern. Pay rates not increasing is another significant issue, with 33% rating it highest and 32% higher. Lack of music work (29% highest, 27% higher) and lack of time for creativity (13% highest, 20% higher) are also notable concerns, along with increasing music-related expenses (10% highest, 27% higher).



Music Ecosystem Health Assessment

Creative Profile (continued)

- **Spend** - Creative respondents in NWA incur various annual expenses, totaling an average of $6,582. The largest expense is recording, averaging $2,480 per year. Gear rentals follow at $1,051, with supplies costing $832. Rehearsal or workspace expenses average $692, while merchandise and promotional activities, including PR and social media, cost $651 and $642, respectively. Legal and accounting fees are the lowest, averaging $233 annually.



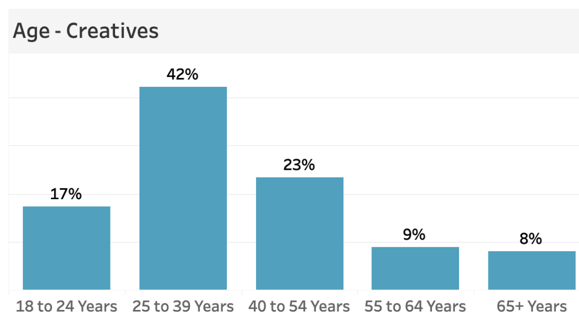
$6,582
Average Creative Spend

$2M
Total Creative Respondents Spend Annually

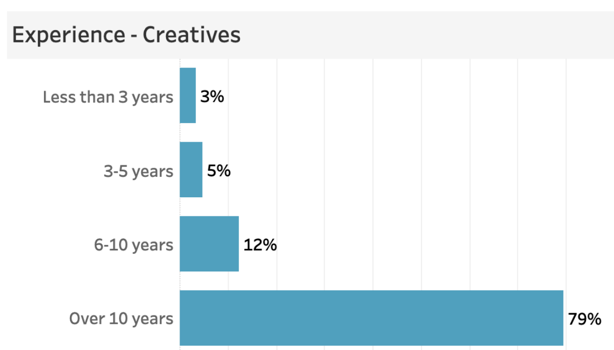
43%
Spent Locally

> "The music is of a higher quality/caliber than most other regions, from my experience. This could provide a path to growth."

- **Age -** The age distribution of creative respondents in NWA shows that the largest group is aged 25 to 39 years, making up 42% of the total. This is followed by 23% who are 40 to 54 years old and 17% who are 18 to 24 years old. Smaller proportions are seen in the 55 to 64 years (9%) and 65+ years (8%) age groups, indicating a strong presence of younger and mid-career creatives in the region



- **Experience** - In terms of experience, the majority of creative respondents in NWA have over 10 years of experience, representing 79% of the group. Those with 6 to 10 years of experience make up 12%, while 5% have 3 to 5 years, and 3% have less than 3 years of experience. This highlights a highly experienced creative community in the area.



> "I love the diversity of people and ages in our area! There are so many fun opportunities to perform with great people."

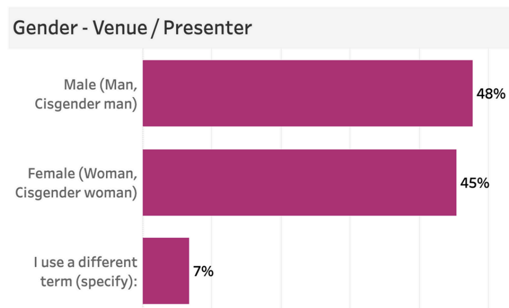
> "Pay could be improved. Overall show attendance is getting better but could still be improved."

> "The variety in musical genre offerings is good, but the amount of representation publicly is favored among more safe and established genres within the regional scene."

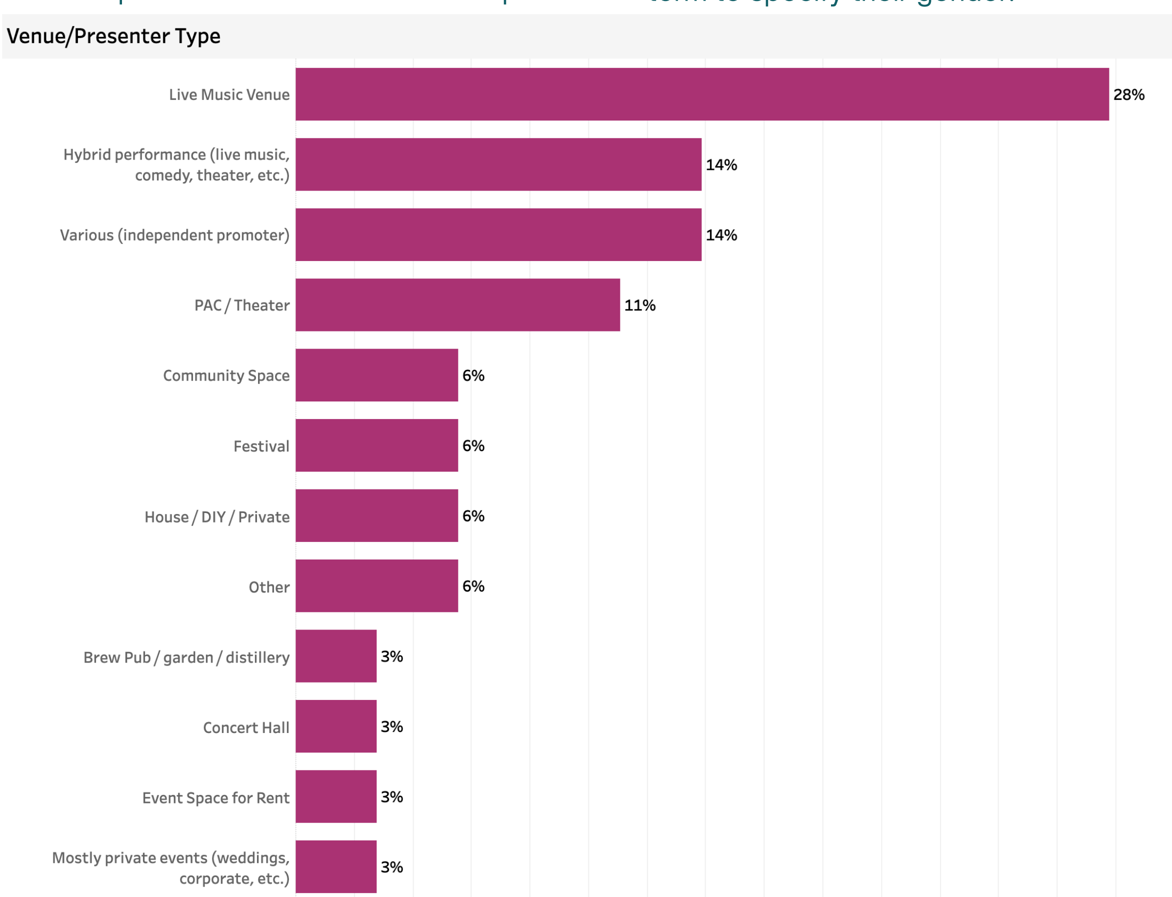
Venue/Presenter Profile

Venue/Presenter respondents in NWA show a more balanced gender distribution with 48% identifying as male and 45% as female, while 7% use a different term. In terms of ownership, 54% of Venues operate as nonprofits, 30% are locally owned for-profits, and 8% are public, education, or government-owned, reflecting a strong nonprofit presence. Venue types are diverse, with live music venues being the most common at 28%, followed by hybrid performance spaces and independent promoters at 14% each. Venue capacities primarily range between 1-200 people (58%), and 89% of venues have outdoor capabilities, showcasing adaptability for outdoor events. Respondents host an average of 91 live events annually, contributing to a total of 3,107 live events each year.

- **Venue/Presenter Type** - The most common type is Live Music Venues, making up 28% of the total. Hybrid performance spaces, which include live music, comedy, theater, etc., and various independent promoters each account for 14%. Performing Arts Centers/Theaters represent 11%. Community spaces, festivals, house/DIY/private events, and other categories each constitute 6%. Brew pubs, gardens, distilleries, concert halls, event spaces for rent, and venues primarily for private events like weddings and corporate functions each make up 3%.

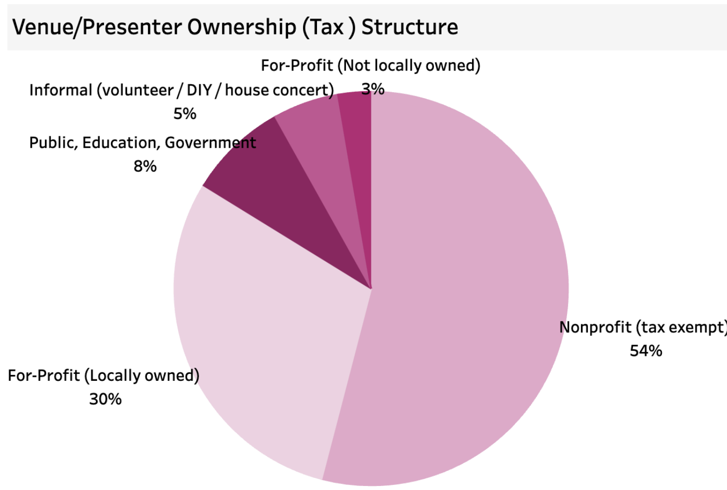


- **Gender** - Across Venue/Presenter respondents 48% identify as male (cisgender man), and 45% identify as female (cisgender woman). Additionally, 7% of respondents use a different term to specify their gender.



Venue/Presenter Profile (continued)

- **Venue Ownership/Tax Structure** - The ownership structure of Venues and Presenters reveals that the majority operate as nonprofits (54%). For-profit entities account for a significant portion, with 30% being locally owned and 3% not locally owned. Public, education, and government-owned venues make up 8%, while informal setups such as volunteer, DIY, or house concerts constitute 5%.

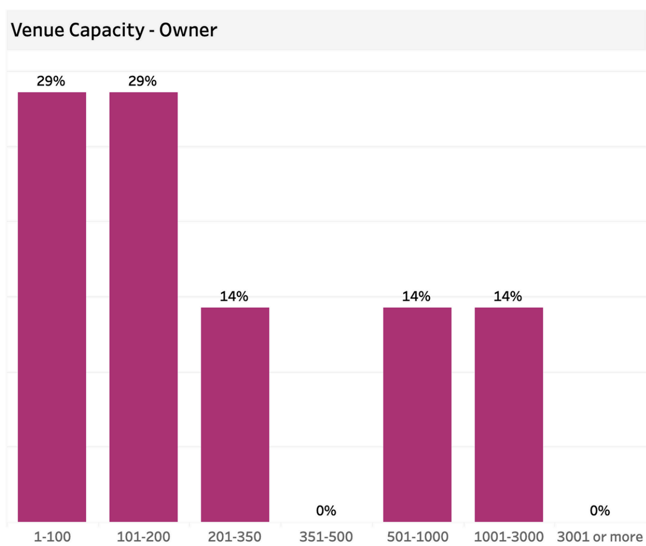


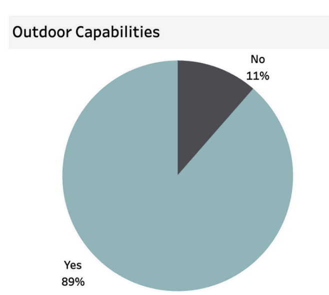
> I can find venues to express myself and play music. I appreciate venues focused upon listening.

> There are many outlets to discover opportunities and what's going on. For the most part musicians and venue owners/managers are up front and honest.

> I appreciate authentic venues that have stayed afloat for decades.

- **Venue Capacity & Outdoor Capabilities** - Venue capacities in NWA range primarily between smaller sizes, with 29% of venues holding 1-100 people and another 29% accommodating 101-200 people. Medium-sized venues (201-350 and 501-1000) each make up 14%, while no venues fall within the 351-500 and 3001 or more capacity ranges. Additionally, a significant majority (89%) of venues have outdoor capabilities, highlighting the region's adaptability to outdoor events and performances. Respondents host an average of 91 live events annually, contributing to a total of 3,107 live events each year.





Venues average
91
live events/year

3,107
total live events/year

> There is a lack of mid-sized venues for larger local acts to grow into.

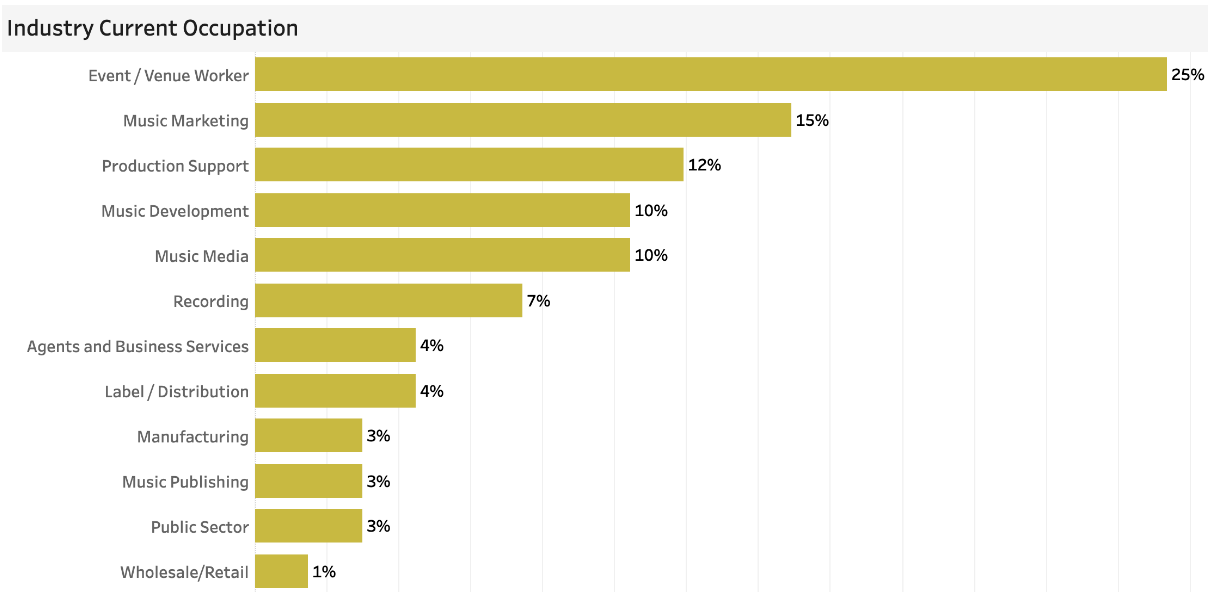
> Need more live music in small venues. More venues for promising students.

> Venues don't prioritize their own and there's no path to success. The people of power and influence don't get behind an artist until they're already established and experiencing success elsewhere.

> More venues, both small and large, for performing and listening to live music.

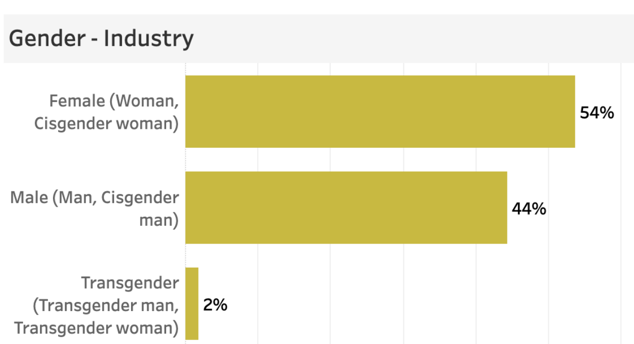
Industry Profile

Industry occupations are largely Event/Venue Workers (25%), followed by Music Marketing (15%), and Production Support (12%). Industry gender distribution highlights a significant majority of women (54%) working in Industry. Creative respondents predominantly handle Industry services themselves, but services that they use local Industry for include studio services (33%), equipment (29%), and merchandise (25%). NWA-area Industry is serving primarily local clients.



- **Industry Occupation** - Within the music industry, largest group, 25%, are Event/Venue Workers. This is followed by Music Marketing professionals at 15% and Production Support at 12%. Music Development and Music Media each account for 10%, while 7% work in Recording. Agents and Business Services, and Label/Distribution roles each represent 4% of respondents. Smaller proportions are found in Manufacturing (3%), Music Publishing (3%), Public Sector (3%), and Wholesale/Retail (1%).

- **Gender** - The gender distribution among industry respondents in NWA reveals that a majority, 54%, identify as female, indicating a significant representation of women in the industry. In comparison, 44% identify as male, and 2% identify as transgender. This data underscores the prominent presence and potential influence of women within the local music industry.



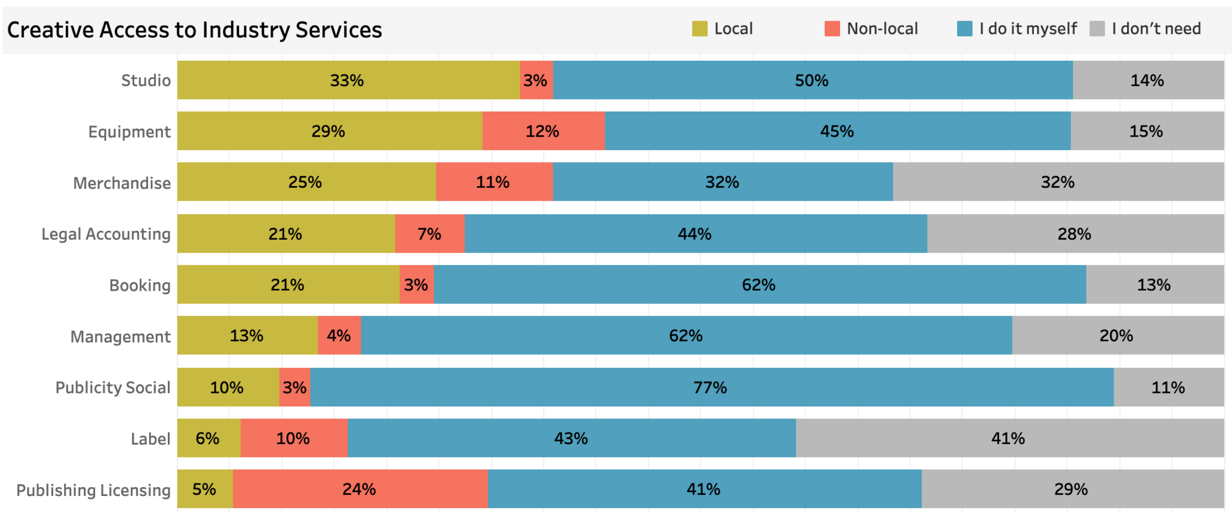
> "Lack of industry and mostly non-profits who go after the same funding and don't tend to last or have to cut way back."

> "The music industry here can feel fragmented and driven by self-interest."

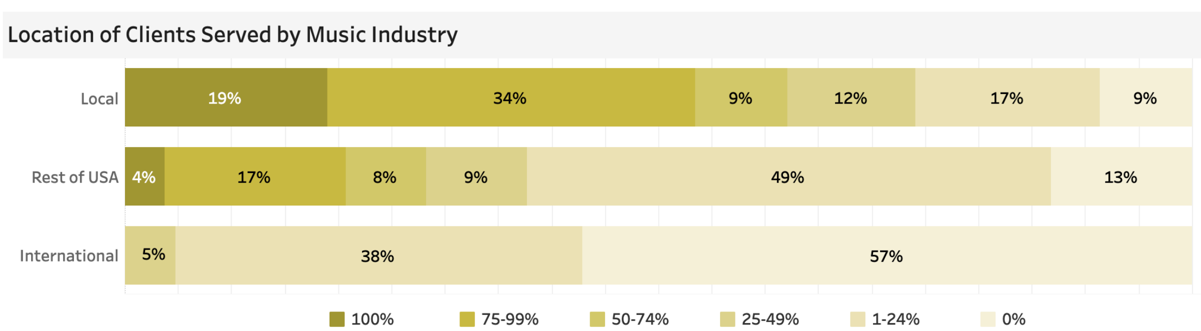
Music Ecosystem Health Assessment

Industry Profile (continued)

- **Creative Access to Industry** - Creative respondents in NWA access a variety of industry services, with significant portions handling tasks themselves. For studio services, 33% use local options, while 50% do it themselves. Equipment needs are met locally by 29%, with 45% managing themselves. Merchandise is sourced locally by 25%, but 32% handle it personally. Legal and accounting services are managed by 21% locally, and 44% personally. Booking is primarily handled by the creatives themselves (62%), as is management (62%). Publicity and social media are managed by 77% of creatives themselves. Label services and publishing/licensing are less frequently used locally (6% and 5%, respectively), with many not needing these services (41% and 29%) or managing them on their own.



- **Location of Clients** - NWA-area Industry is serving primarily local clients. Across the majority (>50%) of the Industry client base, 62% are local, 29% are national, and 0% are international. This highlights a mix of strong local focus and significant national engagement.



> Local musicians need more support in terms of booking and management services.

> There doesn't seem to be a hub for musicians to go and check for music related needs.

Economic Activity

Music generates a total of $10M in income annually across all respondents, with 32% of their annual income coming from music. The average household income for respondents is $81K, and the average annual income from music is $26K. The majority of respondents (54%) receive compensation through independent/direct payment, while 32% earn wages from employers, and 14% remain unpaid. 62% identify as freelancers, 31% are part of a band, and 28% operate as a registered business. A substantial portion (63%) work outside of the music industry, with 83% of them relying on their outside job as their primary income source. Among respondents, 44% hold intellectual property rights, and 44% do not use any royalty collection method. Performance data shows 26% performing 1 local paid show per month, with average local performance pay at $553.78 and touring performance pay at $316.37. Venues host an average of 91 live events per year. Regionally, 70% of respondents traveled to Tulsa for music-related work, followed by 65% to Little Rock.

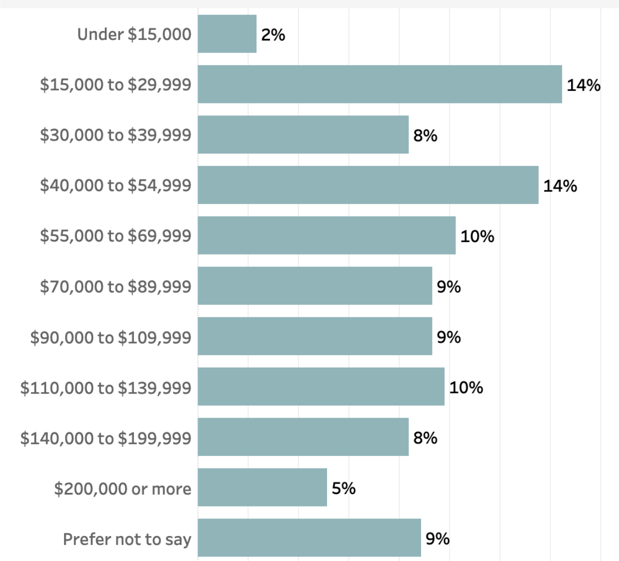
Music generates a total of **$10M** in income annually across all respondents

3**2%** of respondent annual income comes from music

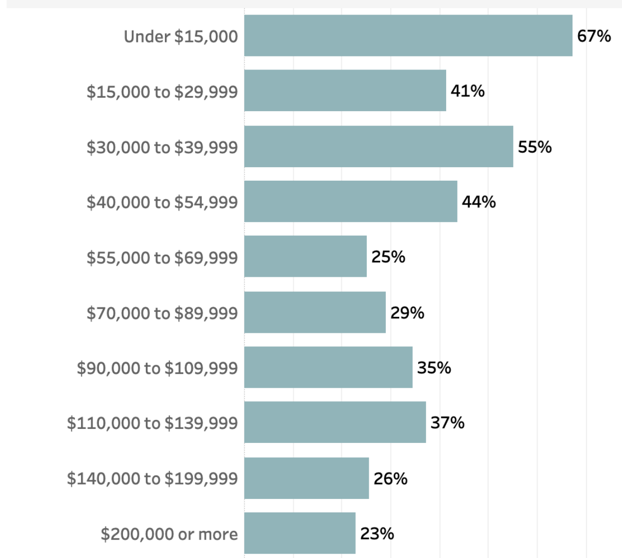
Average household income for respondents is **$81K**

Average annual income from music is **$26K**/respondent

Household Income



% of Income from Music by Income Bucket



“Everything is free or heavily subsidized. It hurts the musicians and trains customers that art isn't valued.”

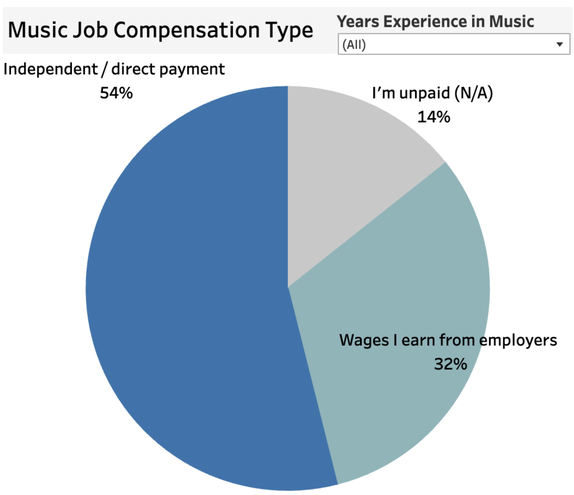
“Money. It takes so much money and time to attend shows because of babysitting fees, ticket costs and such. But I think CACHE and The Medium do a good job of providing low-cost events.”

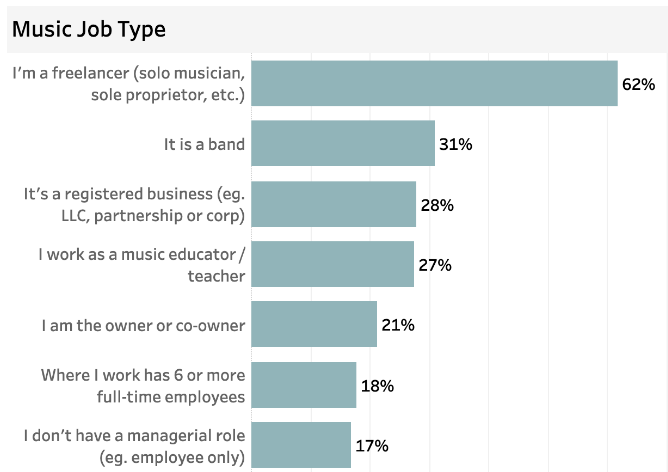
“The market for monetizing locally is small and there doesn’t seem to be a plethora of opportunities. They are there, but not very consistent or profitable.”

“Venues that are not able to make a profit due to high expenses and rent and are therefore not able to pay musicians a fair share for their time and expertise.”

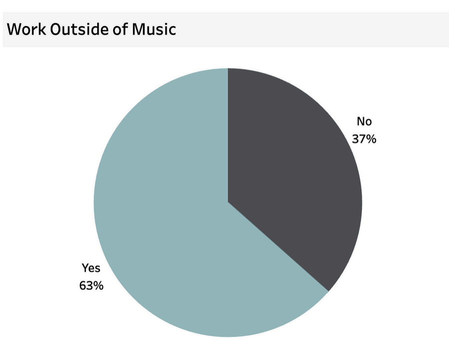
Economic Activity (continued 2/4)

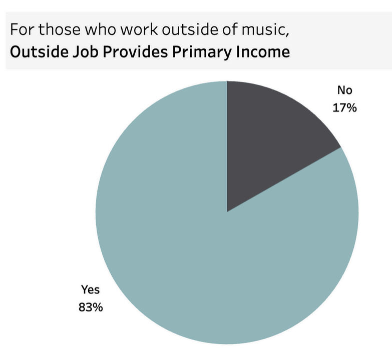
- **Music Job Type/Compensation** - The majority of respondents (54%) receive compensation through independent/direct payment, while 32% earn wages from employers, and 14% remain unpaid. Regarding music job types, 62% of respondents identify as freelancers (e.g., solo musicians, sole proprietors), 31% are part of a band, and 28% operate as a registered business (LLC, partnership, or corporation). Additionally, 27% work as music educators or teachers, 21% are owners or co-owners of their businesses, 18% work in larger organizations with six or more full-time employees, and 17% do not hold managerial roles, functioning solely as employees.





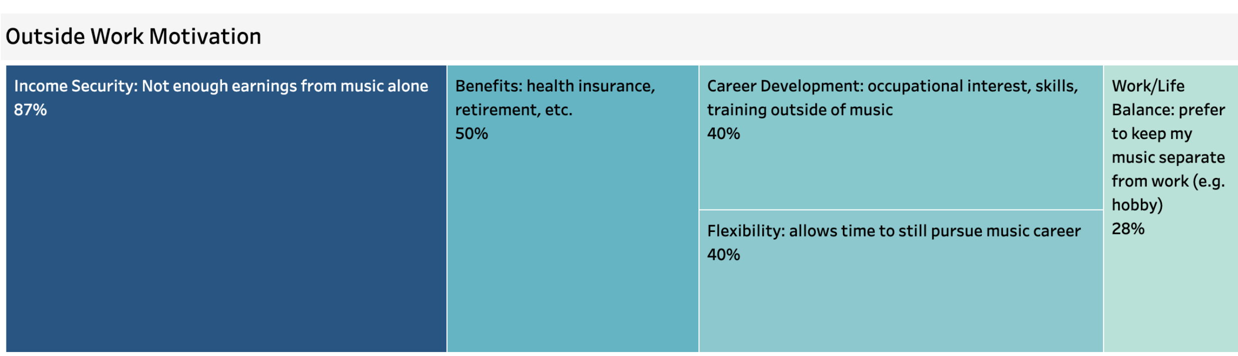
- **Work Outside Music** - A substantial portion of respondents (63%) work outside of the music industry, while 37% do not. Among those who work outside of music, 83% rely on their outside job as their primary source of income, whereas 17% do not.





> "Venues that are not able to make a profit due to high expenses and rent and are therefore not able to pay musicians a fair share for their time and expertise."

> "We used to make 1/2 our income selling CD's...now NO ONE has CD players (Hardly) ...we have a closet FULL OF COASTERS now...it is so sad. Also streaming has made single songs the thing...I miss a COLLECTION."



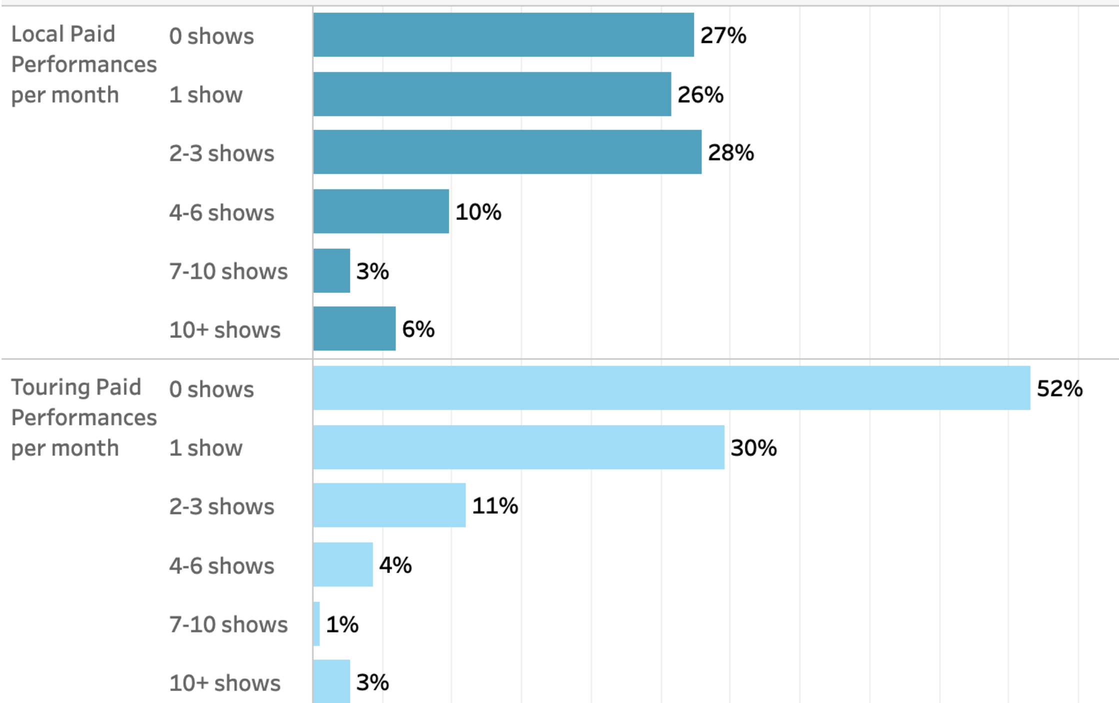
Economic Activity (continued 3/4)

- **Creative Performance Frequency & Pay** - Among respondents, 26% perform 1 local paid show per month, while 27% do not perform any local paid shows, and 28% perform 2-3 shows. Additionally, 10% perform 4-6 shows, 3% perform 7-10 shows, and 6% perform more than 10 shows per month. For touring paid performances, 52% of respondents do not perform any shows per month, 30% perform 1 show, and 11% perform 2-3 shows. Only 4% perform 4-6 shows, 1% perform 7-10 shows, and 3% perform more than 10 shows per month. The average pay per local performance is $553.78, while the average pay per touring performance is $316.37.

$553.78
average pay/local gig

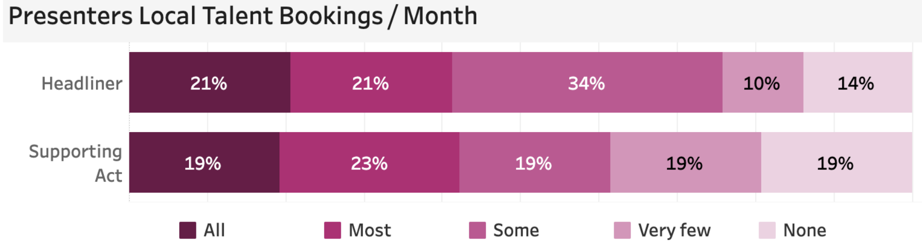
$316.37
average pay/touring gig

Creative Paid Performances / Month



- **Venue Live Events and Local Talent Bookings** - Venue/Presenters on average host 91 live events per year, totaling 3,107 events across all respondents. In terms of local talent bookings per month, 21% of venues book local talent as headliners for all events, 21% for most events, 34% for some events, 10% for very few events, and 14% do not book local talent as headliners at all. For supporting acts, 19% book local talent for all events, 23% for most events, 19% for some events, 19% for very few events, and another 19% do not book local talent as supporting acts.

Presenters Local Talent Bookings / Month

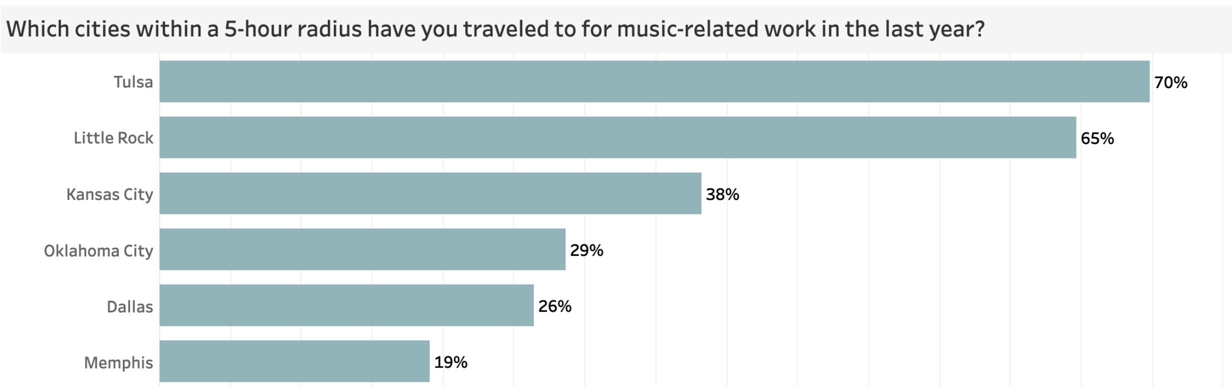


Venues average
91
live events/year

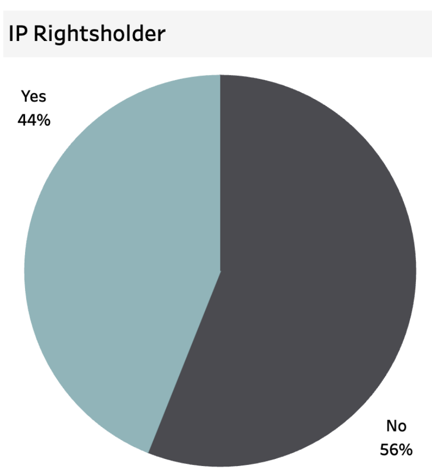
3,107
total live events/year

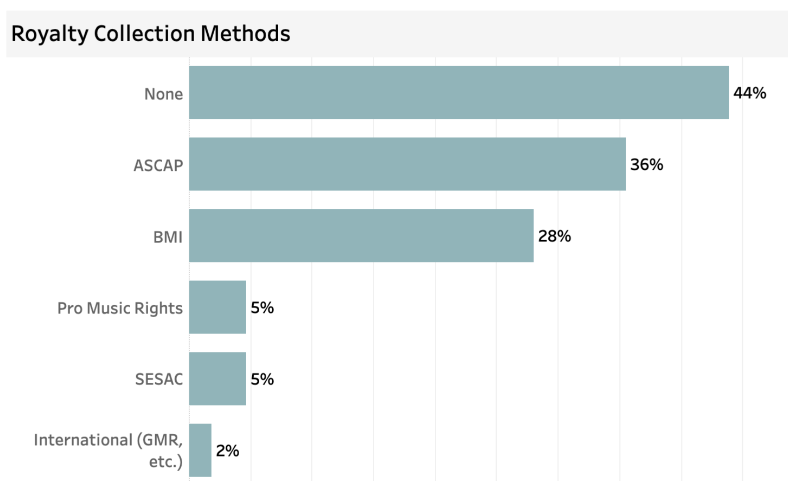
Economic Activity (continued 4/4)

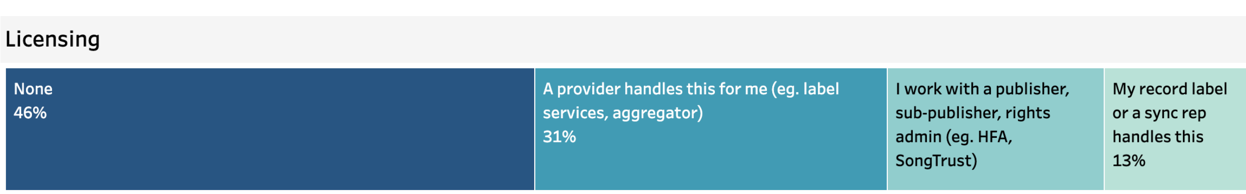
- **Regional Music Work Destinations** - Among respondents, 70% have traveled to Tulsa for music-related work in the last year, making it the most frequented city within a 5-hour radius. Little Rock follows closely, with 65% of respondents traveling there for work. Kansas City was visited by 38% of respondents, while Oklahoma City and Dallas were visited by 29% and 26% respectively. Memphis was the least frequented, with 19% of respondents traveling there for music-related work. This data highlights the key regional hubs for music-related activities among respondents.



- **Publishing/Licensing** - Among music respondents, 44% hold intellectual property rights (IP), while 56% do not. In terms of royalty collection methods, 44% of respondents do not use any method, 36% use ASCAP, and 28% use BMI. Smaller percentages use Pro Music Rights (5%), SESAC (5%), and international organizations like GMR (2%). For licensing, 46% do not engage in licensing activities, 31% have a provider handle it for them (e.g., label services, aggregator), 13% work with a publisher, sub-publisher, or rights administrator (e.g., HFA, Song Trust), and another 13% have their record label or a sync representative manage this aspect.



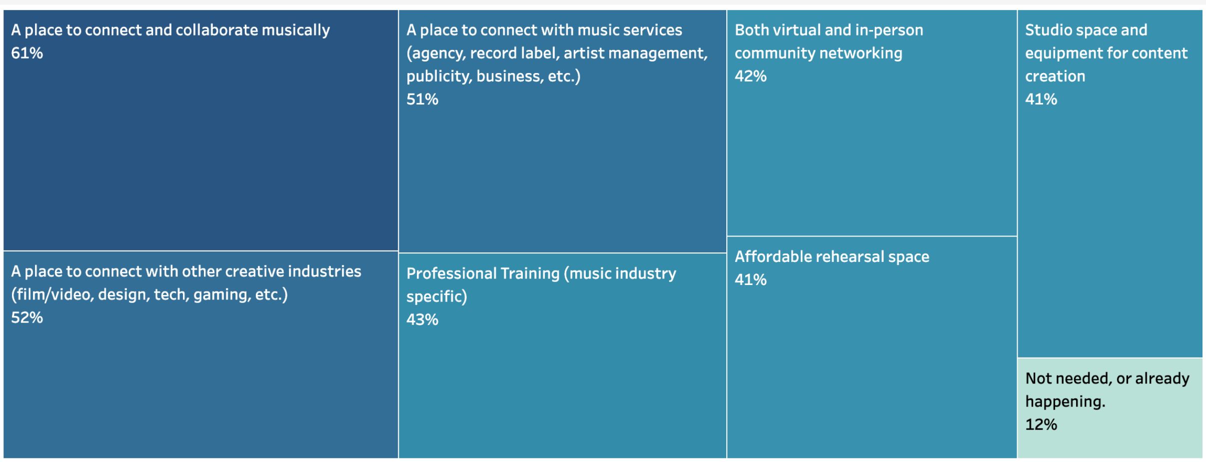




Ecosystem Development

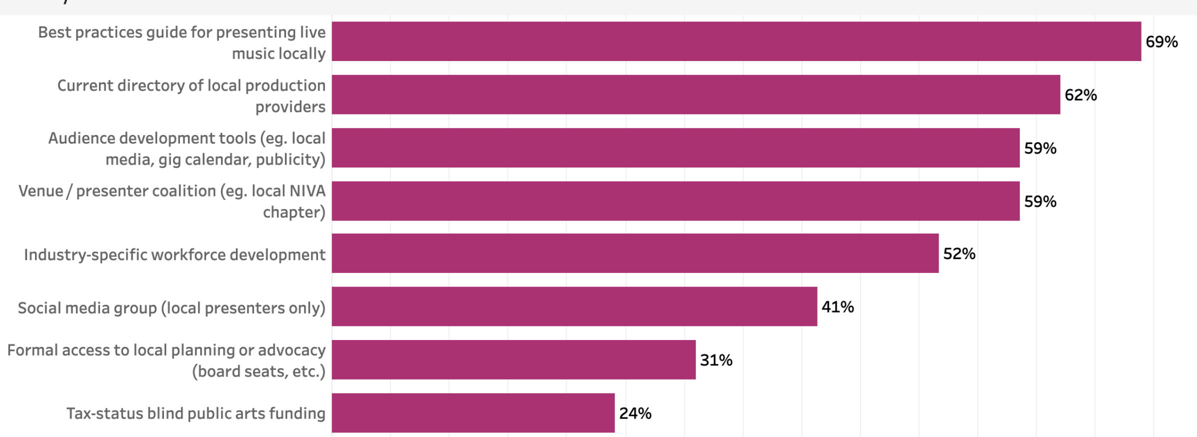
In terms of NWA music ecosystem development, 61% of respondents would like to have a place to connect and collaborate musically, 52% want a place to connect with other creative industries, and 51% want a place to connect with music services. Venue/Presenters prefer having a best practices guide for presenting live music locally (69%) and a current directory of local production providers (62%). Financial assistance has been received by 31% of respondents, with the most common types being scholarships (51%) and support from friends, family, and crowdfunding (47%). The main barrier to obtaining financial assistance is a lack of awareness of opportunities (52%). In terms of financial assistance preferences, 59% prefer micro-grants, while 48% would like tax breaks of any sort. Among respondents, the top sources for finding out about music opportunities within NWA are friends, family, and coworkers (76%), and local music, arts, and culture organizations (75%). Additionally, 34% have been forced to look outside of NWA to find someone with a specific music-related skill set. The top platforms used to find out about music opportunities are social media (81%), word of mouth (72%), and music festivals and events (19%).

Local Music Resource Preference



- **Venue/Presenter Business Resources** - Among Venue/Presenters, 69% prefer having a best practices guide for presenting live music locally, and 62% want a current directory of local production providers. 59% seek audience development tools (e.g., local media, gig calendar, publicity) and a venue/presenter coalition (e.g., local NIVA chapter). Industry-specific workforce development is preferred by 52%, while 41% value a social media group for local presenters only.

Venue/Presenters Preference for Business Resources

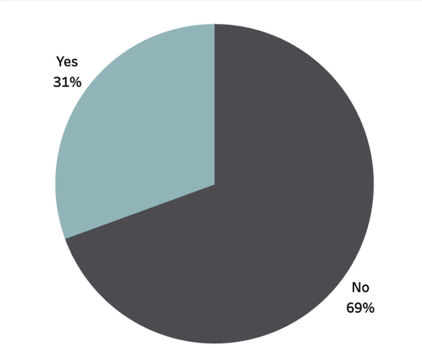


Music Ecosystem Health Assessment

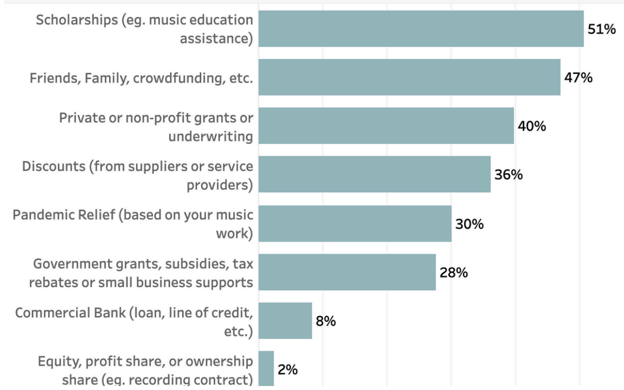
Ecosystem Development (continued 2/3)

- **Financial Support** - Among respondents, 31% have received financial assistance for music work. The most common types of financial assistance include scholarships (51%), support from friends, family, and crowdfunding (47%), private or non-profit grants (40%), and discounts from suppliers (36%). Pandemic relief was utilized by 30%, while 28% received government grants or subsidies, and 8% accessed commercial bank loans. Only 2% received equity, profit share, or ownership support. The main barriers to obtaining financial assistance are a lack of awareness of opportunities (52%), no applicable barriers (25%), and insufficient grant-writing skills (24%). In terms of financial assistance preferences, 59% prefer micro-grants, while 48% would like tax breaks of any sort.

History of Financial Assistance for Music Work

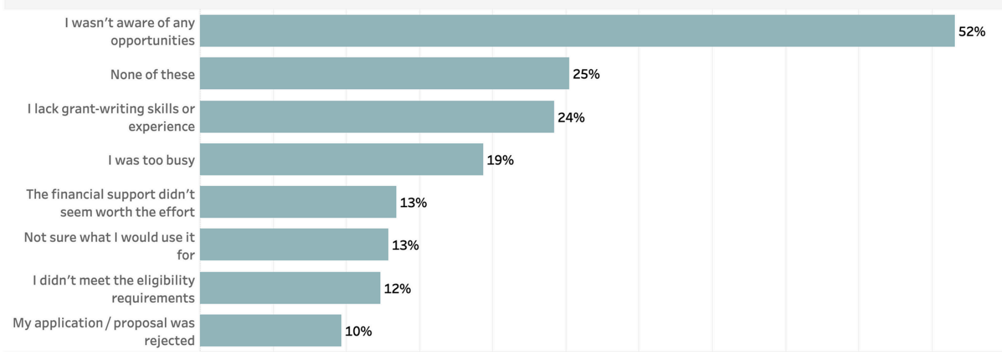


Type of Financial Assistance for Music Work



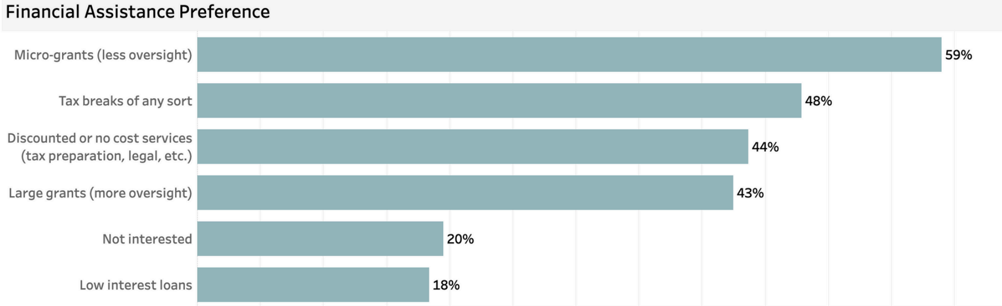
"I feel like I'm always going to the same venues and seeing the same people. I wish there was a way for more people to get involved and get curious about the scene. I find out about local events/new venues mostly through word of mouth/social media but either there's not a lot of new things going on or I just don't know about them."

Financial Assistance Barrier



"We need more training for people who staff events. We need institutions to work together to not oversaturate the market or else risk poor attendance across the board, which ultimately weakens the scene."

Financial Assistance Preference



"Marketing is terrible and there seems to be a lot of gatekeepers for one centralized way of creating shows and opportunities."

"The lack of affordable and readily available rehearsal space is huge need in this region."

"Artists need to work and promote themselves and understand how important it is to do their part to ensure folks follow them."

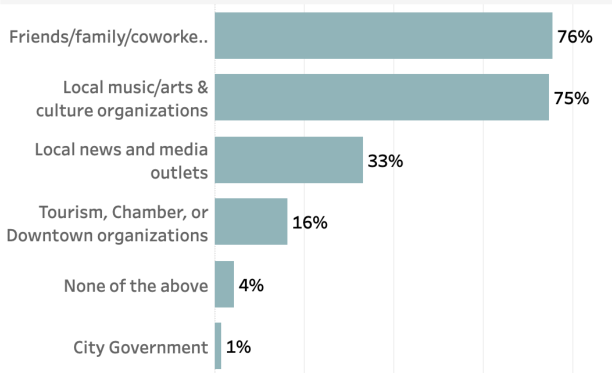
"There are not nearly enough opportunities for classical singing in NWA. Whenever I want to sing, I have to leave the state."

Ecosystem Development (continued 3/3)

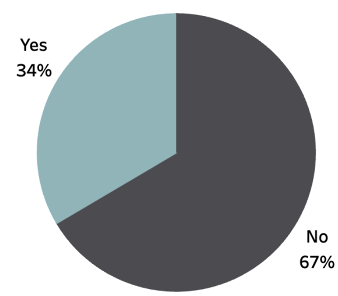
- **NWA Information Sources for Music Opportunities** - Among respondents, the top three sources for finding out about music opportunities within NWA are friends, family, and coworkers (76%), local music, arts, and culture organizations (75%), and local news and media outlets (33%). Other sources include tourism, chamber, or downtown organizations (16%), with only 4% indicating none of the above and 1% relying on city government.

- **External Sourcing for Music Skills in NWA** - Among respondents, 34% have been forced to look outside of Northwest Arkansas (NWA) to find someone with a specific music-related skill set in the last year, while 67% have not needed to do so. This indicates that a significant portion of respondents find the necessary music-related skills within the local area.

Who are your top 3 sources to find out about music opportunities (e.g., gigs, collaborations) within NWA?

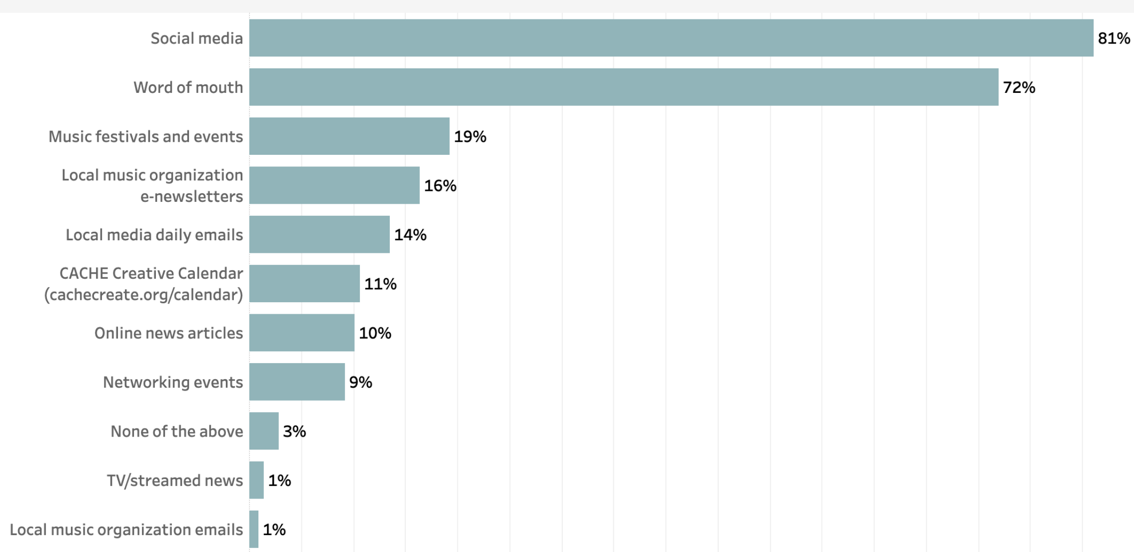


Have you been forced to look outside of NWA to find someone with a specific music-related skill set in the last year?



- **Top Platforms for Music Opportunities in NWA** - Among respondents, the top three platforms or formats used to find out about music opportunities within NWA are social media (81%), word of mouth (72%), and music festivals and events (19%). Other notable sources include local music organization e-newsletters (16%), local media daily emails (14%), and the CACHE Creative Calendar (11%). Online news articles are used by 10%, networking events by 9%, and 3% indicated none of the above. TV/streamed news and local music organization emails are each used by 1% of respondents.

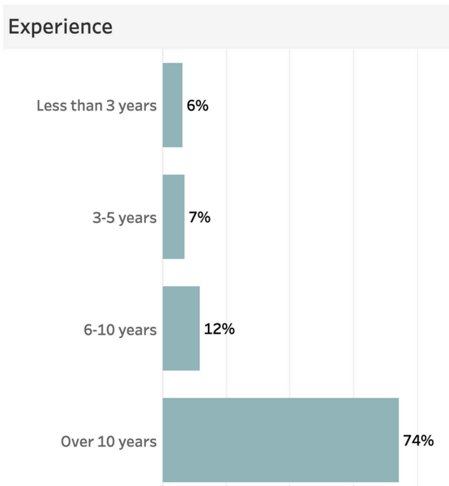
What 3 platforms/formats do you use most to find out about music opportunities (e.g., gigs, collaborations) within NWA?

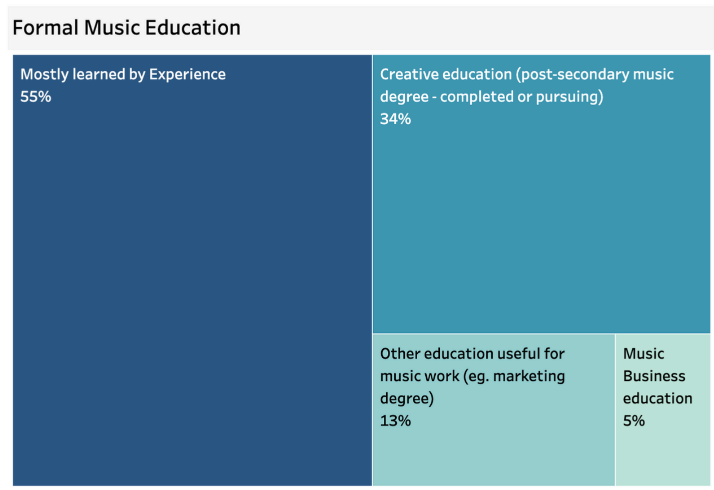


Music Ecosystem Health Assessment

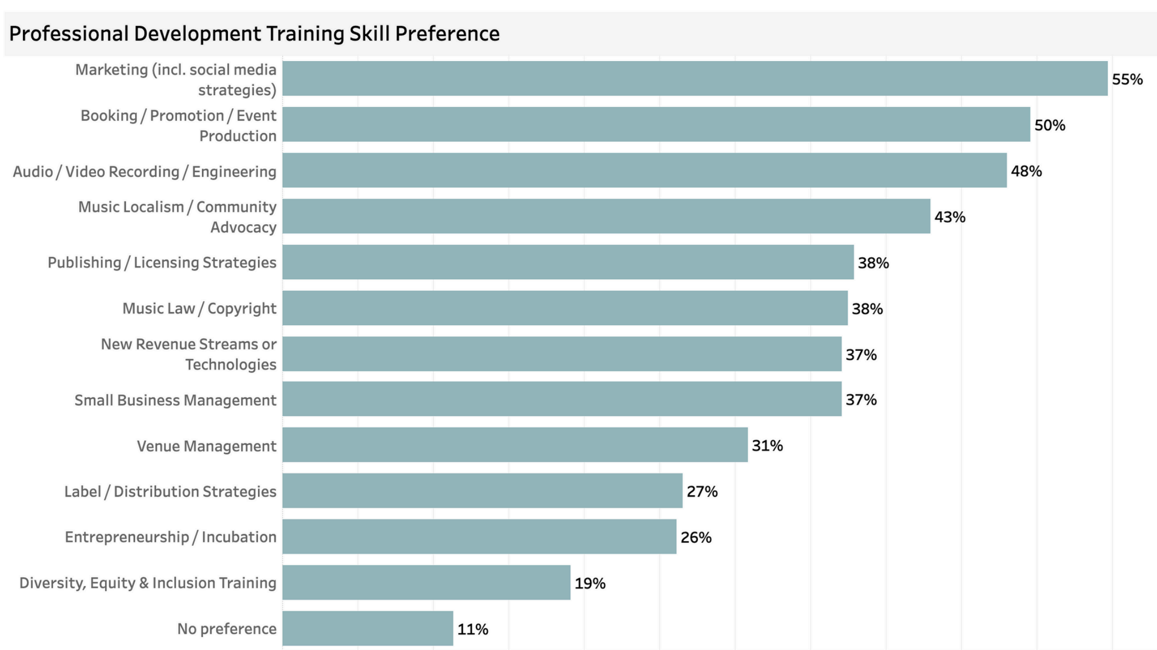
Workforce Development

The NWA workforce features 74% of respondents with over 10 years of experience and 55% primarily learning through experience. Professional development is a priority, with 55% seeking training in marketing and social media strategies, 50% looking for training in booking/promotion/event production, and 48% desiring training in audio/video recording/engineering. Only 11% have no preference for professional development. 52% seek leadership-level training. A significant portion (63%) lack memberships or registrations in music-related organizations.



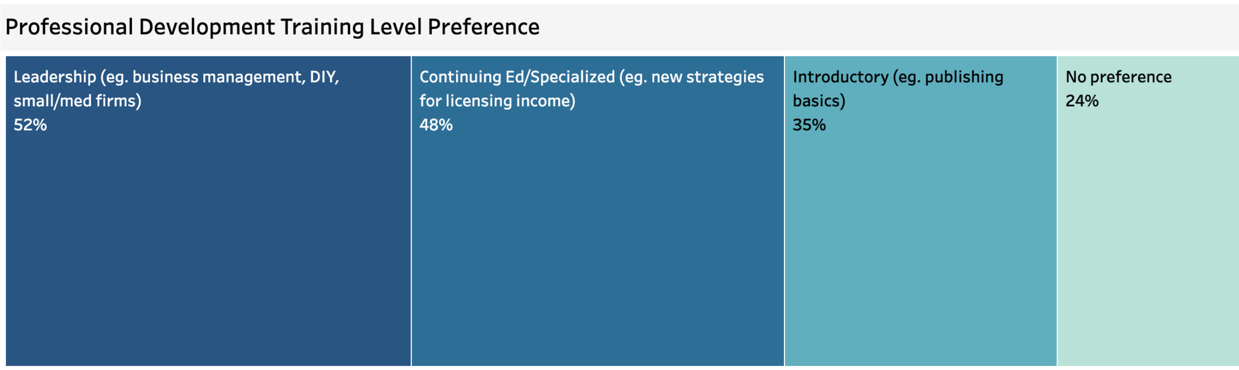


- **Professional Development** - NWA respondents, 55% prefer professional development training in marketing, including social media strategies, while 50% seek training in booking, promotion, and event production. Audio/video recording and engineering training is preferred by 48%, and 43% are interested in music localism and community advocacy. Publishing and licensing strategies, as well as music law and copyright, are each preferred by 38% of respondents. Training in new revenue streams or technologies and small business management is sought by 37%, while 31% are interested in venue management. Other areas of interest include label and distribution strategies (27%), entrepreneurship and incubation (26%), and diversity, equity, and inclusion training (19%). Only 11% of respondents indicated no preference for professional development training.

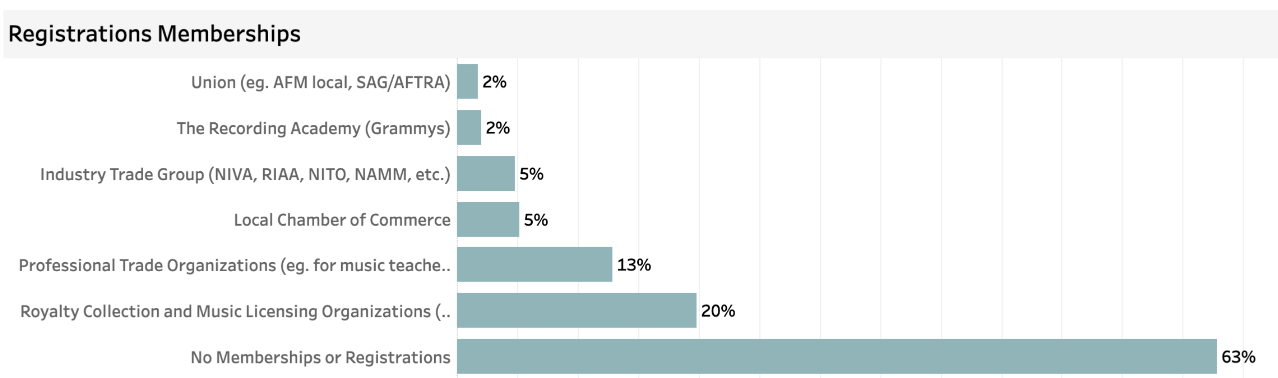


Workforce Development (continued)

- **Professional Development Training Level Preference** - Among respondents, 52% prefer professional development training at the leadership level (e.g., business management for small/medium firms), while 48% seek continuing education or specialized training (e.g., new strategies for licensing income). Additionally, 35% are interested in introductory training (e.g., publishing basics), and 24% indicated no preference for the level of professional development training.



- **Professional Industry Associations** - A significant portion of respondents, 63%, have no memberships or registrations in music-related organizations. Of those who do, 20% are members of royalty collection and music licensing organizations, 13% belong to professional trade organizations (e.g., for music teachers), and 5% are part of industry trade groups or local chambers of commerce. Only 2% are members of unions (e.g., AFM local, SAG/AFTRA) or The Recording Academy (Grammys).



“We need more training for people who staff events.”

“More support of music in schools (orchestra especially). Arts education is crucial for the success of our industry!”

“We need more training for people who staff events. We need institutions to work together to not oversaturate the market or else risk poor attendance across the board, which ultimately weakens the scene.”

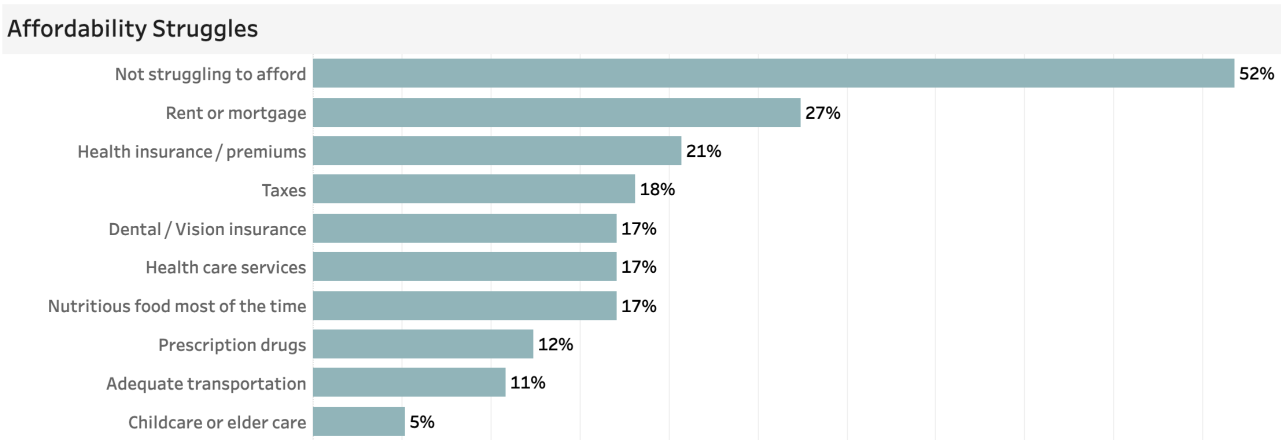
“The music ecosystem in NWA is not focused on creating sustainable careers.”

“The support system is trash asf in Arkansas. Too many People hating on each other for someone to see your true talent.”

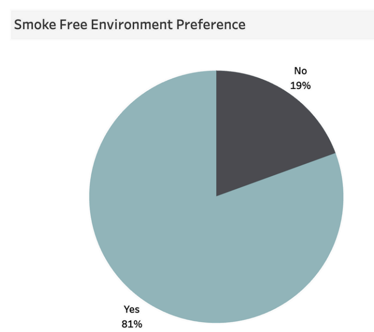
Music Ecosystem Health Assessment

Livability

Over half of survey respondents (52%) are not struggling to afford their basic needs. However, 27% are struggling with rent or mortgage payments and 21% are burdened by health insurance premiums. The most critical creative career concerns are the increasing cost of living (49%) and stagnant pay rates (33%). For music careers, the primary challenge is low or uncertain pay (88%), along with a lack of benefits (61%). Venue /Presenters face challenges with talent costs (33%) and staffing issues (14%). A significant majority (81%) of respondents prefer a smoke-free environment.

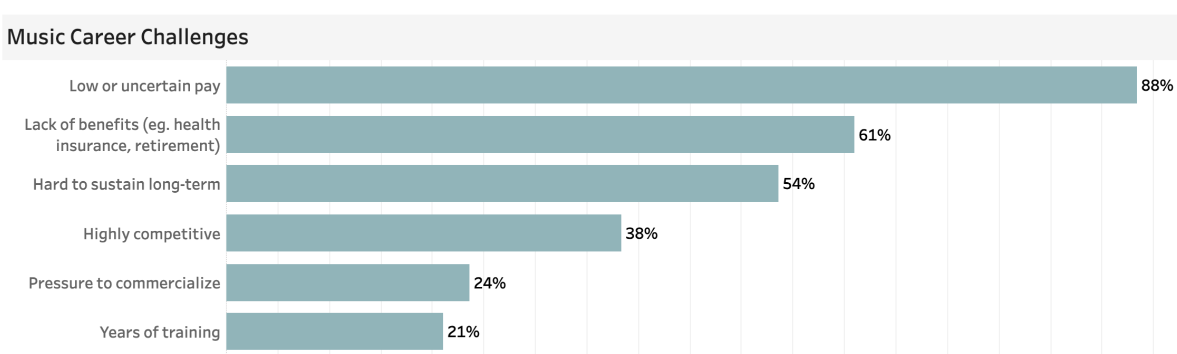


- **Affordability** - NWA survey respondents indicate that 52% are not facing significant financial difficulties. However, 27% struggle with rent or mortgage payments, and 21% find health insurance premiums burdensome. Taxes, dental/vision insurance, healthcare services, and nutritious food present challenges for 17% of respondents each.
- **Smoke Free Environment Preference** - A significant majority of respondents, 81%, prefer a smoke-free environment, while 19% do not have this preference.



- **Music Career Challenges** - The primary challenge for music careers, as indicated by 88% of respondents, is low or uncertain pay. Additionally, 61% of respondents are concerned about the lack of benefits such as health insurance and retirement plans. Sustaining a music career long-term is difficult for 54% of respondents, while 38% find the industry to be highly competitive. Other notable challenges include the pressure to commercialize (24%) and the extensive years of training required (21%).

> "As a person with addictive tendencies, it would be nice to find places to play music where people aren't encouraged to smoke or drink, as well as like-minded people who want to play those places."

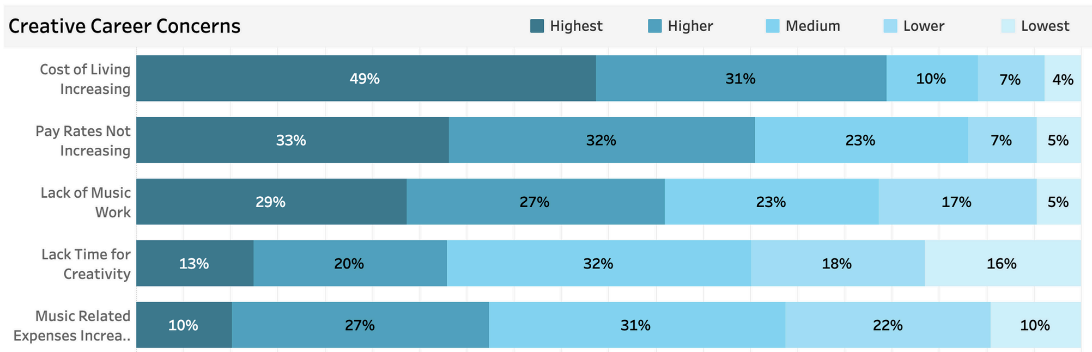


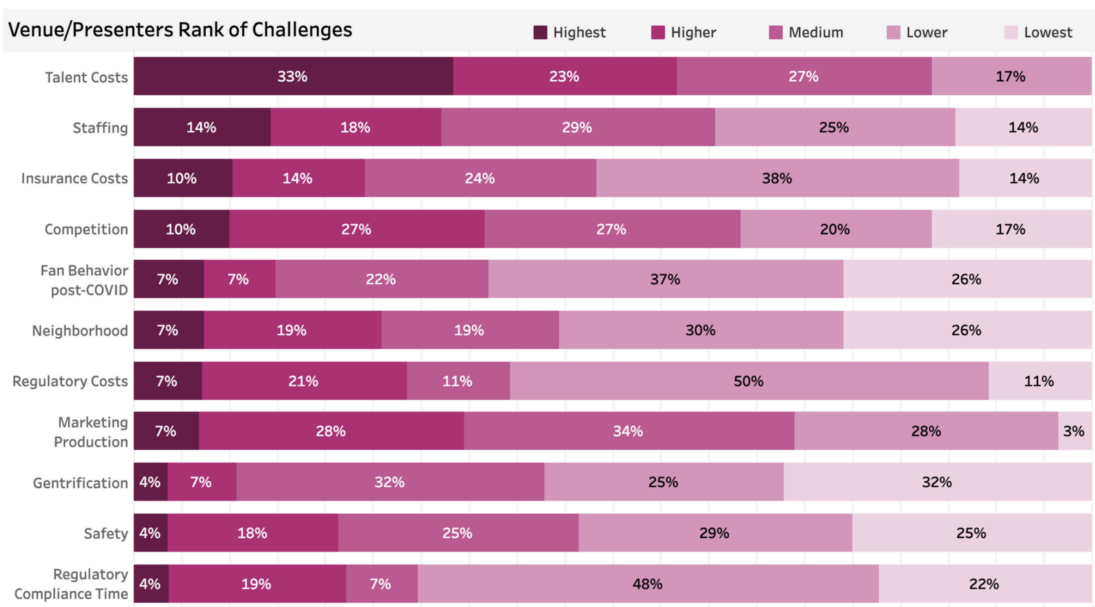
Music Ecosystem Health Assessment

Livability (continued)

- **Creative Career Concerns** - The most significant issue for respondents is the increasing cost of living, with 49% rating it as their highest concern. Pay rates not increasing is also a major worry, with 33% ranking it highest. Lack of music work is another critical concern, with 29% identifying it as their top issue. Additionally, 32% are significantly troubled by the lack of time for creativity. Music-related expenses increasing is a concern for 10% of respondents at the highest level.

- **Venue/Presenters Rank of Challenges** - The most significant challenge for venue presenters is talent costs, with 33% ranking it as the highest concern. Staffing issues are also prominent, with 14% marking it as their top challenge and 29% rating it medium. Insurance costs and competition each have 10% ranking them as the highest challenge, but competition also has 27% rating it higher. Fan behavior post-COVID, neighborhood issues, and regulatory costs are less significant but still notable, with each having 7% to 10% in the highest concern category. Marketing production is a significant medium-level concern for 34%, while gentrification, safety, and regulatory compliance time are rated lower overall but still impact some presenters.





> Performance compensation from local venues has remained mostly stagnant for over a decade leading to lower compensation for artists due to rising costs of living/expenses.

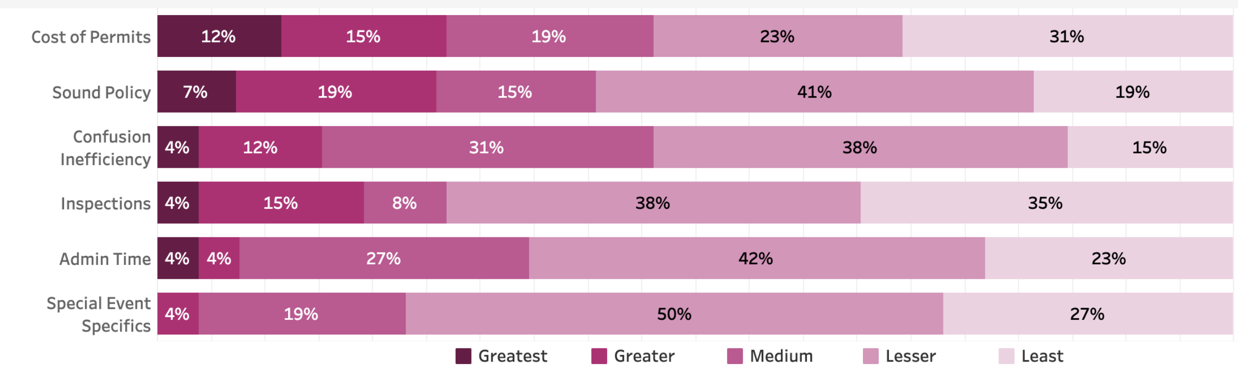
> Hard to make any money playing music. Need more venues, more affordable housing.

> It seems like none of the artists get paid enough from their music to hire photographers or videographers, nor do promoters usually have any additional budget for these services.

Music-Friendly Policies

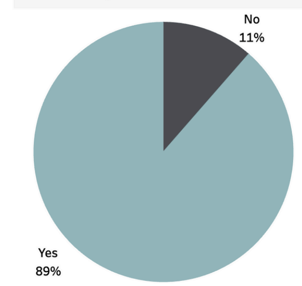
Venues/Presenters face a range of regulatory challenges, with concerns around the cost of permits, sound policies, and confusion/inefficiency. They frequently navigate parking and street regulations, impacting 75% of respondents, while insurance (56%) and amplified sound regulations (50%) are also regulatory processes they regularly encounter. Financial assistance preferences lean heavily towards micro-grants with less oversight (59%) and tax breaks (48%). There is a strong preference for an advocate inside the government (68%) and for a dedicated webpage of current music regulations, also favored by 68% of respondents. 89% of Venues/Presenters have outdoor capabilities.

Presenters Rank of Regulatory Challenges



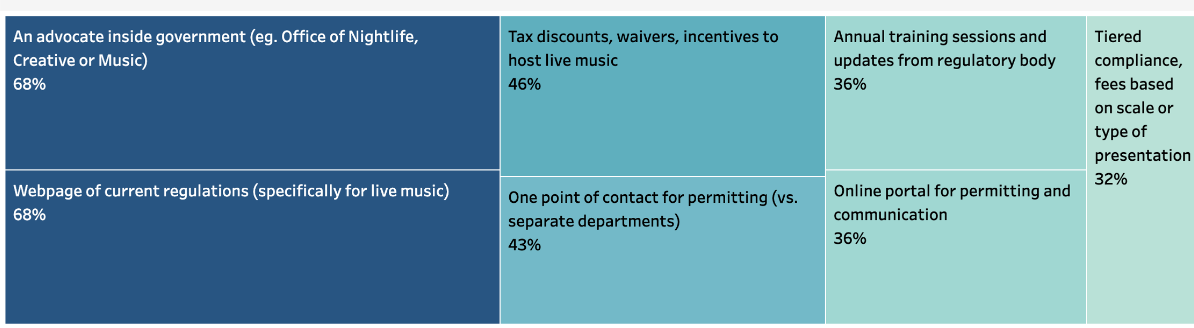
- **Regulatory Challenges** - Venues/Presenters face several regulatory challenges, with the cost of permits and sound policy being notable issues. The cost of permits is a significant concern for 12%, while sound policy affects 7% greatly and 41% to a lesser extent, noting that 89% have outdoor capabilities. Confusion and inefficiency pose moderate challenges for 38%, and inspections are a medium concern for 35%. Administrative time is a notable issue for 42% of respondents. Special event specifics are a moderate challenge for 50%. Overall, while no single issue overwhelmingly dominates, medium-level regulatory challenges are prevalent across these areas for Venues/Presenters.

Outdoor Capabilities



- **Venue/Presenter Tool Preference** - Venues/Presenters show a clear preference for certain regulatory tools to support live music. The most favored options are having an advocate inside the government (68%) and a dedicated webpage for current regulations (68%). Other preferred tools include tax discounts and incentives for hosting live music (46%), a single point of contact for permitting (43%), and annual training sessions with updates from the regulatory body (36%). An online portal for permitting and communication is also valued (36%), along with tiered compliance fees based on the scale or type of presentation (32%).

Presenters Regulatory Tools Preference

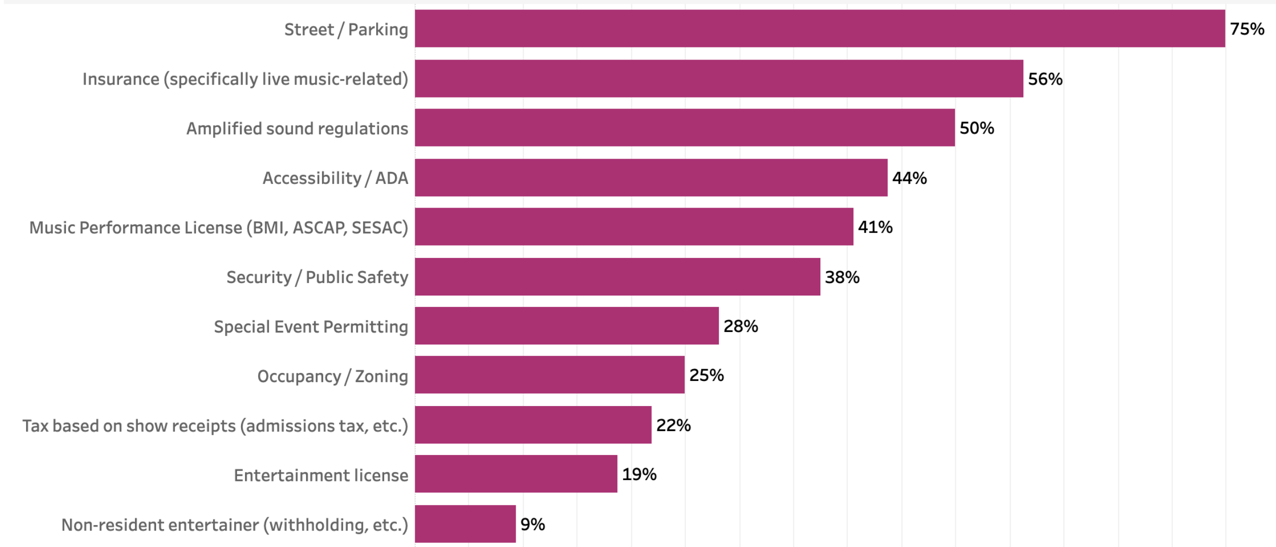


Music Ecosystem Health Assessment

Music-Friendly Policies (continued)

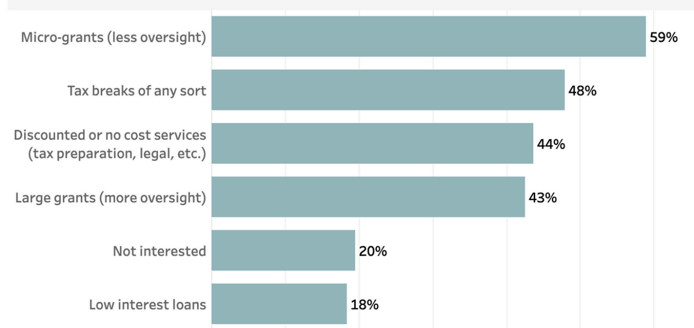
- **Regulatory Fluency** - Venues/Presenters face numerous regulatory challenges when presenting live entertainment. The most significant issue is street/parking, affecting 75% of respondents. Insurance specific to live music is a concern for 56%, while amplified sound regulations impact 50%. Accessibility/ADA compliance is a challenge for 44%, and music performance licenses (BMI, ASCAP, SESAC) affect 41%. Security and public safety regulations concern 38%, and special event permitting is an issue for 28%. Other notable challenges include occupancy/zoning (25%), taxes based on show receipts (22%), entertainment licenses (19%), and non-resident entertainer requirements (9%). These challenges highlight the complexity of regulatory compliance for live entertainment.

Regulatory Processes Encountered to Present Live Entertainment



- **Financial Assistance Preferences** - Financial assistance preferences among respondents show a strong favor towards micro-grants with less oversight, preferred by 59%. Tax breaks of any sort are favored by 48%, while 44% prefer discounted or no-cost services like tax preparation and legal aid. Large grants with more oversight are preferred by 43%. A smaller percentage of respondents are not interested in any financial assistance (20%), and low-interest loans are the least preferred, at 18%.

Financial Assistance Preference



"Sometimes it may seem like there's miscommunication between departments and that affects the workers, parking can be an issue as well."

"Know a lot of parking issues which they are working on in our area, so I see in the future of this being taken care of."

"Parking for load in and load out is almost always problematic."

Culture & Belonging

Respondents find that the NWA music ecosystem offers primarily positive experiences. The NWA music ecosystem's greatest strengths are that it is safe (85%), non-homophobic (79%), inclusive (72%), and non-sexist (70%). The NWA music ecosystem challenges are elitism (52%), and to a lesser extent, homogeneity (45%), highlighting areas for potential improvement despite the overall positive sentiment.

Subgroup Insights

Please see the online dashboard at **Creative Arkansas Community Hub & Exchange** for full data on each indicator by subgroup. Some overarching themes to the subgroups are:

- **Negative experiences** - Respondents who experience the most negative (red) side of the NWA ecosystem are people who identify as Black, African or African American, and to a lesser extent, people who work in Industry.

> Unfortunately, a lot of what's happening in NWA does feel quite elitist and exclusive. There's a lack of diversity in the area in general but especially in music organizations and groups.

> It is so so so male-dominated and usually male owned/or run. As a solo female artist, it's difficult to receive the same support my male counterparts receive here in NWA and beyond.

> It seems all about new, young people not from Arkansas. Locals and old people are never given a chance. It's very pro-anyone but White here too. I prefer diversity and letting anyone with talent shine no matter what they look like, what they believe or who they screw.

> I don't appreciate the stigma placed on urban music styles, especially with DJ's and hip-hop artists. I feel like Caucasian men with beards and a guitar get more of the shows and opportunities in the nicer places/venues, both small and large. I just feel like alternative and indie hip-hop styles should be given a chance to prove and showcase that we aren't about the same negative qualities often associated with mainstream rap music. We are artistic, creative, educated, poised, talented, and just more than a bad situation waiting to erupt. It's not always about breaking sound ordinances, curfew laws, and other stigma associated with our overhanging umbrella.

> The scene is held by gatekeepers and their friends at the venues, not leaving much room for new groups to expand.

Key Insights

Sector Composition: NWA enjoys a relatively healthy mix of sector representation across the three sectors. A higher than usual Venue/Presenter and Industry is closer the 20% as we like the see.

Beyond NWA: Many respondents travel to nearby cities like Tulsa, Little Rock, and Kansas City, indicating a strong reliance on the regional music network.

Regulatory Barriers: Challenges with cost of permits, sound policy and special event specifics highlight the need for a stream lined and more efficient regulatory process.

Local Connection to Industry Services: There is a disconnect between the 17% Industry and the low percentage of creatives using these local services (43%). There is a strong DIY culture in NWA with Creatives handling most music industry services themselves (e.g., 77% handle their own publicity/social media). There are comments that the music industry in NWA is perceived as fragmented, and there may be awareness issues with Creatives reaching Industry as well.

Social Media and Social Networks: An overwhelming majority of respondents 81% use social media as their primary source for discovering music opportunities with word of mouth second at 72%
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Professional Development: A majority of the respondents seek professional development in marketing, event production, and social media strategies.

Age and Experience Levels: NWA holds a high level of experience with a younger age group. More than half of the respondents (53%) are 18-39 years old, which is predominantly younger than many other markets; and yet, 74% of respondents have over 10 years experience.

Collaboration Spaces and Central Hub: There is a significant need for physical and virtual spaces in NWA where musicians can connect, collaborate, and access music-related services.

Need for Midsize Venues: There is a significant gap in mid-size venues that can host larger local and regional acts.

Culture & Belonging: Respondents of the NWA Music Census shared predominantly positive experiences overall. However, a concern is elitism, with 52% of participants perceiving the ecosystem as elitist.

Photo Courtesy of CAHCE

Opportunities

Regional Music City Alliances: Develop regional partnerships and collaborations to create a robust network of shared resources, cross-promotional events, and regional tours to strengthen connections and opportunities across these cities.

Regulatory Landscape Review: Advocate for regulatory reform to simplify permit processes, clarify sound policies, and provide comprehensive guidelines for special events to reduce barriers and support smoother operations for music events.

Maintaining Sector Balance: Continue to support and nurture the growth of the Venue/Presenter and Industry sectors by offering local live music incentives, best practice guide for presenting live music locally, current directory of local production providers, audience development tools, Venue/Presenter coalition, and networking opportunities to maintain and enhance this balanced composition.

Integration of Industry Services: Establish a centralized online platform and physical hubs that offer resources, services, and networking opportunities to connect with Creatives and Venues and foster a more cohesive music community.

Music Hubs: Establish a multifunctional music hub to facilitate collaboration and provide essential services that includes rehearsal spaces, recording studios, co-working areas, and an online resource center in order to support the local music community in connecting with each other and other creative industries.

Community Outreach and Communication: Enhance digital marketing training and support for musicians and venues, and create centralized social media channels and community groups to consolidate information and amplify music opportunities within the region.

Music Mentorships: Implement mentorship programs, internships, and entry-level training workshops to support the development of emerging professionals and ensure they are equipped with the skills and knowledge to thrive in the industry.

Venue Ladder: Encourage investment in and development of mid-size venues through incentives, grants, and partnerships with local businesses and organizations to fill this gap and support the growth of local and regional music acts.

Professional Development: Offer a series of workshops, training sessions, and online courses focused on marketing, booking/promotion, audio/video recording, music localism/community advocacy, and other topics identified by respondents to empower musicians and music professionals with the skills needed to succeed and grow their careers.

Photos Courtesy of Northwest Arkansas Jazz Society, Ra-Ve Cultural Foundation