NASHVILLE
INDEPENDENT VENUES STUDY

This report was produced on behalf of Nashville Metro Planning, by a project team led by PennPraxis in 2023-24.

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THE BASEMENT, FRITZ HAGER, JAN 25 2024

Executive Summary

"That's where I learned to play really ... Nashville." — *Jimi Hendrix*[1]

About the Nashville Independent Venues Study: Nashville is Music City[2]—an identity steeped in its community. For generations, Nashville's local music spaces have incubated emerging talent and enabled networking, jobs, and community for both its recording and live music industries. But in recent years, the impact of Covid-19 and other urban pressures on Nashville's venues has been stark. In recognition of these threats, the Nashville Metropolitan Council adopted a resolution in 2021 calling for an inventory of Nashville's independent music venues (IMVs) to enable Metro government to better "preserve, sustain, and support these venues for the decades to come"[3]. A competitive bid process and selection of a consultant took place in late 2022. Over the course of 2023, a variety of quantitative and qualitative research methods were used to inventory and classify IMVs, while in the process also detailing the threats IMVs face, understanding the needs and aspirations of the region's creative community, and proposing policy approaches for preserving and growing IMVs in concert with the businesses, neighborhoods, and districts around them.

What the report contains: Following an introduction to Nashville's music and economic development history (*Section I*) and the project's qualitative, quantitative and community engagement methodology (*Section II*), the report documents research findings, interspersed with nine profiles of independent, quasi-independent and non-independent venues (*Section III*). Recommendations for action are proposed (*Section IV*), based on findings. By bringing together the voices of Nashville music stakeholders and creators, with detailed analysis and insights on industry and urban processes, this report aims to provide a shared understanding of existing dynamics, challenges and opportunities to enable shared action in the months and years to come.

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1 *Paulson, Nashville's Smoldering R&B Scene.*
2 *Nashville Music City, The Story of Music City.*
3 *Metropolitan Nashville and Davidson County, TN, RS2021-927.*

Defining IMVs:

The first task of this report was to define and classify IMVs. This multi-part definition aims to capture the shades and nuance of different types of space presenting music:

Dedicated Music Spaces have 5+ music events per month, and music is the main draw for audiences. Of these:

Independent Music Venues have no association with another business through common ownership or affiliation, and booking or promotion are not contracted to corporate partners.

Quasi-Independent Music Venues have no association with another business through common ownership or affiliation, but booking or promotion are at least partly contracted to corporate partners.

Non-Independent Music Venues are associated with another business through common ownership or affiliation, and booking or promotion are done at least partly by corporate partners.

Occasional Music Spaces have less than 5 music events per month, and the music program is *unlikely* to be the main draw for audiences (e.g. food or drink instead). These can also be *Independent, Quasi-Independent,* or *Non-Independent.*

Research Findings:

Findings look at several dimensions of Nashville music, including *Music Spaces* and their characteristics, the *Policies and Urban Processes* that impact music spaces and actors, and *Music Community:* how Nashville's music heritage is collectively experienced and marketed.
Overview of findings:

IMVs are valuable laboratories for music—but they represent a small proportion of Nashville's venues.

- **Nashville has at least 252 music spaces**[4]. Of these, **112 are dedicated music spaces** that regularly present music (5+ events/month) as their primary offer. Of these, 24 are fully independently owned and operated, and a further 48 are understood to have some level of independent ownership.
- **Nashville's per capita concentration of venues is notably high among global music cities: more than six times higher per capita than New York City or Tokyo** (cities also studied by this research team). Venue density in Downtown and East Nashville clusters rivals that of central districts of Tokyo, Berlin and New York City.
- **Downtown is dominated by non-independent venues** (over 90%). IMVs are primarily located *outside* of Downtown, in East Nashville, Midtown and South Nashville.
- **IMVs tend to be smaller than other venue types.** Average IMV capacity is 210, while quasi-IMVs have an average 463 capacity, and non-IMVs, 1000.
- **Nashville's venues strongly center music, but are not seen by research participants as especially experimental or community-focused.** In comparison to peer cities studied using similar methodology, Nashville's venues are seen by research participants as *more likely* to promote music as their core offer, but *far less likely* to prioritize artistic experimentation onstage, or prioritize community by serving as a hub for particular niche genres, local scenes, or underrepresented communities.
- **The city's Independent Music Venues are vital spaces to local communities.** IMVs are *more likely* than quasi-IMVs or non-IMVs to present experimental and community-oriented programming, with a focus on the promotion of music and artists.

Nashville is growing quickly, and music venues are increasingly facing a math problem.

- **Nashville venue operations' "math problem":** costs are high and rising further, and it can be extremely difficult to make a profit. In addition to taking fewer chances on less-established artists or genres, some venues aim to reduce risk by either working with corporate partners, or locating further from the downtown core.
- **Relatedly, affordable rents and urban mobility are considered major issues, both for individuals and for venues.** Musicians and nightlife workers are concerned that the cost of living will price them out of central Nashville. And meanwhile, as corporate venue players increase their presence, there is fear that independent venues will soon have no place in an increasingly costly city.
- **Increased development in nightlife areas sets the scene for new conflicts between venues and neighbors.** As residential development increases along commercial corridors, venues and residences are more likely to exist close together, fueling new pressures on existing venues *and* creating challenges for potential operators to find suitable space.

4 Data as of September 2023.

Community members want Metro to more actively support the preservation and creation of venues focused on local, independent music—as well as an active community supporting IMVs.

- **Study participants perceive that Metro government has been inattentive to the plight of IMVs and independent music actors, despite their importance in regional economy and culture.** Participants hope to see official policies, programs and narratives around music shift in several ways: to better support and bring visibility to IMVs; to preserve the affordability of IMVs' real estate; and to re-balance a perceived overemphasis on Downtown, tourism, corporatization, and country music that has been at the expense of other areas, genres, communities, and independent culture. It is strongly felt that IMVs are at the core of Nashville's identity as Music City, and thus essential to support.
- **There is major community support for grassroots music in Nashville,** as demonstrated by the wide range of people and organizations who have given time, money and attention to this study's commissioning, research and creation in hopes it can lead to substantive action.

Recommendations:

The research findings informed recommendations for action. The report lays out a wide range of potential actions, from short-term to long-range, that Metro and its partners can adopt to better support IMVs and live music. Across the board, these actions rely upon improving public governance structures, fostering a "music coalition" that activates public, private and civic actors, and taking proactive steps to ensure venues' health. Aligned with the findings above, these actions aim to support music spaces, improve policies and urban processes, and foster music communities.

1. **Support live music through civic leadership and a "whole of government" approach.** A robust, repositioned Office of Nightlife should coordinate Metro government offices with one another and with a "music coalition" of dedicated civic leaders. Bolster government capacity, strategy, and data practices to more effectively support IMVs.
2. **Use policy, regulatory and development tools to support venues:** launch an independent music venue land trust and legacy business program, and use land-use regulations to create more space for music venues.
3. **Reduce challenges and costs of starting and operating new venues** through education for the next generation of IMV operators, space "matchmaking" initiatives between would-be operators and real estate partners, financial support for venues, and simplified permitting processes.
4. **Make urban mobility work for live music venues, workers and patrons**: improve urban mobility options, and try pilot projects and experiments to benefit venues.
5. **Extend music-related investments to more genres and more neighborhoods** through events, marketing, funding and policy investment in IMV-rich areas outside Downtown. Prioritize independent operators in Metro spaces and events.

THE BASEMENT EAST, TAELA, MARCH 3 2024

Project Consortium

PennPraxis: University of Pennsylvania

PennPraxis is the applied research, professional practice, and community engagement arm of the University of Pennsylvania's Weitzman School of Design. It provides opportunities for multi-disciplinary student and faculty collaboration through fee-for-service projects in the fields of Urban Planning, Architecture, Landscape Architecture, Historic Preservation and more. PennPraxis' data analysis process involves the creation of custom, open-source software tools to allow for reproducible, flexible, and complex analysis for a range of use cases related to planning, health, landscape and the built environment. Penn Associate Professor of Practice Michael Fichman is an experienced global leader in nighttime urban planning, live music, and urban data analytics.

VibeLab

VibeLab is a data-driven research, consultancy and advocacy agency dedicated to supporting creatives and preserving nighttime culture. With over ten years of experience, VibeLab works with local institutions and governments to develop strategies to effectively navigate and support the nightlife industry. We specialize in making complex data clear. VibeLab's research and consultancy helps identify growth opportunities and connects individuals, businesses, governments and institutions, to boost creativity and local economies. We are passionate about the transformative power that nightlife culture and creative communities have in urban areas. Our strength lies in our connections: we bridge the gap between government authorities, nightlife creatives and local communities. VibeLab creates change with sustainable solutions, backed by data to make cities thrive at night.

Culture Shift Team

Culture Shift Team (CST) helps organizations better understand and leverage the shifting demographics and culture that create business opportunities and challenges in the marketplace and workplace. CST helps leaders to shape, strengthen, and build culture through diversity, equity, and inclusion data, strategy, and education, while its multicultural marketing and advertising agency team designs powerfully relevant communication strategies for all audiences. CST is driven by passion to help organizations achieve equity and inclusion and ultimately remove barriers to human potential and performance, believing that change for the greater good comes when people who have the power extend privilege to those who do not, and when historically underrepresented communities are empowered to create spaces that include them.

Project partner: Metro Planning

Metro Planning is the department of the Metropolitan Government of Nashville and Davidson County tasked with providing design guidance, reviews of zoning and subdivision applications, and shaping public policy related to growth, preservation, and development. The Planning Department is committed to proactive, community-based planning founded on public participation, and to the building of liveable, sustainable communities.

Funding and support for the Nashville Independent Venues Study was also provided by Metro Arts Commission, the Metropolitan Historical Commission, Metro Office of Nightlife/Beer Board, the Nashville Convention and Visitors Corporation, and the Nashville Area Chamber of Commerce.


OH HE DEAD
Bombargo
MIDNIGHT SOUTH
THE DIRTBOMBS
FORTYFIVES
WHIRLWIND HEAT
3.9.03
SLOW BAR
THE BIG WHEELS!
PATTY GRIFFIN
HARRIERS
DISCORD
I AIN'T BASHFUL
ZOPTICON
CORB LUND
THE LADYBIRDS
LABOR DAY 1982
slow bar

Section I: Introduction

1.0 Introduction: Nashville's Golden Egg

NASHVILLE, TENNESSEE IS A CITY IN MOTION, CONSTANTLY GROWING AND REINVENTING ITSELF.

Nashville and Davidson County—a consolidated city-county—has seen significant change since 2000, its population growing by roughly 25% to over 715,000. In fact, Davidson County's population has grown by double-digit percentages in almost every decade since 1790[5]. Nashvillians are used to this kind of thing: it was this dynamism that brought many to Nashville to realize their dreams. But the last two decades have felt different to locals. Nashville emerged as a tourism magnet in the early 2000s, particularly due to its music heritage. Since then, many have since begun to feel that corporatization, rising land values, and an insatiable "growth machine" are killing the goose that lays Nashville's golden egg: the places, people, historic locations, environments, and opportunities that make Nashville "Music City."

The year 2020 brought the tensions of growth into sharper focus. Covid-19 shut down live entertainment. A catastrophic tornado and a tragic bombing destroyed nightlife businesses. The city grappled with its identity and visions of how it should be governed. Music venues organized in Nashville and nationwide[6] to appeal for government support. But not all of Nashville's beloved independent music venues (IMVs) have emerged unscathed. Independent spaces presenting varied programming with deep ties to Nashville's local artists, scenes and communities—Exit/In, Douglas Corner Cafe, Cannery Ballroom, Mercy Lounge, High Watt and other spaces—closed their doors due to a variety of accumulating pressures. Even while some of these spaces have reopened under new names or owners, these pressures have not diminished for the city's independent venues.

Explicitly in response to these closures, this study was commissioned by a 2021 Council resolution, and developed in partnership with the Metropolitan Planning Department, Metro Arts Commission, Nashville Office of Arts & Culture, Metropolitan Historical Commission, the Nashville Convention and Visitors Corporation, and the Nashville Area Chamber of Commerce[7]. Proposals were solicited in 2022 through a competitive bid process, a consultant was chosen at year's end, and the study commenced in January 2023. This report's aims complement and build on other recent research, such as Nashville Area Chamber of Commerce's 2020 *Music Industry Report*.

What is an IMV, and why do IMVs matter? This study defines a "dedicated music space" as a space presenting live music as its core program on a regular basis. An IMV is a dedicated music space that does not outsource its core functions to corporate partners, and is not owned in conjunction with another venue (see *Section III: Findings* for more). While Nashville is often associated with its country music superstars and major labels, the interdependent "ecosystem"[8] of music industry people and businesses—which represent over 80,000 jobs and $5.3 billion in revenue, according to one study[9]—is enormous, and far more concentrated than any other US region. And venues are critical to this system. Venues need promoters, security, graphic designers, bar staff, sound and light technicians and more—and as royalties and music sales become scarcer in a streaming world, songwriters, labels, musicians and publishers need venues to make a living.

5 *US Census Bureau, Decennial Census, Davidson County, TN.*
6 *Music Venue Alliance Nashville, MVAN.*
7 *Nashville.gov, Music Venues Study.*
8 *Shapiro, This Must Be the Place.*
9 *Nashville Area Chamber of Commerce, Music Industry Report 2020.*

"My very first night in Nashville (24+ years ago) was at a now defunct indie venue. It was life changing. I knew I had to work my way into the most creative and inspiring community I'd ever witnessed. Every moment since then has been a blessing."

—Travis Collinsworth, Venue Co-Owner, The 5 Spot

The independence aspect of independent music venues is critical. When venues make their own decisions about who to book or hire, and how to promote, they are more likely to engage with local artists and a more diverse group of acts and entrepreneurs. This independence allows for the artistic risk-taking and creativity that pushes music forward and keeps a scene local. These venues are a critical innovation laboratory for the music industry. Almost every musician's career starts in a small venue that takes a chance on them[10] [11]. The lack of corporate intermediaries means deeper links between a venue and its community—Nashvillians producing entertainment for Nashvillians, often by Nashvillians.

The essence of IMVs' struggle is economic. In short: venues have a "math problem." Music operations are not the most lucrative way to use a given property or piece of land, and operational margins are very thin. Whereas a corporate venue operated by a national company can offset a few bad nights with good nights in other markets, an IMV, especially one taking chances on local artists, is exposed to much more risk. As real estate values rise, it's harder for a landlord to turn down development offers, or keep from raising rents. This cost gets passed to the venues, making it harder to operate in desirable locations. High costs can also preclude would-be venue owners and operators, particularly those from marginalized groups, from entering the market at all. And meanwhile, venue workers and audiences increasingly struggle to live affordably nearby. How do you square the circle?

This study examines Nashville's music venues—particularly IMVs and other "dedicated music spaces"—and suggests how Metro Nashville government and other civic, industry and private actors can support them. This report aims to understand:

- **What makes a space independent, and what does that mean to music scenes and communities?**
- **What kind of programming do IMVs offer in comparison to other venues, and how do they operate?**
- **How are venues born, and how do they die?**
- **How do economic forces, including land markets, housing, and operational costs, affect IMVs?**
- **What do venues and music community members say they need?**
- **How do other cities or communities support music venues through governance, regulation, or financial support?**
- **What policies or programs can Metro implement given its powers and legal constraints?**

A wide range of people and organizations have generously given time, resources and attention to bring this study to life. To the public officials advocating for this study's creation, the civic and business organizations whose partnership and participation has been crucial, and the venue owners and operators, advocates, promoters, musicians and music enthusiasts who contributed their insights, information, stories, and energy—a heartfelt thanks for your support. This report aims to enable the next steps in the shared work ahead.

10 *Michelson, The Bluebird Café.*

11 Famously, Taylor Swift's 2004 performance at the Bluebird Cafe is cited as her "discovery" moment. It's widely noted that the Bluebird's independent, female ownership was critical to artists like Swift getting access to the stage.

1.1 History

How did we get here? While Nashville's music history is too extensive to be fully captured here, this timeline tracks key events that have made Nashville the "Music City" depicted in this report: not only the evolution of important venues and music communities, but also the policy, governance and population shifts that have informed them. By tracing history, it is possible to see the cycles of new live music venues opening and closing, often due to urban pressures and new development. Though Nashville's music scene has been constantly in flux, there is and always has been a demand for space to make music. Understanding both the historical context and new pressures of recent decades can help chart the path forward.

1870s

(Davidson County pop. 62,897 / Nashville pop. 25,865)

Nashville rises in prominence as a music publishing town. The Fisk University Jubilee Singers, an all-Black choral ensemble, tour Europe in 1873; their performance inspires Queen Victoria to dub Nashville a "city of music"[12].

1890s

(pop. 108,174 / 76,168)

The Union Gospel Tabernacle, later Ryman Auditorium, opens on Lower Broadway in 1892. The Fisk Jubilee Singers are one of the first musical performers[13]. Nashville Musicians Association, AFM Local 257, is founded in 1902[14].

1920s

(pop. 167,815 / 118,342)

Lula Naff becomes manager of the Ryman in 1920, booking jazz, country and R&B acts[15]. Radio station WSM launches the *Grand Ole Opry* radio broadcast in 1925, a weekly live music performance that still runs to this day. The Bijou Theater, considered one of Nashville's first live music venues and a leading venue for Black performance at the time, transitions from hosting plays, to showcasing blues and early rock 'n' roll by the early 1920s[16].

1930s

(pop. 222,854 / 153,866)

North of Broadway, Jefferson Street rises to prominence as the center of Nashville's Black musical community[17]. Speakeasies, supper clubs, dance halls, and nightclubs like the Del Morocco and New Era were some of Nashville's first independent venues; in later decades, they supported internationally famous local and touring acts including Etta James, Ray Charles, Little Richard, Jackie Shane and a young Jimi Hendrix[18].

1940s

(pop. 257,267 / 167,402)

In 1943, the Ryman becomes the home of WSM's *Grand Ole Opry*[19], launching hundreds of country music careers and Nashville's identity as a touring and recording hub[20]. Between sets, Opry artists playing R&B, jazz and country would venture from the Ryman's tiny green room out to the honky tonks on and near Broadway, like Skull's Rainbow Room (est. 1948) and Tootsie's Orchid Lounge (est. 1960)[21]. WLAC, later to be joined by Black-operated radio station WSOK, begins broadcasting R&B nationwide from Nashville[22].

1950s

(pop. 320,388 / 173,359)

The 1952 Capitol Hill Redevelopment Project designates the predominantly and historically Black area of Jefferson Street for redevelopment, leading to displacement of over 400 families and demolition of the New Era Club and Bijou Theater[23] [24]. Meanwhile, country music's popularity in Nashville and nationwide continues to grow, with creativity fueled by performers' sets at the Ryman and numerous honky tonks emerging on Lower Broadway. "Music Row" develops as a Nashville music industry hub, with radio stations, recording studios and publishing houses located in 19th century homes and 20th century office buildings[25].

12 *Nashville Music City, The Story of Music City.*
13 *Ryman Auditorium, History.*
14 *Nashville Musicians Association, About Us.*
15 *Ryman Auditorium, History.*
16 *National Register of Historic Places, Exit/In Registration Form.*
17 *Mitchell, Jr., Nashville's Jefferson Street.*
18 *Paulson, Nashville's Smoldering R&B Scene.*
19 *Ryman Auditorium, History.*
20 *Stimeling, The Birth of the Nashville Recording Industry.*
21 *Gold and Castillo, The Honky-Tonks and Dives of 1960s.*
22 *Country Music Hall of Fame, Hey John R!: Nashville's R&B Radio.*
23 *TNVacation.com, Jefferson Street Music District.*
24 *National Register of Historic Places, Exit/In Registration Form.*
25 *Nashville Tours, Music Row Nashville Guide.*

1960s

(consolidated pop. 399,000)[26]

Nashville and Davidson County merge into one metropolitan governing body in 1963, boosting population, tax base and city revenues[27]. The Country Music Hall of Fame® and Museum opens on Music Row in 1967[28]. R&B TV shows *Night Train* and *The!!!!Beat* debut[29]. In 1968, Interstate I-40's development destroys the Del Morocco (on the heels of Jimi Hendrix's residency there) and decimates Jefferson Street, ending that chapter of Nashville music history[30].

1970s

(pop. 448,000)

The *Grand Ole Opry* leaves the Ryman for Opryland north of downtown[31], while the honky tonks and musical vibrancy of Lower Broadway are largely replaced by adult bookstores, massage parlors and related perceptions of violence[32]. The Ryman is slated for demolition but ultimately saved in 1974 by historic preservationists and a handful of Nashville musicians[33]. New venues open including the Exit/In[34] (Midtown, 1971) and Station Inn (the Gulch, 1974)[35], bolstering space for genres beyond country music.

1980s

(pop. 477,000)

Mercy Lounge, 12th and Porter, 328 Performance Hall[7] and the Bluebird Café[36] open. Midtown's Elliston Place becomes known as the "Rock Block" due to rock venues like The Gold Rush, Exit/In and Elliston Square/The End[37]. The city further embraces historic preservation, adopting historic conservation zoning in 24 of Nashville's neighborhoods.

Early 1990s

(pop. 510,000)

Mayor Bredesen prioritizes Downtown's revitalization, reinvigorating parts of Nashville's music economy while displacing others. The building housing bluegrass mainstay Norma's Dusty Road is demolished for the new Juvenile Justice Center[38] [39], forcing Norma's to move to East Nashville. Rhinestone Western Wear opens (1992[40]), later to become Robert's Western World. Zoning updates allow residential development downtown. Large-scale projects including hotels and two new stadiums move in[41].

Mid-late 1990s

Radio Cafe[42] and The 5 Spot open in East Nashville, drawing the city's musical attention away from downtown[43]. Nissan Stadium opens downtown. The Opryland theme park closes in 1997 after a successful 26-year run as "Opryland USA,"[44] which, years later, executives regret because of its success[45]. The former Opryland site is now Opry Mills.

2000s

(pop. 569,000)

Mayor Bredesen's tenure comes to an end, but not before strengthened economic development efforts. The Ryman, the Frist Art Museum and Nashville Public Library are revamped while other, smaller historic venues are razed.[46] Mayor Karl Dean cracks down on illicit businesses and activities along Lower Broadway, invests in the convention center and works to reframe the area as a tourist destination. Dean's "Music City" Music Council births the Ascend Amphitheater, rent-controlled musician apartments the Ryman Lofts, and funding for music education in Nashville schools. East Nashville's music scene continues to grow (Slow Bar, 2000[47]; Family Wash, 2002[48]) while some longtime downtown venues shutter to make room for new development (328 Performance Hall, 2002; Sutler Saloon, 2005[49]). The Country Music Hall of Fame moves from Music Row to a new 130,000 square-foot building downtown[50] as Music Row faces growing development pressures, fueling initiatives like Save Music Row and the Music Industry Coalition.

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26 Note: Nashville and Davidson County consolidated in 1963; thus, population totals are represented here with a single figure from the consolidated government from the 1960s onward. (*US Census Bureau, Decennial Census.*)

27 *Metropolitan Government of Nashville & Davidson County, History.*

28 *Nashville Tours, Music Row Nashville Guide.*

29 *Country Music Hall of Fame, All Aboard the Night Train!.*

30 *Jefferson Street Sound Museum, Our Story.*

31 *Ryman Auditorium, Did Ryman Auditorium Used to Be a Church?.*

32 *The Nashville, Nashville through the Ages.*

33 *Ryman Auditorium, Did Ryman Auditorium Used to Be a Church?.*

34 *Tate, Nashville Music Venues.*

35 *The Station Inn, History.*

36 *Rodgers, How Did Nashville Get to Be the 'It' City?.*

37 *Paulson, Nashville's 'Rock Block.'*

38 *Griffith, The Bar That Time Forgot.*

39 *Gold and Castillo, The Honky-Tonks and Dives of 1960s.*

40 *Robert's Western World, About.*

41 *Buntin, Amid Scandal and Explosive Growth.*

42 *Ridley, Off the Air.*

43 *Havighurst, The Family Wash Legacy.*

44 *Greensboro News & Record, Opryland Obituary.*

45 *Snyder, Why Did Gaylord Close Opryland?*

46 *The Nashville, Nashville through the Ages.*

47 *Ridley, Slow to Go?*

48 *Havighurst, The Family Wash Legacy.*

49 *Rogers, The Sutler Saloon.*

50 *Nashville Tours, The Country Music Hall of Fame.*

Early 2010s

(pop. 626,000)

Damage from May 2010 floods force artists and developers to recognize the importance of Downtown Nashville music history, catalyzing a burst of development supporting the "Music City" brand, and the opening of major country artists' themed clubs, such as Jimmy Buffett's Margaritaville (2010[51]).The historic RCA Studio A is narrowly saved from demolition as Music Row is challenged by gentrification and development pressure[52]; Music Industry Coalition forms. Nashville's IMVs, Downtown revitalization, and East Nashville's hip reputation lead the *New York Times* to dub Nashville the "It City" of 2013[53].

Late 2010s

Nashville's visibility and music tourism creates booming development and speedy gentrification. Real estate prices skyrocket[54] and music tourism explodes, rising from 2 million visitors per year in 1998 to 14 million in 2018[55]. Venues of importance to the city's Black music scene close, including The Place (Downtown), Level 88/Lucy Blu (Gulch) and Limelight (East Bank)[56]. As of this writing, these venues have not moved elsewhere or been replaced[57]. National booking and ticketing platform LiveNation wins bidding to operate Ascend Amphitheater (2015)[58] and offers to buy Marathon Music Works and Exit/In (2016)[59]. The Other Nashville Society and Music Venue Alliance (MVAN) are established (2017).

2020

(pop. 715,000)

A March 2020 tornado tears through Middle Tennessee, killing 25, injuring hundreds, and destroying homes, infrastructure and businesses, including the Basement East[60] [61]. Days later, the Governor of Tennessee declares a state of emergency for Covid-19: the *Grand Ole Opry* suspends ticketed audiences at their shows; businesses on Lower Broadway are ordered to close[62]. The National Independent Venue Association (NIVA) proposes the Save Our Stages Act in October 2020, seeking support for live venue operators through late 2021[63]. Nashville's Music Venues Alliance (MVAN) forms, whose members represent local independent spaces[64]. MVAN, NCVC and Jack Daniel's co-produce Music City Bandwidth[65], broadcasting virtual concerts from 15 Nashville independent venues to support musicians and venues during lockdown; NCVC allocates $621,000 to support participating venues[66].

2021

Despite 2019 advocacy efforts by operators to "Save the Rock Block"[67], Exit/In land owners announce the sale of the venue in April, leading to a purchasing battle between then-owner Chris Cobb and eventual owner, AJ Capital, an international real estate firm headquartered in Nashville. The sale faces backlash from Nashville's music community.

2023

Exit/In reopens. Broadway Entertainment Association is formed, representing 15 downtown honky tonks[68]. Council approves the construction of a new stadium for the NFL's Tennessee Titans, slated to include two concert stages[69] in a 60,000-capacity[70] facility. The $2.1 billion cost for the stadium's construction will be funded through both public and private funds, including financing from the Titans and NFL, alongside $1.26 billion in public financing from several revenue streams, including a 1% county hotel occupancy tax increase. This is the largest public subsidy ever for an American stadium.[71]

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51 *Franklin, Margaritaville.*
52 *National Trust for Historic Preservation, Nashville's Music Row Updates.*
53 *Severson, Nashville's Latest Big Hit.*
54 *Benfield, Zoning Reform Strengthens Nashville.*
55 *Buntin, Amid Scandal and Explosive Growth.*
56 *Williams, Stadium-Area Site Sells.*
57 The Place (217 2nd Ave.) was succeeded by The Listening Room, which subsequently moved; the venue footprint is now occupied by a high-rise. Level 88/Lucy Blu is now a dog care facility, Bark Public (609 9th Ave S). Limelight's property was sold in 2019 to a local hotel operator and stands vacant as of this writing.
58 *Rau, Live Nation Eyes More Expansion in Nashville.*
59 *Rau, Nashville's Live Music Scene.*
60 *Stanglin, Whitney, and Estes, Pretty Much like an Explosion.*
61 *Sistek, Nashville's Scars.*
62 *Timms, Coronavirus in Tennessee.*
63 *SaveOurStages, About Us.*
64 *Music Venue Alliance Nashville, MVAN.*
65 *Nashville Music City, Music City Bandwidth.*
66 Venues included 3rd & Lindsley, Station Inn, DRKMTTR, Exit/In, Mercy Lounge, Rudy's Jazz Room, Springwater Supper Club & Lounge, The 5 Spot, The Basement, the Basement East, the Bluebird Cafe, The End, The East Room,The High Watt, and The Listening Room Cafe.
67 *Cobb, Save the Rock Block!*
68 *Mazza, New Downtown Business Alliance.*
69 *Muret, Two Concert Stages Part of Titans' Proposed Stadium.*
70 *Nissan Stadium, Nissan Announce Naming Rights.*
71 *Stephenson, Nashville on brink of historic decision.*


Low Volume
Lounge

Section II: Methodology

2.0 Project Design

"My only reason for coming to Nashville from Chattanooga was for music, and it was usually local shows at the small venues...my best memories are from being packed into the small places where the support for musicians felt authentic and sincere."

—Jessica Arthur, Architect, Nashville GSA

This project's core purpose is to inventory and classify IMVs, while in the process detailing the threats IMVs face, articulating the needs and aspirations of the region's creative community, and proposing policy approaches for preserving and growing IMVs alongside the businesses, neighborhoods, and districts around them. Community-engaged data collection was central to this project—both to gather accurate and well-contextualized data, and also to involve community and industry members in the research process, outputs and identifying next steps.

Metro defined the scope of this project to include classification of independent music venues, an inventory of IMVs, measurement of key IMV characteristics, and analysis of IMVs' importance to the music industry. Alongside case studies from other localities, and detailed profiles of selected IMVs' operations, these research outputs were then to inform recommendations: proposed "public policy tools to equitably support, sustain and grow IMVs."[72] The scope did not include analysis of shuttered venues. The study, as it now appears, is the product of the project team's proposed approach, which was accepted by Metro in awarding the contract. It includes some elements not included in the original scope, including a community engagement process, case studies of policy instruments and governance strategies, and data collection related to non-IMV music venues for comparative purposes.

This project used spatial and quantitative analysis, public engagement events, focus groups and interviews, desk research, and written feedback via an online form to gather information. This section details the overall process and methods.

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72 *Metropolitan Nashville Government, RFQ 269260.*

2.1 Process

Figure 1: Overview of project activities and timeline

Stage 1: January–April 2023

Literature review
Broad review of gray and academic literature, media and web content pertaining to Nashville's music and nightlife scenes, including regulation, zoning and related codes, as well as existing IMV databases.

Stakeholder database development
Identification of relevant music and nightlife stakeholders to engage through focus groups and individual interviews.

Preliminary meetings
Initial site visits and preliminary in-person interviews with local stakeholders in February and March 2023.

Venue database development
Research and development of a venue database based upon requested criteria and modified Creative Footprint metrics.

Spatial and economic database development
Consolidation of US Census and municipal open data records on properties, licenses and related information, to be used in spatial analysis and reporting.

Stage 2: May–September 2023

Focus groups
Preparation and hosting of virtual small group sessions to populate venue database through consensus building with local music industry subject experts from March–August, 2023. In-person small group sessions with relevant stakeholders in May 2023.

Interviews
24 in-depth, primarily virtual interviews:
with venue operators, for *Venue Profiles*,
with policy experts of related urban music economies in other cities, for *City Case Studies*,
with local subject matter experts, for further depth into policy tools and local conditions.

Open House
Preparation and hosting of public Open House event in May 2023 to engage a wide range of Nashville-based stakeholders to gather data related to IMVs, music space and local framework conditions.

Office hours
Preparation and hosting of informal, virtual drop-in sessions in September 2023 to engage interested participants who were unable to attend Open House, and to share initial findings with local stakeholders.

Stage 3: August–October 2023

Research data analysis
Analysis of all qualitative and quantitative data obtained from venue database research, focus groups, venue profiles, case studies of relevant peer cities' music economies and policies, and additional interviews.

Report development
Compilation of data and report writing.

Recommendations formulation and report development
Consolidation of data into actionable policy insights and strategies for local stakeholders related to governance, business models and policy frameworks.

Stage 4: November 2023–Spring 2024

Report finalization and release
In consultation with Metro Nashville Planning Department, finalization of report content, production and release of designed final output.

2.2 Quantitative Methodology

The research team collected and analyzed a database of Nashville spaces where music performances take place. This study integrated the approach used by the Creative Footprint[73]: sourcing information about venue spaces and programming from government records, and from knowledgeable individuals in the local scene. Venue identification took place during spring and summer of 2023[74].

These data generally fall into a few distinct categories:

Space: Measurements related to the internal and external physical conditions of the venue, including capacity, age, location, and condition.

Programming: Metrics related to creativity and culture, including how venues promote cultural offerings in their marketing, to what extent venues facilitate interdisciplinary and/or experimental artistic formats, how community-centered venues are, and if venues foreground original creative content.

Operations and Finance: Data related to business processes, including ownership structure, booking and promotional model, land ownership, lease terms, business licensing, and property valuation.

Community-Engaged Data Collection

Many of these data represent the evaluation of expert members of Nashville's music community—generated by paid focus-group participants, paid local project team researchers, or music community members invited to public events.

The community approach is important for two reasons. First, many important characteristics of music venues and cities at night are not well measured by government data sources, including economic data, licensing records and the US Census. Second, the involvement of community members in a data collection process related to their lives and interests is an opportunity to generate investment in its outcomes, and to gather data that reflect their perceptions of the local reality[75], in turn informing recommendations for action.

Some critical information used in this study is subjective—for example, whether a venue's programming is likely to be "experimental" in nature. Individual data points may be subject to disagreement. Final assessment was worked out through consensus in facilitated sessions by local project team members and focus group experts.

The measurements are designed to avoid issues of personal taste and instead assess expert agreement on the "likelihood" of certain statements regarding the nature of the venue. There are some data points that could not be ascertained with high certainty due to the large volume of "occasional music spaces" and an inability to contact some venues or research those with a limited promotional footprint.

Building A Venue Database

1. *Early 2023:* CST research assistants built an initial database of over 300 spaces where musical performances occur. This was taken from local knowledge by Nashville-based researchers, internet listings of performances, searches of commercial databases for key terms, and from a database of music venues collected for the Nashville Area Chamber of Commerce 2020 report[76].

2. *March–May 2023:* The database was narrowed down, first by a series of 9 focus groups with 11 total participants (project liaisons, joined by local industry experts). Open House attendees (70+) subsequently audited the draft list, adding missing venues, noting when spaces did not fit listed criteria, and contributing information about venue characteristics.

3. *June–August 2023:* Nashville-based project team members, community forum participants and expert focus group participants made an assessment of 32 venue characteristics, including responses to specific statements (see the following table) to indicate their level of agreement or the validity of the statement for a given venue. This assessment was augmented with desk and field research. Initial assessments were then discussed and finalized in a series of facilitated workshops with experienced local music journalists, promoters, venue managers and artists.

73 A data-driven research project by nighttime consultancy agency VibeLab in partnership with PennPraxis, which studies creative spaces and communities to examine the cultural value and impact of music and nightlife in the city. Creative Footprint defines a music venue as spaces where music is the main driver of attendance, that program at least one publicly-advertised music event per month. See more at *www.creative-footprint.org.*

74 Some venues have opened or closed since data collection was finalized; this information was current as of September 2023.

75 The Global Nighttime Recovery Plan, Chapter 7 covers the limitations and opportunities of data in nighttime governance for practitioners and communities. See More: Nighttime.org, Global Nighttime Recovery Plan.

76 *Nashville Area Chamber of Commerce, Music Industry Report 2020.*

Figure 2: Data points assessed for each venue, including Likert scale assessment questions

Question	Value(s)
Ownership structure: Is the venue independently owned and operated? (No association with another business through common ownership or affiliation: e.g. sharing of employees, resources, branding, etc.)	*Yes* *No* *Information unavailable*
Corporate booking: Are booking or promotion contracted to corporate partners?	*Always* *Sometimes* *Never* *Information unavailable*
Events per month: What is the average number of public music events per month? (Excluding weddings, private birthday parties, private corporate events, etc.)	*1-4* *5-10* *11-20* *20+*
Years of Operation: What is the length of time for creative usage (overall time/not just recent operator)?	*0-3* *3-10* *11-20* *20+ years*
Interdisciplinarity: Does the venue offer events for non-music presentations, such as visual art, performing art, panel discussions or film screenings?	*1. Not at all likely* *2. Not too likely* *3. Somewhat likely* *4. Very likely*

Question	Value(s)
Main Purpose: Is the music program the main purpose why people attend this venue, and not e.g. food, drink, products?	*1. Not at all likely* *2. Not too likely* *3. Somewhat likely* *4. Very likely*
Community Focus: Is the venue likely to be any of the following... a consistent platform for a niche genre, a space for underrepresented communities or music scenes, a neighborhood community hub and not solely walk-in tourists?	*1. Not at all likely* *2. Not too likely* *3. Somewhat likely* *4. Very likely*
Promoting Events: Is the promotion and marketing of this space focused on artistic content (artists, lineups, performances)?	*1. Not at all likely* *2. Not too likely* *3. Somewhat likely* *4. Very likely*
Experimentation: Compared to other venues in the city: Is this venue a platform for niche or experimental trends, sounds and art forms? Is it a place for experimental performers or extraordinary event concepts?	*1. Not at all likely* *2. Not too likely* *3. Somewhat likely* *4. Very likely*
Threats: Is there an urgent threat to the venue related to: relationships with neighbors rents or operation costs licensing or regulations?	*Yes / No*

4. Venue locations and characteristics were related to a variety of economic and demographic data sets, using a custom, open-source software environment built and maintained by PennPraxis[77]. Data sets included:
   - Metro planning databases of property characteristics—sales, appraisal and assessment values, ownership, and building characteristics;
   - Metro planning databases of zoning and land use;
   - US Census data on area demographics, rents and income;
   - Metro business license records;
   - Metro Fire capacity data;
   - Nashville Community Planning area boundaries (e.g. neighborhoods).

5. The research team then analyzed the data set with the following general steps:
   - Create descriptive statistics related to independence and programming variables;
   - Use administrative data to understand the land use and market dynamics related to venue locations;
   - Examine the relationship between venue location, venue independence and venue program, and Nashville's geography and built environment;
   - Understand differences and similarities between IMVs and other dedicated music spaces in economic, programmatic and geographic terms;
   - Mine the data set for important trends related to the geography of venues and their programming;
   - Generate maps, charts and tables to effectively communicate findings through visualization.

A data dictionary associated with all characteristics of the venue database and their origins are included in *Appendix 2*. Note that demographic data on owners and managers, and information regarding the exact nature of ownership structures was not systematically assessed. This was researched in the qualitative component of the project through interviews and engagement.

77 The venue database and analysis code are available for public use and reproducibility at: https://github.com/mafichman/Nashville_IMV/.

2.3 Qualitative Methodology and Engagement

The qualitative, quantitative and engagement aspects of this study are tightly intertwined: engagement events simultaneously gathered data for qualitative and quantitative analysis, while also seeking to build a sense of ownership, representation and participation among Nashville music community stakeholders. Drawing upon the existing Creative Footprint methodology, PennPraxis and VibeLab used a range of session formats, each with distinct research goals and focuses:

Figure 3: Overview of engagement activities conducted during process.

One **Open House** event solicited insight from participants on several aspects of Nashville's music spaces and local frameworks:

- policies and regulations;
- governance, accessibility and discourse;
- venues and real estate;
- data related to venues and their programming.

Co-led by VibeLab and PennPraxis staff with local liaisons, small-group discussions and interactive activities prioritized accessibility and fostering relationship-building between local attendees.

Two **focus groups** gathered in-depth and candid insights from a small group of experienced participants to:

- identify key threats to venues,
- understand notable local processes of venue development,
- validate potential proposals or recommendations.

One session with venue operators focused on daily operations; one for venue "advocates" looked more broadly at regional issues and opportunities.

24 **in-depth interviews** (plus additional informal exchanges in-person, via video or phone, and via email) formed the basis of *Venue Profiles* and *City Case Studies* while also offering deeper nuance into local processes and areas. (See *Section III: Findings* and *Appendix 1: City Case Studies* for more.)

Two **Office Hours** (informal, drop-in virtual sessions) were offered late in the engagement process to enable participation for those who could not attend the Open House, and to validate findings and priorities from earlier research steps.

An informal **online form** enabled participants to share insights, and subscribe to the periodic **project newsletter** even if unable to attend in-person or virtual events, providing ongoing updates and means of participation.

Participation and Stipends

To make participation as equitable and accessible as possible, the project hosted a mixture of in-person and virtual meeting options, and provided stipends to recognize the value of participants' knowledge and offset the cost of participation. Twelve stipends were offered for focus groups and interviews conducted with local participants.

2.4 Research Participants

In addition to the project team and community liaisons, this study engaged 154 participants across the modes of engagement described above.

To engage participants, Culture Shift Team conducted intentional outreach by leveraging diverse professional networks to reach such as the TN Latin American Chamber of Commerce, the TN Pride Chamber, and the Nashville Black Chamber of Commerce in order to reach venue owners, musicians, and industry professionals inclusive of Black, Latine[78], Asian and LGBTQ+ communities. Identity data was tracked to measure representation in the stakeholder database and open house. Representation of stakeholders who are racially or ethnically diverse in the database was about 13%. All stakeholders received invitations to the open house; selected participants were additionally invited to participate in focus groups and one-on-one interviews. All research participants are named in *Special Thanks.*

Collectively, participants in the open house, focus groups and interviews represented venue operators, musicians, event promoters and organizers, real estate developers, economic development professionals, artist managers, talent buyers and programming professionals, elected officials and candidates, local students and music enthusiasts. While participants represented a range of ages, backgrounds, ethnicities, sexual orientations and gender identities, a majority were white and a slight majority male[79]. They represented a blend of experience, from several years to multiple decades' work in music and nightlife across a range of genres.

Participants are generally quoted by name throughout the report, unless a preference for anonymity was expressed (e.g. via online form). Where it was not possible to identify individual speakers from session transcripts, participants are identified by session rather than name and/or affiliation.

2.5 Research Geography

The research scope includes only the area of Metro Nashville and Davidson County, although the research team acknowledges that Nashville's music and nightlife impact extends beyond these boundaries and across the region. This region was considered in qualitative research and in venue case studies—there are relevant venues and areas outside the County, and regional out-migration is a noted concern.

To conduct this research, the Community Planning Areas of Metro Nashville were used as the "neighborhood" scale geography for forming insights about different areas within the County (*Figure 4*).

78 Latine is used throughout this report as a gender-neutral term to represent communities of Latin American descent.

79 Of the participants who pre-registered for the Open House event (the only engagement event for which demographic data was collected by participant self-report), 31 identified as BIPOC (Black, Indigenous, People of Color), and six identified as LGBTQ+. Further breakdown: 63% self-identified as white, 9% Black or African American, 2% Asian or Asian American, 14% Hispanic or Latine, 4% of two or more racial/ethnic identities, and 9% declined to answer. 54% self-identified as men, 39% as women, 2% non-binary or gender non-conforming, and 5% declined to answer.

Figure 4: Metro Nashville and Davidson County Government's Community Planning Areas.

Community Planning Areas

THE BASEMENT EAST, TAELA, MARCH 3 2024

Section III: Analysis & Findings

"Exit/In, Basement East, Live Oak, Listening Room, Riverside Revival, Losers, The Local...Tin Roof, Whiskey Row, Tootsie's, Bluebird...These venues created the story of Nashville.
...Without independent venues, we accidentally turn into a Vegas version of reality.
...If the grit goes, the heart goes. If the heart goes, the music dies. Nashville is important because of these fundamental spots. Dreams start somewhere and it is RIGHT here in these venues."

—Ty Bentli, Radio Show Host/Producer, The Ty Bentli Show

3.0 Summary of Findings

Music venues are essential for music industries—and downtown Nashville has one of the densest clusters of venues and important music industries anywhere in the world. As places for writers, musicians, DJs and others to experiment and earn a living, venues are keystones in the arch of actors that make Nashville's music industry thrive. This section presents this study's findings, generated from qualitative and quantitative research in Nashville, plus comparative research of how other city governments support music venues, cultural industries, nightlife and tourism.

The findings in this section are divided into several categories:

- *Music Space:* where live music is played, and the characteristics of these spaces;
- *Policies and Urban Processes:* official processes and urban factors that impact music spaces and actors;
- *Music Community:* how Nashville's music and heritage is collectively experienced and marketed.

Overview of research findings:

IMVs are valuable laboratories for music—but they represent a small proportion of Nashville's venues.

- Nashville has at least 252 music spaces as of September 2023. Of these, 112 are *dedicated music spaces* that regularly present music as their primary offer. IMVs—independently owned and operated—represent 24 of those 112. A further 48 have some level of independent ownership—these are known as *quasi-independent music venues*.
- Nashville's *per capita* concentration of venues is notably high among global music cities: more than six times higher per capita than New York City or Tokyo. The venue density of Downtown and East Nashville clusters rivals that of central districts of Tokyo, Berlin and New York City.
- IMVs are primarily located outside of Downtown, in the Community Planning Areas of East Nashville, Midtown and South Nashville. Downtown is dominated by non-independent venues—both dedicated and occasional music spaces.
- Data confirm community sentiment: Nashville IMVs are vital spaces for local communities and for Nashville's music industry. IMVs act as creative laboratories. They are more likely to present experimental and local programming, with a focus on the promotion of music and artists.

Nashville is growing quickly, and music venues have a math problem.

- It's hard to turn a profit running a music venue—a dedicated music space where music is the primary programming—and especially an independent one. A good space in a good location is critical to success and longevity/staying power. However, real estate and other costs are becoming increasingly expensive, making new venues hard to start.
- It can be financially risky to put on unconventional acts or give a new local artist a shot. Higher rents are associated with a lower likelihood of experimental and community-focused programming: high rents can reduce venue operators' ability to invest in local or experimental programming, creating an undesirable tradeoff as rents continue to rise.
- One way venues survive is by working with corporate partners, to offload risk and costs. However, venues with corporate relationships were less likely to present community-focused and experimental programming.
- As another survival strategy, IMVs seek out cheaper land, further away from the downtown core.
- Corporate venue players are increasing their presence in Nashville, and there's a fear among research participants that this will keep happening until IMVs are gone and music industry workers live far from the city center, pushed outwards by cheaper rent.

Community members want Metro to more actively support the preservation and creation of venues—as well as an active community supporting IMVs.

- There's a perception that the government has been inattentive to the plight of IMVs, despite their pivotal role in sustaining the region's economy and culture. Stakeholders hope to see Metro provide funds and attention to IMVs, particularly preserving the affordability of real estate.
- Some perceive that policies and narratives have long favored Downtown tourism and growing corporatization of music, at the expense of neighborhood and grassroots scenes. There is a related sense that country music (primarily played by white artists for primarily white audiences) is prioritized, while Black and Latine artists and audiences are largely ignored.
- The high and increasing cost of living, limited parking availability, and conflicts between venues and residential neighbors are considered major challenges.
- The many people and organizations who have given time, money, input and attention to this study points to major community support for protecting Nashville's grassroots music scene—essential for the continued cooperation and work ahead.

Throughout this section, nine venues are profiled, reflecting the rich musical tapestry of Nashville: honky-tonks and venues dedicated to country music, as well as iconic rock, alternative, jazz and punk mainstays—and the only Black co-owned music venue identified in this study. These venues were selected to represent a range of sizes, ages, geographic locations, genres, community significance, business models and ownership structures. While a majority of these venues are fully independent (ownership *and* programming), these profiles also showcase how quasi-independent venues operate. They display the gray areas and nuances of independence, with "hybrid" booking strategies (Basement East, Eastside Bowl) or now-corporately owned venues still booking in-house (Exit/In). Some profiles note how spaces were selected, repurposed or purpose-built by operators. Further analysis of venues' historical development was beyond the scope of this research, but may be suitable for future studies or further exploration.

These profiles underscore the types of threats IMVs face: rising land costs, licensing obstacles, conflicts with neighbors, and the impact of ongoing development. The experiences and pressures relayed by these venue operators inform the recommendations in the final section of this report.

Figure 5: Map showing nine venue profiles included throughout the following section (Note: venue inset maps throughout section show entire parcels in which the venue is located.)

Venues Profiled In This Report

3.0.1 What is an

Independent Music Venue?

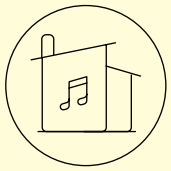
The first task of this report was to classify Independent Music Venues (IMVs) and define what types of businesses fall into this category[80]. Venues' ownership and operation varies greatly. Some are independently owned and operated. Some independently-owned spaces may always or sometimes work with corporate partners. Some spaces may present music infrequently or program it as a secondary offering. Many "feel" like an independent music venue but are not strictly "independent."

The following definition aims to capture the *shades of independence*. The differences between *dedicated music spaces* and *occasional music spaces*, and between *independent, quasi-independent* and *non-independent spaces* can help clarify how IMVs work.

This report's first distinction is of **"dedicated music spaces":** establishments where **the music program is the main purpose** why people attend the venue (not for food, drink, or other products), and there are, on average, **5+ public music events per month** (or typically more than 1 per week). Of these spaces, there are shades of independence:

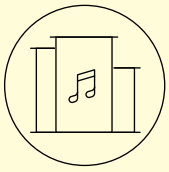
An **"Independent Music Venue"** is a dedicated music space where:

- The venue has no association with another business through common ownership or affiliation (no sharing of employees, resources, branding, etc.).
- Booking or promotion are not contracted to corporate partners.



A **"Quasi-Independent Music Venue"** is a dedicated music space where:

- The venue has no association with another business through common ownership or affiliation (no sharing of employees, resources, branding etc.).
- Booking or promotion are *sometimes or always* contracted to corporate partners.



A **"Non-Independent Music Venue"** is a dedicated music space where:

- The venue *is associated with another business* through common ownership or affiliation (no sharing of employees, resources, branding etc.).
- Booking or promotion *are sometimes or always* contracted to corporate partners.

By contrast, an "**occasional music space**" is an establishment where:

- The **music program is *unlikely* to be the main reason** why people attend the venue (and not for food, drink, or other products).
- There are, on average, 4 or fewer public music events per month (1 or fewer per week).
- Occasional music spaces can also be Independent, Quasi-Independent or Non-Independent.

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80 Groups such as the National Independent Venue Association (NIVA), and Music Venue Alliance Nashville (MVAN, NIVA's Nashville chapter) have their own IMV definitions.

MVAN's considerations for member venues include seven criteria, summarized here: musicians and audiences in Nashville perceive it as an IMV; its primary purpose is cultural activity; its organizational focus is live music, with admissions as a main source of income; it takes risks with cultural programming; it acts as a "beacon of music and key generator of night-time economic activity"; it serves an important role in local community; it pledges to retain control over programming calendars without exclusive third-party booking agreements.

NIVA's membership criteria similarly require that venues not be "owned (in whole or in part), managed, or exclusively booked" by organizations that are "publicly-traded" and operating in multiple states or countries. Further criteria require that cultural programming is a "primary driver" for business, assessed through appropriate performance space, staffing, ticketing, artist payment models, and marketing. Read more at https://www.nivassoc.org/join.

3.0.2 How do
Independent Music Venues work?

To understand how to support IMVs, it's important to understand the way they work. Music venues are a varied class of businesses in how they generate revenue, the expenses they incur—even their business models. This section details how IMVs function—specifically dedicated music spaces, where music is the primary function of the business.

Most IMVs are either limited liability corporations (LLCs) or limited partnerships (LPs), or in a few cases, non-profits. Venues vary in design and programming, and their space and program can drastically affect how the business operates. Some venues are music halls only; others have restaurant-style foodservice. Some have different acts nightly; others, regular daily or weekly acts. Some hold thousands; others, 80 or fewer. A case study conducted by the Nashville Area Chamber of Commerce[81] found that an IMV generates employment for, on average, 17 Full-Time-Equivalent employees[82].

They rely on a range of employees and contractors—musicians, graphic designers, security personnel—and each make their own decisions about what functions to do in-house and what to leave to outside entities. It can vary from show to show. Some venues work with (external) independent promoters for all events; others do booking and marketing in-house.

As private businesses currently in operation, most venues in this study were not interested in sharing their financial information. However, the previous Exit/In ownership provided a broad breakdown of their costs and revenues for 2022. It's important to recognize that no two venues are alike, and that recovery from the Covid-19 pandemic was still ongoing in 2022. These figures are intended to show the types and shares of income streams and costs venues have, and to illustrate the precarity many venues experience:

Sample Venue Financials: Exit/In, 2022

Net Sales:
$1,689,707

Event Costs:
Live music: $-836,680
Bar purchases: $-180,732
Food purchases: $-6,364
Payroll: $-457,993

Gross Profit:
$207,938

Operating Expenses:
$-493,671 (rent is $226,692, on a monthly basis this was $14,054 in base rent, $4,837 in property taxes)

Annual Net:
$-285,733

81 *Nashville Area Chamber of Commerce, Music Industry Report 2020.*
82 The Chamber of Commerce found that MVAN's 16 member venues employed 279 "full-time-equivalent" (FTE) persons prior to the pandemic (2019). An FTE employee is calculated by taking the total number of employee hours worked by the length of the working week for a given establishment.

Income

Ticket sales and door charges (entry fees): Ticket sales and door charges (entry fees): Entry fees are split in a variety of ways. Normally, the venue takes a production fee off the top, then the promoter pays the band and other remaining expenses like marketing. The remaining money goes to the promoter. If the venue is acting as the promoter, the talent may take a larger percentage of the door fees.

Food: Some venues, like Station Inn, serve little or no food, while others, like Rudy's Jazz Room, operate table service alongside performances. Venues with significant food operations may use musical entertainment as a secondary programming offer.

Liquor & Beer: Alcohol is a critical part of many venues' income—often the largest line item. Liquor is regulated by the State of Tennessee, beer by Metro's Beer Board. Some venues, like DRKMTTR, eschew the more expensive liquor license. Alcohol sales typically go directly to the venue[83].

Sponsorships: Many hospitality brands subsidize events or supplies in exchange for favored product placement or event-related cross-promotion.

Merchandise: Some venues take a cut of sales from merchandising sales done by acts performing.

Rental events: Many venues are available for rent for corporate events or other non-concert programming like weddings. Some venues make "rental fee" deals with promoters, who must pay up front and then recoup the cost in ticket sales[84].

Expenses

Staff: Venues employ different types and numbers of people. Many consolidate different tasks into different employee descriptions, and some contract out certain roles. Staff roles might include:

- *Front of house:* security, bartenders, food service staff, bar managers.
- *Back of house:* bar managers, general managers, kitchen staff, light and sound technicians, stagehands, artist liaisons.
- *Promotion and production:* talent buyers, marketing specialists, designers.

Musical talent: There are many ways to procure and pay musical talent. "Working musicians" and DJs might make a flat rate for a weekly engagement[85]. At other venues, talent is paid through a percentage of ticket or bar sales by the venue—often via promoters. Elsewhere, talent buyers might negotiate flat rate contracts that vary from show to show.

Rent and property taxes: A significant expense for some venues, as most do not own their land or building[86]. Leases are often in 5 or 10 year increments, sometimes with options for extensions. Landlords who experience a tax increase sometimes raise rents[87] to cover their increased operating expenses.

Taxes and fees: Venues are subject to a variety of taxes, including but not limited to state and federal corporate income taxes, sales taxes, property taxes, and some one-time fees paid for various licenses or approvals.

Supplies: Materials such as cleaners, toilet paper, acoustic cables, wristbands, and usually beer or liquor. More extensive food or bar operations have restaurant-level food service needs[88].

Advertising and Promotion: Depending on a venue's relationship with external promoters and acts, it may take on more or less promotional cost. At a minimum, a venue will maintain a website, social media feeds and publish regular calendars and announcements. At a maximum, it might pay hundreds or thousands per show for graphic design, paid advertising campaigns, or physical fliers and a "street team" to pass them out.

Services: A venue may require a variety of services, potentially including:

- *Insurance*: alcohol service and assembly require significant liability coverage.
- *Legal*: reviews of leases and contracts, or advice on licensing and codes.
- *Consultants:* design, sound, marketing or other functions might require outside consultation.
- *Performing Rights Organizations:* PROs like ASCAP, BMI and SESAC routinely require fees from venues in exchange for acts performing music whose rights they control. This includes live acts at ticketed events. For a mid-size venue (appx 500-750 capacity), this can be a five figure expenditure in a given year.

Development Costs: Launching a venue requires a substantial amount of expenditure, some of which is financed and then paid off through the operation of the venue. Design and building costs vary depending on the space and the amount of detail put into the fixtures[89].

- These expenditures are detailed more in *Section 3.2.2, Local Case Study: How are music venues born?*, but they may include:
  - Real estate agents and attorneys
  - Architects and designers
  - Sound[90] and food service equipment[91]
  - Point of sale, HVAC and security systems
  - General contracting
  - Permits and licenses

Physical plant: Ongoing maintenance and repair are required to keep the structure and equipment in working order.

83 Sometimes, a deal negotiated with promoters or event producers might include a percentage of bar sales set as an enticement to increase attendance.

84 This practice is widely disliked by independent promoters.

85 Notably, many honky tonks pay low flat rates and the musicians rely largely on tips.

86 Some venues do own their land and might owe mortgage payments and property taxes in lieu of rent.

87 *Rolheiser, Commercial Property Tax Incidence.*

88 Eastside Bowl and Brooklyn Bowl have operations associated with a bowling alley, a concert venue, and a restaurant.

89 Even the most minimal venue is expensive. A "turnkey," code-compliant room for ~100 people with no decor, no food service equipment and a basic stage would require a few tens of thousands of dollars of audio equipment, lights and sound.

90 In a venue approaching arena or amphitheater size, this can be even more.

91 For venues with major restaurant operations, development costs can run into the hundreds of thousands or more depending on the scale and nature of the fixtures.

Figure 6: Visualization of the "ecosystem" of music industry actors related to venues

Music Ecosystem

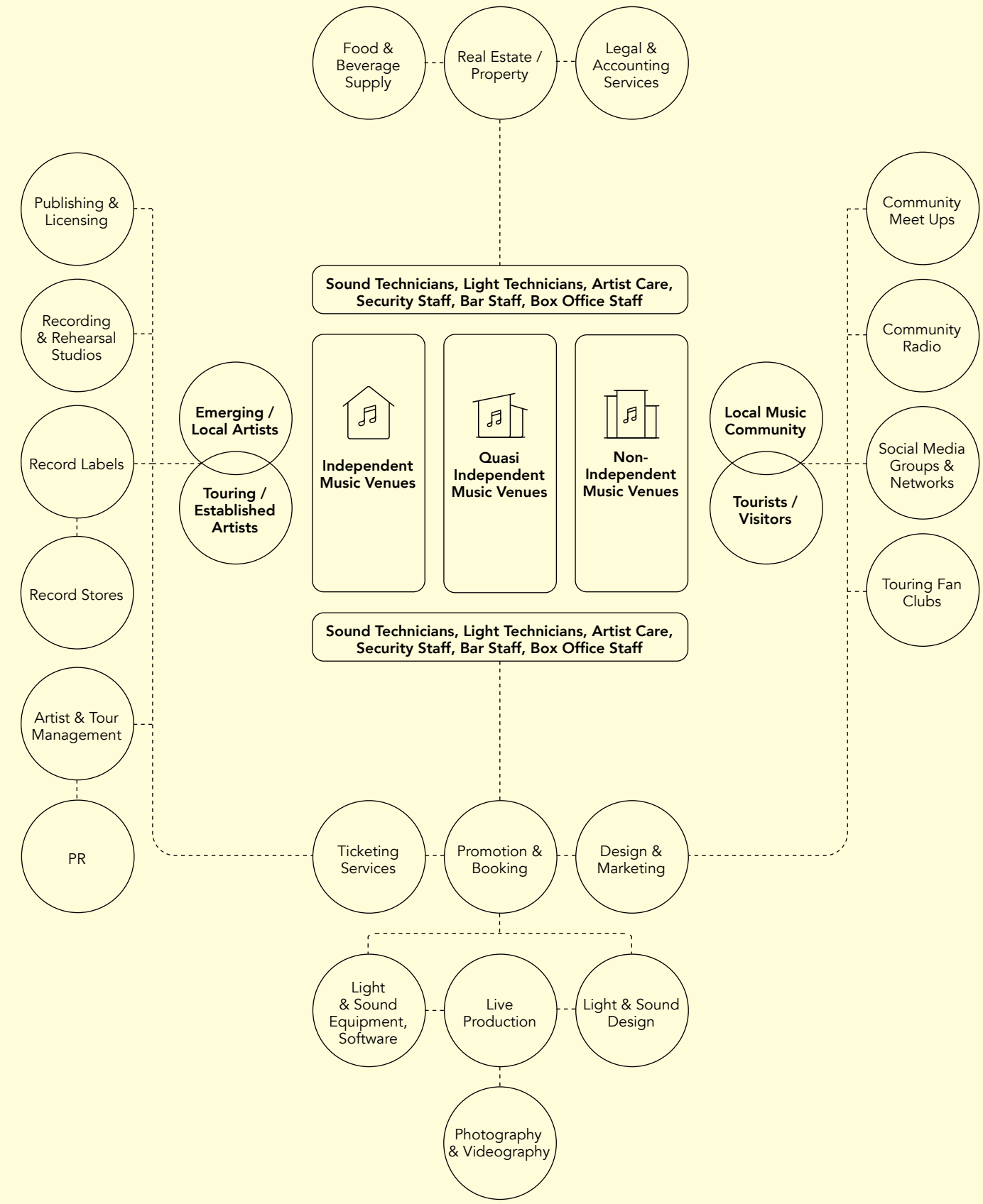
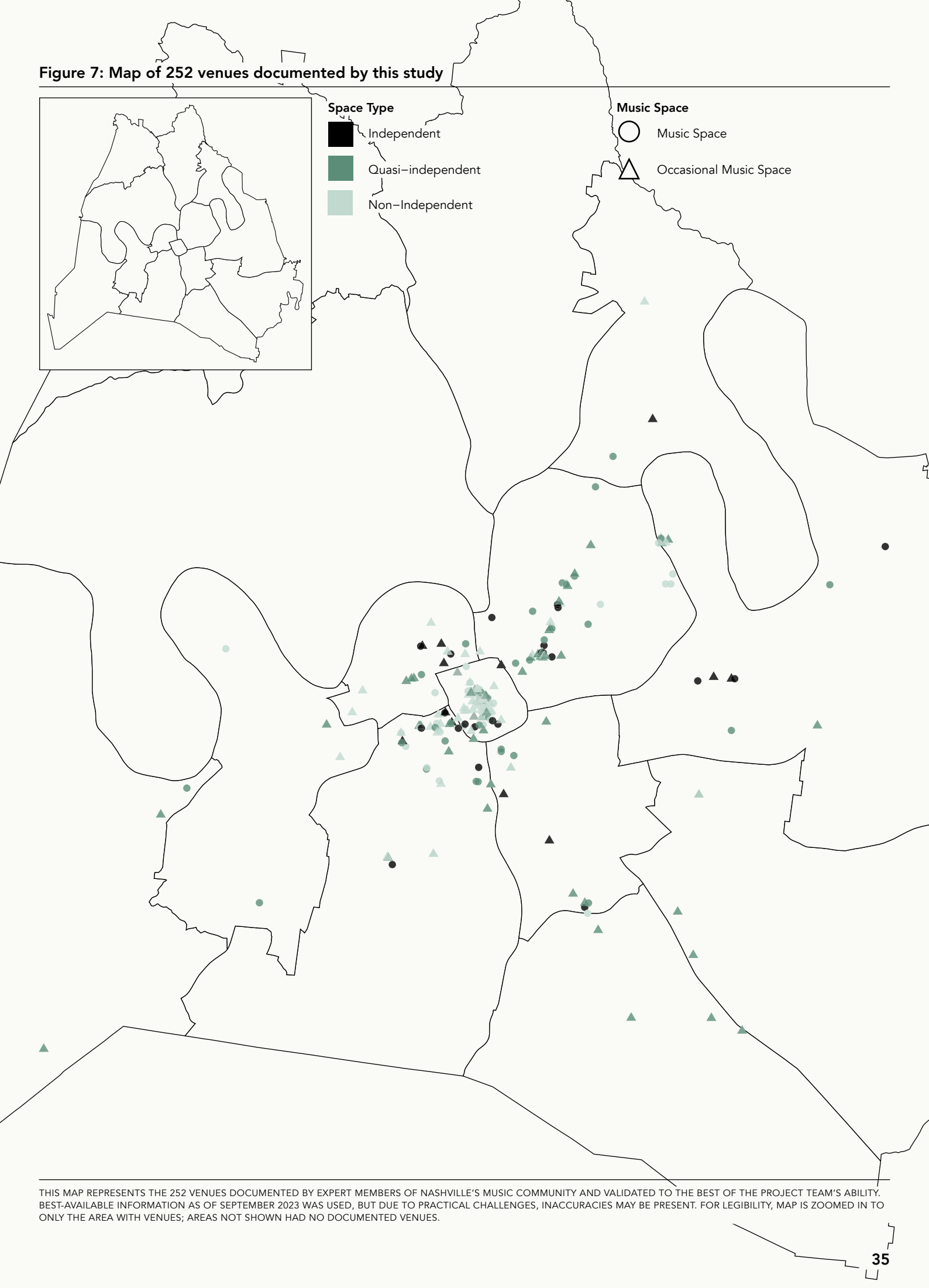


Figure 7: Map of 252 venues documented by this study



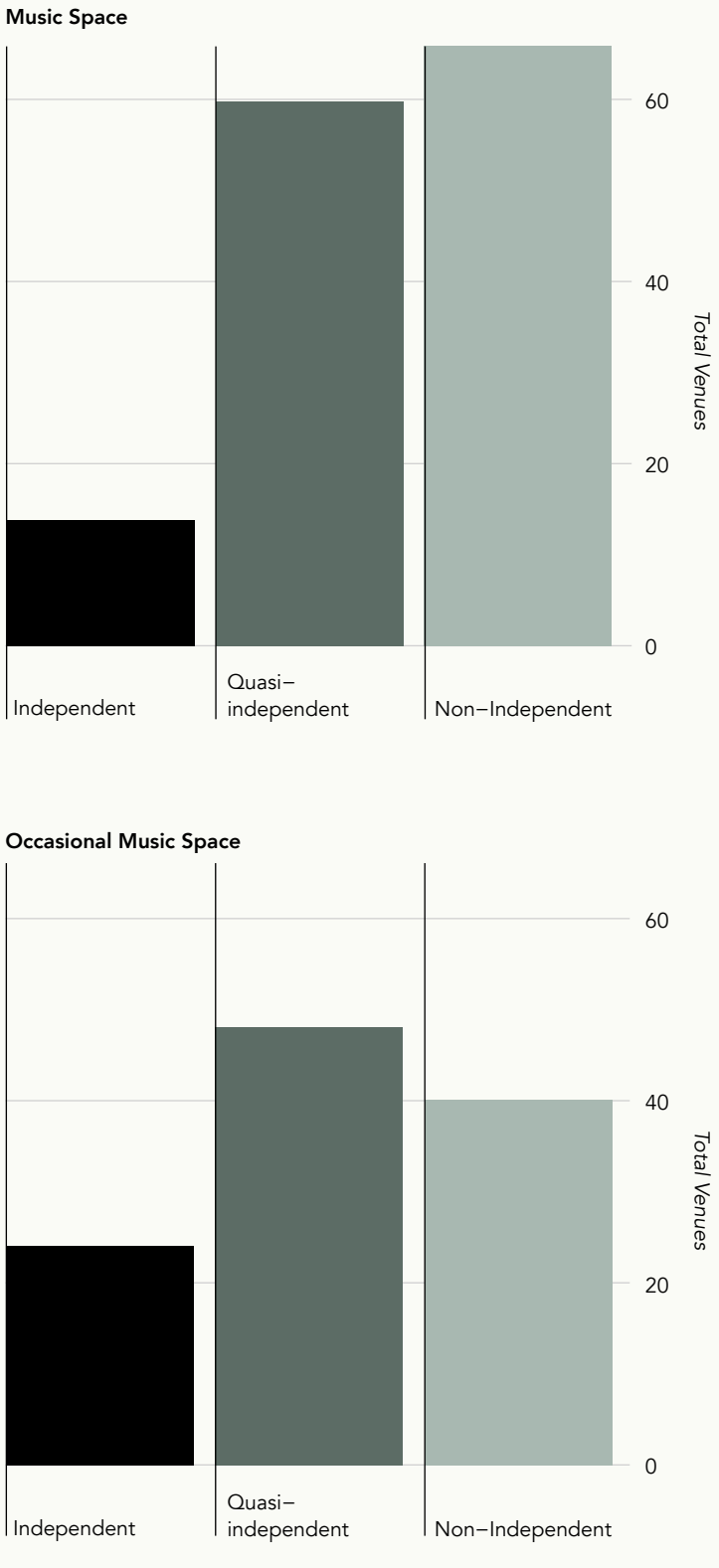
THIS MAP REPRESENTS THE 252 VENUES DOCUMENTED BY EXPERT MEMBERS OF NASHVILLE'S MUSIC COMMUNITY AND VALIDATED TO THE BEST OF THE PROJECT TEAM'S ABILITY. BEST-AVAILABLE INFORMATION AS OF SEPTEMBER 2023 WAS USED, BUT DUE TO PRACTICAL CHALLENGES, INACCURACIES MAY BE PRESENT. FOR LEGIBILITY, MAP IS ZOOMED IN TO ONLY THE AREA WITH VENUES; AREAS NOT SHOWN HAD NO DOCUMENTED VENUES.

3.1 Music Venues in Nashville

3.1.1 Nashville's venues range in degrees of independence and programming frequency.

- Researchers, community members, and focus group experts identified 252 spaces used for music in Nashville on a periodic or regular basis[92].
- **112 of these were identified as dedicated music spaces,** where music is likely to be the *primary* offer, and events are held more than weekly. (See *3.0.1 What is an Independent Music Venue?* for definitions.) Of these:
  - **24 music spaces were identified as likely to be independent music venues.**
  - **48 were identified as likely quasi-independent.**
  - **40 were assessed as likely not independent.**
- **The remaining 140 spaces are considered occasional music spaces,** where music may be a secondary offer, or music events are held weekly or less. (See *Appendix 2A: Venue Database* for a breakdown of these by independence.)
- **Nashville has a healthy "venue ladder,"** with a wide variety of venue sizes, dominated by venues under a 500 person capacity[93].
- **Independent and quasi-Independent music venues make up the vast majority of Nashville's small music spaces** (capacities under 500).

Figure 8: Nashville venues by independence status and music space type. Data: PennPraxis



92 These data were gathered from expert members of Nashville's music community through paid focus groups, public events, and paid local project researchers, and validated to the best of the project team's ability. Due to the large number of venues, some venues' limited promotional footprint, and the practical challenges of contacting and receiving information from every venue, some data points could not be ascertained with a high degree of certainty. Categories here are assessed based on expert consensus regarding the likelihood of certain aspects of the nature of the venue.

This venue database strives to provide the most accurate information possible, but recognizes that inaccuracies may be present in this information. The analysis of information is designed to provide aggregate statistics about venues by type (e.g. on average are IMVs on properties with a higher square footage assessment value). This approach minimizes the influence of individual data points on the overall conclusions.

93 Capacity data are incomplete, with Nashville Fire Dept and Greater Nashville Chamber of Commerce Data covering 162 of 252 venues from this study.

Figure 9: Dedicated and occasional music spaces in Nashville. Data: PennPraxis, Nashville Area Chamber of Commerce, Metro Planning.

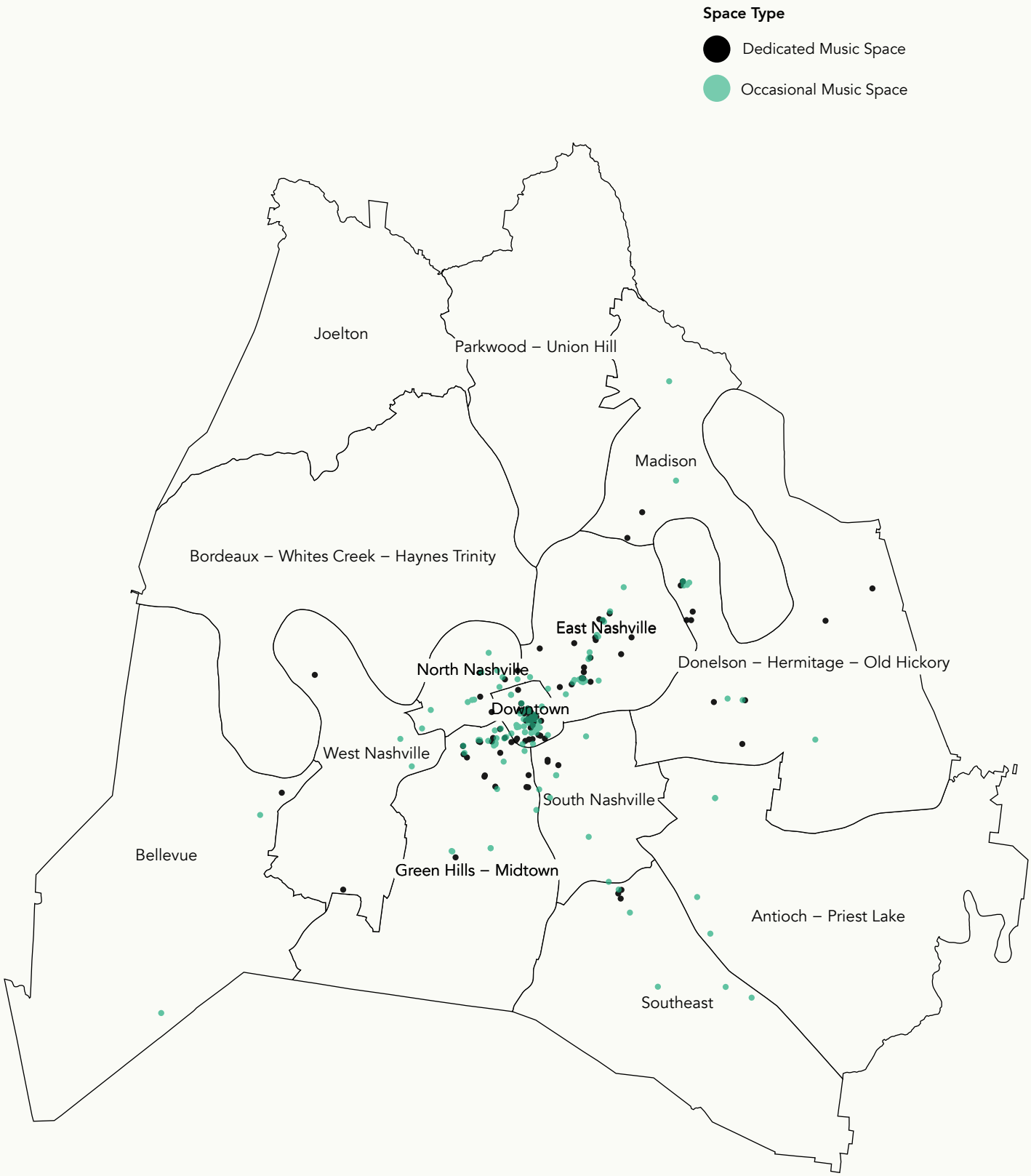


Figure 10: Density of Dedicated Music Spaces. Data: PennPraxis, Nashville Area Chamber of Commerce, Metro Planning, Open Street Map.

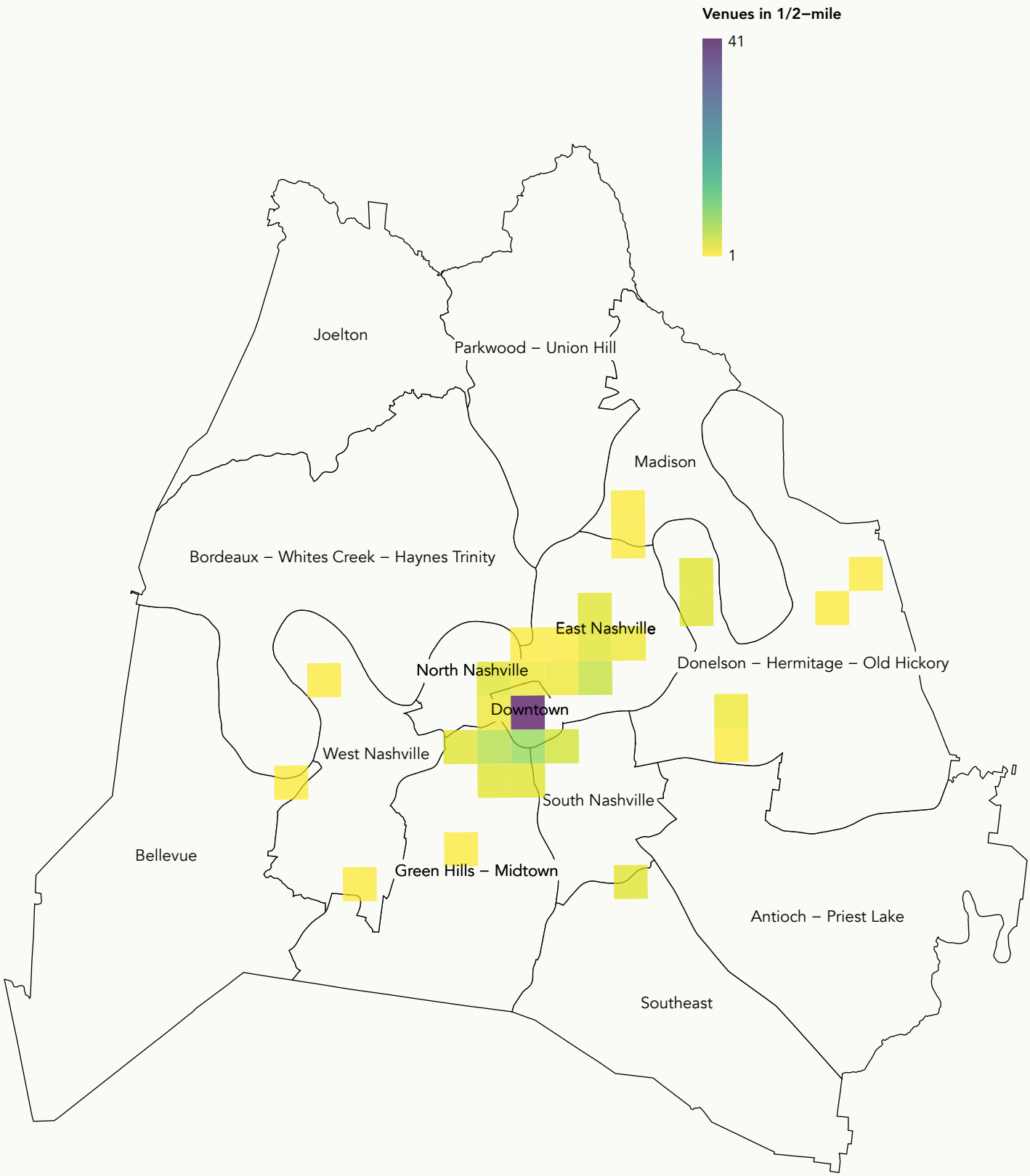


Figure 11: Map showing geography of dedicated music spaces, by independence. Data: PennPraxis, Nashville Area Chamber of Commerce, Metro Planning.

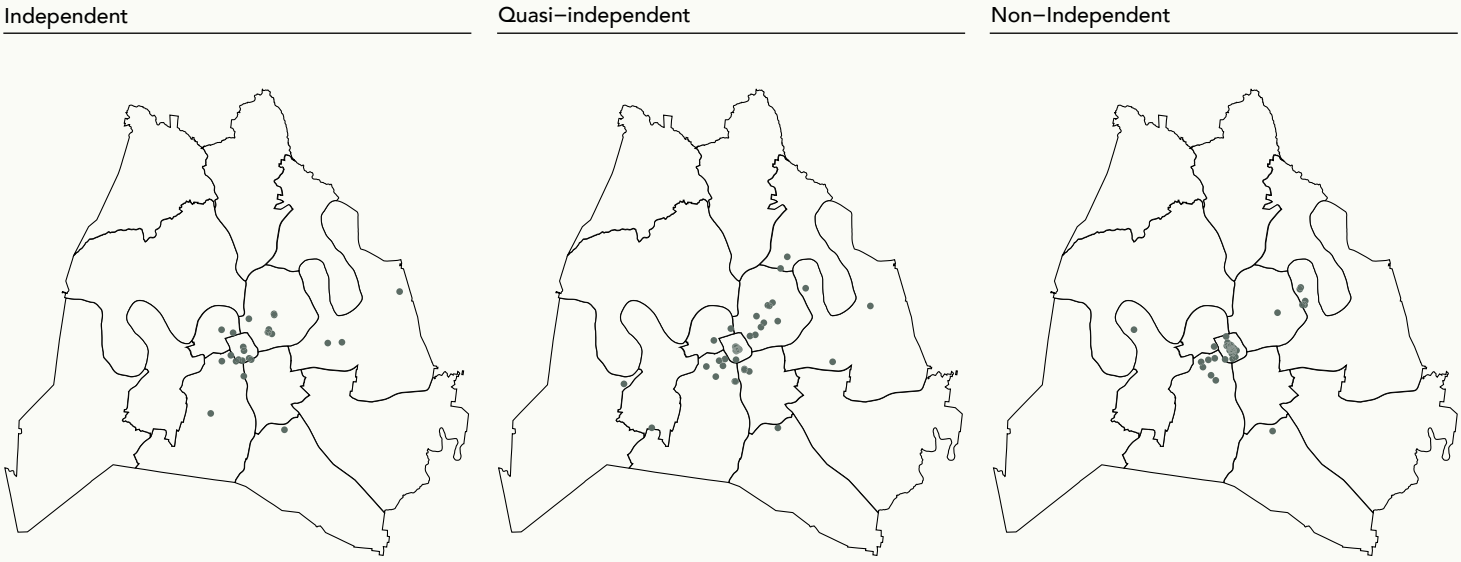
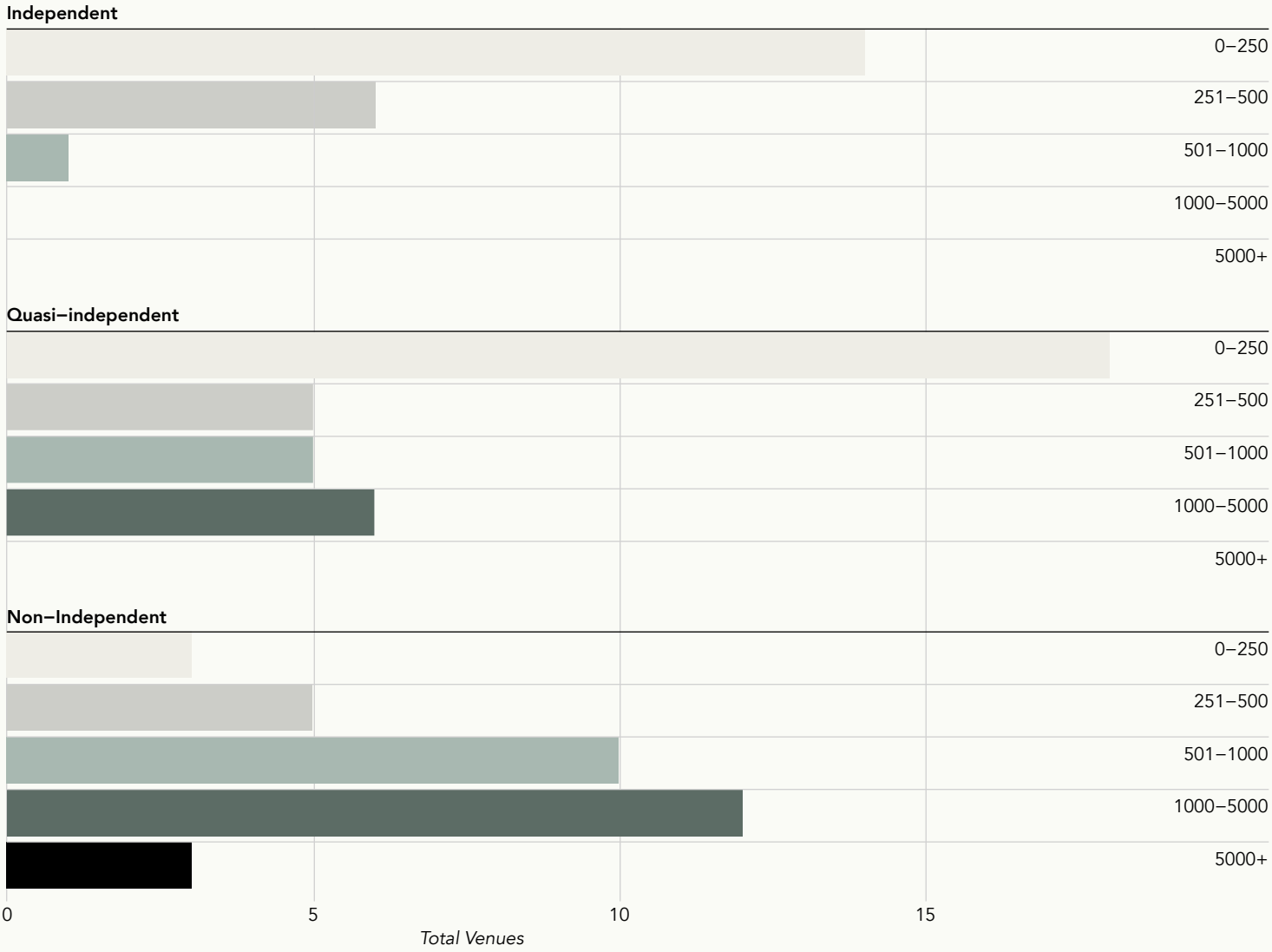


Figure 12: Bar chart showing capacity of dedicated music spaces, sorted by independence.

Capacity information missing for 24 of 113 dedicated music spaces



3.1.2 Independent venues are a critical part of how music in Nashville "works."

"Nashville's independent music venues foster connections among my neighbors and friends through the power of music. These venues serve as the foundation for community building. The intimacy in these spaces create memorable experiences. They are typically locally owned, staffed by neighbors, and curated by friends. Moreover, they act as a crucial launchpad for numerous touring artists."

— Juliana Lee, Program Director, Helping Music Foundation and *Helping Our Music Evolve (HOME)*

IMVs are critical to Nashville's music sector, and the music industry is vital to the regional economy. The research team found considerable evidence that independent venues are places that foster creativity, provide entry into the music industry, and create jobs for musicians and allied workers. Music businesses, consumers, and communities are sometimes described as interdependent members of an "ecosystem." Each element—venues included—is an interdependent part of the whole[94]. If one part is missing or out of balance, the negative effects ripple throughout.

It's crucial to note the scale and importance of Nashville's music industry. While Nashville's music business is primarily about recording, selling, and licensing recorded music, most musicians and songwriters rely on live performances for income. Live events are the largest revenue stream in the music industry—representing 50%[95] of global revenues, and around 75% of artists' income[96]. And as a shrinking number of musicians are able to earn income from streaming services[97] [98], music venues are increasingly important. Industry studies estimate that money spent at IMVs also has substantial positive economic effects beyond the venues themselves[99] [100].

94 *Nashville Area Chamber of Commerce, Music Industry Report 2020.*

95 *PwC, Perspectives from the Global Entertainment and Media.*
96 *Lunny, Record Breaking Revenues In The Music Business.*
97 *Sisario, Musicians Say Streaming Doesn't Pay.*
98 *Hesmondhalgh, Is music streaming bad for musicians?*
99 *National Independent Venue Association, Economic Impact Calculator.*
100 *McPhillips, Small Music Venues Kept Rocking.*

The Nashville Area Chamber of Commerce's 2020 Music Industry Report[101] cites the following facts about the regional music industry:

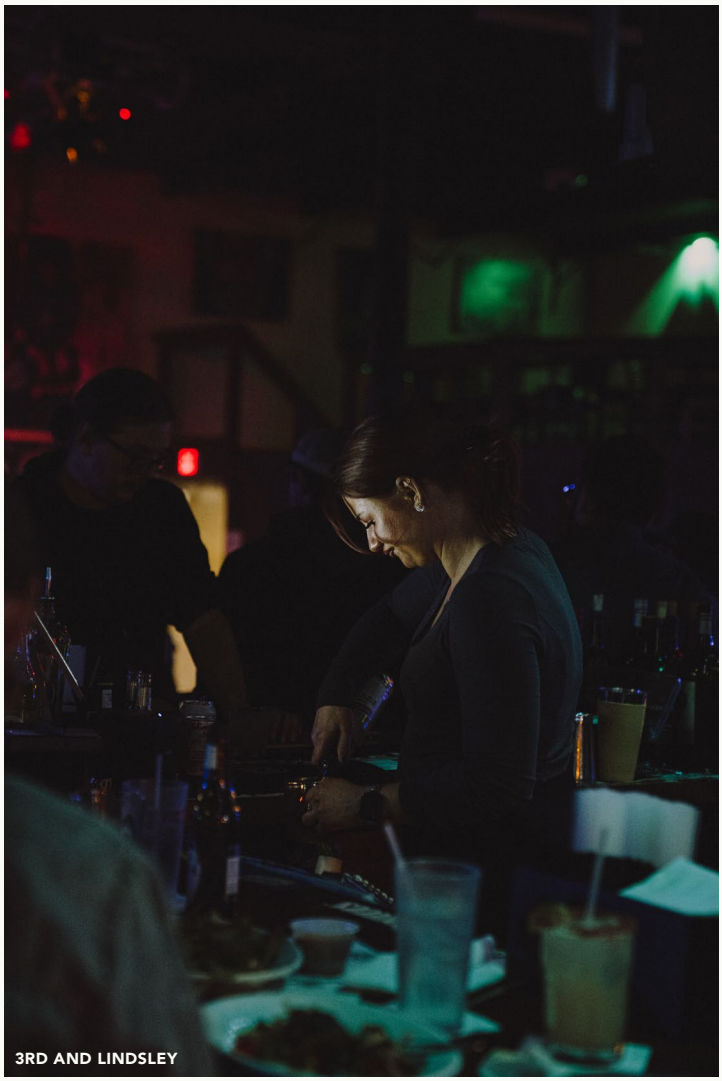
- With 16,298 jobs as of 2019, Nashville has the nation's third largest music industry cluster after New York and Los Angeles. It has the highest local share of music jobs of any region in the country—six times more concentrated than any other US region—and was also the fastest-growing region between 2009–2019.
- In 2020, the music and entertainment industry was responsible for over 80,000 jobs in the metro region, and added $5.3 billion to the local economy. The regional music industry grew at more than four times the rate of the national industry since 2013.
- Prior to the pandemic, IMVs had an economic impact of $49 million in Davidson County alone.

Data from elsewhere supports the centrality of IMVs to musicians, local economies and music city reputations and scenes. London's 2015 report on grassroots music venues[102] found that such venues make a number of economic and cultural contributions, including:

- **Economic impact:** £91.8 million (appx. $115.8m) annually to the city economy, supporting 2,260 full time jobs, and investing £44 million (appx. $55.5m) in new and emerging talent.
- **Indirect impact:** contributing to urban regeneration and benefiting other businesses in the nighttime economy: for every £10 (appx. $12.60) spent on tickets, £17 (appx. $21.40) is spent at nearby businesses.
- **Talent incubation:** Grassroots venues in London were the birthplace of global music superstars (see *City Case Studies: London* in *Appendix 1* for more). They incubate talent onstage *and* off: many venues partner with educational institutions to take on 'back-of-house' apprentices in lights, sound, etc.

Additionally, research[103] on all-ages DIY punk venues in Omaha, NE, Seattle, WA and Flint, MI also traces the importance of these venues in developing audiences, fostering music scenes, and acting as artistic and entrepreneurial incubators. These functions lead to spillover benefits in the wider urban and cultural economy. This earlier research aligns with this study's findings about the value of Nashville IMVs.

Nashville is a music industry cluster. Research on the nature of innovation emphasizes the importance of "agglomeration" in places like Nashville: clustering of people, firms, and capital in a place that brings about efficiency returns[104]. This is what makes Nashville a more productive center for music than other cities. Two critical components that drive the efficiency of an agglomeration are *networks* and *innovation*. IMVs and small venues facilitate *networks*: they bring together communities and music professionals. These venues are also the laboratories for *innovation*: places where sophisticated bookers can evaluate new talent and take risks, or where artists can try new styles and techniques and collaborate with a variety of skilled colleagues. In other industries and clusters, the government has played a major role in subsidizing innovation through funding, procurement, and basic research[105].



3RD AND LINDSLEY

101 *Nashville Area Chamber of Commerce, Music Industry Report 2020.*
102 *The Mayor of London's Music Venues Taskforce, London's Grassroots Music Venues Rescue Plan.*
103 *Seman, Creative Hubs in Question.*
104 *Fleming et al., Why the Valley Went First.*
105 *Kerr and Robert-Nicoud, Tech Clusters.*

Independent venues are incubators for "the artists of the future." Local music experts and community members regard Nashville IMVs as *more likely* than other dedicated music venues to present experimental or community-oriented programming and *more likely* to focus on the promotion of music and artistic content. Quasi-IMVs and non-IMVs also focused on these elements, but less so (*Figures 13 and 14*).

Figure 13: Bar chart showing community focus ratings of dedicated music spaces.

Community Focus – Music Spaces

Q: Is the venue likely to be any of the following... a consistent platform for a niche genre, a space for underrepresented communities or music scenes, a neighborhood community hub, and not solely walk-in tourists?

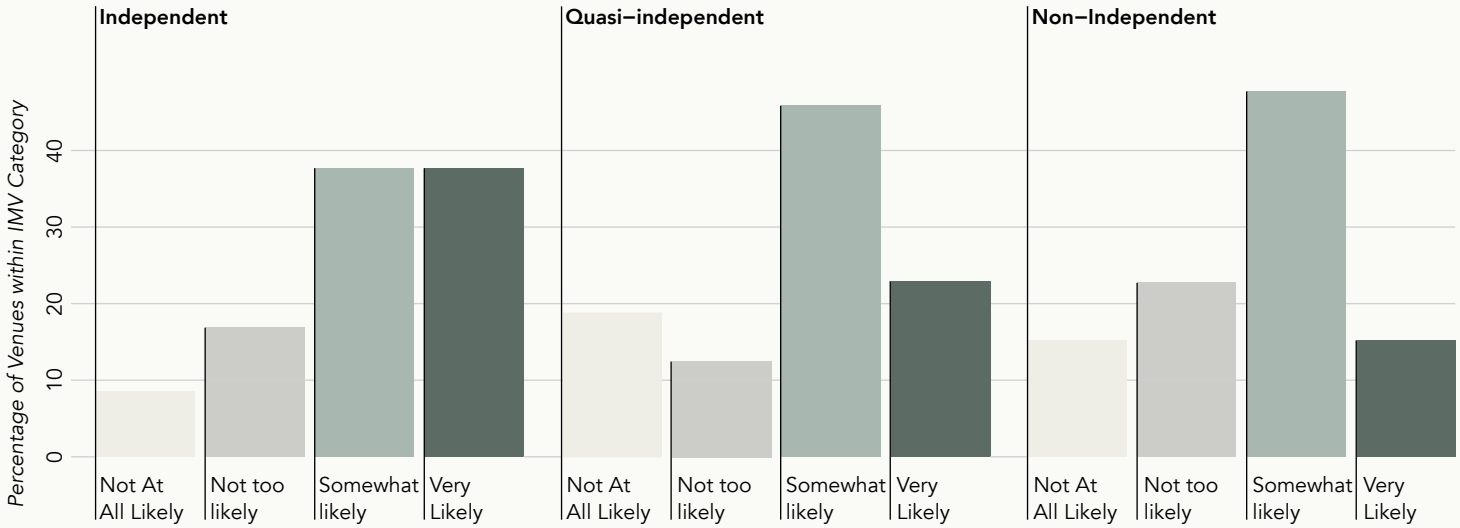
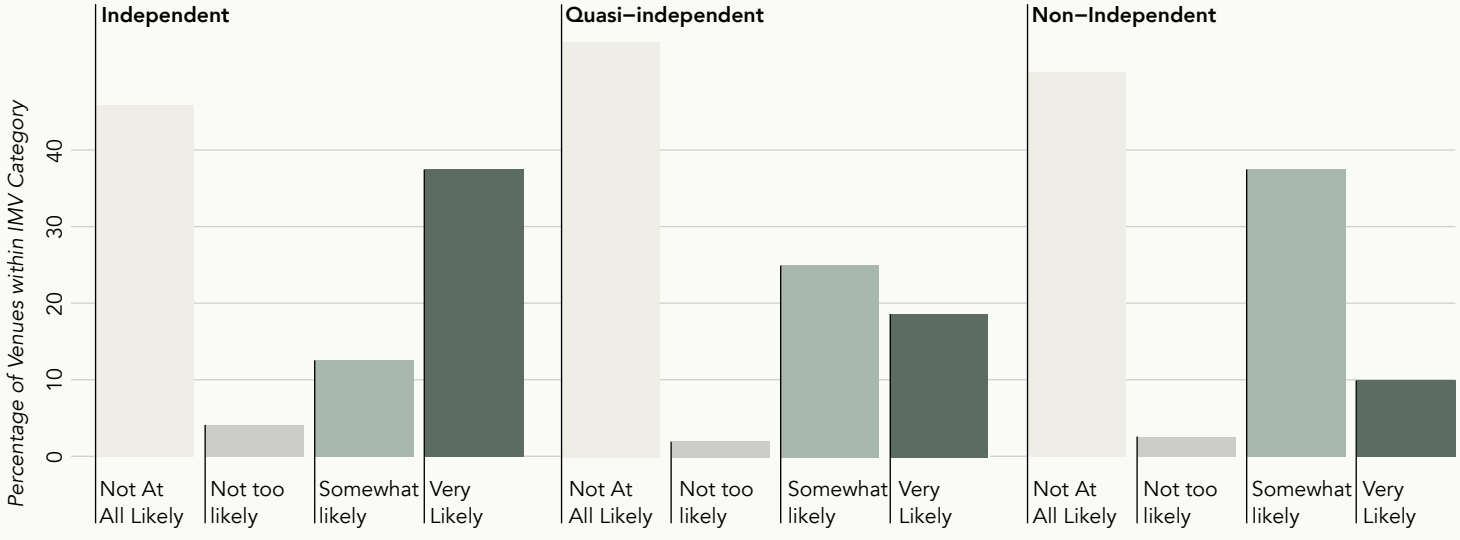


Figure 14: Expert-assessed likelihood of experimental programming for dedicated music spaces. Data: PennPraxis

Experimentation Likelihood – Dedicated Music Spaces

Q: Compared to other venues in the city: Is this venue a platform for niche or experimental trends, sounds and art forms? Is it a place for experimental performers or extraordinary event concepts?



Focus groups, interviews and feedback forms upheld this same sentiment: independent venues play an essential role in fostering new artists, new writers, and original music. (This may be related to the fact that Nashville's smaller venues tend to be independent. Average capacity for an IMV is 210, 463 for a Quasi-IMV, and 1000 for a non-independent music venue.)

Research participants articulated the value of independent venues in the following ways:

- **Small independent venues play a crucial role in A&R (Artists & Repertoire)**[106] **by identifying and providing opportunities to promising new artists and writers**. Independence enables venues to book risk-taking or unconventional acts in a way that is unlike larger corporate entities. Committing to high-quality A&R is essential for Nashville to retain its reputation as, in the words of one venue operator, "a town you come to to get discovered." IMVs are also associated with the "writers round" style of performance, where songwriters test drive new material in a live setting (see *Venue Profile: The Bluebird Café*).
- **"Independent artists are the artists of the future."** Participants widely agreed that artists need venues willing to program unknowns, and this "middle ground ecosystem" is an essential component of the entire music ecosystem. Independent venues were seen as crucial for new and young artists to "learn and grow."
- **"Original music and independent venues are totally inseparable."** While participants recognized that musicians do sharpen valuable performance skills playing familiar repertoires on Lower Broadway, it is understood as "a whole other skill set" from what is cultivated in independent venues, which tend to emphasize original music.
- **"Incredibly localized…authentically Nashville" performance calendars** are seen as arising from decades of deep knowledge of, and care for, the city's musical communities. While many venues do book national tours ("and need to and have to"), these operators' and programmers' experience and relationships in the local scene are seen as crucial to independent venues' roles as nodes of local community.
  Space for many communities: Some participants felt that IMVs' independence allows them to better cultivate space for musicians and audiences of diverse backgrounds. Adam Charney of Rudy's Jazz Room describes programming audience-specific nights such as Latin jazz Mondays, as well as acts that draw diverse audiences:

> *"You look out at the audience on any given night [especially on a Friday, Saturday night], and it's diverse, and we're really proud of that."*

Artists across genres highlight this aspect of IMVs:

> *"What Nashville venues mean to me, especially the independent ones, is freedom of expression, providing a safe space and a free space for artists like myself… [for audiences to] champion us locally along the way to our goals. A chance to explore our artistry…and share a space with our peers to connect." —Roycardoes Kelly, Artist and event coordinator, Healhop*

Participants noted that partnering with corporate booking entities could sometimes be necessary for venues aiming to book bigger-name artists, particularly those signed to corporate-backed labels. However, independent and quasi-independent venues were perceived as more likely to be willing to take risks on lesser-known artists, and more connected to Nashville's local community—thus acting and publicly valued as essential incubators of talent.

> *"The cool, edgy, great stuff of the future that's exciting, the cult acts that can nowadays go viral, that's all happening in the independent world. They have to have these venues, willing to take a chance on an act that isn't as well known." —Participant, Focus group 1*

Research participants defined venue independence with multiple criteria, which informed this study's definitions of independence and quasi-independence. Some saw a venue's booking and programming as the key factor, while others saw independent ownership as the primary point. Participants did note "gray" areas, recognizing that even independent venues will sometimes work with larger entities to book a bigger act.

For some, venue independence was also connected to artistic independence. Some participants articulated an independent "aesthetic" linked to grassroots values. For some, this notion of music space as expressive space underscored the importance of protecting artistic freedom in nightlife and music. One venue operator expressed concern that for spaces with liquor licenses, the Alcohol Beverage Commission can hypothetically function as a censor, particularly in cases where nudity may be a legitimate part of an artist's performance style or self-expression. To him, this fear of unintentionally overstepping what can take place in an entertainment venue forces a difficult choice between upholding artists' free expression and retaining a license: "as a club, [if] you lose your liquor license, you don't have your livelihood anymore."

106 The department of a record company focused on finding talent and artists' creative development. *(Iliev, Understanding the Importance of A&R.)*

Venue Profile

The Bluebird Cafe

Venue Profile: The Bluebird Cafe

"I started out being this two-headed creature: During the day, we were this Green Hills ladies-lunch place, with flowered tablecloths and tuna stuffed into tomato halves. And then in the mid-afternoon, we would take the tablecloths off and haul the sound system out for the live music." —Amy Kurland, Bluebird founder[107]

Opened by Amy Kurland as a restaurant, the Bluebird Cafe has since become one of Nashville's preeminent spaces for songwriters and original music. The venue is known as a launching pad for artists like Taylor Swift, Vince Gill, Dierks Bentley, Keith Urban, Lady A, and Faith Hill—and for stars like Garth Brooks to find some of their biggest hits.

In Bluebird's tiny storefront space, audiences are never far from performers, especially when played in-the-round, with artists at the center. Bluebird's audition system and twice-nightly show schedule provides a trajectory for artists to grow their skills and audience, starting from the venue's open mics, to writers nights, to early to late shows as they gain experience.

The venue's presence on ABC's *Nashville* has brought immense tourist interest, and audiences are increasingly made up of visitors. General Manager and COO Erika Wollam Nichols sees the sudden fame as a chance to "tell people how important our creators are." Despite the visibility, she stresses that the venue still operates on slim margins: "If our door doesn't open every night that it can, we're not in business."[108]

While sponsors like City National Bank, RIAA, and Taylor Guitars have come on board, Bluebird has remained in independent hands. Kurland still owns the building; Nashville Songwriters Association International runs the venue[109]. Yet as a new high-rise with 265 residential units goes up next door[110], Nichols must stay in conversation about development decisions from loading zones to anticipated open-air patios, to ensure that Bluebird can continue to operate alongside incoming neighbors and neighborhood change: "We're sticking it out until we can't."

Venue land parcel and surrounding area

Fast facts

Venue type	Independent
Address	4104 Hillsboro Pike, Nashville 37215 / Green Hills - Midtown
Year Venue Established	1982
Year of Construction	1952
Capacity	86
Booking strategy	Independent
Show frequency/ Events per month	20+ (Nightly)
Genres	Country, Bluegrass, Singer-Songwriter
Ownership Structure	S Corp owned by Nashville Songwriters Association International
Land Owner	Amy Kurland
Lease Terms	Venue has site control
Assessed Value	$280,360
Appraised Value	$700,900
Community Identified Threats	Adjacent development
Zoning	SCR (Shopping Center Regional)
Land Use	Condominium OFC (Office)
Business License Type	General Retail

107 *Heckert, An Oral History of the Bluebird Cafe.*
108 *The Bluebird Cafe, An Interview [with] the COO and General Manager.*
109 *Shearon, Bluebird Entrusted to NSAI.*
110 *Young, Protecting the Bluebird Cafe's Nest.*

3.1.3 "Two realities" in Nashville Music: Downtown and Beyond

NASHVILLE'S MUSIC-DENSE DOWNTOWN IS SURROUNDED BY MORE INDEPENDENT, EXPERIMENTAL, AND COMMUNITY-FOCUSED REGIONS.

The geographic center of gravity of Nashville's live music cluster is Downtown. This hub, demarcated by the Downtown Community Planning Area, is incredibly venue-dense: 52 dedicated music spaces and 55 occasional music spaces make it comparable to central districts in New York, Berlin, and Tokyo[111]. The area[112] is well served by regional and interstate road and highway networks, is strongly frequented by tourists—and its population density and rents are accelerating the fastest of any neighborhood in Davidson County[113]. Recent studies have found Downtown pedestrian activity to be 100% of pre-pandemic levels—the only such downtown in the country[114]. However, less than 10% of the music spaces downtown were identified as IMVs, meaning that policies and services focused on this central cluster inherently excludes IMVs.

East Nashville and Green-Hills / Midtown also have significant clusters of music venues: these "Community Planning Areas" (geographies used by the city for neighborhood planning) are adjacent to Downtown, and contain important nightlife districts. Venues in South, North, East and West Nashville Community Planning Areas—both dedicated and occasional music spaces—were seen by community members as having higher likelihood of experimental or community-focused programming than Downtown (*Figure 16*). Venues from the Downtown and East Nashville clusters are profiled on the subsequent pages (see *Venue Profile: Layla's Honky Tonk* and *Venue Profile: DRKMTTR*).

111 *VibeLab, Creative Footprint.*
112 The Metro Government's "Community Planning Area" geographies were used to represent neighborhoods in analyzing Downtown and other areas in Nashville.
113 *US Census Bureau, American Community Survey (ACS) 2021.*
114 *Center City District, Downtowns Rebound.*

Figure 15: Number of dedicated music spaces by Community Planning Area.

Number of Dedicated Music Spaces per Community Planning Area

1. *Joelton:* 0
2. *Parkwood – Union Hill:* 0
3. *Madison: 2 Dedicated spaces:* 0
4. *Donelson – Hermitage – Old Hickory:* 11
5. *Bordeaux – Whites Creek – Haynes Trinity:* 0
6. *East Nashville:* 17
7. *Bellevue:* 1
8. *West Nashville:* 2
9. *North Nashville:* 5
10. *Downtown:* 50
11. *South Nashville:* 3
12. *Green Hills – Midtown:* 18
13. *Southeast:* 3
14. *Antioch – Priest Lake:* 0

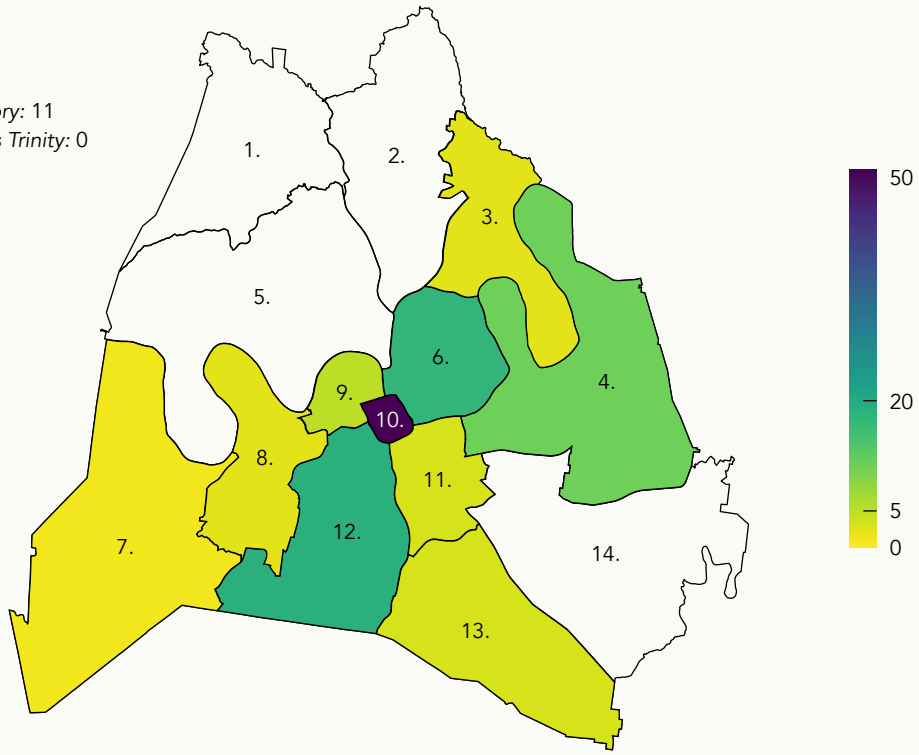
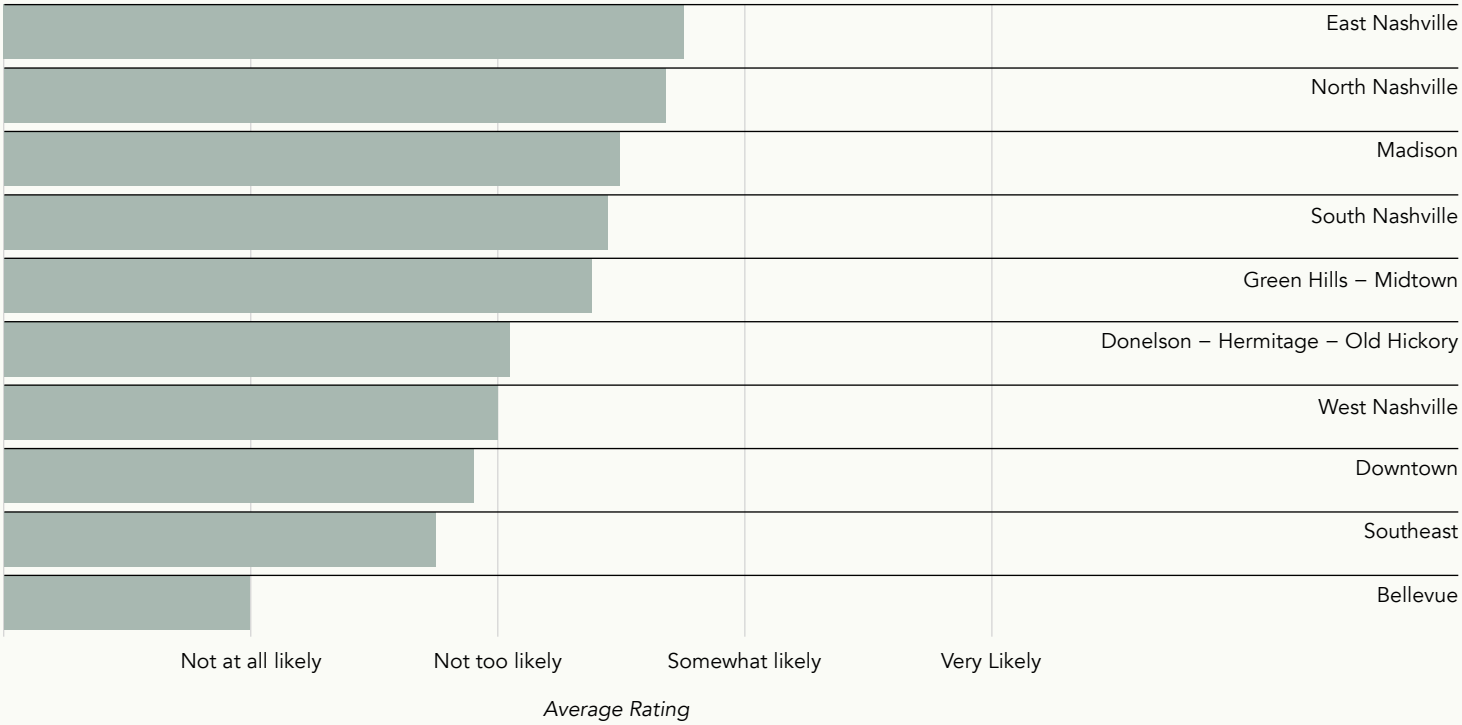


Figure 16: Community focus scores by Community Planning Area. (Question applies to dedicated music spaces only.)

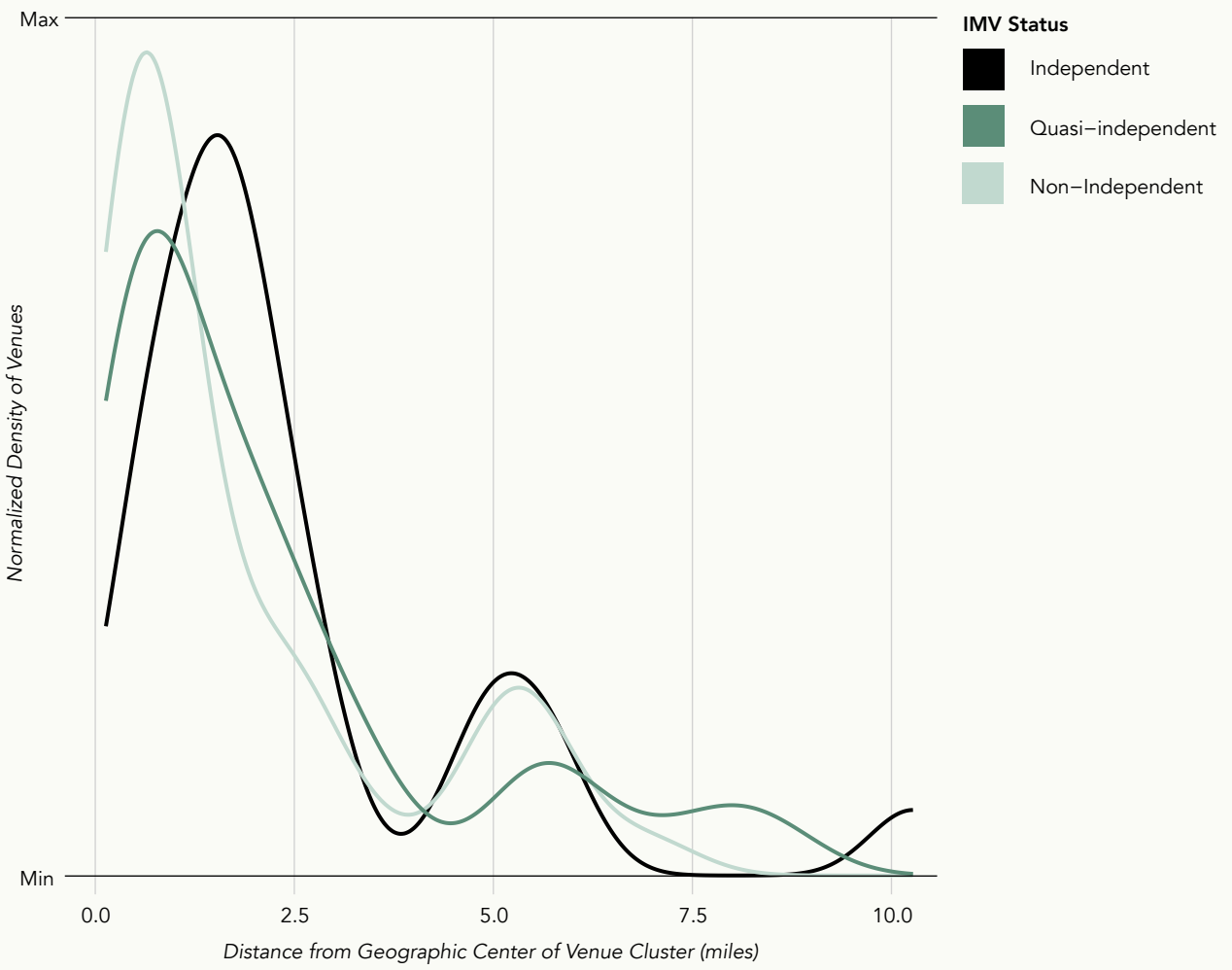
Community Focus Ratings by Community Planning Area – Dedicated Music Spaces

Q: Is the venue likely to be any of the following...*a consistent platform for a niche genre, a space for underrepresented communities or music scenes, a neighborhood community hub, and not solely walk-in tourists?*



Note: This analysis uses Community Planning Areas, as shown on the map in Figure 4. These areas often contain multiple neighborhoods, and may include neighborhoods with the same name as the wider planning area itself.

Figure 17: Graphic showing density of IMVs, quasi-IMVs and non-IMVs (dedicated music spaces only) in relation to Nashville's music center.



IMVs are most concentrated in East and South Nashville, and are located further from the geographic center of Nashville's venue cluster (the average latitude and average longitude point of the venues in the sample). Non-IMVs are located an average of 1.8mi from this center, while IMVs average 2.6mi away.

Participants described "two realities" in Nashville: the Downtown tourist city and the locals' city beyond. As one Open House participant put it, "I don't go downtown in Nashville." This was echoed across the session: locals described a reluctance to go to Lower Broadway unless absolutely necessary. For some musician participants, gigs on Lower Broadway do provide a source of income. But other research participants described a growing sense of "resentment" of Downtown within the local music scene, with the area either competing with other areas for audiences and tourist dollars, or simply disconnected from the local scene.

Entities like Nashville Metro and NCVC aim to distribute support, investments and tourism marketing across the region, seen in Metro's investments in public safety, placemaking, parks and community centers across the county, as well as destination marketing platforms[115]. However, a number of study participants still strongly perceive that Downtown venues get more support and access to city services than those elsewhere in the city (i.e. city services such as policing, tourism marketing of Downtown-area venues[116], etc.), even while independent venues are less discoverable by visitors than the walkable, dense area of Downtown. The additional city services needed and directed downtown during major events such as sports games and public holidays (e.g. a quarter-million people attending July 4th fireworks[117]) may also contribute to this perception.

115 *Nashville Music City, Search for Live Music Venues.*
116 *Nashville Music City, Guide to Free Live Music in Nashville.*
117 *Nashville Downtown Partnership, 2023 Annual Report.*

Venue Profile

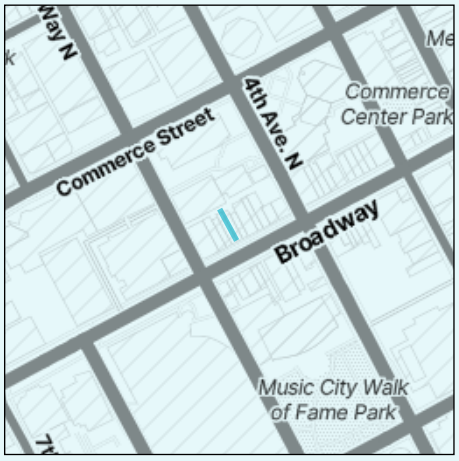
Layla's Honky Tonk

Venue Profile: Layla's Honky Tonk

As one of Lower Broadway's longstanding honky tonks, Layla's Honky Tonk has hosted a range of notable country and rock stars at various times in their careers: Drive-By Truckers, Chris Scruggs, Ralph Stanley and more. The only independent woman-owned venue on the strip, Layla's story highlights the reciprocal nature of support in Nashville's music community and how this influences a venue's success.

After moving to Nashville from Chicago in 1996, owner Layla Vartanian integrated herself into the local scene by spending time at honky tonks like Robert's Western World, eventually becoming a bartender and regular performer there. In 1997, Robert Moore opened the Bluegrass Inn next door, where Layla and her partner at the time became the primary performers. Soon after, they took over the bar from Robert, renaming it after themselves. When her partner left, Vartanian and her honky tonk remained.[118]

According to the *Tennessean*, downtown musicians feel that Layla's retains a more traditional honky tonk spirit than other, newer venues—particularly given its openness to original music, which is unusual for Lower Broadway: "old country songs get covered in a variety of ways and performers are free to work in originals."[119] Vartanian also still performs from time to time, supported by a community of locals and newcomers alike. When considering Layla's place among newer honky tonks, Vartanian expressed confidence in the venue's continued resonance, as it draws "leaders, not followers. You can go to Margaritaville in any town. You can't go to Layla's, Robert's or Second Fiddle in any other city. These are one-of-a-kind places."[120]



Venue land parcel and surrounding area

Fast facts	
Venue type	Independent
Address	418 Broadway, Nashville 37203 / Lower Broadway
Year Venue Established	1996/1997
Year of Construction	1900
Capacity	146
Booking strategy	Independent
Show frequency/ Events per month	11-20
Genres	Country, rockabilly
Ownership Structure	Information unavailable[121]
Land Owner	JLC Properties, LLC Nashville, TN
Lease Terms	NA - Venue controls the site
Assessed Value	$1,019,320
Appraised Value	$2,548,300
Community Identified Threats	None identified
Zoning	DTC (Downtown Code) 2nd and Broadway
Land Use	Nightclub/Lounge
Business License Type	Drinking Places (Alcoholic Beverages)
Further Notes[122]	Located in Broadway Historic District

118 *Justus, Broadway Then and Now.*
119 *Keefe, A Money Making Machine.*
120 *Paulson, Will Big Names Overshadow Lower Broadway?*

121 Venue ownership and team were unavailable to participate in the development of this case study; information has been gathered from published sources.
122 In addition to Layla's, three other IMVs are located in historic districts: Lipstick Lounge (see profile in Section 3.2.2), Skulls (Printers Alley Historic Dist.) and Rosemary & Beauty Queen (East Nashville Historic Dist.), in addition to other quasi- and non-independent venues.

Venue Profile

DRKMTTR

Venue Profile: DRKMTTR

From its 2015 start as a house venue to its current nightclub space in Cleveland Park, DRKMTTR Collective has evolved through many iterations. This DIY (do-it-yourself) space is one of Nashville's only all-ages venues catering to the punk/indie scene, with shows running the gamut between small touring acts (Horse Jumper of Love) and local legends (Screaming Females).

Volunteer aid and crowdfunding are a major part of the venue's history. DRKMTTR's first location, a house venue on Third Avenue South, came to fruition after a small group including co-founders Kathryn Edwards and Olivia Scibelli crowdfunded for rehabilitation costs. After a year, DRKMTTR moved from its house show origin to a former barber shop, operated by a collective of approximately 20 members at its largest. The 2016 Ghost Ship fire in Oakland, CA led to the venue "going legit" on code, and crowdfunding to do so. However, stricter fire codes and lower capacities in the wake of Ghost Ship still resulted in DRKMTTR having to move due to permitting challenges and a space of inadequate size[123].

Their third and current location arose with the financial backing and know-how of Don Kendall, a local real estate professional, musician, and DIY scene supporter. Kendall's company, Development Management Group, owns 4209 Associates, LLC, which has purchased the venue's land on Dickerson Pike. "We really couldn't have done any of this without Donnie," DRKMTTR cofounder Olivia Scibelli explained in an interview—underscoring the power that sympathetic developers can have in facilitating local music space.

Community is the lifeblood of DRKMTTR: the venue has never made a profit, and excess funds go to the bands and employees. As profit has never been a goal, Scibelli notes that a non-profit model might suit the space better, allowing them to apply for grants and expand all-ages programming. (Following this interview, DRKMTTR has announced they are seeking non-profit status.) As a community hub for touring bands and local punks alike, Scibelli hopes DRKMTTR can play a role in re-invigorating Nashville's rock scene after the impacts of the Covid-19 pandemic.

Venue land parcel and surrounding area

Fast facts

Venue type	Independent
Address	1111 Dickerson Pike, Nashville 37207 / East Nashville
Year Venue Established	2015 (3 locations/ iterations)
Year of Construction	1966
Capacity	99
Booking strategy	Independent
Show frequency/ Events per month	20+
Genres	Rock, indie, hardcore, metal, punk
Ownership Structure	LLC
Land Owner	4209 Associates, LLC, Nashville, TN
Lease Terms	5 year lease until 2027
Assessed Value	$124,040
Appraised Value	$310,100
Community Identified Threats	Neighbors, land costs, licensing
Zoning	CL (Commercial Limited)
Land Use	Nightclub/ Lounge
Business License Type	Drinking Places (Alcoholic Bev): License on file is from previous owner, Music City Lounge

123 *Trageser, Drkmttr to Close — for Now.*

3.1.4 Land and rent costs are related to artistic programming and independent status.

IMVs are willing and able to pay far, far less for land and rent than non-IMVs. IMVs are located on land whose value is, on average, 66% lower than that occupied by non-IMVs, and 34% lower than Quasi-IMV spaces. This implies that property taxes and rents for IMVs are substantially lower than for their competitors.

Figure 18: median land cost per square foot, sorted by independence status

Independence Status (Dedicated Music Spaces only)	Median Land Cost per Square Foot[124]
IMV	$119
Quasi-IMV	$178
Non-IMV	$350

The higher the rent, the less experimental or community-focused the music program. Venues want to be near audiences, transportation infrastructure, and certain amenities. Those areas can be expensive—other types of businesses want to be at those same locations[125]. The more a venue pays in rent, the more pressure it faces to ensure its programming hits revenue targets. Even a few underperforming nights can impact thin budget margins. This makes it harder to take programming risks on new acts and niche genres. Simply put: more affordable space enables more local acts, experimental content, and/or music-focused programs.

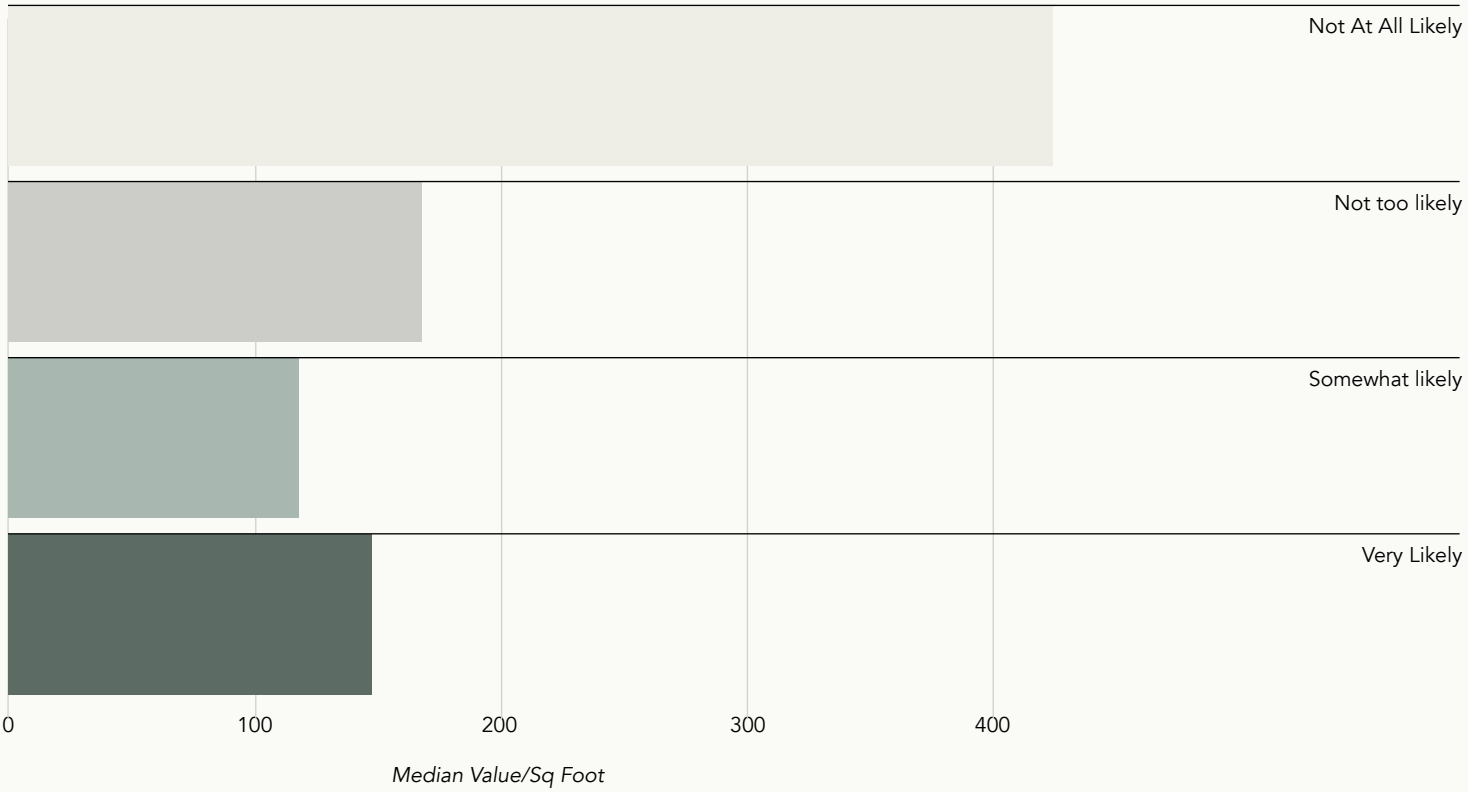
124 This value is based on appraised land value per square foot for the entire parcel where a venue sits. Source: Metro Nashville and Davidson County.

125 This pattern of location, cost, and programming is very consistent throughout VibeLab and PennPraxis' Creative Footprint Project, and appears in cities across the world.

Figure 19: Median appraised value per square foot for Dedicated Music Spaces as a function of their likelihood to present experimental content.

Dedicated Music Spaces – Median Appraised Value by Likelihood of Experimental Program

Based on appraisal values of 113 dedicated music spaces. Q: Compared to other venues in the city: Is this venue a platform for niche or experimental trends, sounds and art forms? Is it a place for experimental performers or extraordinary event concepts?

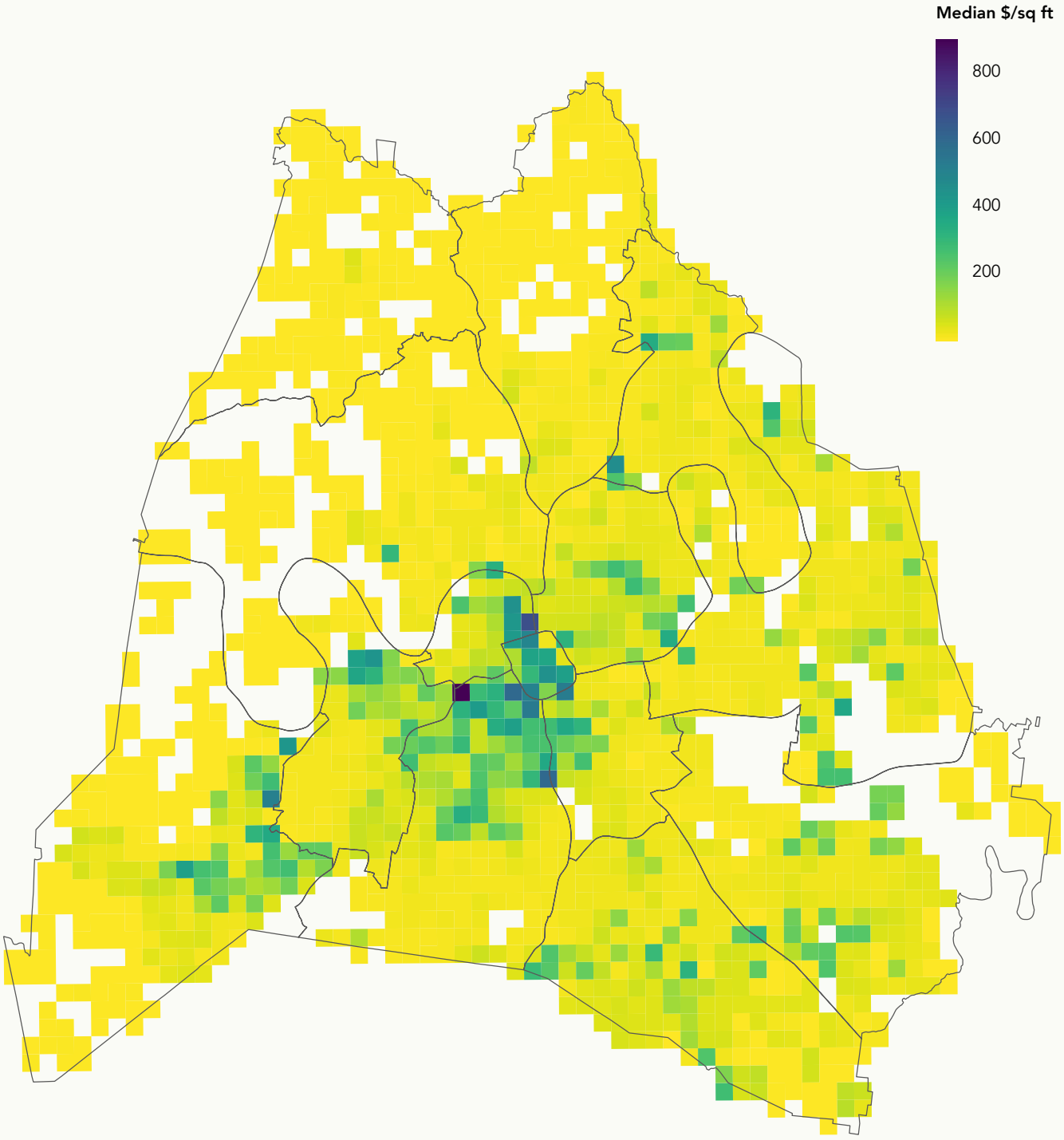


In Nashville, music spaces with lower land costs are more likely to present community-oriented or experimental programming, regardless of independence (Figure 19, above). Venues assessed as "Not At All Likely" to be a platform for experimental trends or performers have the highest land values.

As land values increase in Nashville, more affordable land is harder to find. Furthermore, as neighborhoods see an influx of commercial and residential development, formerly affordable leases become far more expensive for venues—sometimes prohibitively so (Figure 16, below).

Figure 20: Median square foot value of all property sales in a half-mile grid cell, 2021-2023.

Median Appraised Value per Square Foot, Sales 2021–23
Half mile grid



VENUES HAVE TO CONSIDER TRADEOFFS BETWEEN INDEPENDENCE AND MITIGATING FINANCIAL RISK.

As real estate costs rise, venues may choose to partner with corporate booking entities as a way to boost revenue, or reduce their financial risk. Under some arrangements, a national or international booking entity can bankroll expensive bills, or absorb the impact of unsuccessful shows. IMVs are particularly susceptible to having to make this choice, given the low cost structure they choose. One local staple, the Basement East, has evolved a "hybrid" booking strategy that has enabled financial sustainability (see the following *Venue Profile: Basement East*).

Given rising land costs, music scenes in outlying areas are beginning to emerge. Participants had varying views on the "next" centers of independent music. Some mentioned the emergence of new venues in Madison. Others predicted movement to the south, to the west ("out in the Nations, way out towards Bordeaux"), or north of Germantown. Some hope to see North Nashville re-emerge as a music center (see *Local Case Study: North Nashville* for more). Emphasizing the value of dense, walkable co-location of independent venues for local creative scenes, one property developer felt that the East Bank offers an opportunity "similar to what the Rock Block was in the 80s": a potential for concentration of independently owned and/or operated spaces that allow local artists and audiences to grow and be supported (see *Local Focus: East Bank* in *Section V: Recommendations* for further discussion of this area). However, music scenes located further from the center may struggle to create the concentrated groupings of venues that can enable a sense of community to emerge; see more on this in *3.2.5: Affordability and Urban Mobility*.

Venue Profile

Basement East

Venue Profile: Basement East

The Basement East ("BEast") is the third of Mike Grimes' Nashville music institutions—a sister business to IMV The Basement (colloquially known as the "OG Basement") and quasi-IMV Grimey's Preloved Records and Tapes. With a reputation for booking both local and national favorites, BEast is notable for its mixed business model: booking some of its own programming, with a bespoke contract with Live Nation accounting for the rest. BEast's trajectory demonstrates how an independent venue works to mitigate risk and remain financially sustainable.

In 2014, co-founders Grimes and Dave Brown began looking for a larger venue to host shows after many of the bands that played the OG Basement earlier in their careers (Black Keys, the Shins, My Morning Jacket, Drive-By Truckers) had outgrown the space.[126] They found a warehouse on the east side and crafted a simple 500-capacity venue with a bar in the back. Despite their long-standing reputation in Nashville and numerous relationships with agents and local acts, Basement East had a hard time at first, with Grimes admitting: "we bit off more than we could chew with a 500-cap room. You can't be successful at that size only with local acts." Richard Sloven, who had recently moved to Nashville after promoting at Knitting Factory in New York, joined the team in 2016 and helped the venue achieve real success.

Sloven had been in talks with Live Nation and, in 2019, agreed to work with them on one condition: Basement East gets folded into the deal. BEast has a unique arrangement with Live Nation: unlike other spaces associated with the live music giant, BEast is 100% independently owned. Live Nation books a majority of BEast's shows, but they are free to use outside promoters or book as many shows as they want. Sloven still books almost exclusively for BEast, maintaining that critical partnership and allowing the venue to toe the line between touring and local acts.

Basement East has endured a number of recent hardships, from a tornado destroying the site in February 2020 (it was rebuilt) and the Covid-19 pandemic. Without the support of their landlord, investors and the greater community, Grimes is not sure they could have made it: "The Basement East props itself up largely from national acts, but the calendar we have draws thousands to East Nashville every month. People want to champion us because we have been here. There are so many things that could have gone one way or another, but we are firing on all cylinders."

Venue land parcel and surrounding area

Fast facts

Venue type	Quasi-Independent
Address	917 Woodland St, Nashville 37206 / East Nashville
Year Venue Established	2015
Year of Construction	1973 (Partially rebuilt 2020-21)
Capacity	575[127]
Booking strategy	Sometimes independent
Show frequency/ Events per month	20+
Genres	Alternative
Ownership Structure	Limited Partnership
Land Owner	H & H Investments Ltd, Goodlettsville, TN
Lease Terms	10 years
Assessed Value	$964,880
Appraised Value	$2,412,200
Community Identified Threats	Land costs
Zoning	MUL-A (Mixed use limited - low intensity)
Land Use	Nightclub/ Lounge
Business License Type	Not available

126 *Rau, The Basement Adds East Nashville Location.*

127 *Hudak, How the Basement East Built Back.*

THE BASEMENT EAST, TAELA, MARCH 3 2024

3.1.5 Characteristics of Nashville Venues

Comparing Nashville to Creative Footprint Cities

Creative Footprint Project (CFP) is a research study conducted by VibeLab and PennPraxis that researches music spaces and communities in order to study the cultural strength and impact of a city's music and nightlife. At time of writing, it has been conducted in Berlin (2017), New York City (2018), Tokyo (2019), Stockholm (2021), Montréal (2022) and Sydney (2023). This study used much of the CFP methodology to collect information on spaces with at least one event per month (e.g. occasional and dedicated music spaces). How does Nashville compare?

Figure 21: Table comparing Nashville to Creative Footprint cities by population, number of music spaces, area, and spaces by population and area. See footnotes for data sources[128].

City (Study Year)	Population	Number of Music Spaces	Area (square mi)	Spaces per 10k people	Spaces per Square km
Nashville (2023)	**690,540**	**252**	**525.2**	**3.7**	**0.2**
Berlin (2017)	3,517,424	495	342.7	1.4	0.5
New York (2018)	8,426,743	493	467.9	0.6	0.4
Tokyo (2019)	9,272,740	581	253.6	0.6	0.9
Stockholm (2021)	975,551	96	214.6	1.0	0.4
Montreal (2022)	2,004,265	265	82.9	1.3	0.4
Sydney* (2023)	394,178	241	27.2	6.1	3.4

**Study area of Creative Footprint Sydney was confined to City of Sydney and Inner West Local Government Areas (LGAs).*

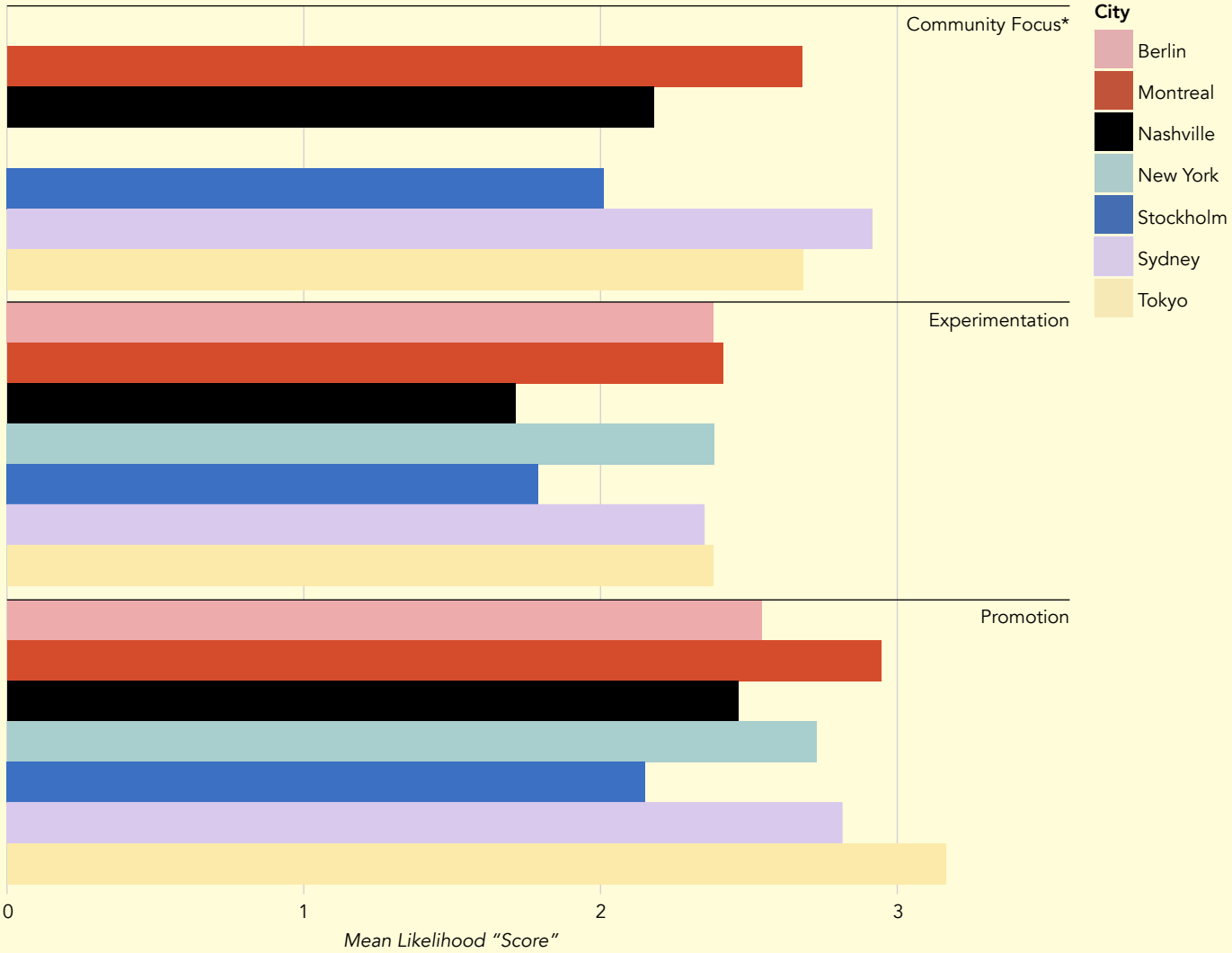
128 Data sources: VibeLab / Creative Footprint (2017, 2018, 2019, 2021, 2022, 2023), Statistics Canada (2016, 2021), US Census Bureau (American Community Survey 2016 & 2021 5-year estimates), Japan Statistics Bureau (2019), Statistikdabasen.scb.sc (2021), Australian Bureau of Statistics (2016, 2021), Geodaten aus Deutschland (2016).

Figure 22: Comparison of mean scores of community focus, experimentation and promotion among six Creative Footprint cities and Nashville (in black). Figure includes all Nashville music spaces.

Programming Comparison

Community Focus, Experimentation, and Promotion

**Community Focus data was not collected in Berlin and New York City*



- Nashville, with its ubiquitous live performances has, by far, the highest *per capita* concentration of music spaces observed in any of these cities[129].
- Both Downtown Nashville and East Nashville have venue clusters whose size rivals major areas of CFP cities' nightlife, including Shibuya (Tokyo) and Mitte (Berlin).
- Nashville is *by far* the least dense of this group of cities, and its *per-area venue density is very low*. Not surprisingly, venues, workers, and residents in Nashville have far less access to affordable transit than peer music cities, and parking is a much more prominent issue.
- Nashville's programming was rated by locals as *far less likely* to feature experimental or community focused content than peer cities, as seen in the figure below. However, Nashville rates comparatively strongly on metrics of promotion: its venues are more likely to promote music as a core offer, rather than food, drink or other attractions.

129 Sydney (2023) had higher density—however, that study focused only on a portion of the metropolitan area.

3.1.6 Venues at Risk

"The independent music venues [in] this city are vital to artist development and thus vital to the fabric of Music City."

—Jenny DeLoach, Director of Marketing and Fan Engagement, Tennessee Titans

"Nashville's independent music venues are the heartbeat of the city. As a South Floridian who saw... Miami's cultural institutions [get] eliminated, it scares me to imagine the same happening to my beloved Nashville."

—Jamie Rodriguez, President, Producer and Host, Jrodconcerts Media

Research participants strongly emphasized the need to preserve the music venues that have formed Nashville's music heritage. They identified the *intangible* element (the business and its programming) as being important to a venue's history. Participants and preservation professionals recognized that traditional historic preservation tools are often hard to apply to live music venues because they focus on the *physical* element of a venue's history. The Rock Block was cited as an example: there, preservation efforts have focused primarily on the facades, not the buildings or businesses within.

For participants, preserving a venue means preserving its *function* in Nashville's community, beyond its physical space alone. One prime example is Douglas Corner Cafe, whose May 2020 closure was followed by the Eighth Room's opening in the same space[130], and the launch of Douglas Corner Country Place in Skyline Village, primarily as a privately-booked event space. But these new iterations are no replacement. Douglas Corner Cafe's closure is widely seen as a loss for the overall music ecosystem: it "leaves a hole in Nashville's soul"[131].

Preservation professionals note that some tools are hard to apply to music venues. Many venues that are thought of as mainstays are not old enough to qualify for some historic designations. Furthermore, tools such as conservation or façade easements or historic zoning overlays require opt-in from the property owner, and many venues are not operated by the property owner. Often, preserving the built spaces and the intangible heritage within them can require different approaches and tools.

130 *Paulson, New Nashville Venue.*

131 *Hurt, The Closing of Douglas Corner.*

"Preserving the venues that are already here and established is a really, really important thing to do. ... That tradition in there, the energy, the artifacts and memorabilia, the things that built this city or helped to build this city are really worth preserving."

—C4 Ebrahimi, Musician and event host

Participants proposed a range of tactics: Metro could work with developers to keep venues where they are; provide tax abatements, low-interest loans, or financial support for IMVs with historical value; ease regulations and fees on small independent venues; and support campaigns to educate urban actors outside the music industry about the importance of preserving venue space. These types of actions, plus two models drawn from other localities, are further discussed in *Section IV: Recommendations*.

Some saw conflict between music venues and nearby development as a growing concern. Participants anticipated this to become a larger issue with more incoming Airbnbs and rental apartments. They worried that low residential build quality would cause new sound conflicts with nearby venues.

As development intensifies in Nashville, venue operators face the risk of either direct displacement of their venue (such as when the land the venue sits on is sold) or secondary development pressures (e.g. noise complaints from newly adjacent residents) making operations untenable.

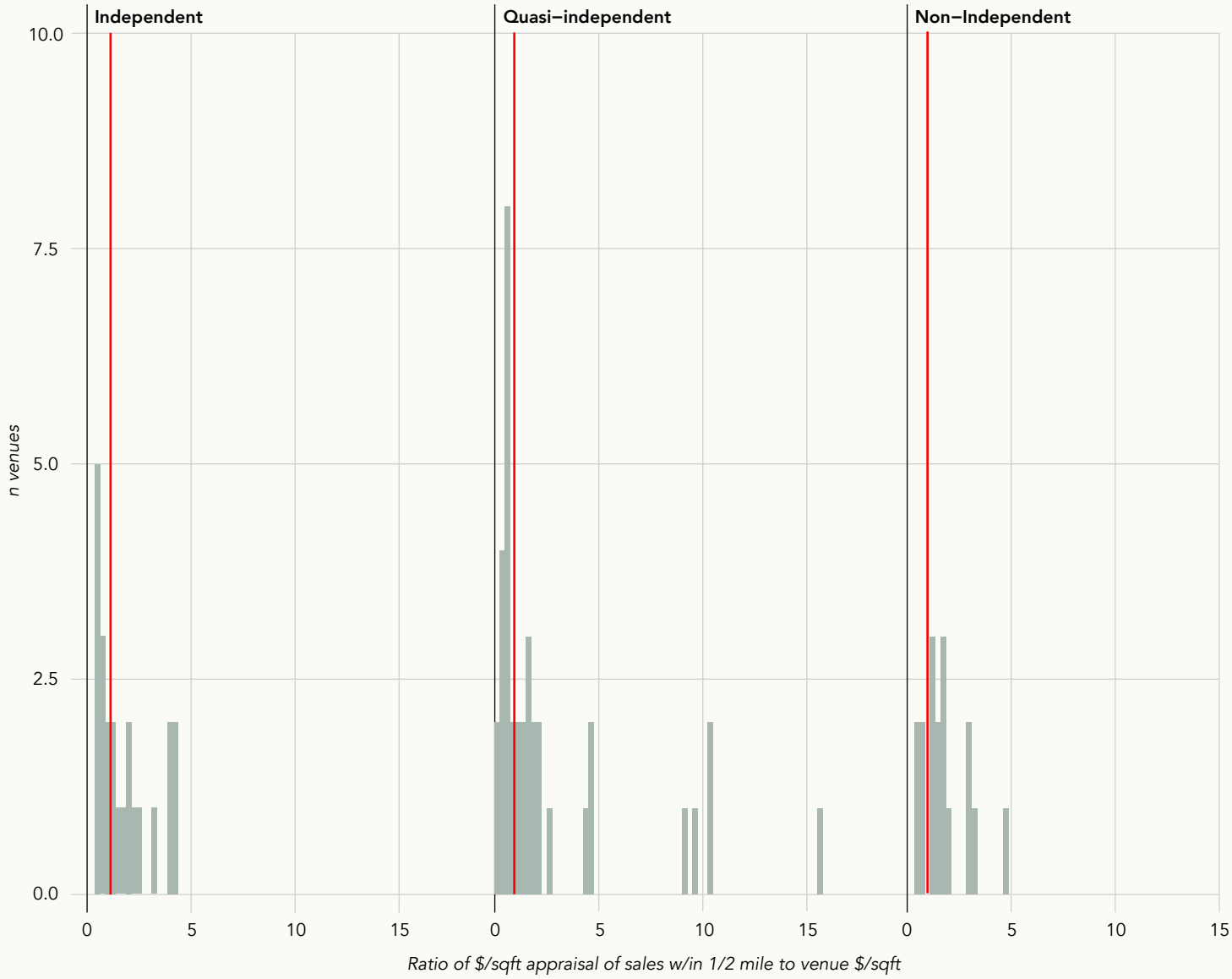
Data show that many of Nashville's venues are facing serious real estate pressure. Many music spaces are in areas of Nashville where real estate sales intensity is high, and where the value of recent property sales per square foot is quickly rising, often selling for more than the appraised value[132]. See Figure 23 for a visualization of this trend. For example, in the last few decades, land near 3rd & Lindsley has appreciated in value 1000% (see *Venue Profile: 3rd & Lindsley* later in this section). Property owners may want to capitalize on this rising value by selling their land, redeveloping, or raising rents—putting venues, as renters, at greater risk for displacement and incentivizing corporatization.

132 Based on average appraised price-per-square-foot calculations of sales within the past 3 years in a 1-mile area relative to the appraised price-per-square-foot of a given venue. Data source - Metro Nashville and Davidson County Cadastral property records. (*Note:* **appraised value** is a property's worth for purposes of mortgage or market valuation; **assessed value** is a property's worth for the government's tax assessment purposes. These and other terms are in Appendix 4: Glossary.)

Figure 23: Appraised Property Value of Dedicated Music Spaces relative to recently sold properties.

Assessed Value Relative to Recent, Nearby Sales

Dedicated Music Spaces Only – Venues to the right of the right of the red line are assessed at lesser value than the median value of nearby sales
2021–2023



In Figure 23, a ratio of 1 (the red line) means that a venue is appraised at the same value as nearby properties recently on the market. Anything over 1 is potentially vulnerable because it is in an appreciating area.

A very high proportion of music venues, regardless of independent status, do not control their own property (e.g. as renters of their space), leaving them susceptible to displacement (Figure 24).

Figure 24: On-site ownership of dedicated music spaces, by type, based on text matching of addresses in Metro Nashville property and business license databases.

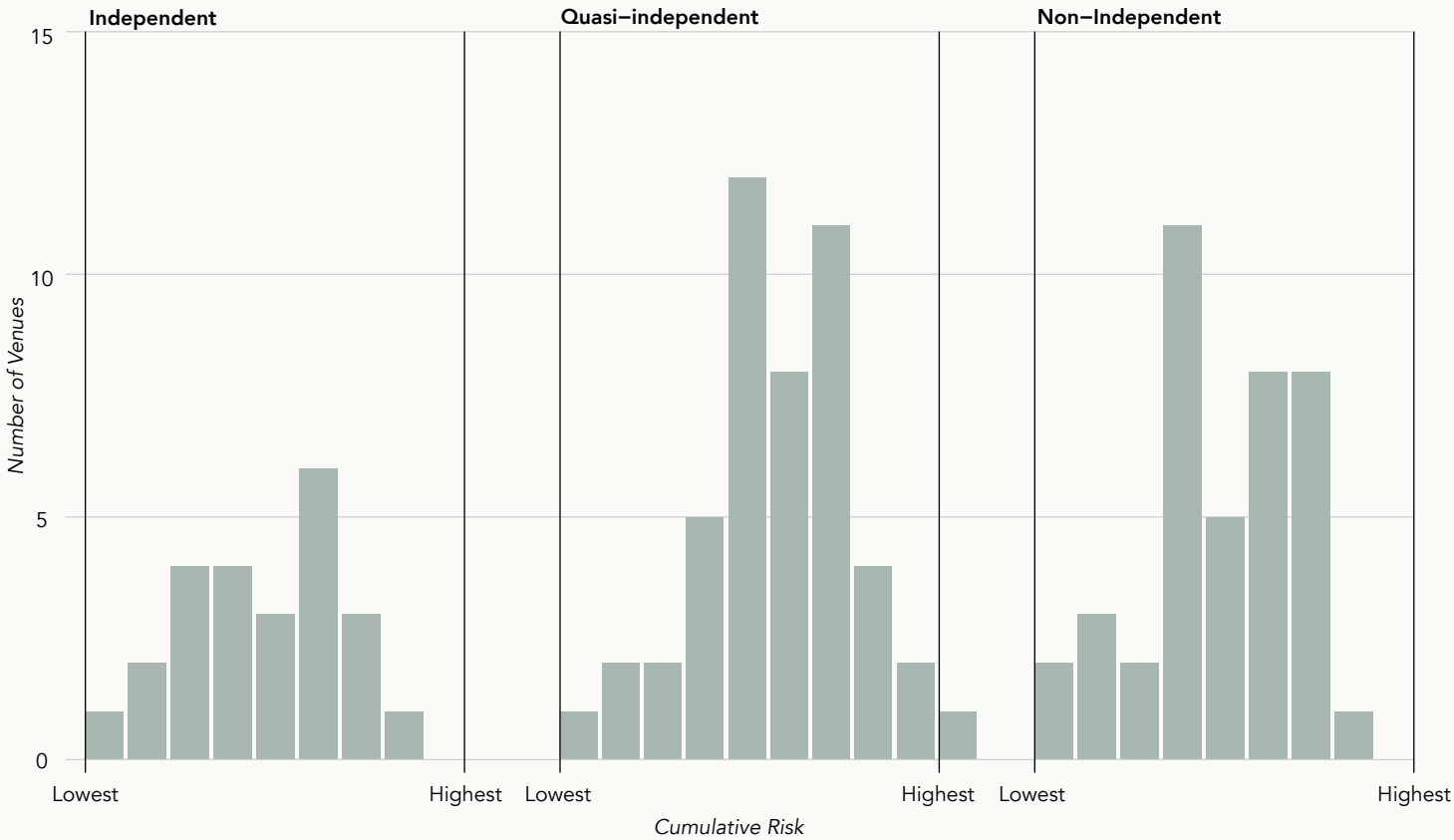
	On-Site Ownership	Off-Site Ownership	Information Unavailable
IMV	5	17	2
Quasi-IMV	8	33	8
Non-Independent	2	33	5

The research team created a "Risk Index" (see *Appendix 3, Risk Exposure Framework, for methodology*) that assesses risk factors for dedicated music spaces: property ownership status, nearby property values and sales intensity, building condition, and programming investments. Music spaces of all types face a fair amount of risk. Some of the most exposed dedicated music spaces are not IMVs (Figure 23). Venues like Exit/In, Cannery Ballroom and others with high risk exposure were once IMVs, but have since moved to corporate ownership or operation (see *Venue Profile: Exit/In* for more). Downtown venues (primarily non-IMV) have the most intense nearby real estate sales volume, but IMVs outside Downtown are seeing nearby sales appreciating quickly in value.

IMVs are likely to be less prepared to deal with risk than their competitors: they already require lower cost structures and cheaper land, and they also lack the risk protection of a corporate parent that might be able to pay higher rent or absorb more costs.

Figure 25: Risk index for dedicated music spaces: risk estimated by adding up a venue's number of risk factors. While venues across all types of dedicated music venues are exposed, IMVs may be less prepared to deal with these risks than quasi or non-independent venues.

Dedicated Music Spaces Only



Venue Profile

Exit/In

Venue Profile: Exit/In

"Many times people have said you never knew who might show up or sit in with the advertised artist. Even waiting to get in for the second show. Squeezed into a booth and looked straight into Randy Scruggs' eyes." — Exit/In - the early years[133]

Exit/In has been a staple in Nashville's music scene for over 50 years. Founded in 1971 as a "listening room," the Exit/In was, at its start, one of the only spaces for rock and alternative artists to play as Nashville solidified its country roots in the '70s and '80s[134]. Setting itself apart from the honky-tonk scene of Lower Broadway, the storied space has hosted legendary acts including The Police, Steve Martin, Etta James, the Red Hot Chili Peppers, Willie Nelson, and more.

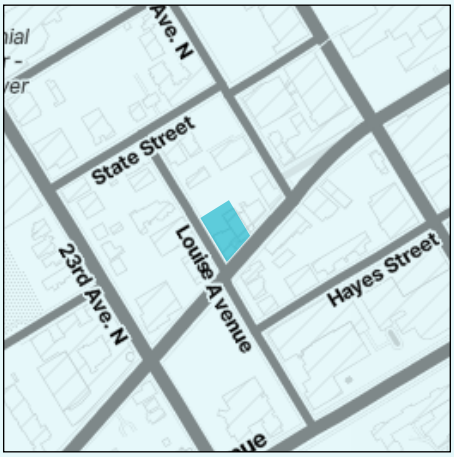
Exit/In's independent programming and laid-back atmosphere helped grow the rock scene in Nashville, bringing like-minded musicians and promoters to Elliston Place which, because of the venue, became known as the "Rock Block." But while the venue is strongly associated with rock music, programming varied from its 1970s start, including jazz, comedy, and a range of other genres. More recently, on any given week, the venue might host R&B, indie rock, country or reggae, catering to a wide audience and growing its cult-like patronage.

Exit/In has had a handful of owners over its 5-decade-long run: prior promoters, club operators, and others closely involved with the Nashville music scene. Chris Cobb, Exit/In's most recent owner, became involved in 2004 after years of playing and promoting, and has since risen to prominence as a champion of Nashville independent venues.

Cobb and his wife Telisha owned the venue until 2022, when the property was put up for sale. A bidding war ensued between Cobb (with backing from Grubb Properties' Live Venue Recovery Fund and a GoFundMe page) and corporate real estate developers AJ Capital Partners, who own other venues outside of Nashville. Ultimately, AJ Capital purchased the site for $6.45 million in July 2021[135] and reopened the venue in 2022. Under AJ Capital's ownership, the venue still books its own programming in-house, rather than contracting with Live Nation or AEG.

It was Exit/In's sale that catalyzed a Council resolution—raising awareness of "the potentially devastating effects the loss of our locally-owned, independent music venues would have"[136]—and leading to this study concerning the state of IMVs in Nashville today.

** This venue is one of the very few in this research to be corporate-owned but independently-booked— hence the asterisk on this profile's designation.*



Venue land parcel and surrounding area

Fast facts

Venue type	Non-Independent* (see profile)
Address	2208 Elliston Pl / Green Hills - Midtown
Year Venue Established	1971, (Re-established 2022)
Year of Construction	1953
Capacity	500
Booking strategy	Independent
Show frequency/ Events per month	11-20
Genres	Rock and others
Ownership Structure	Subsidiary of AJ Capital Partners
Land Owner	MVTN OWNER LLC, Nashville TN 37023
Lease Terms	NA - Venue's parent company controls the site
Assessed Value	$2,015,120
Appraised Value	$5,037,800
Community Identified Threats	Land costs
Zoning	CS (Commercial Service)
Land Use	Restaurant/ Cafeteria
Business License Type	Office Administrative Services (Bona Fide Live, the former owner, is the license in Metro records)
Further Notes	Individually listed in the National Register of Historic Places[137]; Historic Landmark Overlay.

133 *Exit/In - the early years, Facebook.*
134 *Sapp, A Brief History of the Exit/In.*
135 *Ewers, Exit/in Sale Finalized.*
136 *Metropolitan Nashville and Davidson County, RS2021-927.*
137 *National Register of Historic Places, Exit/In Registration Form.*

Venue Profile

3rd & Lindsley

Venue Profile: 3rd & Lindsley

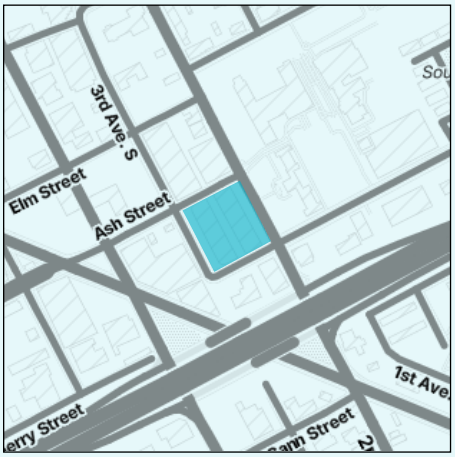
3rd & Lindsley was established in 1991 when Ron Brice bought a then-defunct Mexican restaurant in a 1980s-era strip mall business center. What started out as a neighborhood bar with live music at night set itself apart by supporting shows across genres, and partnering with local rock station Lightning 100 to book and promote shows and host weekly broadcasts on Sundays, *Nashville Sunday Night*[139] [140]. 3rd & Lindsley has maintained much of its core staff over the years, and is known for welcoming small and large acts alike. The venue has grown with both its own and Nashville's popularity, expanding from a 200-person to a 700-person capacity space after multiple renovations.

Deriving most of its revenue from food and drinks and leaving door sales to the bands, Brice considers his booking approach a "partnership" between the venue and the artists, a unique model for a venue of 3rd & Lindsley's size. Brice's independent and curated approach to booking shows is largely responsible for the venue's visibility. Past shows at 3rd & Lindsley include Vince Gill, Lucinda Williams, Wilco, Sheryl Crow, Train, Chris Stapleton, Lady A, Martina McBride and more.

The warehouse district that existed when 3rd & Lindsley launched has grown into high rise residential developments. Brice has voiced frustration with a loss of on-street parking to bike lanes and surprise street closures due to construction—factors he chalks up to a lack of communication or understanding from Metro. As of early 2022, Metro received a proposal for redevelopment from the property's owner, causing Brice to consider moving the venue when the lease was up in 2023; he recently signed an extension through 2024[141].

The venue has felt an increasing push to pick up stakes as nearby real estate pressures mount, competition with Lower Broadway increases the cost of labor and bookings, and land costs continue to rise. 3rd & Lindsley's block has appreciated in value by more than 1000% since 2001. Brice prefers not to move, but he is not averse to it: he is considering properties in New Heights, only 300 yards and just across the interstate from 3rd and Lindsley's current location, but far more affordable. He acknowledges that "as margins shrink and the cost of real estate grows, [IMVs] are finding it difficult and often impossible to continue in Nashville."

Acknowledging the pressure venues feel to work with corporate booking, Brice says that folding into a corporation like AEG does not fit with his booking model: "I like the idea of being able to do whatever I want to do when I want to do it, and do all kinds of music from all kinds of places and people."



Venue land parcel and surrounding area

Fast facts

Venue type	Independent
Address	818 3rd Ave S / 805 President Ronald Reagan Way, Nashville, 37210[138] / Rutledge Hill/SoBro
Year Venue Established	1991
Year of Construction	1984
Capacity	350-700
Booking strategy	Independent
Show frequency/ Events per month	20+ (30)
Genres	Rock, country, alternative, indie, blues, pop, Americana
Ownership Structure	S Corp
Land Owner	Greensboro I, Nashville, TN
Condition	Average
Lease Terms	20 year lease, with recent extension to end of 2024
Assessed Value	$4,341,200
Appraised Value	$10,853,000
Community Identified Threats	Neighbors, Licensing, Parking, Land values
Zoning	DTC (Downtown Code) Lafayette
Land Use	Business Center
Business License Type	Small Restaurants - Independents

138 For this study, venues' administrative tax parcel addresses were used instead of property mailing addresses, as the former provides more data for analysis. Tax parcels are sometimes larger than the venue building, so the address may not be the same as the mailing or published address.

139 *Ridley, 3rd & Lindsley Celebrates 20 Years.*

140 *Lightning 100, Nashville Sunday Night.*

141 *Trageser, 3rd and Lindsley Considering Relocation.*

3.2 Policies and Urban Processes
3.2.1 Challenges of Launching Venues

PARTICIPANTS IDENTIFIED DIFFICULTIES FOR INDUSTRY ENTRANTS AS A MAJOR CHALLENGE.

In addition to the challenges that *existing* venues face, finding affordable *new* venue space is seen as extraordinarily difficult for would-be operators. Some participants would like to see policies and frameworks that ease the process of starting a new venue for prospective independent owners who are not "hyperwealthy." Venue owners and managers expressed frustration that it was difficult to research spaces and develop design and financial plans without significant professional expertise from architects, contractors and others. To ease the space-seeking process, a "matchmaking" proposal is laid out in *Section IV: Recommendations*.

The clarity and costs associated with building codes were both identified as obstacles. Early-stage venue operators described challenges with Metro's building codes in venue development, encountering unpleasant surprises once they had already begun to invest in the space. Real estate professionals noted a backlog of administrative delays. Even experienced venue operators in focus groups reported major budget disruptions associated with unforeseen fees (water and sewer hookups, for example) or confusion related to the sequence of the real estate approvals process (See more in *Section 3.2.2*, *Local Case Study: How are Music Venues Born*?).

Venue operators, who noted the value they place on safety, said the cost of adding bathrooms or installing a sprinkler system led them to keep venue capacities lower than a space might otherwise accommodate (ex. only 100 visitors in a space over 2000 square feet), limiting the venue's income potential and audience. Whether launching a venue or renovating one, operators feel navigating the codes process requires experienced real estate partners to set floor plans, financial plans, and timetables based on knowledge of Metro codes and relationships with codes officers. Venue operators face delays and complications navigating Metro codes processes, or costly consulting fees. Especially for small venues with slim financial margins, or aspiring operators with limited upfront capital, this process can become challenging and prohibitively costly. (see *Venue Profile: Lipstick Lounge*). Currently, venue operators face delays and complications.

"There's no shortage of buildings in town, but there's a shortage of buildings in town that can host or facilitate live music, especially from an independent standpoint."

—Walter Blackman, Venue operator, Night We Met

Participants felt that Metro has a significant role to play in helping new venues to come into being. This is in two key ways: helping to maintain affordability for venue operators, and potentially connecting prospective entrepreneurs to real estate.

Solving the math problem: Participants stressed that Metro must clearly recognize how unaffordable the financial models are. Many feel it is no longer feasible to buy property and start a dedicated music space. Mixed-use combinations of residential and venue use are often sonically incompatible. In order for new venues to exist, music advocates stress that it must be financially feasible to run an independent venue.

Some participants felt that government-owned land has a significant role to play in creating new concentrations of venues. Publicly-held property can be developed in ways that offer affordable opportunities for live music. Music advocates indicated a particular interest in community-center-style nonprofit spaces that offer not just shows, but also space for training and artistic practice.

Nashville has many excellent private and non-profit institutions providing education and training to develop music entrepreneurs. Several community members reported affiliation with programs designed to build entrepreneurial capacity. An initial scan identified several existing programs at local universities, like TSU's Center of Entrepreneurship and Economic Development[142] and Belmont University's Curb College of Entertainment and Music Business[143], which offers venue management/ ownership courses, and positions for recent grads as Event Fellows to gain experience as they move into the professional world. Local nonprofits Music Venue Alliance[144], Leadership Music[145] and Leadership Nashville[146] also provide industry entrants and actors with valuable resources and support.

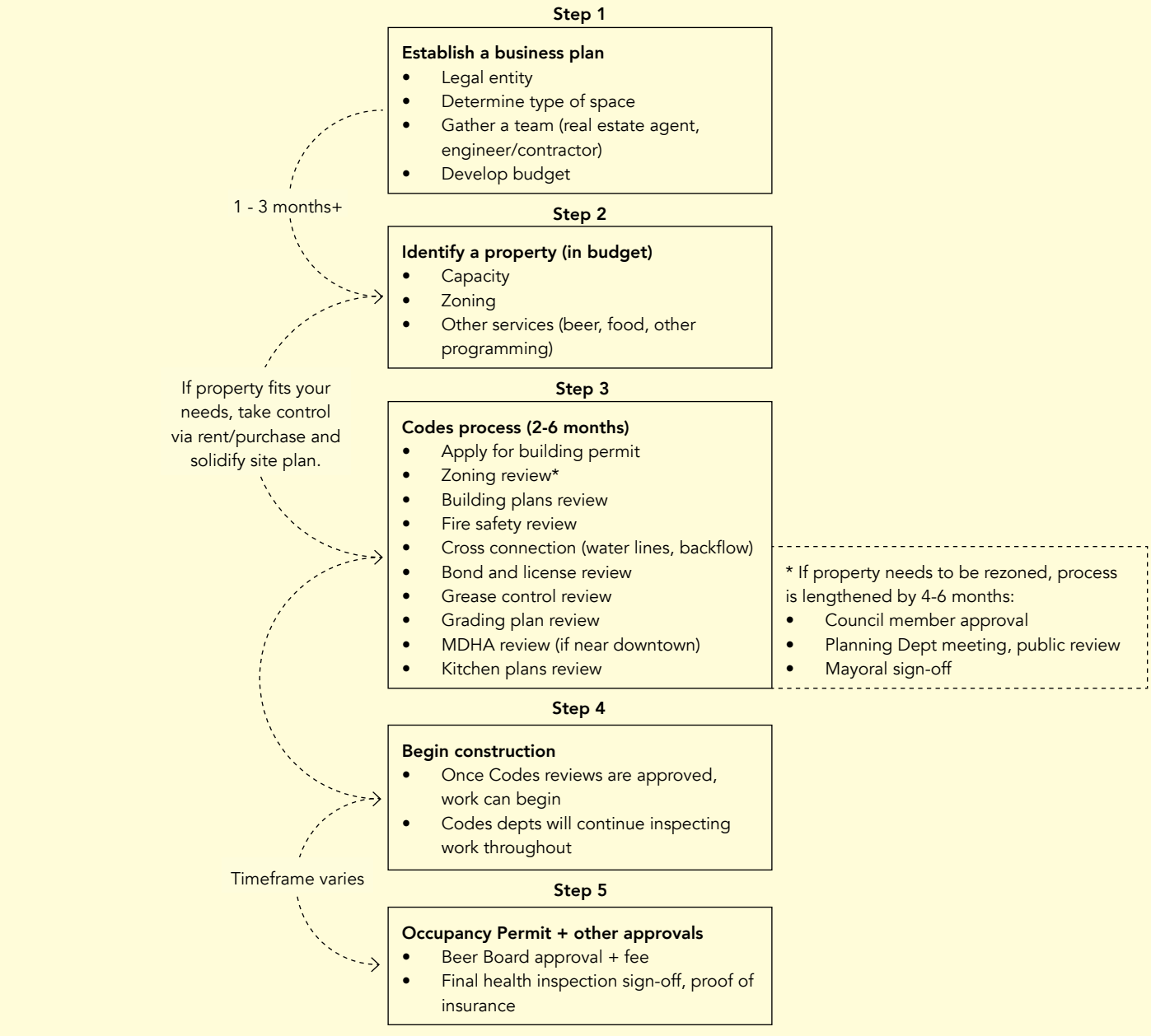
142 *Tennessee State University, TSU Incubation Center.*
143 *Belmont University, Curb College.*
144 *Music Venue Alliance Nashville, MVAN.*
145 *Leadership Music, Leadership Music.*
146 *Leadership Nashville, Leadership Nashville.*

3.2.2 Local Case Study:

How are Music Venues Born?

It's not enough to try to keep venues from dying: Nashville has to keep birthing new venues to keep its music scene healthy. How does this process work in relation to the Metro Nashville government? This flowchart, developed following interviews with venue owners, real estate developers and municipal planners, depicts the "approvals process" to design, build and license a new venue.

Figure 25: Flowchart depicting the steps to design, build and license a new venue



Process complications and annotations

Step 2

Identify a property (in budget)

Finding the right realtor is a crucial part of finding the right space. Lacking connections to the commercial real estate world might make it difficult to find a commercial realtor, as they specialize in commercial properties and have knowledge a residential realtor may not.

In addition, a lack of political or monetary leverage can make the process of finding and securing the right space more challenging. Especially in a hot market like Nashville's, properties are listed and purchased with quick turnaround.

Step 4

Begin construction

If purchasing a space that is not already fit for live music, large-scale renovations will likely mean a lengthened approvals process due to periodic inspections. The length added can also mean higher hidden costs for the project.

Step 3

Rezoning process

Not every venue will be zoned properly upon purchasing. Some may require rezoning before applying for a building permit. The steps are as follows:

- Meet with the district's Council Member to garner approval for the rezoning process.
- Appropriate Metro departments review the plan and inform the Planning Department of their approval or rejection.
- Planning Department makes a recommendation to the Planning Commission based on reviews.
- Planning Commission holds a public hearing and votes, which advises the Councilmember.
- Councilmember sponsors a Council bill which will be introduced, undergo public comment, and be finalized.
- Once the Mayor signs the bill, rezoning is complete. Venue can then proceed to Codes process.

Step 5

Occupancy Permit + other approvals

If a venue has had issues with noise, the occupancy permit may be threatened. However, there is not much precedent for this in Nashville.

Step 3

Codes process

The codes process is challenging to navigate at any time. The procedure may look simple, but in actuality, requires many more interlocking steps than first glace may suggest. Some tasks are more important than others, or must occur in a certain order. Politics and established relationships can also play a role in how quickly the process can be completed. Furthermore, some venues (such as DRKMTTR) typically operate in a gray area, as their activities span multiple business categories–they are not only bars, restaurants, etc. Venues therefore must, at times, fit into Metro definitions that don't fit perfectly, and Metro may have to bend existing requirements to help a venue pass inspection.

Venue Profile

Lipstick Lounge

Venue Profile: Lipstick Lounge

With its slogan "A Bar for Humans," Lipstick Lounge, Tennessee's only lesbian bar, welcomes not just Nashville's LGBTQ+ community, but all for music, karaoke, and more. Lipstick Lounge grew out of what co-owner Jonda Valentine describes as a religious calling to "build a bridge": a space of fellowship and community[147]. In its 125-year history, Lipstick's East Nashville building is said to have been a printing press, barber shop, church, grocery store, and more. Now, the "bar for humans" offers live music, trivia, quiz and comedy nights, and karaoke seven nights a week. Co-owner Christa Suppan books venue programming in-house: largely local artist lineups include a weekly showcase of emerging LGBTQ+ artists from queer music organization RNBW[148], along with Cody Belew, The Kentucky Gentleman and Chris Housman.

Although Suppan has owned the building since 2003, easing one common risk factor for independent venues, the bar still faces other pressures. Extreme weather has regularly flooded its floors and sound system. Damage from the March 2020 tornado, immediately followed by Covid-19, made Valentine and Suppan consider closing. Without a sprinkler system, capacity remains below 100, limiting business in the popular space until permits are secured for an expansion."I wish Metro knew how hard these mom-and-pop (or mom-and-mom) businesses worked," explains Suppan. To add capacity in the meantime, Lipstick has opened an upstairs cigar bar, the Upper Lip.

But despite its challenges, Lipstick has remained not simply a space for entertainment, but a community center for Nashvillians—hosting weddings, memorials, fundraisers for medical expenses, even serving as a community food pantry during Covid-19[149]. In one patron's words, "Having Lipstick as a mainstay, it's vital to our community."[150]

Venue land parcel and surrounding area

Fast facts

Venue type	Independent
Address	1400 Woodland St, Nashville 37206 / East Nashville
Year Venue Established	2002
Year of Construction	1920
Capacity	99
Booking strategy	Independent
Show frequency/ Events per month	3-10 (nightly entertainment)
Genres	Country, Indie, Rock, Pop, Soul, Eclectic
Ownership Structure	LLC
Land Owner	Christa Suppan, Nashville, TN
Lease Terms	Venue has site control
Assessed Value	$491,680
Appraised Value	$1,229,200
Community Identified Threats	Flooding
Zoning	MUL-A (Mixed use neighborhood - low intensity)
Land Use	Nightclub/Lounge
Business License Type	Drinking Places (Alcoholic Bev)
Further Notes	Located in East Nashville Historic District (National Register of Historic Places); Lockeland Springs-East End Neighborhood Conservation Zoning Overlay

147 *Post, God's Bar.*
148 *Young Music City, RNBW.*
149 *Villena, Lipstick Lounge Turns 20.*
150 *Villena, Lipstick Lounge Turns 20.*

3.2.3 Music is played everywhere in Nashville.

Live music is played in an extraordinary variety of contexts in Nashville: in concert halls and auditoriums, but also in strip malls, restaurants and stores, mixed-use complexes with apartments or offices, hotels, at docks and marinas, and converted spaces. Most of the time, when music is being played, it's on land that is primarily being classified as something else. Zoning, land use and business licensing data and classifications do not capture the location or nature of live music activity in Nashville.

IMVs and Quasi-IMVs are more likely to be in bar/nightclub, restaurant or retail contexts, whereas non-independent spaces span a very wide variety of uses, including large format industrial reuse and institutional spaces (see *Venue Profile: Eastside Bowl* for a K-Mart turned multi-use venue). Only three of the music spaces identified have Performance Space as a primary business type; most are Drinking or Food establishments. Only 18.5% of all 252 spaces are administratively identified with events, music, theater or nightclub use.

Figure 26: Top 5 types of Business License Descriptions associated with Live Music Spaces in Nashville. "Musical Groups / Artists". "Event Venue" and "Music/Performance Venue" are types that have <8 observations in the data. 49 venues do not have business license type information. Data: PennPraxis, Metro Nashville Planning.

Business License Description	Venues (All Types)	Dedicated Music Spaces	IMVs
Drinking Places (Alcoholic Beverage)	74	40	18
Full Service Restaurants	33	15	3
Small Restaurants	25	10	4
Full Service Hotel	13	4	0
General Retail	8	4	1

Figure 27: Top Land Uses associated with Live Music Spaces in Nashville. Data: PennPraxis, Metro Nashville Planning.

Land Use Classification	Venues (All Types)	Dedicated Music Spaces	IMVs
Restaurant / Cafeteria	55	24	7
Nightclub / Lounge	35	24	11
Strip Shopping Center	29	14	3
Hotel / Motel	26	6	0
One Story General Retail Store	12	6	2

Most venues are in areas that support bars and nightclubs or food service use by right, and many are in mixed use contexts. There are 107 dedicated or occasional music spaces zoned for the DTC (Downtown Code) district, where form-based code means there is a mix of land uses and activities (and potential conflicts). Outside of downtown, most venues are in areas zoned Commercial (CS/CL/CA) and Mixed Use (MUL-A, MUI-A, MUG-A)[151]. However, music uses are found in a wide variety of districts - more than two dozen. The most common zoning types used for music make up an extremely small percentage of available land area in the County (*Figure 28*).

Figure 28: Top zoning districts associated with dedicated and occasional music spaces. Data: PennPraxis, Metro Nashville Planning.

Zoning District	Description	Venues (All Types)	Dedicated Music Spaces	IMVs	Acres under this zoning, county-wide (% of county total)
DTC	Downtown Code zoning district found only in Downtown Nashville, intended for a broad range of residential and non-residential activities with an emphasis on urban design— the relationship between the street, building and open space for efficient land use, increased transit and the creation of vibrant and safe pedestrian streetscapes	107	51	9	1047 (0.4%)
CS	Commercial Service, intended for a wide range of commercial service related uses including low intensity manufacturing and storage facilities	22	12	7	5160 (1.9%)
MUL-A	Mixed Use Limited, intended for a moderate intensity mixture of residential, retail, and office uses	21	10	4	335 (0.1%)
CL	Commercial Limited, intended for retail, consumer service, financial, restaurant, and office uses	15	8	4	1371 (0.5%)
MUI-A	Mixed Use Intensive, intended for a high intensity mixture of residential, retail, and office uses	11	4	3	406 (0.1%)
CA	Commercial Attraction, intended for a wide range of amusement, recreational, and retail support uses typically associated with the tourist industry	10	6	0	557 (0.2%)
MUG-A	Mixed Use General, intended for a moderately high intensity mixture of residential, retail, and office uses	10	4	1	323 (0.1%)

151 More information about zoning districts in the Metro code: Nashville.gov, Zoning Classifications.

Venue Profile

Eastside Bowl / The Wash

Venue Profile: Eastside Bowl / The Wash

Eastside Bowl, the creation of three tenured venue owners and investors seeking a new approach to Nashville's live music market, is notable for its diversity of offerings, including a venue, a restaurant, large lounge, and a bowling alley, and its "hybrid" booking model blending in-house, external, and AEG lineups. It is also notable for its location: although listed at a Madison address, partner Chark Kinsolving notes that the venue is on the border of East Nashville and wants to brand it as such. Its location in a former K-Mart is auto-accessible with plentiful parking, direct highway access—and isolation from its neighbors.

In 2018, Kinsolving, founder of The Cannery Ballroom, The Mercy Lounge and The High Watt, approached Jamie Rubin—former owner of East Nashville's bar/club the Family Wash, which had recently closed after 15 years of business—about a concept for a bowling alley/live music venue. Kinsolving then secured investor Tommy Pierce, whom he had met through an earlier venue project[152].

Eastside Bowl incubated during the pandemic, and opened in December 2021. Across its 33,000 sq ft space, a 16-lane bowling alley is separate from a 5000 sq ft venue with two stages. The venue layout, with a balcony, skybox, a smaller stage facing the bar, and a larger stage facing the full room, prioritizes flexibility: larger touring acts can play theater-style, while smaller acts can use the more intimate configuration, without pressure to fill a cavernous room. A third, small stage in the "Low Volume Lounge" is designed for local East Nashville audiences and musicians. Shows Monday to Friday feature seasoned artists as well as impromptu ensembles from musicians between tours, with no cover and a tip jar. With these three stages, Kinsolving wants Eastside Bowl to accommodate and foster talent at all levels: "We are trying to build local talent on the small stage and move them to the main stage."

The programming is varied at Eastside Bowl, with a combination of an in-house talent buyer, outside promoters and a "small partnership" with AEG, who program some of the venue's larger acts. As a new venue, Kinsolving feels a need to book widely across genres to encourage highest attendance, although he'd like to further focus its artistic programming in the coming months: "Over the next year, I'd like to be able to curate more of what this room is and make it a true rock and roll destination here in Nashville."

Venue land parcel and surrounding area

Fast facts

Venue type	Quasi-Independent
Address	1508 Gallatin Pike, Madison 37115 / Madison
Year Venue Established	2021
Year of Construction	1965
Capacity	750 - venue 1350 -overall
Booking strategy	Sometimes independent
Show frequency/ Events per month	11-20 (15)
Genres	No Genre
Ownership Structure	Limited Partnership
Land Owner	Madison Center Partners, LLC Nashville, TN
Lease Terms	10 year lease with two 5-year options pre-negotiated
Assessed Value	$3,607,640
Appraised Value	$9,019,100
Community Identified Threats	None
Zoning	CS (Commercial Service)
Land Use	Strip Shopping Center
Business License Type	Restaurant/ Cafeteria[153]

152 *Littman, Eastside Bowl Will Be A Boon.*
153 In databases, this business license may still be listed as Automotive Parts; these records are considered out of date.

3.2.4 Music Governance: Public and Private Support for Grassroots Music

Nashville's newly created Office of Nightlife and Nashville Music, Film, and Entertainment Commission hold promise for supporting the city and county's nightlife actors. The Cooper administration created the Director of Nightlife role in late 2022, explaining that the new role in his office would "serve as a key liaison to neighborhood residents and the nightlife industry to address quality of life issues like cleanliness, noise (and) safety."[154] Other cities use this kind of office as a primary tool to encourage preservation and creation of live music venues. As of May 2023, not all research participants were familiar with the Office of Nightlife yet: some Open House participants asked whether "a certain department or certain office" served as a liaison to the music scene, suggesting that further visibility may have valuable impact. Further opportunities for this office are detailed in *Section IV: Recommendations*.

During research conducted in spring 2023, participants also raised questions about how the newly formed Nashville Music, Film, and Entertainment Commission (whose representatives have since been appointed[155]) would function, and how it might effectively represent the interests and perspectives of IMVs. Given the Commission's broad focus on TV, film, and music, participants verbalized their hopes that the new commission would include strong representation from independent music entities as part of a balance of representation from the various industry areas—and that *all* committee members would be actively involved in local culture.

The Music, Film and Entertainment Commission faces a wide breadth of issues, and also represents a diverse set of interests from both music and film industries. In its current structure, the Commission can identify key concerns for each industry, to determine areas of similarities, differences—and potential impact. These might include topics such as:

- Cost of living and working
- Special events and street closures
- Branding and promotion
- Business development, start-ups, and small businesses
- Business attraction
- Industry components that should be represented on the Commission
- Career pathways and alignment with high schools, colleges, and universities
- Access and impacts to neighborhoods and residents.

> "Every member of that committee needs to be involved deeply in what's actually happening in the culture...needs to know what DRKMTTR is, needs to actually go to shows, needs to have a favorite Nashville band, needs to know that Kings of Leon started here. It needs...to understand what the culture is behind it, and assist and protect and represent the people that they're supposed to."
>
> *—Participant, Open House, Event Policies & Regulations table, round 3*

154 *Smithson, Night Mayor to Crack down on Noise.*
155 *Nashville.gov, Nashville Music, Film, and Entertainment Commission.*

Furthermore, other open house participants recognized the challenges of staying informed and present in Metro Council meetings and processes where issues relevant to independent music venues and actors are discussed, suggesting potential opportunities for greater engagement.

Data related to live music, real estate, and businesses are lacking in Nashville. The lack of any one clear data indicator related to live music makes it difficult to understand and monitor the health of live music in Nashville. Government data portals do not publish common data sets about properties, sales, or business licensing that are commonly available in major cities. This also inhibits venue operators from researching land and prevents Metro's partners from doing economic research. Furthermore, property records, fire code data, and business records do not have common identifiers, requiring property-by-property searches to assemble records. For specific action steps to address these challenges, see Recommendation 1.5 in *Section IV: Recommendations*. This study's venue database, study variables and data sources are available in *Appendix 2*.

There is some resentment of the political and financial support for big-ticket sports and entertainment and Downtown tourism. Tourism entities already strive to spotlight diverse, local and independent businesses, and encourage visitors to get beyond Lower Broadway. But participants with ties to independent venues feel that these efforts are not yet having an impact—they hope to see local government and tourism entities help visitors better connect with independent venues and a wider range of music.

> *"I just wish that there was as much focus on supporting people that actually make the city what it is, as…trying to get the Super Bowl here." —Participant, Open House Governance, Accessibility, Discourse table, round 2*

One venue operator described trying to point visitors to local independent mainstays as often as possible but "they just can't find it." Initiatives like Independent Venue Week were appreciated, but seen as a "missed opportunity" to do more. While participants recognized it can be challenging to build excitement around seeing an unknown or new artist, some proposed leaning on the city's reputation as a hub for new, original music as a framing for a night out in Nashville. As one venue owner explained, "You go to hear original music and you go to hear new and engaging artists. You go to experience something that you don't really know what you're getting yourself into, but you're going to see it."

There is hope for more engagement and partnership with grassroots music stakeholders. Participants recognized the value in non-governmental initiatives to support and advocate for independent venues. Suggestions included an industry-based advocacy group; a regular meeting between council members and industry members; and potential statewide gatherings or initiatives linking independent venues in Nashville with those in cities like Knoxville, Clarksville, Jackson, Franklin, Chattanooga and Memphis[156] [157]. Further discussion of public-private coalition-building is in *Section IV: Recommendations.*

How can "big music participate in small music"? One business professional pointed out that health care, as an industry, invests heavily in its own development, and asked how big name actors in music and real estate could similarly be induced to fund and support the creation of grassroots, independent live music. Others noted that the biggest actors are often already saturated with requests for support, or tend to focus their energies outside of Nashville—meaning a strategic approach and coalition-building is essential. (This is further discussed in *Section IV: Recommendations.*) Other interviewees strongly affirmed this potential course of action, noting the power of philanthropy and local actors to directly foster the creation of new venues and cultural spaces. And in all cases, IMVs' role as incubators of new artists and new music is understood as essential to music on the largest scale:

> *"If Bridgestone and Ascend and the Ryman and the new football stadium don't start investing back into the bottom level, they will run out of tours in a decade… currently the bottom is eroding. We're not building new Taylor Swifts." —Participant, Focus group 1*

While Fox & Locke is located outside of Davidson County in Leiper's Fork, Williamson County, it offers one example of how private philanthropy has successfully preserved a venue's independence and history.

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156 Tennessee Entertainment Commission's new Music Office was announced in the same month as this study's Open House event where these suggestions were collected.

157 *Hollabaugh, Jimmy Wheeler to Open New Music Office.*

Local Case Study:

Fox & Locke

Located just an hour's drive southwest of downtown Nashville, Fox & Locke, a longstanding hub of musical community in Leiper's Fork, highlights the important role preservationists can play in retaining independent music space.

Founded as Fox & Locke General Merchandise Store in 1947 and purchased by the Puckett family in 1960[158], Puckett's Grocery has been the "social and cultural center"[159] of Leiper's Fork for decades, particularly since its introduction of live music in 2002. Leiper's Fork, an unincorporated village in Williamson County, has the only historic district on the Natchez Trace[160], in large part thanks to preservationist Aubrey Preston's purchase of nearly 2100 acres in the mid-1990s[161], spurring its transformation from a "ghost town" to a "cultural renaissance"[162].

The grocery and music venue, with its famed Thursday open mic, had seen an uptick in buyers expressing interest in 2021—including a California restaurant that hoped to use the space to create a Leiper's Fork outpost of its business. Preston, who had also made a successful last-minute bid to save RCA Studio A in 2014[163], saw it as a "preservation emergency" and stepped in, retaining the grocery as a venue and community meeting spot: "it's our Ryman Auditorium," he explains.

Now once again under its original name from the 1940s and still operating independently, Fox & Locke's Wednesday to Sunday program features a mix of traditional country music, Americana, jazz, top songwriters, cover bands, and its Thursday open mic featuring a mix of rock, pop, country, Americana and folk, all booked in-house. The 120-person capacity venue's Wednesday shows might feature an early-career act—or, as in 2022, a surprise appearance by local resident Carrie Underwood, jumping in with her bandleader's Tom Petty cover band.

Preston recognizes the precarity of these spaces, and the need for proactive intervention to support them amidst rising costs: "Everybody assumes that market forces will maintain important creative spaces and gathering places. But in the 21st-century economy…we're gonna wake up and not have any of those places because of the economics of running a little bar that plays music." He emphasizes the need for shared learning across the region spanning Nashville, Memphis, New Orleans, and the small communities in between: "Through...reaching out through the region and creating more alliances… we can all help each other learn more strategies around cultural tourism" that support the local ecosystem of artists, songwriters, and robust local cultural life. To him, independent venues like Fox & Locke are the keystone species in that ecosystem: "It's a lotta work, but it's magic. It is a butterfly tree."

158 *Nashville Music City, Leiper's Form Puckett's Back to Original.*
159 *Schmitt, Preserving Puckett's.*
160 *Puckett's of Leiper's Fork, About.*
161 *Trigger, Who Is the Man Who Saved Historic Studio 'A'?.*
162 *Buie, How Leiper's Fork Found Its Sweet Spot.*
163 *Gilfillan, Aubrey Preston Explains Why.*

3.2.5 Affordability and urban mobility threaten local music scenes.

THE RISING COST OF HOUSING AFFECTS THE DEVELOPMENT OF LOCAL MUSIC.

Local music cultures like East Nashville developed by having artists and audiences within walking distance of venues. As prices rise, artists, venues and audiences are pushed further out from the urban core, reducing the proximity, accessibility and cross-pollination that led to community and creativity in earlier eras: 1930s Jefferson Street, 1940s Broadway, or 1950s Music Row. What one economic development professional called the "drive 'til you qualify for a loan" model detracts from dense centers and communities of music.

> *"How do [we] create community with venues, to be able to keep this Music City thing…real? If we don't, it's Murfreesboro to Gallatin Pike and no community but the traffic." —Marcus Dowling, music journalist, The Tennessean*

Affordable living keeps venue workers in the industry. A recent music business survey by the Other Nashville Society found that over 40% of respondents have considered moving out of Nashville due to cost, and 77% feel that more affordable housing is needed[164]. One property developer emphasized that an economic system "that allows for people to be successful at the very bottom level" is necessary to keep music and nightlife workers in the industry. Other participants saw provisions for health insurance, affordable and relatively central housing and a "safety net" as essential for a healthy music industry. One venue operator described seeking housing for his staff near the venue, in an effort to keep workers in the neighborhood—but few other industry actions have been raised. In considering housing for artists and industry workers, it's important to recognize that a range of housing types are needed, such as appropriate options for those with families or caring responsibilities.

Access to urban services, like childcare and food service, is not a given for nighttime workers. Cities tend to be designed for the movement and needs of those who work in the daytime; services like transit, childcare and even healthy food options can be limited for those who work at night. Research participants noted the importance of two kinds of infrastructure for musicians, venue staff and other nighttime workers: first, childcare outside of traditional 9-5 hours was seen as essential to enable full participation in cultural work at night. Second, food service open for workers to eat after nighttime shifts was also recognized as crucial for nighttime workers' well-being.

164 *Rau, Nashville's Creative Class Ponders Leaving.*

"If the musicians can't get into their club with the gear at the top of the hour, there's a problem. Been working on this for 15 years and it's not gotten a whole lot better. "

—Dave Pomeroy, President, Nashville Musicians Association

Parking was repeatedly cited as a top issue by musicians, venues, workers, and audiences. Rising parking and mobility costs can cut heavily into a gig's profit. Safety concerns arise for musicians opting to park further away and walk; this point was particularly often expressed by women. Participants noted this issue in areas including Midtown, Downtown, the Gulch and to some extent, East Nashville. Metro is experimenting with solutions for musicians: as of February 2024, Metro and a local parking-tech company have partnered to offer musicians 60% off in their downtown garages, following a brief application and approval process[165].

But similar issues for audiences remain. Promoters reported that parking availability and price affects their choice of venues (and that often, parking can be "higher than the ticket price to see the band"). Audiences explained that "parking is something that can determine whether I go or not." In some areas, time limitations on parking made it functionally impossible to use street parking to work at or attend an entire show or shift—as articulated in *Venue Profile: Rudy's Jazz Room* at the end of this section.

Parking will continue to be an issue as the city grows and mobility issues are left unaddressed. Building, requiring, or subsidizing parking will not solve the problem—and will in fact *increase* the financial stress on venues. Building public parking or requiring developers to create more would *increase* rents by a) decreasing land supply and b) increasing development costs. Reducing the price of street parking *reduces* availability by encouraging driving and longer parking stays. The research on these dynamics is well established[166].

> "People need to get used to density being a thing. Development isn't always bad especially if it improves accessibility/walkability. Noise is something that happens when you cohabitate with other humans… we want [our neighborhood] to be vibrant, and new builds should be more soundproof." *—Olivia Scibelli, Co-Founder, DRKMTTR*

Participants recognized that Nashville's 2018 transit referendum defeat[167] has set the stage for current urban mobility issues. Trends in sprawling land use and lack of public support for multi-modal transportation are barriers. Nashville was recently found to have the worst commute in the U.S.[168], partly due to having one of the lowest public transportation and walk mode commuter shares in the country (around 2% each)[169]. The situation only compounds at night. Lack of sidewalks and density, unaffordable housing near venues—many factors conspire to keep people driving to go see music.

165 *Stephenson, Nashville's downtown musicians to get parking discounts.*

166 *Shoup, The High Cost of Free Parking.*
167 *Garrison, Nashville Rejects Transit Referendum.*
168 *Durrani, The Hardest Commutes in the U.S.*
169 *TransitCenter, Derailed.*

"The time is a big thing, right? That's an hour of your time you're not getting paid for, the trolling around [looking for parking]. That's gas. And if you're a parent, that's extra babysitter time. And then there's a safety thing: if you don't finish until 2 a.m. and you've got to park five blocks away, and you have to walk there by yourself, with gear..."

—Rachel Rodriguez, Musician and producer, Rachel Rodriguez Productions

Even for venues that are served by bus lines, current route planning is often not well-designed for night work or attending live music. Route service hours may end before gigs and work shifts do. Wait times between bus service (known as *headways*) may stretch to 30 minutes or an hour on evenings and weekends. And bus stops' distance from venues can make it impossible for musicians to travel with unwieldy, heavy gear. Furthermore, as housing costs push musicians and night workers further out of the urban core, transit journeys become longer or simply impossible.

Some asserted that more frequent, more convenient transit would ease parking struggles for musicians and event goers, reduce driving under the influence—and also, with an increase of regional transit options from college hubs like Murfreesboro, connect new audiences like college students to music in Nashville. Given the transit system's limited hours and availability, groups brainstormed possible solutions, most notably a shuttle service connecting musicians and venue employees to free or very low-cost parking near high-demand areas, based on a similar model operated by Downtown Partnership for daytime workers in the area[170]. Recently publicized priorities for NDOT's Connect Downtown Action Plan[171] hold some promise, but the plan itself was not yet released during the study period. Some urban mobility solutions and initial steps are elaborated in *Section IV: Recommendations*.

170 *Nashville Downtown Partnership, Park it! Downtown Shuttles.*
171 *Connect Downtown, Connect Downtown: Draft Action Plan.*

Venue Profile

Rudy's Jazz Room

Venue Profile: Rudy's Jazz Room

Michael Braden and Adam Charney, lifelong Nashvillians and childhood friends, left behind IT careers to intertwine their love of music and food into a uniquely Nashville venue.

Named in homage to Rudy Wooten, a significant jazz musician and once a mentor to co-owner Charney[172], the intimate 80-cap room follows the traditional jazz club format, while the space's seven-foot grand piano was purchased through community fundraising, underscoring the co-owners' commitment to artistic quality and ties to the local community. The venue offers two to three nightly shows, with both pre-reserved tables and individual seating, and a full menu of New Orleans-style cooking. A hybrid of national and local booking draws from Nashville's vibrant musical community and academic institutions.

The club's 2017 launch faced challenges: lack of experience, financial constraints, aggressive rental prices, and the Gulch's initial underdevelopment. Yet, they perceived the proximity to downtown as an asset. As Downtown has flourished, and the Gulch has transformed into a hotspot, Rudy's has seen growing audiences, but the balance between overhead costs and revenue remains precarious. The venue relies upon the foot traffic coming from its central location and proximity to hotels and downtown.

Now, the club faces threats of rising real estate valuations, onerous local ordinances—and parking regulations, like the recent two-hour parking limit, which caused challenges for musicians and employees, and pushed customers to leave midway through shows. Discussion between venue operators, advocates and NDOT led to a new pilot project: the designation of streets around Rudy's as parking especially for IMVs, with longer paid limits in evenings[173], and free parking after midnight. Charney explains while this has improved a difficult situation, other parking restrictions and newly steep parking fines still pose challenges.

As lease renegotiations ensue, the co-owners have considered relocation, potentially to North Nashville—still close to Downtown, with less pronounced development and comparatively affordable rent. But as Charney explains the elements needed for a successful venue—a central location, affordable rent, and the financial resources to cover design, buildout, and the "down time" of moving locations—he reflects, "For us, staying in our current space likely means everything…As much as I would want to, I am honestly not sure we would continue if we have to move."

Venue land parcel and surrounding area

Fast facts

Venue type	Independent
Address	809 Gleaves St., Nashville 37203 / Gulch
Year Venue Established	2017
Year of Construction	1946
Capacity	80 (seated)
Booking strategy	Independent
Show frequency/ Events per month	20+ (60-65)
Genres	Jazz, jazz variations
Ownership Structure	Limited Liability Corporation
Land Owner	Smyrna Commons, GP, Nashville, TN
Lease Terms	10 Year Lease
Assessed Value	$2,756,280
Appraised Value	$6,890,700
Community Identified Threats	Parking Development Rent
Zoning	DTC (Downtown Code) Gulch South
Land Use	Restaurant / Cafeteria
Business License Type	Drinking Places (Alcoholic Bev)

172 *Wynn, Rudy's Jazz Room.*
173 *Nashville.gov, Paid Parking in Nashville.*

3.3 Music Community

3.3.1 Nashville's many genres and music heritages deserve recognition.

PARTICIPANTS PERCEIVE THAT A HYPERFOCUS ON NASHVILLE'S COUNTRY MUSIC INDUSTRY COMES AT THE EXPENSE OF OTHER MUSIC GENRES, SCENES, AND COMMUNITIES.

"Maybe they don't all know why it's Music City. A lot of people associate it with country music, but the Fisk Jubilee Singers are the reason why it's called Music City. That is not country music. So there's a lot of education that needs to be done as well."

—Jannelle Means, Musician and coach

"Nashville is full of the most talented musicians I've ever been around in any given place. It's so saturated, which is amazing."

—Parker Hawkins, Musician

"The artists in this town desperately want space to do things other than country music."

—Marcus Dowling, Music journalist, The Tennessean

Participants agreed that Nashville has an extraordinary base of talent, but that the "country music machine" can outshine other genres, making Nashville "one-dimensional." Many musicians making a living playing country or bluegrass also want to play jazz, rap or other genres, but feel that the spaces and audiences are missing.

One venue program director noted that in order to be a truly global music city, Nashville must not only be seen as a country music hub, but one with a robust industry where artists playing many genres of music can succeed. He observed the feeling that local venues are "building up" artists who then leave to seek success elsewhere. A music business professional noted that Black musicians, producers and entrepreneurs do see benefits in access to the industry infrastructure, such as labels, performing rights organizations (PROs), marketing and studios that Nashville has to offer. However, although Davidson County is 27% Black and 11% Latine as of 2021[174], only one of the 24 IMVs identified in this study was Black-owned, and only a handful of venues of any type were identified as being minority owned.

Destination marketing organizations are aware of the independent music community's desire for broader marketing attention. They are working to promote a wider variety of Nashville neighborhoods and genres, encouraging visitors to get beyond Lower Broadway[175] and highlighting rock, R&B, pop-punk and other genres in promotional materials[176]. But despite these efforts, one music writer stressed that representation remains narrow—both on Nashville's stages and in Nashville's global marketing of its music culture—reinforcing a vicious cycle and a perception that for marginalized communities and certain genres, Nashville "isn't for us."

> "When I first started meeting people who do hip hop and R&B and stuff… they were like, *that place [Nashville] isn't for us.* …The conversation started there and it ended there. So having places that are more open and welcoming to other genres, that would help. As we know, hip hop is the number one genre in the world."
> *—Roberto Martinez, Venue operator, Cocos Backstage*

Groups like Black Opry[177] and The Other Nashville Society[178] have emerged, which aim to improve representation and promotion of more Nashville communities and music styles. While partnerships between entities like NCVC and Other Nashville have begun, participants felt that Metro and tourism entities can still further amplify these other visions of Nashville's musical breadth and diversity.

174 *US Census Bureau, American Community Survey (ACS) 2021.*
175 *Nashville Visitors Guide, Nashville Visitors Guide.*
176 *Nashville Music City, Come on Back.*
177 "Black Opry is home for Black artists, fans and industry professionals working in country, Americana, blues, folk and roots music." *Black Opry, Home.*
178 The Other Nashville society seeks to "identify and bring together the non-country music community in Nashville," including "Pop, Rock, Singer/Songwriter, Soul, Emo, Hip Hop, R&B, Jazz, Orchestral, Electronic, and Christian music scenes." *The Other Nashville Society, Who We Are.*

"We all know that Nashville has a history that we are not proud of as far as race is concerned. It can't be Music City if it doesn't have all the elements of music and to leave out [hip hop], one of the biggest genres in the world, is kind of a crime to the expression and the artistry."

—Roycardoes Kelly, Artist and event coordinator, Healhop

What's at stake? Nashville's identity as Music City. Some local leaders have observed a sense that "'Music City' is losing its brand," and express a strong desire to preserve and strengthen this unique identity—with independent music venues at the core of what makes Nashville Music City.

Participants were also quick to identify what they felt were "missing" spaces in the overall music ecosystem of the city. Among the types of spaces most frequently identified:

- **18+/all-ages venues**. While The End, Blue Room, and DRKMTTR were named, one venue operator stressed the need for more age-inclusive options, "because not everyone that is a fan of music in the city is an adult yet."
- **Spaces for soul, jazz, hip-hop, rap and electronic music**. Participants lauded venues of various sizes—from DRKMTTR to Acme to even Bridgestone Arena—that are programming more widely, but still perceived a shortage of space for genres beyond country.
- **Midsize venues** of approximately 250-500 capacity. This sentiment was repeated across sessions, particularly for genres beyond country (e.g. pop, hip hop, EDM). One participant observed that musicians seeking spaces of this size also tended to be the ones moving out of Nashville. While project data show that this capacity range is well represented in Nashville compared to other global cities, Nashville's dense music ecosystem may require more music space than that of other regions. In a recent survey of music-business professionals, 85% felt that more small music venues are needed[179], affirming this research's finding.

> "We need more diverse opportunities for people to perform that do different music, and especially soul music, which is at the root of all music." —*Jannelle Means, musician and coach*

Participants hope for more outdoor and low-cost festival-type events that include diverse genres and communities, and prioritize independent artists and venues. While Musicians Corner was raised as a good example of use of public space for music, some participants felt that public events can be more inclusive of Latine artists and hip hop[180]. Participants agreed that more, similar events are needed, and recognized that there is excitement around new outdoor events like AEG's Reset Festival. However, promoters see challenges in creating hometown versions: cost of outdoor space (ex. Shelby Park, East Park) and securing sponsorships for new festivals were named as two major barriers. Independent venue owners expressed frustration that corporate contracting at public venues or events feels like an additional layer of competition.

The music heritage of North Nashville and Jefferson Street was a top priority for support and preservation. Jefferson Street was raised in a number of sessions as a high priority for support and preservation (guided by the wishes of the local community). The lack of visibility and knowledge of its musical legacy was seen by some as a "shocking omission" in the prevailing narrative of Nashville music, and participants largely felt that it does not have a visible enough role in the storytelling of Nashville music to visitors.

179 *Rau, Survey: Nashville's Creative Class Ponders Leaving.*

180 Lightning 100's Live on the Green was noted as a successful free event on public land that did not take place in 2023 due to post-Covid financial strain.

3.3.2 Local Case Study

North Nashville

Nashville's music history is often told through stories about Music Row, honky tonks and the Ryman Auditorium. But the history of R&B and Jazz on North Nashville's Jefferson Street is critical to Nashville's culture—and the broader story of American music. Participants across this study recognized that the history of North Nashville—where music and communities were erased by urban policies—is important to the story of music spaces in the city.

North Nashville has been a base for Black residents since the city's founding, and its community's art and culture has been acknowledged as a "tour-worthy venture"[181] since the Fisk University Jubilee Singers' first journey in 1869. Live music venues thrived on Jefferson Street well before the modern invention of Downtown Nashville's Broadway, and stories abound about the who's-who of 20th-century Black music: Jimi Hendrix, Ray Charles, Etta James and more, at venues like the Del Morocco, New Era, and Club Baron.

After a decade of planning for "urban renewal" in the name of the Interstate Highway system, I-40 was built through the neighborhood, which decimated its music spaces and communities. To make way for the interstate in the late 1960s, over 600 Black-owned businesses and residences were torn down and not replaced[182].

Now, parts of North Nashville are considered "food deserts" by researchers[183] [184]. One might argue it is also a live music desert where it was once a music destination. Similar to the basic need for food, the need for economic investment in North Nashville is clearly recognized[185]. And as of 2023, with the exception of Rudy's Jazz Room, Nashville has no Black-owned live music venues.

Now, development is on the agenda in North Nashville, and particularly Jefferson Street. As of 2022, $14 million remains in a TIF (Tax Increment Financing) for the Jefferson Street Redevelopment District[186], running through 2035. Local and small retail as well as business incubators are named as priorities. Community leaders have also called for a major infrastructure program and building investment plan for North Nashville. Basic infrastructure, such as Jefferson Street's storm sewers, needs repair[187]. Attempts have been made to address the issue, but potential developers still shoulder much of the responsibility.

While the city has attempted to approach the area with solutions, some have been met with skepticism[188] or are seen as disconnected from the community's needs: a recent proposal to cap I-40 (and thus restore the area disrupted by 1960s-era planning decisions) was met with pushback from the Jefferson Street community as not being aligned with community needs[189]. As of this writing, Metro has issued a Request for Proposals for community engagement related to this plan[190].

Despite North Nashville's rich musical history, the area has been left out of city planning for music tourism. The RIAA's 2015 Nashville Music Industry Analysis proposed a downtown "music performance district…where major live music venues already thrive and are poised to continue growth"—yet it carves around the once-vibrant Jefferson Street corridor. To some extent, this particular map is arbitrary (based on a 2009 proposal for a "tourism development zone" (TDZ) intended as a tax funding mechanism for Music City Center[191]), but the distinction between Jefferson Street and downtown's "thriving" venues is stark. Even so, Jefferson Street has always been—even after being gutted—geographically well-located for active tourists in the downtown core.

North Nashville has recently seen a new influx of residential development[192], but some undeveloped parcels owned by family trusts and groups still remain. They have been identified by community investors and leaders as prime locations for possible music venues. One such investor originally tried to transfer a property at 17th and Jefferson to the non-profit Nashville Jazz Workshop, which ultimately relocated to another North Nashville neighborhood, Buchanan Arts District. Even with Buchanan experiencing more commercial development than Jefferson Street in recent years, Jefferson Street's rich history and proximity to Downtown Nashville's tourism core still make it a strong location to reestablish a live music scene. Since 1994, Jefferson Street Jazz and Blues Festival has attempted to keep the music alive—but even with an annual festival, Jefferson Street struggles to secure the commercial financial investment to build a dedicated music venue.

One hope for Jefferson Street's musical revival is the Pride of Tennessee Elks Lodge #1102—formerly Club Baron[193], a 1960s-era music mainstay that was home to the early careers of Etta James, Ray Charles, Muddy Waters and others. The space, which operated as a community hub since the mid-1950s, needs significant financial investment to once again serve as a music venue. Fundraising and restoration efforts by both the Elks and NCVC[194] are now underway. In October 2023, Metro's Historical Commission received federal grant funding via the Tennessee Historical Commission for restoration of the former Club Baron, unlocking additional preservation resources[195]. While this project is just one starting point for North Nashville's music ecosystem, it represents an important first step, and a model for how citywide groups might work alongside local leaders to support the neighborhood.

Community leaders and small business owners, like Lorenzo Washington and Karen Coffee of Jefferson Street Sound Museum, are optimistic about a future welcoming visitors, businesses and development while honoring the area's Black history and community. Rather than major investment on the proposed cap, Coffee hopes to see that spending "split…into the community as seed money to invest in Black owned businesses on Jefferson Street and encourage Black ownership in the community." The pair also own and operate a recording studio on the Museum property. Washington explains, "If we can survive over here, then we can encourage other businesses to come in and other folk to be a part of this community. And it's gonna grow, and it's gonna be a beautiful place again."[196]

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181 *Jefferson Street Sound Museum, Our Story.*
182 *Wynn, Interstate 40 and the Decimation of Jefferson Street.*
183 *Hineman, Who Eats and Who Doesn't?.*
184 *McDonald, S & E Food Market Just Opened.*
185 *Hildreth, The Next Mayor.*
186 *Nashville MDHA, Jefferson Street Redevelopment District.*
187 *Barge Civil Associates, Jefferson Street.*
188 *Pfleger, First Community Meeting for North Nashville's Jefferson Street.*
189 *Kim, Metro Hits Pause on Jefferson Street Cap Project.*
190 *Praino, Metro Seeks Firm to Study North Nashville.*
191 *Rau, 5 Things to Know about Nashville's Tourism Development Zone.*
192 *Williams, Summer 2024 Finish Set.*
193 *Dowling, Club Baron Renovation.*
194 *Nashville Music City, Club Baron Donation.*
195 *Nashville.gov, History Gram October 2023.*
196 *TheGoodRoadTV, Lorenzo Washington: Interview Part 3.*

3.4 Looking Elsewhere: City Case Studies

As a part of this research, case studies were compiled to document innovative tools that other city governments use to support music venues, cultural industries, nightlife, and tourism. Six other localities were selected for these case studies, with interviews and desk research conducted for each one: **Austin, TX; London, United Kingdom; San Francisco, CA; Philadelphia, PA; Berlin, Germany; and New Orleans, LA**. Each of these cities have experienced threats to their music and cultural spaces, whether related to sharply rising land values (Austin, San Francisco), an outsized tourism industry reliant on, and impacting, local music cultures (New Orleans, Berlin), an epidemic of venue closures (London), or the Covid-19 pandemic (Philadelphia). Each city has taken meaningful action to protect their music and cultural spaces and scenes through policy.

While each city's situation is unique, there are parallels and common themes. All six featured cities have some form of nighttime governance, whether it exists within a city office, like Philadelphia's Department of Commerce or the Mayor of London's office, or in an independent structure, like Berlin's Clubcommission. Some policy and funding tools have similarities: In recognition that the city's vibrant cultural life fuels hospitality and tourism, San Francisco and Austin both direct their hotel occupancy taxes to fund culture and music activities. London and San Francisco use the "agent of change" principle to ensure that incoming developments account for nearby music venues and design accordingly.

These case studies are available in full in *Appendix 1: City Case Studies*, and the models profiled here inform *Section VI: Policy Recommendations.* To briefly summarize the approaches and tools highlighted:

- **Austin, TX**, frequently cited as a comparable music city to Nashville, uses a "whole of government" approach to keep venues and musicians part of the city's fabric. Alongside a range of planning and governance mechanisms, a Cultural Land Trust, Live Music Fund and Cultural Arts Funding Program provide funding to keep musicians and venues in the city amidst skyrocketing costs.
- **London, United Kingdom** strives to retain its grassroots music venues through policy, planning tools, and public-civic advocacy. A 2015 study identified factors influencing a massive wave of venue closures, then led to specific actions such as implementing the "agent of change" principle, the "night test," and the Culture and Community Spaces at Risk Office. The continued support and advocacy of the Music Venue Trust shows the necessity of civic actors working alongside government offices.
- **San Francisco, CA** fights to protect cultural spaces and districts amidst quickly rising land values. Two unique programs work to protect small business and culture: the Legacy Business Program, which preserves and supports longstanding businesses including music spaces, and the Cultural District Program, which directs city hotel taxes to culturally-significant placekeeping and urban strategy.
- **Philadelphia, PA** has drawn from global good practices and community engagement to create a new Night Time Economy Office in 2022, developed in part by members of this project team. Philadelphia's office provides an example of how nighttime governance can be structured to work cross-departmentally and effectively solve problems inside and outside of government.
- **Berlin, Germany**, like Nashville, is identified strongly with a specific music genre that draws international tourism. The city and its Clubcommission are conscious of the negative impacts that "techno-tourism" can have on displacement of creative space and affordability for artists; now, programs such as Tag der Clubkultur (Day of Club Culture) and Clubs im Neubau (Clubs in New Buildings) are instructive examples of how destination music cities can meaningfully support local culture.
- **New Orleans, LA**, like Nashville, is a city built on a unique musical heritage. Together, its civic, community and industry actors seek to protect and promote the city's jazz, funk and bounce cultures, both through official institutions like the city's Office of Nighttime Economy, and unofficial "culture bearers," in order to foster visitors' deep and longstanding relationship with the place.

3.4.1 Case Study

Land Trusts: Preserving Land for a Purpose

Affordable housing. Farmland. Music venues. While each of these are necessary and important, markets are not necessarily good at providing or preserving them. There's a long history of creative solutions to preserve or create open space, natural resources and affordable housing—and increasingly, similar strategies are being used for music venues. This final profile showcases approaches to land trusts from Nashville and elsewhere in Tennessee, from Austin, TX, and additional models across the US and UK.

What is a Community Land Trust (CLT)? A CLT is a nonprofit organization dedicated to acquiring and stewarding land. This model is often used to create affordable housing. Nashville already has one CLT, created in 2017 by The Housing Fund[197]. It purchases land, then leases it to a homeowner, who buys the house on top of that land. The CLT keeps the land ownership, ensuring affordability; the tenant builds wealth and stability through homeownership. Commercial buildings can also be built on the property. By maintaining ownership of the land, CLTs offer opportunities for homeownership for lower-income households who otherwise could face difficulties becoming homeowners in the private market. A land trust is funded by grants, donations, and asset management. Some of these funds can be publicly chartered. For example, the Housing Fund CLT's funders include the Barnes Housing Trust Fund, created by Metro.

How does a Land Trust come about? A land trust can either be a product of the private sector—for example, a coalition of community members, philanthropies, business leaders and the like—or an entity chartered by a local government. The Housing Fund was chartered as a "component unit" of a local housing agency and later spun off on its own. Land trusts can vary in focus, from housing, to conservation, to commercial land.

Land trusts dedicated to preserving farmland or historic sites use a "conservation easement" framework to restrict the use of the land. In essence, this compensates the land owner against the potential value of the land in exchange for a binding guarantee to "conserve" it in an agreed-upon way. This might mean leaving open space, preserving historic structures, restricting its use, or other agreements. Metro has studied the framework for historic preservation under local laws, but most of the tools available for use involve buildings of advanced age (not applicable for most venues) and an emphasis on design, not use[198].

How does this work for music venues? The City of Austin's Cultural Venue Trust (CVT) is a notable example of a trust being used to stabilize music venues. The CVT was created in 2017 using a City-chartered Austin Economic Development Corporation with the ability to issue bonds. It is also financed by hotel taxes. The CVT recently made its splash in venue preservation, granting $1.6 million for its first project: a major lease extension and physical improvements at a venue called The Hole In The Wall, a 250-capacity venue with over 1000 live shows per year[199]. This was the product of a competitive RFP process to preserve existing spaces by either purchasing the land or financing long-term agreements to prevent their displacement. The process is also open to financing the purchase of new space to be used for creative use. (See Case Study: Austin for more on the "whole of government approach" to supporting live music).

Cultural venue trusts also exist on a national scale in the UK and US. The UK nonprofit Music Venue Trust has recently launched Music Venue Properties (MVP)[200], a Charitable Community Benefit Society that purchases grassroots music venues' sites and rents them back to operators on sustainable, affordable terms. With public funding as well as individual investors' purchases of community shares, MVT purchased its first venue in October 2023, with plans to purchase eight more[201].

In the US, Grubb Properties' Live Venue Recovery Fund[202] is an example of a private venue fund. Grubb partners with the National Independent Venue Association (NIVA) to provide venue operators paths to ownership: the fund purchases culturally significant venues under threat, with a path for operators to in turn buy their venue within three to five years[203]. Thus far, Louisville's Headliners venue has been the first participant.

And there is already a convergence between Tennessee's land trusts and music industry. The Land Trust for Tennessee, an organization responsible for conserving over 135,000 acres of rural land, was instrumental in conserving land around Leiper's Fork in Williamson County. (See Venue Profile: Fox & Locke earlier in this section.) Music stars including Carrie Underwood, Chris Stapleton, and Justin Timberlake own property there—having sold conservation easements on leafy acres through The Land Trust[204] from Aubrey Preston. Preston is also well known for preserving music venues in the region[205], and was a part of the movement to preserve historic RCA Studio A.

Ben Brewer, a Nashville affordable housing developer, sees land conservation tools as being an easy sell. "People in Nashville love Nashville," he says. "They are willing to invest in it to see it preserved."

What can Nashville do now? Governments can help to support land trusts in a multitude of ways. It can fund them, reduce taxes for land trust-owned property[206], donate land[207], or adjust tax policy to favor easements[208]. Section IV: Recommendations details a proposal for a Nashville land trust for IMVs.

197 The Housing Fund is a 501(c)3 non-profit "established to finance affordable housing and neighborhood revitalization projects throughout Middle Tennessee." *The Housing Fund, About Us.*

198 *Nashville.gov, Shaping Nashville's Progress.*
199 *Swiatecki, Hole in the Wall Dodges Closure.*
200 *Music Venue Properties, About.*
201 *Paine, #OwnOurVenues Scheme Acquisition.*

202 *Grubb Properties, Live Venue Recovery Fund.*
203 *Greenwald, Will This Impact Fund Save America's Music Venues?.*
204 *Justus, Justin Timberlake Partners.*
205 *Schmitt, Preserving Puckett's.*
206 *Lowery, Weber, Gaynor, Leonard, Lee, Butler, Community Land Trusts.*
207 *We Conserve PA, Preserving Land for Open Air Spaces.*
208 *Brandywine Conservancy, Conservation Easements.*

Section IV: Recommendations

"Independent venues made this city and we're losing them at an alarming rate. ...Folks are losing options, not gaining. Right now, I can go over to Brown's and sit in the same barstool that John Prine used to sit in, and listen to live music. The terrifying thing is that I'm not worried IF that will go away, I'm worried about WHEN it will go away."

— Music photographer

This section lays out a range of potential actions, from short to long-term, and small to large-scale, that Metro and its partners can adopt to better support IMVs and live music. They are locally customized and grounded in research and community engagement. And they are deliberately laid out here in broad terms, in recognition that the details of each action will need further development by the implementing entities, in line with local laws and regulations. In all cases, Nashville's ability to make meaningful change for independent venues rely on a few major commitments.

Proactive support. Meaningfully supporting venues requires a mindset shift, from *re*active to *pro*active thinking. Political attention for venues has often focused on crisis events or particularly visible, storied venues, rather than the everyday health of the overall venue ecosystem. But sustained attention to venue health will have much greater impact—because once a venue is in crisis, fewer tools are available to save it.

Improved governance. Governance typically refers to the norms and rules of government action. And it's important that Nashville's public structures, programs, funding, and people reflect the Nashville of today: a metro region that is a dynamic, growing, international center of music, business and tourism. These recommendations require a dedication to improved governance: a willingness to employ new systems and talented people, to try new ideas, build capacity, and rise to meet the expectations of Nashville's citizens. Building capacity in nighttime and music governance through a robust, empowered nightlife office underpins all the other actions in this section.

Coalition building. Governing nightlife is not solely the responsibility of public offices. No one actor in Nashville's public life has all the power, nor all the knowledge, to holistically support Nashville venues and music scenes. Effective support will come from cultivating collective, shared responsibility across public, private, civic and industry actors, each contributing the different "ingredients" and capacities needed.

An IMV is not a legal classification of business entities, and other types of Nashville music venues deserve support too. Metro will need to thoughtfully craft rules for targeting funding or programming in ways that best support independent music. Capacity, ownership, and location are characteristics that might be used.

Note: Any local government act must comply with state law. Additional analysis on recommendations in this section, particularly related to waiving taxes or fees, may be needed to ensure such acts are within the legal authority of local government.

This section's recommendations are grouped into five major action steps, and assessed with a general idea of priority, cost, timeframe, and key actors:

1. Support live music through civic leadership and a "whole of government" approach.
2. Use planning and regulatory tools to support venues.
3. Reduce challenges and costs of starting and operating venues.
4. Make urban mobility work for live music venues, workers and patrons.
5. Extend music-related investments to more genres and more neighborhoods.

Figure 29: Overview of recommendations and sub-actions, sorted thematically.

Urgency: Lower: ■ Medium: ■ Higher: ■

Cost: Lower: $ Medium: $$ Higher: $$$

Timeframe: Short: ⧖ Medium: ⧖⧖ Long: ⧖⧖⧖

1. Support live music through civic leadership and a "whole of government" approach.

1.1 Coordinate government to support IMVs.
■ $ ⧖⧖⧖

1.2 Cultivate a "music coalition" with dedicated civic leaders.
■ $ ⧖

1.3 Build durable government capacity to execute programs for IMVs.
■ $$$ ⧖⧖

1.4 Undertake a planning process to set goals and strategy.
■ $ ⧖⧖

1.5 Improve data practices to allow for monitoring the health of IMVs.
■ $ ⧖⧖

2. Use planning and regulatory tools to support venues.

2.1 Create a land trust dedicated to IMVs.
■ $$$ ⧖⧖⧖

2.2 Create a Legacy Business designation for IMVs.
■ $ ⧖⧖

2.3 Utilize land use regulations to create space for music venues.
■ $$ ⧖⧖ (⧖)

3. Reduce challenges and costs of starting and operating venues.

3.1 Make the venue development process more user-friendly.
■ $$ ⧖⧖

3.2 Train and support a diverse next generation of IMV operators.
■ $$ ⧖⧖⧖

3.3 Facilitate "matchmaking" between venue operators and real estate partners.
■ $ ⧖

3.4 Offer grants, loans, tax abatements or fee reductions.
■ $$ ⧖⧖⧖

4. Make urban mobility work for live music venues, workers and patrons.

4.1 Improve urban mobility options to improve access to venues.
■ $$$ ⧖⧖⧖

4.2 Experiment with inexpensive urban mobility programs to benefit venues—and scale up the ones that work.
■ $$ ⧖⧖

5. Extend music-related investments to more genres and more neighborhoods.

5.1 Promote IMV-rich areas with events and marketing.
■ $$ ⧖⧖

5.2 Focus funds and policies on areas outside Downtown.
■ $$ ⧖⧖⧖

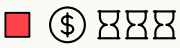
5.3 Prioritize independent operators in city-controlled venues and events.
■ $ ⧖⧖

1.
Support live music through civic leadership and a "whole of government" approach.

The "night test": In many cities, planning for nighttime and live music can be an afterthought, or—as acknowledged in the Council resolution that gave rise to this study—solely responsive when a valuable nightlife or cultural space is under threat. Seeking to combat this mindset, London (see *Appendix 1: City Case Study: London*) is in the process of implementing a *"night test"* for planning and policy decisions implemented across the city. The aim? Ensure that urban decision-making considers potential impacts on nighttime artists and workers, cultural spaces and infrastructure.

In that spirit, this section of recommendations encourages Metro and all its urban partners to take the same approach—coming together across the "whole of government" to think *pro*actively about live music, nightlife, cultural spaces and communities in planning and policy decisions.

1.1 Coordinate government to support IMVs.



Why? Supporting music venues will require several government agencies to act in coordination of common goals.

How? Bring Metro departments and commissions together with a shared mission of supporting music and venues, so that elected officials and civil servants can see the city from the perspective of its music spaces and govern accordingly. An example can be drawn from cities studied in this report (see *Appendix 1: City Case Studies*, particularly *Austin* and *San Francisco*) where citywide agencies support live music through coordinated goals related to venues, sound, planning, safety, finance and more. Austin's Music and Entertainment Division (MED) works with at least nine other departments in support of artists, live music and nightlife, while at least six public offices work together to support legacy businesses and cultural districts in San Francisco. Nashville's own existing good practices, such as partnerships, data-sharing strategies, fast-tracking or process streamlining, can also be applied to better support IMVs. While the Music, Film and Entertainment Commission was still a very new entity at the time of this study's research period, the Commission can also be assessed to ensure that its structure, function and commissioners clearly reflects the needs of Nashville's local music community, particularly its independent venues, artists and promoters. A strong, effective interface between government and the music industry (see action 1.2) is essential to success for both.

Who? Office of the Mayor, Metropolitan Council of Nashville & Davidson County Office of Nightlife, Metropolitan Beer Permit Office ("Beer Board"), Metropolitan Codes & Building Safety, Metro Nashville Finance Department, Music, Film, and Entertainment Commission, Metro Nashville Planning Department, Metro Arts: Nashville Office of Arts & Culture, Nashville Metropolitan Historical Commission, Nashville Information Technology Services, WeGo Public Transit.

1.2 Cultivate a "music coalition" with dedicated civic leaders.

Why? Government cannot do this alone.

How? Private sector and community leaders need to partner with the government and take roles the government cannot fill, such as fundraising, promoting awareness and keeping the government accountable. For example, a land trust might be best founded and led by a private entity, mobilizing private support. It is essential that this coalition be maximally inclusive, to be fully representative of Nashville in all its diversity. This recommendation does not suggest a formal structure in addition to existing industry entities, municipal offices and commissions, but rather a well-organized civic coalition of individuals and organizations who recognize their shared interests on behalf of Nashville music (see the "*we* feeling," described in accounts of a civic "growth coalition"[209]). It is critical that individuals step forward to help organize and lead such a coalition.

Who? Non-governmental entities and individuals such as MVAN, Nashville Musicians Association, venue operators, promoters, philanthropic individuals and organizations, real estate developers, music-industry actors, Nashville Area Chamber of Commerce, Nashville Convention and Visitors Corp; in partnership with Metro actors including Council, Office of Nightlife and Nashville Music, Film, and Entertainment Commission.

1.3 Build durable government capacity to execute programs for IMVs.

Why? Metro Nashville and Davidson County municipal government does not have the structure, capacity, personnel, or programming to carry out the types of services needed to support IMVs at the present level of population growth and socio-economic change.

209 *Molotch, The City as a Growth Machine.*

How? Actions:

1.3.1 Activate a strengthened Office of Nightlife to lead governance efforts and deploy programming related to venues.

Why? Peer cities' experience shows that a strong nightlife office is *critical* to the implementation of other recommendations that follow in this document.

How? Nashville's existing Office of Nightlife can be strengthened with additional staff and agency, and can be reshaped and housed in a different department, to focus more on business development, engagement and governance.

The Office of Nightlife can take on some of the following locally-appropriate good practices:

- Act as the principal liaison for music and nightlife venues to government programs and services.
- House programs to facilitate business development, ongoing community engagement, and smooth interfacing with planning and codes processes.
- Engage in mediation and negotiation to help venues in conflict or crisis and promote understanding with communities.
- Operate two regular working groups for government and external stakeholders, respectively. The external group should be broadly representative of industry and community roles and reflect Nashville's diversity.
- Build a staff that can deliver for a broad group of local stakeholders by recruiting from under-represented communities and nightlife scenes.
- While the office may advise on navigating codes processes, the office should not have a code *enforcement* function. US nightlife officers believe that a nightlife office is most effective when seen as a supporter and ally to stakeholders. Clearly separating it from enforcement responsibilities improves trust. Enforcement functions associated with the Office of Nightlife can be housed in Codes and other agencies. Ideally, currently shared leadership roles of the Beer Board and Office of Nightlife can be separated to support this division.

Further, to foster long-term relationship building and continuity of programs, many nightlife offices in US cities are placed within a dedicated economic development department, which supports nighttime stakeholders and offers programs to facilitate business development, such as small business support. Such a department can permanently house programs focused on live music and independent venues.

Who? Mayor's Office, Metro Council, Office of Nightlife.

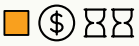
1.4 Undertake a planning process to set goals and strategy.

Why? This study establishes the existing conditions and issues for IMVs, and offers a basic framework and useful tools to address the problem of venue loss. It is not a substitute for a full, integrated plan to solve the venue crisis. This study should be followed by a structured strategic planning process to set a course for implementation.

How? A full-fledged strategic plan would convene stakeholders to establish a vision for Nashville's music future, identify goals that characterize that future Nashville (e.g. how many venues should we strive to have?), and outline strategies, funds and programs to achieve them. It should be led by the Office of Nightlife.

Who? A coalition of all Metro and non-governmental stakeholders related to nightlife, led by the Office of Nightlife, and supported by Metro Council.

1.5 Improve data practices to allow for monitoring the health of IMVs.



Why? Metro, its partners, and its stakeholders cannot easily monitor indicators related to music venues because administrative databases lack information regarding music uses in Nashville. Furthermore, common public records on property and licensing are not available on open data sites, and the quality of the databases is uneven. (Read more on data availability in *Section 3.2.4: Music Governance*.)

How? Two key actions:

- Metro's Information Technology Services (ITS) should work with relevant Metro departments to link business, property, and fire inspection data. These data sets should be used internally and periodically published as Open Data. This will save tens of thousands of dollars of future labor associated with monitoring the health of venues and will add efficiency to private sector activities well beyond music.
- Create an identifier for a music venue's most common characteristic, amplified sound. This does not mean requiring a permit for amplified sound—that would create more complexity in developing venues. Instead, create a checkbox on fire or health inspections that indicate the presence of amplified sound in order to generate this record. The Office of Nightlife should "own" and maintain this process and coordinate collection.

- These actions will first require identifying the department that will act as "data owner" of each data set (e.g. identifying needs, collecting data, maintaining data sets) and offering ITS support for the process of collecting the amplified sound identifier.

Who? Metro departments included but not limited to Office of Nightlife, Information Technology Services, Director of Data and Innovation (Mayor's Office), Metro Planning, Metro Fire, Beer Board, Codes, Public Health, Greater Nashville Regional Council (GNRC) Economic & Community Development Office.

EASTSIDE BOWL

2.
Use planning and regulatory tools to support venues.

2.1 Create a land trust dedicated to IMVs.

Why? Independent music venues have a "math problem": the value they can generate often isn't enough to deal with their costs. This is complicated by the rising value of land in Nashville, and the fact that many are renters that do not control their properties.

How? A well-funded land trust can acquire IMV sites for the purpose of preserving their current use and lease them to tenants affordably. Land trusts are used in Tennessee and across the US to preserve environmental assets (conservation land trusts) or affordable housing (community land trusts). These trusts take possession of land and then, in the example of a housing trust, lease it affordably in perpetuity for a specific use. Some land trusts elsewhere in the US exist for commercial properties[210], and others are dedicated to cultural and artistic assets (see *Case Study: Land Trusts* in *Section 3.4.1* and *Case Study: Austin* in *Appendix 1*). This framework can be used to determine how and when to get site control of a venue.

Local government and the community would need to find a model that works for Nashville. Leadership and financing are critical. Some land trusts and funds are chartered by public bodies (e.g. Nashville's Barnes Housing Trust and Community Land Trust); others by communities or private organizations.

Trusts can be supported by various government acts, including:

- Direct subsidy,
- Chartering funds or agencies to operate a trust,
- Donation of parcels[211],
- Waiver of certain fees or taxes[212] [213],
- Expedited approvals and development priority.

Who? Nashville Metro government and/or nonprofit organizations, including existing land trusts active statewide, such as The Land Trust for Tennessee.

2.1.1 Consider taxation to finance programs for independent music.

Why? The government support that venues need is not without a cost. Taxes are one preferable solution that has been used successfully. Assessing fees on venues to pay for services would increase their already existing financial vulnerability.

How? Hotel occupancy taxes offer a potential resource for the venue land trust proposed above. The recent hotel tax increase to finance the new Titans stadium[214] [215] offers one possible precedent for supporting entertainment seen as regionally valuable. While there are necessarily multiple allocation priorities for this type of tourism revenue, potential future increases can *also* benefit the independent, grassroots and small-business base of Nashville's music culture, helping to foster the pipeline of emerging local artists who may later play these stadium-size shows.

Currently, Nashville's Hotel Occupancy/Lodging Tax of 16.25% (state tax of 7%; local tax of 9.25%) plus $2.50/night remains below the rate of most other US cities profiled in this report (New Orleans, 18.20%; San Francisco, 16.75%; Philadelphia, 15.50%; Austin, 17%)[216]. Both Austin, with its venue fund, and Berlin, which previously allocated a part of its hotel tax to artistic and cultural projects, offer references for how hotel tax can directly support culture[217].

Alternatively, a portion of the Hotel Occupancy Tax that goes to the General Fund could be redistributed to support independent venues.

Who? Mayor's Office, Metro Council, Metro Finance Department, State of Tennessee.

2.2 Create a legacy business designation for IMVs.

Why? Historic preservation typically focuses on buildings, but legacy business programs honor the *businesses* that contribute to the economy and cultural traditions of the city or specific neighborhood (see *Case Study: Supporting Legacy Businesses*). This program, originating in San Francisco, was initially designed to support legacy bars, restaurants—and music venues.

How? A legacy business program would allow Metro to honor and support eligible independent venues beyond the existing built-environment historic preservation framework, and provide a new tool for visitors to easily discover participating venues. Cities across the U.S. have

210 *All-in Cities, Commercial Community Land Trusts.*
211 *We Conserve PA, Preserving Land for Open Air Spaces.*
212 The Housing Fund currently operates a Payments In Lieu of Taxes (PILOT) program for affordable housing in Nashville that could generalize to IMVs.
213 *Lowery, Weber, Gaynor, Leonard, Lee, and Butler, Community Land Trusts.*
214 *Friedman, Taxpayers to Pay $1B.*
215 Hotel taxes are also used to fund the Barnes Fund for affordable housing.
216 *HVS, 2023 HVS Lodging Tax Report - USA.*
217 *Senatsverwaltung für Kultur und Gesellschaftlichen Zusammenhalt, Arbeits und Recherchestipendien.*

developed their own models with a range of criteria and benefits. In each city, legacy business frameworks establish requirements for businesses and may offer benefits including rent stabilization grants, marketing and promotion, visibility on city social media or online maps, and regulatory flexibility[218]. Importantly, operations across multiple locations "count": businesses' entire histories, including moves between spaces, are considered. Following San Francisco's eligibility guidelines, approximately 20 IMVs and quasi-IMVs in Nashville have operated long enough to qualify (as well as further occasional music spaces). But other cities operate differently: Seattle's pilot program, for example, allowed businesses to participate starting from only 10 years' operation, if independently owned and centers of community[219].

It is important to recognize that histories of discrimination and local disinvestment have posed systemic obstacles for certain groups of people to formally establish businesses, much less last to "legacy" age (e.g. female entrepreneurs' access to business loans without male co-signers, or disinvestment in primarily Black neighborhoods—see *Local Case Study: North Nashville* for discussion of the latter). Such a program would do well to account for this reality. A focus on lowering barriers for business formation and fostering young businesses can be found in *Recommendations: Section 3*.

Who? Office of Nightlife, Metro Historical Commission, Nashville Music, Film, and Entertainment Commission, in conjunction with tourism and business entities such as Nashville Area Chamber of Commerce, Nashville Convention & Visitors Corp, local Business Improvement Districts (BIDs).

2.3 Utilize land use regulations to create space for music venues.

2.3.1 Use the zoning code to unlock land for live music.

Why? Zoning restricts land supply that can be used for music. Where zoning prohibits music-related land uses (such as nightclubs, theaters, restaurants, etc), potential operators must apply for zoning variances. This is a risky, complex, and often expensive process.

How? Most non-residential zonings permit music-related uses in Nashville[220] [221]. However, there are opportunities to unlock more land. This is less a question of developing new zoning districts specific to live music space but rather, allowing music-related *uses*—like nightclubs and theaters—by-right in more types of zones (see *Section III: Findings*: *3.2.3* for more about zoning and land use). Industrial zones can be redefined to include nightclubs, theaters and outdoor music events by-right. Rezoning or remapping districts can expand the footprint of existing zoning districts that permit music-related uses by-right — primarily commercial and mixed use zoning types. *Zoning overlays* that offer density bonuses for new developments that include music use can incentivize venues as a part of new construction.

Who? Metro Planning and Planning Commission; Metro Council.

2.3.2 Use easements and transfers of development rights for venue sites.

Why? The development potential of music venue sites incentivizes landlords to sell the land or raise rents.

How? Use conservation easements and development rights transfers to allow landlords to benefit from the potential value of the venue land without having to sell it or develop it.

Conservation (or façade) easements are used to preserve historic or environmental assets by letting the landowner take a charitable deduction on their taxes related to the amount of value they forgo by preserving the site. Housing developers, conservation professionals, and land use policy experts interviewed for this study recommended the use of easements to preserve venue sites, and the Music Row Vision Plan favors their use for historic music uses of other kinds. Governments can support such easements with a tax assessment formula that is sensitive to their use[222].

Transfers of development rights (TDR) allow for landowners to transfer their rights to build higher or bigger buildings to other sites. This is allowed in some contexts (such as in historic buildings, or downtown) and potentially feasible with Council involvement in others. The Music Row Vision Plan also recommends TDR for historic music buildings, and the model can be explored for existing venue sites that are not historic but are culturally significant in nature.

218 *Morton, Legacy Business Programs.*
219 *Vansynghel, Looking for Ways to Save.*

220 Music is not strictly regulated as a "use" of land, but most music takes place in zoning districts where restaurants, nightclubs, hotels, retail or other commercial activities are permitted by-right.
221 *Nashville.gov, Land Use Table.*
222 *Brandywine Conservancy, Conservation Easements.*

Who? Metro Planning and Planning Commission, Metro Historical Commission, Metro Council.

2.3.3 Make room for live music in the development or sale of public land.

Why? Government is a major local land owner, with discretion to specify the use of land for music when it develops or sells land.

How? When redeveloping or selling city-owned land, Metro has wide discretion in the kinds of uses and designs it allows. Cities dispose of land for a range of purposes such as affordable housing, parks, and other amenities. Likewise, it can encourage or explicitly stipulate the creation of relatively affordable, usable live music space in redevelopment strategies through use restrictions, density bonuses, or the disposal of land for specific music use (see *Local Focus: East Bank* in *Section 2.3.5*). Land disposal can be to a music-dedicated land bank or trust (see *3.4.1 Case Study: Land Trusts: Preserving Land for a Purpose* and *Recommendation 2.1* in this same section).

Who? Metro Planning, Metro Finance Department, Metro General Services, Office of Nightlife, Department of Transportation; State of Tennessee landowning offices (ex. STREAM).

2.3.4 Update Metro Code to reflect the "agent of change" principle, to reduce conflicts between venues and new development.

Why? Music is endangered by conflicts with neighbors in fast-developing, mixed use areas. Pre-existing music venues are susceptible to conflicts with new development over sound, circulation and other issues—and venues often don't receive the benefit of the doubt.

How? The "agent of change" principle[223] [224] (see *City Case Study: London* in *Appendix 1*) is a planning tool used to protect music venues. This principle obligates incoming developers to mitigate potential conflicts with *specified* existing uses. This principle is enacted differently in various cities: in some municipalities, proposed development near a venue with an entertainment permit triggers further review (see *City Case Study: San Francisco* as well as Toronto's Agent of Change policy[225].) For example, a new proposed residential building near an existing venue would have to proactively plan for its proximity to a venue (e.g. mitigating sound by soundproofing, accommodating musician loading zones, etc). Conversely, new venues opening in residential areas would also need to establish sound and crowd management measures in consideration of existing neighbors. In Nashville in particular, which has different standards for venue sound depending on its proximity to residences, this logic might suggest updating Metro Code to ensure that venues can continue operating under the same standard they began under, rather than automatically changing when new residences are developed.

Who? Metro Planning, Office of Nightlife, Planning Commission, Metro Council.

2.3.5 Consider Community Benefits Agreements (CBAs) to codify relationships between venues and neighbors.

Why? Having healthy, predictable relationships with neighbors reduces conflicts which can jeopardize venues.

How? CBAs codify expectations and relationships between new and existing uses when either new venues or new residential developments are built. While venues, community groups and property developers must be the core actors developing CBAs, this type of multi-stakeholder consideration of music venues aligns with the ethos of civic leadership and holistic governance articulated in *Recommendation #1*. This type of engagement may run alongside community or council review processes, and can set agreements on everything from sound levels, to loading zones, to complaint resolution pathways, as in one 2016 Philadelphia example[226]. Here, a consistent group of community entities and/or a clear liaison on the community side can help to ensure a smooth collaboration process.

Who? Neighborhood associations, community groups, real estate developers, music venue operators.

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223 *Imbruglia, How To: Agent of Change.*
224 *Music Venue Trust, What Is 'Agent of Change'.*
225 *Tanner, City-Approved Venue Protection Measures.*
226 *Cineas, Meet the Team.*

Local Focus:

East Bank

Large planned developments offer an opportunity to think boldly about the future of an entire district—and how it might support Nashville music. One such opportunity is the East Bank development plan, which reimagines the mostly industrial neighborhoods around the new Titans Stadium to be built on the Cumberland River. This section considers how the East Bank might serve as a home for new, locally-focused independent music venues, in contrast to visitor-centric Broadway across the river.

With the approval of a new $1.2 billion Oracle development just north of the Imagine East Bank study area, Metro Planning staff knew it was a matter of when, not if, the area just south of Oracle would redevelop. Planning embarked on a 24-month study that led to the release of the Imagine East Bank Vision Plan in October 2022[227], which proposes sustainable mixed-use development in the creation of "new neighborhoods, services, and jobs on the East Bank to be designed with the intention for Nashvillians, in contrast to the visitor-oriented places across the river"[228]. The plan also calls for economic opportunities for all, emphasizing small business support, an urban street grid that promotes walkability and community cohesion, and affordable housing to enable diverse and equitable community development. A handful of small, independent music venues, with a strong focus on local and grassroots promoters and artists, would help to realize this vision of the area: creating small business opportunities, walkable nighttime destinations for residents, and shared spaces for locals to gather.

While the plan lays out detailed ideas of what the city hopes to achieve, it generally does not place Nashville's music economy into the context of the area. Venue space could be incorporated in plans for predominantly mixed-use buildings and a walkable urban grid. The East Bank could be an ideal place to trial music-related use restrictions in zoning code, as well as height bonuses for developers incorporating music uses into their buildings, similar to TDRs explored in the Music Row Vision Plan[229].

As one of the landowners on the East Bank, Metro is in a unique position to support and grow small and independent businesses—including IMVs—via real estate investment and policy changes. Metro-owned land, plus a mix of zoning code adjustments and tax abatements, can meaningfully support independent music venue creation and sustainability. While there are indeed many hopes for what Metro-owned property here can become, a thoughtful approach can allow for the creation of new music space, well-integrated into mixed-use and commercial development, in East Bank and beyond.

227 *Looper III, Developer Moves Forward.*
228 *Nashville.gov, Imagine East Bank Vision Plan.*
229 *Metro Nashville Planning Department, Music Row Vision Plan.*

3.
Reduce challenges and costs of starting and operating venues.

3.1 Make the venue development process more user-friendly.

3.1.1 Create simple informational resources for nightlife operators.

Why? Nightlife operators do not have clear online information about licensing, codes and other issues. More predictable operations can cut costs, lower barriers, and reduce the need for lawyers and other professional advice.

How? Nashville can follow the example of Seattle and other cities' portals, which outline important processes and communications[230]—and can ideally also include modernized real estate and open data portals for prospective operators of all kinds. Nashville.gov may be a useful platform to act as a 'one stop shop' or 'Venue Hub' for current and potential venue and event operators; this might be developed through a collaboration between the Office of Nightlife and Metro ITS.

Who? Metro Planning, Codes, Office of Nightlife, Information Technology Services; Nashville Music, Film, and Entertainment Commission.

3.1.2 Provide specialized support for venues under development.

Why? Many music venues incur delays, costs, or uncertainty due to difficulty navigating the development system.

How? A "business concierge" service from the Nightlife Office can offer a single point of contact and sustained "case management" for government services that touch on live music, including real estate and business development[231].

Who? Office of Nightlife, Mayor's Office, GNRC Economic Development program for small businesses, and involved Metro offices.

3.1.3 Increase capacity in planning and codes to process applications.

Why? Interviewees from multiple industries reported dissatisfaction with the amount of time it takes to go through the real estate approvals process, citing a lack of capacity to deal with a high volume of applications.

How? Additional staff to process applications will decrease development time and unpredictability. This confidence will allow music venues the ability to launch more profitably with a predictable timetable allowing for proper programming through advance booking[232]. (*Note:* Staffing increases in both departments since spring and summer 2023 engagement events suggests that action on this recommendation is already underway.)

Who? Metro Planning, Codes.

3.2 Train and support a diverse next generation of IMV operators.

Why? Starting a small business is difficult (see *Section 3.2.1: Challenges of Launching Venues* for more), and venues are often launched by people who are music lovers first, businesspeople second. Nashville needs to support people willing to start and operate new music venues and diversify the field of venue ownership. Because while this report details the challenges that venue owners experience, it only scratches the surface on *additional* obstacles faced by venue owners who are female, LGBTQ+, and/or BIPOC. Research confirmed a near absence of minority-owned venues—something cited as a bottleneck to minority representation on stages.

How? Metro can participate in the funding, development, or facilitation of programs for IMVs and associated entrepreneurs. Such programs might include hospitality-oriented business planning and operations workshops, worker training in hospitality skills, and business incubator programs. A specific outreach to engage minority communities is necessary[233]. Incubators might be modeled on programs in other industries, such as Urban League of Middle Tennessee's R.E.D. (Real Estate Developers) Academy[234], which aims to empower developers of color in Nashville through training, mentorship and access to financing.

Who? Such a program could be developed in partnership between university departments, industry entities and/or nonprofits working around economic empowerment and music industry education, potentially in partnership with Metro offices, particularly Office of Nightlife, economic

230 *Seattle.gov, Nightlife Establishment Handbook.*
231 *Nyc.gov, NYC Business Quick Start.*

232 Advance timetables for booking tours or well-organized events range from three months to a year depending on program type.
233 Cities and business communities have had good success collaborating on the accelerator approach as a tool to build capacity for Minority, Disability, and Women-Owned Business Enterprises (MDWBE) who can participate in municipal contracting. The Cincinnati Minority Business Accelerator program is a notable example.
234 *Urban League of Middle Tennessee, R.E.D. Academy.*

development actors, and Nashville Music, Film, and Entertainment Commission. This might include actors such as TSU's Center of Entrepreneurship and Economic Development, MTSU's Music Business program, Belmont University's Curb College of Entertainment and Music Business, Music Venue Alliance, Leadership Music, Leadership Nashville, Nashville Business Incubation Center, TN Latin American Chamber of Commerce, Nashville Black Chamber of Commerce, TN Pride Chamber of Commerce, Pathways Women's Business Center, FUTURO, The Recording Academy's Black Music Collective, the Equal Access Development Program (offered by mtheory and CMT), the National Museum of African American Music, and OnRamp (offered by the Black Music Action Coalition and the Academy of Country Music).

Taking action: Lowering barriers to entry for Nashville music

The recommendations in this report, taken together, aim to lower barriers to entry for a more diverse cohort of Nashville IMV operators. They are intended to offer musicians, promoters, venue operators and audiences from across genres, neighborhoods and backgrounds a fuller opportunity to take part in Nashville's music scenes.

This attention to expanding opportunity and support for marginalized groups in Nashville runs throughout this section, in actions such as:

- Cultivating a maximally diverse "music coalition" of public, civic and music actors (1.2).
- Creating and funding a land trust dedicated to IMVs (2.1) and formalizing "matchmaking" between those seeking and offering space (3.3).
- Creating a legacy business designation—that also acknowledges the historical barriers to business ownership (2.2).
- Simplifying the venue-development process to reduce costs and knowledge barriers (3.1).
- Training and supporting a diverse next generation of IMV owners and operators (3.2).
- Boosting small business loan funds and grants, while reducing taxes and fees (3.4).
- Directing funds and support to a wider range of music neighborhoods and genres (5.1-5.3).

These programs and efforts may consider geographic or demographic prioritization to support areas such as Jefferson Street, discussed throughout this report (see *Local Case Study: North Nashville*), or Nolensville Road, which supports a number of venues frequented by Nashville's Latine community.

However, this report recognizes that investments in placemaking have the potential to bring a given area into focus for investment, potentially fueling displacement of the current residents and businesses there. It is essential to proactively consider "placekeeping" steps, such as a cultural land trust, to retain affordability and spaces of community in the face of potential change.

3.3 Facilitate "matchmaking" between venue operators and real estate partners.

Why? Most venues without site control (i.e. renters) reported that they could only operate because their landlord appreciated or tolerated having a music venue for a tenant, even while the landlord knew it wasn't the most profitable use of the land.

How? Recruiting and connecting sympathetic real estate investors with prospective IMV operators through engagement and networking may help stabilize or create venues. The partnership between DRKMTTR and Don Kendall of Development Management Group is a reproducible model. Savvy engagement by a nightlife office or private business development program can link IMVs and investors, who believe in the value of independent and grassroots music in Nashville.

Who? Real estate investors and IMV operators convened by Office of Nightlife, Chamber of Commerce and/or other private-sector actors, particularly those serving communities underrepresented as venue operators (see *Who?* in prior recommendation).

3.4 Offer grants, loans, tax abatements, or fee reductions.

3.4.1 Bolster loans funds and grants for small businesses.

Why? Loans and grants can help small and independent venue operators build their businesses or stabilize operations. Public-private loan funds are available in Middle Tennessee to small businesses[235] [236], but they are limited and have most or all of their funds currently mobilized. Grant funding for music venues is rare, but was shown to be a valuable tool to preserve venues during the pandemic.

How? Public or private entities can create new grant programs for small venue entrepreneurs. Peer cities offer competitive grants specifically designed to stabilize small music venues: Austin's program is funded through its Cultural Land Trust (*see Case Study: Austin* in *Appendix 1*).

Elected officials and civil servants can lobby government and private philanthropy to add to existing (but limited) funding pools such as the Greater Nashville Regional Council's revolving loan fund for small businesses. The Nashville Convention and Visitors Corp is working with partners to consider a reprise of successful pandemic-era grants by assembling private and philanthropic dollars. And as of this writing, legislation to create a statewide Live Music Fund[237] is awaiting the governor's signature, providing another vehicle to direct donations and support to venues.

Who? Metro Council, Greater Nashville Regional Council (GNRC), Federal and State Economic Agencies (SBA, Commerce), philanthropic community, Nashville Convention and Visitors Corp, State of Tennessee.

3.4.2 Utilize tax rebates, fee waivers and abatements.

Why? Property taxes and other taxes and fees are significant contributors to IMV instability. Given that there are relatively few opportunities to reduce costs for venues through the tax code, a couple possibilities are indicated here.

How? There are a range of taxes and fees that can be examined as candidates for reduction or abatement:

- Property taxes are a major source of instability for IMVs. Increases in taxes are sometimes associated[238] with increases in rents. Reducing or abating property taxes on land area used for small-capacity music venues could stabilize existing venues by reducing rents and creating a financial incentive for developers to include music spaces in new projects. Developers interviewed in this process expressed reticence to include music-compatible spaces in their projects because they perceived these businesses as financially risky.
- Precedent suggests a willingness for state and local governments to cooperate on taxing hotel revenue and some other streams to generate funds. The State could emulate Texas' example and set aside funds for rebates on liquor taxes[239] for music venues, or abate liquor tax for music venues up to a certain cap[240], potentially in conjunction with programs that promote safety and responsible behavior. Venues often derive a significant proportion of revenue from drink sales: one recent European study found that food and beverage sales can be 43% of commercial venues' income[241]. (For more, see *How Do Independent Venues Work?* in *Section 3.0.2.)* Administrative fees related to the development, operating and licensing of IMVs could be considered for waiver or reduction. These include Beer Board privilege tax fees.

Who? Tennessee Alcoholic Beverage Commission and other state-level actors; Metro Beer Board, Metro Council, Metro Historical Commission, Metro Finance, State of Tennessee.

235 *US Economic Dev. Admin., EDA Revolving Loan Fund Nashville.*
236 *Pathway Lending, TN Rural Opportunity Fund.*
237 *Tennessee General Assembly, SB2508/HB2712.*
238 *Rolheiser, Commercial Property Tax Incidence.*
239 *Texas Music Office, Texas Music Incubator Rebate Program.*
240 Such a measure is intended to reduce financial pressure on small venues for whom liquor taxes are a major expense, rather than to incentivize cheaper alcohol for patrons. However, it may be beneficial to accompany such measures with the continuation or expansion of programs focused on safety at night, such as the Safe Bar program. (Sexual Assault Center, Safe Bar Program.)
241 *LiveDMA, The Survey.*

4.
Make mobility work for live music venues, workers and patrons.

Nashville's transit and mobility systems do not serve live music venues well. There aren't many alternatives to the automobile and development has led to the loss of some surface parking. Businesses, workers and patrons are increasingly dissatisfied with parking costs and availability. In a city with such demand for land, dedicating more land to parking will intensify the cost-of-living crisis and induce more driving. The answer is to improve mobility options and experiment with smart transportation solutions. This section builds upon existing efforts to reimagine Nashville's transit and mobility offers, aiming to complement plans like Connect Downtown, nMotion, and the Mayor's proposed transit referendum.

It is imperative that the "whole of government approach" be leveraged here—using the "night test" and coordinating with the Nightlife Office will ensure that the interests of live music stakeholders are considered in transit planning and operations (See *Recommendation #1*).

4.1 Improve mobility options to improve access to venues.

Why? As Nashville continues to grow, parking (and land) will become increasingly expensive, but density will facilitate better transit and better outcomes for venues. Improved mobility options for Nashvillians will decrease the demand for driving and parking, and improved nighttime transit service will give options for patrons and workers.

How? This is a complex political problem that requires the "music coalition" (see Recommendation 1) to participate in civic conversation in support of multi-modal transit and walkable, affordable urban development. There is civic precedent: the NashvilleNext plan states a goal to "provide transportation choices in all communities so people have the choice to travel by foot, bicycle, car, or transit to make jobs, education and daily needs accessible."[242] Nashville Connector, the city's Transportation Demand Management (TDM) program, educates commuters on alternative transportation options[243]. The last Metro Nashville Transportation plan lists improved bus transit as its first priority.[244] The Connect Downtown Action Plan proposes a bus-only loop around Downtown and high frequency 24-hour service[245] - such proposals would benefit from engaged support from the music coalition.

Who? Metro Planning, Nashville Department of Transportation, Tennessee Department of Transportation, WeGo, Nashville Downtown Partnership, area Business Improvement Districts (ex. Central, Gulch) and similar entities, music venues.

4.2 Experiment with inexpensive programs to benefit venues—and scale up the ones that work.

Why? Large scale transit reforms do not seem likely in the immediate term.

How? Cities worldwide are trying new urban mobility solutions in low-cost "tactical" pilots to test what works. Nashville can pilot programs in service of nightlife to increase access and lower costs for patrons and workers, and decrease parking demand.

Some possibilities:

- Create high-frequency bus service (a "shuttle") through nightlife areas, connecting nearby parking and venues.
- Examine nighttime frequency and operating hours of existing transit routes with an eye to serving nightlife workers, musicians and audiences; address gaps as needed.
- Subsidize rideshare services to bridge the "first mile / last mile" problem in transit. For the cost of a fare, bring riders who live in currently inaccessible locations into the transit system and then get them from transit to their destinations[246].
- Create circulation and access plans for nightlife areas to improve access for rideshare and prioritize pedestrian flow and safety.
- Facilitate parking "swap" arrangements between venues and nearby businesses with day-use parking.
- Create musician loading zones in areas with limited parking[247].
- Encourage venues to invest in backlines for musicians (e.g. drums, amplifiers, turntables, etc.) to allow musicians to travel lighter, following the example of less car-centric cities like New York. This may enable performers to use alternatives to personal vehicles.
- Develop locally-appropriate parking policies for venue-dense neighborhoods - especially as an alternative to two-hour parking limits. This may follow the example of pilot programs, like the recent downtown parking-

242 *Nashville Next, Guidebook.*
243 *Nashville Connector, About the Program.*
244 *Nashville.gov, Metro Nashville Transportation Plan.*
245 *Connect Downtown, Draft Action Plan.*

246 *Sands, Charlotte Will Pilot Transit Service*
247 Placard and entitlement-based parking systems are commonly abused and should be considered carefully. An example of a musicians' loading permit can be found in Australia. Musicians Venue Loading Permit. (*City of Port Phillip, Musicians Loading Venue Permit.)*

discount program for musicians[248], or extended parking timeframes in the Gulch area (see the *Venue Profile: Rudy's Jazz Club* for more).

Who? Metro Planning, Nashville Department of Transportation, Tennessee Department of Transportation, WeGo, Nashville Downtown Partnership, area Business Improvement Districts (ex. Central, Gulch) and similar entities, music venues.

3RD AND LINDSLEY

248 *Stephenson, Nashville's downtown musicians to get parking discounts.*


5.
Extend music-related
investments to more
genres and more
neighborhoods.

As described in prior sections, some research participants felt that government and institutions focus services and energies on Lower Broadway and Downtown, while venues and music communities in other areas—including non-country genres and minority communities—receive less support. This geographic focus can also leave out IMVs, as most are not located downtown. Based upon participants' suggestions, the following steps can offer more support for Nashville music across genres and neighborhoods:

5.1 Promote IMV-rich areas with events and marketing.

Why? Independent music communities believe they would financially benefit from marketing support, similar to what currently spotlights Downtown and country music for tourists.

How? Citywide cultural events are opportunities to offer promotion and exposure to small businesses. While tourism platforms already showcase the region's music venues[249], a specific showcase of grassroots and hyperlocal music scenes, like a Nashville "Independent Music Week" or similar, could draw attention, audiences, and dollars to the breadth of local, independent music. There are good models for this across a range of geographic scopes and business types, including restaurants and legacy businesses[250] [251], most notably, the National Independent Venue Association (NIVA) Independent Venue Week[252].

Who? Nashville Convention and Visitors Corp, MVAN, NIVA, venue operators and industry organizations, Metro Arts, Nashville Music, Film, and Entertainment Commission, among others.

5.2 Focus funds and policies on areas beyond Downtown.

Why? Downtown policy and infrastructure investments such as zoning reform, streetscaping, public safety provisions, transportation, tax breaks, and tourism marketing have supported and functionally subsidized businesses since the 1990s. For example, the transition to form-based zoning code, alongside large institutional development, unlocked an enormous amount of growth downtown. The area is indeed a powerful economic engine for the region[253], but a perception of imbalance between this and other venue-dense areas has also developed.

How? Prioritize engagement, programming, policies, and investments in areas rich with IMVs.

Who? Departments, commissions and offices state- and Metro-wide, including but not limited to the Mayor's Office, Metro Council, Office of Nightlife, Planning and Planning Commission, Nashville Convention and Visitors Corp, Nashville Music, Film, and Entertainment Commission, Tennessee Department of Transportation.

5.3 Prioritize independent operators in city-controlled spaces and events.

5.3.1 Prioritize IMVs' participation in events in the right-of-way.

Why? Many events are produced in public right-of-ways (the Special Events group in the Mayor's office estimates roughly 180 permitted events a year, and Nashville Parks and Recreation does more than twice as many[254]). While Nashville can already point to some examples of free and multi-genre music events such as Musicians Corner and programs produced or supported by NCVC[255] [256], research participants expressed a strong desire for more outdoor, free or low-cost events that more fully showcase and serve Nashville's diverse musical heritage and public, with an emphasis on local, independent promoters and artists. Independent operators perceive that larger, tourism-driven events can often be frustrating competition.

How? Metro can proactively include IMVs and independent promoters by including or promoting their participation in public events where the government oversees the permitting process. Metro Nashville already prioritizes minority and woman-owned business in procurement; this structure can be adapted here. Other event funders such as NCVC can further emphasize independence and diversity in event funding and production.

Who? Departments including; Metro Arts, Special Events (Mayor's Office), Parks and Recreation, Finance Procurement Division, NDOT; Nashville Convention and Visitors Corp (potentially via its Major Event Fund)

249 *Nashville Music City, Search for Live Music.*
250 *Sf.gov, Perfect Legacy Business Days.*
251 *Center City District, CCD Restaurant Week.*
252 *Independent Venue Week, Venues.*
253 *Nashville Downtown Partnership, Market Conditions Report.*
254 Mayor's Office of Special Events. Personal Communications, March 6, 2023.
255 *Nashville Music City, Moon Taxi Will Play.*
256 *Nashville Music City, Nashville July 4th Lineup.*

5.3.2 Consider IMVs as partners in city-controlled venues.

Why? Contracting with existing and prospective independent venue operators to program city-owned spaces will keep money in the local economy and avoid subsidizing competition against locally-based businesses.

How? Consider how contracting arrangements at government-owned music spaces can include independently owned and local music operations.

- This might include "local set-asides" at Ascend Amphitheatre, where a current operations contract with LiveNation runs through 2025[257] [258]. Larger venues in other cities, like Philadelphia's Dell Music Center and the Mann offer opportunities for smaller venues or community artists-in-residence[259], giving local music a larger platform to connect with audiences.
- Music at Nashville International Airport (BNA)[260] might also spotlight independent artists and venues "in residence."

Who? Departments including; the Mayor's Office of Special Events, Metro Airport Authority Arts at the Airport, Metro Parks and Recreation, Music City Center, Metropolitan Sports Authority.

EASTSIDE BOWL

257 *Hall Strategies, Ascend Amphitheater.*
258 *Boyer, The City's Deal with Live Nation.*
259 *The Mann., Downstage @ the Mann.*
260 Arts at the Airport is an example of an existing organization that operates programming in public space to the benefit of local artists.

6.1 Implementation Sequence of Recommendations

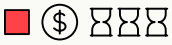
These recommendations have thus far been presented thematically, by *types* of actions rather than chronological steps. This report does not prescribe a specific timetable, but rather groups actions into initial, intermediate and long term steps.

Figure 30: Overview of recommendations' sub-actions, sorted by initial, intermediate and long term steps.

First steps

These initial actions enable all the subsequent steps. They create a foundation of governance and a safety net for venues. These steps may not be completed in the short-term—but it's essential that they start soon.

1.1 Coordinate government to support IMVs.



1.2 Cultivate a "music coalition" with dedicated civic leaders.

1.3 Build durable government capacity to execute programs for IMVs.

2.1 Create a land trust dedicated to IMVs.

3.4 Offer grants, loans, tax abatements or fee reductions.

5.2 Focus funds and policies on areas outside Downtown.

The final two steps in this category are those that can be simultaneously initiated by actors outside of Metro—again, in the spirit of coordinated support for venues.

3.3 Facilitate "matchmaking" between venue operators and real estate partners.

5.1 Promote IMV-rich areas with events and marketing.

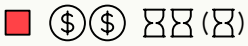
Intermediate steps

These actions build upon the foundation from the prior category. They solidify good policy and governance to support music venues.

1.4 Undertake a planning process to set goals and strategy.

1.5 Improve data practices to allow for monitoring the health of IMVs.

2.3 Utilize land use regulations to create space for music venues.



3.1 Make the venue development process more user-friendly.

4.1 Improve urban mobility options to improve access to venues.

4.2 Experiment with inexpensive urban mobility programs to benefit venues—and scale up the ones that work.

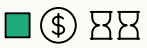
Long term steps

The actions in this category further support and stabilize current venue operators, while expanding the pipeline of new venue operators who can develop future spaces for Nashville.

2.2 Create a Legacy Business designation for IMVs.

3.2 Train and support a diverse next generation of IMV operators.

5.3 Prioritize independent operators in city-controlled venues and events.




ROAD TO ROCK BOAT '24
RED WANTING BLUE
JANUARY 24, 2024
3RD & LINDSLEY
NASHVILLE TN
LIGHTNING 100'S
NASHVILLE SUNDAY NIGHT
VERA BLOOM
WITH BAD CULTURE
JAN. 21, 2024
DOORS 5:30PM
SHOW 7PM
NOTICE
PROPERTY
PATROLLED
BY ARMED
SECURITY
GUARD

Section V: Conclusion

"In 1972, Richard Nixon played the Grand Ole Opry as a guest. And he stood up and he looked at the Ryman. They'd already made plans to knock it down and build a chapel with the windows out at Opryland. And Richard Nixon said, 'You know, this is a beautiful place. I sure hope nothing happens to it.' And everybody started scrambling ... and they kept it there... Somebody who's an extremely unlikely ally is going to be critical to this at some point."

—Dave Pomeroy, President, Nashville Musicians Association

What is an independent music venue, why do they matter—and how do we preserve them in a changing Nashville? For the last year, our research team has sought to answer these questions by gathering people and listening deeply, and designing steps for action from models from near and far. While independent venues are often-fragile parts of the region's music ecosystem, they powerfully enable new artists, new music, and local communities. This research confirms that Nashville stakeholders understand their value.

That the government should support innovation in technology, energy, agriculture, and other critical sectors is nearly a matter of political consensus. But in Nashville, music is *the* critical sector—and supporting innovation means supporting small and independent venues. The economic argument for government support spaces that prize creativity is two-fold. First, these spaces are the laboratories for new artists and sounds that drive the massive Nashville music and tourism industries. Almost every single artist starts in a venue of this kind, and these spaces support the social connectivity that drives innovation. Second, the market is showing an inability to generate stable conditions for IMVs and small venues in Nashville. This fact jeopardizes the industries that rely on them, and is a classic pre-condition for government intervention.

These spaces have arisen in various ways, but their continued existence requires careful stewardship. And the ultimate power to retain IMVs, incubators of "the artists of the future," rests with Nashvillians: citizens, politicians, organizations, communities and private actors. This report contains no single magic, near-term or simple solution to solve these very complex challenges. It will take persistence, cooperation and leadership—and the contributions of "unlikely allies" coming together to reach a common goal.

"Th[e] thriving sense of community is what sets Nashville apart. Independent music venues are an essential element in keeping us united, especially in a state that can often work to divide us."

—Juliana Lee, Helping Music Foundation and Helping Our Music Evolve (HOME)

Many determined leaders have brought us to this point—people fighting to save their venues, their livelihoods and their scenes. The last few years have been exhausting. New leaders must join the effort to secure the future. Government must meet independent music communities where they are, with good-faith governance, funding and sustained partnership. There is work to be done to support the vitality, profitability, inclusivity and spiritual value of music in Nashville. It will require creating new structures and new coalitions; building new policies and making them work; building harmonious streets and neighborhoods; catalyzing citizen leadership and civic power—and empowering actors across Nashville to realize the next chapter of its music future.

“Money can’t buy what independent music venues can do for Nashville. It has to be done with passion and love and care at the end of the day. But you got a town full of passionate people.”

—Aubrey Preston, Music and heritage preservationist; owner, Fox & Locke

THE BASEMENT EAST, TAELA, MARCH 3 2024

Appendix 1: City Case Studies

As a part of this research, case studies were compiled to document innovative tools that other city governments use to support music venues, cultural industries, nightlife, and tourism. Six localities were selected for these case studies, with interviews and desk research conducted for each one. These cases are summarized in *Section 3.4: Looking Elsewhere: City Case Studies* and presented in full here.

A Coordinated Defense of Live Music: Austin, USA

Using a wraparound approach to keep venues and musicians part of the city's fabric.

Austin is frequently cited as a comparable city to Nashville, with its reputation as the "Live Music Capital of the World," its location in the American South, and its recently booming real estate and labor markets. National media pieces titled "Skyrocketing cost of living threatens Austin's music scene[261]," and "How Austin Became One of the Least Affordable Cities in America[262]" could also have been written about Nashville—musicians moving to the outskirts while corporate headquarters rise and professional migrants come to town.

The City's Music and Entertainment Division (MED) is the planning and regulation agent for the City of Austin. Located in the Economic Development Department, it manages entertainment-related sound and regulatory policy related to nightlife. Entertainment Services Manager Brian Block leads this effort, playing the "Night Mayor" role prominent in many cities. This profile touches on several significant ways that the MED helps to coordinate city offices, for a commitment to live music that pervades municipal government.

Costs have pushed patrons and businesses outside of downtown (South Congress, and East 6th St among others), and the MED is planning to support the expansion of live music clusters outside the core. To support this, Block's office has developed a **"customizable framework" for sound management** to deal with the conflicts that come from music encroaching on residential areas. City Council, the Austin Planning Commission and the Economic Development Department have worked together to propose **new zoning types** that allow for live music and limited alcohol sales without being zoned as a bar—a concept that will open up 685% more land for music uses[263]. A 2023 ordinance[264] subsequently established the new commercial use category of "performance venues" as sites for plays, films, and other performances—which explicitly includes live music venues.

The MED also provides **music-sensitive expertise on planning issues and urban governance**. When a shooting on the dense 6th Street entertainment corridor occurred in 2021, City Council relied on MED's expertise to put forward a resolution calling for improved lighting, design and circulation, nightlife-sensitive public safety and a diversification of cultural offerings as alternatives to police-only strategies. As one related step, the office was also directed[265] to convene multiple city departments—including but not limited to police, transit, energy, fire, medical services, violence prevention, code, historic preservation and the city manager—to promote safe and positive nightlife, particularly downtown.

The **Cultural Land Trust** is a new instrument being used to develop or preserve critical land or spaces. The Trust has $17 million in bond seed funding to acquire land for arts and music spaces - to either own or invest in leases to make these spaces permanently affordable. The Trust is administered by the new, quasi-governmental Austin Economic Development Corporation (EDC). It is designed to be agile in real estate deals and also has goals to address issues of housing and other policy areas. The Trust's first two projects are leveraging city-owned property to create arts and culture hubs on city land; the third is a lease subsidy for an IMV—the Hole In The Wall—that was facing closure[266].

The **Live Music Fund** is a tool designed to support musicians—no musicians, no music venues. As Austin's real estate prices have soared, musicians have experienced increasing financial challenges, and there is a movement afoot to keep musicians coming to, or staying in Austin. Established in 2019, the Live Music Fund is funded by Hotel Occupancy Taxes, and disbursed by the Austin EDC. It disburses several types of grants, notably $5,000-10,000 grants to artists for project-based awards[267].

The Economic Development Department's Cultural Arts Division also has a grantmaking program. Its **Cultural Arts Funding Program** supports business development and training. Its funding is also drawn from a Hotel Occupancy Tax and directed towards tourism-relevant industries.

To keep track of the success of these efforts, **Austin's Music Census of 2015 and 2022**[268] is used to monitor key indicators. For example, participation in music industries declined while venues diversified in that interval. This survey instrument is conducted by Sound Music Cities through a widespread community engagement campaign.

Many of Austin's approaches are enabled by its home rule authority.[269] The City may enact any law that is not expressly forbidden by the state, a power Nashville does not have.

261 *PBS NewsHour, Cost of Living Threatens Austin's Music Scene.*
262 *Sandoval, How Austin Became One of the Least Affordable Cities in America.*
263 *Stark, Zoning Changes.*
264 *AustinTexas.gov, Ordinance Amending City Code Chapter 25-2.*
265 *austintexas.gov, RESOLUTION NO. 20210729-175.*
266 *Swiatecki, Hole in the Wall Dodges Closure.*
267 *austintexas.gov, Live Music Fund Timeline.*
268 *Sound Music Cities, 2022 Greater Austin Music Census Results.*
269 *austintexas.gov, Overview of the Austin City Government.*

Fighting Grassroots Venue Closures: London, UK

Holding on to grassroots music venues through policy and planning tools and public-civic advocacy.

London and other UK cities' grassroots music spaces are famously associated with the development of influential musicians across genres and eras, from the Rolling Stones and Sex Pistols to Blur, Amy Winehouse and Adele[270] [271] [272]. But beginning in the early 2000s, London and the wider UK experienced an epidemic of venue closures: London lost more than a third of its grassroots music spaces between 2007–2015[273] and almost 60% of its LGBTQ+ venues between 2006–2017, while the UK lost 44% of its nightclubs (2005–2015) and 25% of its pubs (2001–2016)[274].

The Mayor of London created a Music Venues Taskforce to understand *why* venues were closing, and its impact on London. The 2015 *London's Grassroots Music Venues Rescue Plan* identified factors including rising property values and business rates, licensing and planning challenges, and increasing proximity of venues to residential buildings[275]. This report proposed a "rescue package," and the Greater London Authority (GLA) took action, including appointing a Night Czar in 2016. Further actions are detailed in the GLA's 2017 progress report[276].

This section focuses on three particular initiatives that support grassroots venues: the **agent of change** principle**,** the **Night Test,** and the **Culture and Community at Risk Office**.

The "agent of change" principle in urban planning holds incoming or new development in an area (the "agent of change") responsible for mitigation to ensure that existing residents, businesses, or community spaces do not experience significant adverse effects. (This is particularly relevant in cases where new residential construction adjacent to music venues results in conflict between the venue and new residents.) The principle, already in use in the US, Australia, and Canada, was implemented into both the London Plan[277] and UK National Planning Policy Framework (NPPF)[278] in 2018[279]. This action followed significant advocacy from the UK music industry, particularly the Music Venues Trust (MVT).

The "Night Test": In recognition that nighttime can often be an afterthought in urban planning and policy decisions, a 2019 report[280] produced by the London Night Time Commission recommended that the mayor introduce a "Night Test" that would evaluate *all* new policies' anticipated impact on "London's culture, sociability, wellbeing and economy at night." The night test is now in the process of being implemented across GLA departments and London boroughs, to ensure that all planning and policy decisions are considered through this lens; public-facing documentation is slated to be available in 2024.

The **Culture and Community Spaces at Risk Office**[281] works to safeguard London's cultural and community infrastructure in several different ways. The primary task of the three-person team is to work closely with venues on a case-by-case basis to deal with risks of closure. The office has also commissioned research, maintains London's Cultural Infrastructure Map, and works to identify buildings that may be suitable for conversion to new cultural uses[282]. Given the large volume of demand for the office's support—supporting 200 cases in the first year alone—a framework has been established that prioritizes spaces that are led by or serving marginalized communities, located in areas of the city that typically lack cultural and social infrastructure, and/or contribute meaningfully to community resilience[283]. Such an office enhances the impact of the Night Czar, laying the groundwork for more effective intervention in support of grassroots venues.

24Hour London Manager Paul Broadhurst also emphasizes that alongside the GLA's programs, community and industry advocacy has been pivotal: "One of the key things is having [the] Music Venues Trust." He explains that the nonprofit Music Venue Trust[284], a national alliance of grassroots music venues, has not only provided research and data that enables effective policymaking, but has helped to normalize the concept of a "grassroots music venue"[285] in industry and political discourse.

270 *The Mayor of London's Music Venues Taskforce, Rescue Plan for London.*
271 *The List, Why Grassroots Music Venues Matter.*
272 *Mawn, The Brilliant Camden Pub.*
273 *The Mayor of London's Music Venues Taskforce, Rescue Plan for London.*
274 *Campkin and Marshall, LGBTQ+ Cultural Infrastructure in London.*
275 *The Mayor of London's Music Venues Taskforce, Rescue Plan for London.*
276 *The Mayor of London's Music Venues Taskforce, Rescue Plan for London.*
277 *Music Venue Trust, Agent of Change Is Policy D12.*
278 *Department for Levelling Up, Housing and Communities, National Planning Policy Framework.*
279 *Holmes and Wex, The 'Agent of Change' Principle.*
280 *London Night Time Commission, Think Night.*
281 *Greater London Authority, Culture and Community Spaces at Risk.*
282 *World Cities Culture Forum, Culture at Risk Office.*
283 *Greater London Authority, Culture and Community Spaces at Risk.*
284 *Music Venue Trust, Music Venue Trust.*
285 *Music Venue Trust, Grassroots Music Venue (GVM) Definition.*

Supporting Legacy Businesses: San Francisco, USA

Fighting to protect cultural spaces and districts amidst fast-appreciating land values.

As San Francisco housing prices skyrocketed in the early 2010s[286], the city's leadership recognized the pressure that some residents faced: "Our neighborhoods are revitalized… but some still look to the future anxiously, and wonder whether there's room for them in a changing San Francisco."[287] The Bay Area's battles against appreciating land values have led to the creation of several unique policy devices for protecting cultural spaces and districts. This section profiles two programs that work to protect small business and culture—the **Legacy Business Program** and **Cultural District Program**—as well as the city's use of the **"agent of change" principle.**

While traditional historic preservation tools focus on buildings, the **Legacy Business Program** focuses on businesses: what they see as "the soul of the city"[288]. Managed by the SF Office of Small Business, the program grew from the 2013 SF Heritage "Legacy Bars & Restaurants"[289] list that aimed to spotlight long-standing bars and restaurants contributing to the city's history and culture. That, paired with a 2014 report[290] calling for a holistic approach to preserving cultural heritage, led to the Legacy Business Program. A 2015 initiative ordinance approved by voters established the Legacy Business Historic Preservation Fund, consisting of both a rent-stabilization grant (which continues) and business-assistance grant (offered through 2020)[291].

To become a Legacy Business, the Mayor or a member of the Board of Supervisors nominates an independent business or nonprofit that has operated for over 30 years (or between 20-30, if it faces a significant risk of displacement) and has significantly contributed to the city's history or identity. Music venues are eligible, as are businesses that have moved between locations. Legacy Businesses receive educational and promotional assistance, access to financial support such as planning protections in some parts of the city[292] and multi-year Rent Stabilization Grants to landlords[293] (up to $22,500 per year[294]). This model has been adopted by San Antonio, Birmingham, Washington, D.C. and other US cities[295].

At the neighborhood level, the **Cultural Districts** program provides a means for City departments to work collaboratively with community members in "place-making and place-keeping" of cultural communities. A 2018 ordinance established the program, defining Cultural Districts as areas that embody a "unique cultural heritage" due to their cultural and historic assets, culturally-significant businesses, or being a place of significance to a specific group of people historically discriminated against or displaced[296]. With an annual $3 million budget from the city's Hotel Tax Fund, the program enables community members and City departments to jointly develop district-level strategy around historic and cultural preservation, tenant protections, arts and culture, economic development, land use and housing, and cultural competency. Thus far, the program includes ten districts created between 2013 and 2022.

San Francisco's **Residential Development Review (RDR)**, which operates similarly to the **"agent of change"** principle used in London and other cities, aims to protect venues near planned housing, hotel or motel development[297]. Triggered when development is proposed within 300 feet of a venue with an entertainment permit, the process requires developers to follow specific steps, including conducting a sound study while the venue is operating and at its closing time[298], and notifying potential residents of the venue nearby. This process seeks to increase transparency and communication early on in development projects. Ben Van Houten, Business Development Manager, Nightlife and Entertainment Sector for the Office of Economic and Workforce Development, explains that one forthcoming housing development next to live music venue The Independent adjusted its planned design, moving bedrooms away from the venue side of the building: "which was feasible, it was just something they weren't considering…there are even small dollar ways to make projects better."

286 *McCann, 1979 to 2015.*
287 *SF Heritage, Sustaining San Francisco's Living History.*
288 *Legacy Business San Francisco, About.*
289 *SF Heritage, Toasting 100 Legacy Bars and Restaurants.*
290 *SF Heritage, Sustaining San Francisco's Living History.*
291 *SF.gov, Legacy Business Program.*
292 *SF.gov, Legislation That Supports Legacy Businesses.*
293 *SF.gov, Rent Stabilization Grant.*
294 *Legacy Business San Francisco, Annual Report.*
295 *Morton, Legacy Business Programs.*
296 *Sf.gov, An Overview of the San Francisco Cultural Districts Program.*
297 *Sf.gov, Get Your Housing Project Reviewed.*
298 *Sf.gov, Recommended Noise Attenuation Conditions.*

Building Nighttime Governance: Philadelphia, USA

Global good practices and a focus on community engagement spur design of a new "night mayor" office.

Governments and nightlife communities worldwide are investing in "nighttime governance" as a way to take deliberate care of music spaces and the adjacent businesses and communities that use the city at night. At last count, there were nearly 80 government or civic nighttime offices (sometimes called "Night Mayors"), and more emerging every year. Nashville recently created a Director of Nightlife position, which is in the process of exploring its purpose and developing programming. **Philadelphia's Night Time Economy** office, founded in 2022, provides a useful example in how such an office can be developed to function effectively, and to fit the local governmental context.

The Philadelphia office is notable for a number of reasons:

- It was designed specifically in the context of governmental support for live arts, but it coordinates government actors, services, and policies for a broad cross-section of nighttime stakeholders.
- It was created after a research process on best practices from peer cities.
- It is primarily an economic development office with other civic functions.
- It is designed to build public trust by having a strong community engagement function and lacking enforcement authorities.
- It is designed to be a durable office staffed by civil servants.

In late 2020, Philadelphia City Council created the **Arts and Culture Task Force (ACTF)** to advise them on the needs of the city's artists amidst the worst of the Covid-19 pandemic. This group—made up of artists, non-profit leaders, entrepreneurs, educators and more—created a sub-committee dedicated to addressing nightlife. This sub-committee, chaired by one of the authors of this report, Michael Fichman, was formed because nighttime is the context for so much arts and cultural production, and many of the city's pre-pandemic policies were neglectful of the nighttime urban context[299]. The ACTF set about creating an advisory document with legislative and budgetary recommendations[300].

The ACTF created a raft of recommendations—reforms to licensing, harm reduction policies, financial supports for workers and businesses, and improved nighttime design and lighting. It also recommended the **creation of a nighttime office** to ensure proper stewardship and coordination of these activities and active engagement. City Council requested a detailed scope for a directorship, and this was budgeted in 2021, largely in the form it was designed by the Task Force[301]. In 2022, Manning was hired into the position in a competitive process.

The NTE director sits in the Philadelphia Department of Commerce. This decision was made after the ACTF interviewed nighttime managers across the US. Placing the office in the civic service bureaucracy insulates it from mayoral turnover. It provides the office with the legal, communications, and administrative resources of a larger department. This placement also allows the director to leverage existing small business programs and economic development expertise to connect stakeholders to local, state, and federal programs. New York City recently followed Philadelphia's example - Mayor Eric Adams moved the Office of Nightlife from the Mayor's Office of Media and Entertainment to the Department of Small Business Services[302].

The Director is expected to be a problem solver inside and outside government—reducing the alienation and frustration of nighttime businesses and communities, mediating sticky issues, and providing arts and nighttime-sensitive advice to officials in commerce, public safety, planning, transit, licensing, and zoning. As such, the office convenes two working groups on a regular basis—one consisting of municipal officials and one consisting of community stakeholders. The office's non-enforcement role is designed to let communities know that the Director can be an ally in working out potentially high-stakes disputes with enforcement agencies—this was a deliberate reaction to US nightlife officers with enforcement powers telling the ACTF that they had experienced difficulties building community trust.

Manning has carried out several first year objectives sketched out by the office's founders and started to dig into the larger list of ACTF policy recommendations. First, he undertook a **city-wide "listening tour"**[303] to build engagement and identify issues of note. Second, he convened his **internal and external working groups** and began to build relationships within government. Third, he laid the groundwork for a **governance plan** with a team of graduate interns from the University of Pennsylvania. Currently, the office is working with city departments to reform code definitions, launch harm reduction and commercial corridor safety programs, facilitate hospitality employee training, and build entrepreneurship support for minority nightlife business owners, with significant political and budgetary support from City Council. The office's efforts are focused on having programs and policies ready for 2026, when Philadelphia will host the FIFA World Cup, MLB All-Star Game and the country's 250th "Sesquicentennial" birthday celebrations.

299 *Weitzman School of Design, Q&A: Michael Fichman.*
300 *City of Philadelphia ACTF, City of Philadelphia Arts and Culture Task Force.*
301 *City of Philadelphia ACTF, Nighttime Economy Office Proposal 2021.*
302 *Nyc.gov, Jeffrey Garcia as Office of Nightlife Executive Director.*
303 *Albertine, A Night in the Life of the Night Mayor.*

An Unexpected Peer Music City: Berlin, Germany

Global destination for electronic music supports grassroots music while exploring new possibilities for music space.

While the average traveler might not immediately consider Berlin and Nashville to be peer cities, both strongly identify with a specific music genre that has drawn international attention and tourism. The rise of techno music in post-Wall Berlin led to an explosion of "techno-tourism[304]" as Berlin became known for its weekend-long club events and thriving music culture—but also a backlash against increasing gentrification and loss of creative space in the city[305]. In part due to advocacy by Berlin's Clubcommission[306], active since 2001, Berlin has made major investments in the protection and promotion of club spaces and scenes, working to support and foster its unique culture. Berlin's support of independent and grassroots music venues and collectives provides an instructive example of how destination music cities can meaningfully support their local culture.

One globally unique program is Berlin's **Tag der Clubkultur (Day of Club Culture)**, an annual series that grants up to 40 awards of €10,000 each (approximately $10,750 as of this writing) for clubs and collectives that exemplify a high degree of artistic innovation, diversity and inclusion, and future-looking sustainability[307]. With awardees selected by a five-person jury representing multiple generations and perspectives of club culture, each award recipient produces an event on or around October 3, the designated Day of Club Culture, creating a grassroots citywide festival. Originally launched in 2020 as a mode of support to venues and collectives closed during the pandemic, *Tag der Clubkultur* has continued into its fourth year, with funding from the Berlin Senate Department for Culture and Social Cohesion and Musicboard Berlin, and administrative support from the Clubcommission. In a city with a traditionally sharp division between state-funded fine arts institutions and club scenes typically seen as "entertainment," *Tag der Clubkultur* is a powerful statement of support for the artistic and cultural innovation that takes place in club culture.

Clubcommission and state actors have taken steps to combat *Clubsterben* ("club death"), such as the development of the *Clubkataster*[308], a web map that tracks planned development adjacent to clubs and venues, as well as a *Schallschutzfonds*[309] (soundproofing fund) that subsidizes noise-reducing measures for clubs to mitigate noise complaints and conflicts with nearby residents. But preserving existing clubs is not the only focus. Notably, city actors are beginning conversations on **Clubs im Neubau (Clubs in New Buildings).** An October 2020 conference[310] brought together Clubcommission, the Technical University of Berlin, the Senate Department for Economic Affairs, Energy and Public Enterprises, and a host of other political and real estate actors to discuss how new spaces of club culture might coexist in new developments. These efforts have continued, project-by-project. For example, incoming development on the R.A.W. Gelände, a former railway repair depot turned cultural hub, has been negotiated to preserve several existing clubs onsite and provide long-term rental agreements, in exchange for a higher building allowance adjacent to the street[311] [312]. Astra Kulturhaus, slated to be displaced in the current building plans, will move to a new purpose-built space [313]. While final outcomes of this project are yet to be seen, this ongoing dialogue between clubs, developers, policymakers and city offices can help to preserve the overall stock of independent space for music in changing cities.

304 *Allyn, Berlin's Famed Techno Scene.*
305 *The Local, Berliners Vote against Massive Spree Development.*
306 *Clubcommission Berlin e.V, Clubcommission | Berlin.*
307 *Tag der Klubkultur, Tag der Clubkultur.*
308 *Clubkataster, Clubkataster Web Map.*
309 *Schallschutzfonds, Home.*
310 *Haus Eins, Clubs Im Neubau.*
311 *rbb, Club Preservation, RAW Site.*
312 *baunetz.de, Workshop Procedure Decided.*
313 *Bruns, Partykiez Auf Dem RAW-Gelände.*

Tourism and the Preservation of Jazz: New Orleans, USA

New Orleans seeks to protect its jazz heritage through official institutions and informal "culture bearers."

It's a tall order to preserve a unique musical heritage. What Nashville is to country, gospel, and Americana, New Orleans is to jazz, funk, and bounce. What has New Orleans learned from its decades as a major cultural center with an outsized tourism industry—and with tourism on the continued ascent in Nashville, how can Music City learn from the Crescent City's mixed record in keeping culture at the center of its civic and economic identity?

Tourism and hospitality are the largest employment sectors in New Orleans[314], responsible for over 19 million yearly visitors spending $10.5 billion prior to the pandemic[315]. Nashville is beginning to approach these numbers, with 14.4 million visitors spending $8.8 billion in 2022[316].

The 20th century saw heavy municipal and private investment in New Orleans tourism, with hotels, convention centers, stadiums and festival marketplaces in the French Quarter and downtown, and substantial marketing campaigns[317]. These changes dislocated communities, and despite some preservation, many elements of historic character were lost. The simultaneous decline of the oil industry led to an outsized role for tourism, while the city became a top American tourism destination, despite its relatively low population.

The French Quarter, with its preserved façades and long-standing reputation for street life, late night boozing and parties, stands distinct from other districts and corridors with different cultural offerings. Frenchmen Street, the Garden District, Uptown and other wards feature dozens of music venues, with jazz and a variety of other genres.

How effective is New Orleans in dually supporting the central district and adjacent districts? Is it preserving the vitality of jazz and the affordability of the city for musicians and service workers? The record is mixed.

Civic, community and industry actors are undoubtedly key. Decades of organized attention to the legacy and future of jazz have created **civic entities and institutions** like Preservation Hall, The New Orleans Jazz and Heritage Festival, and organizations like Music and Culture Coalition of New Orleans (MaCCNO) and Save Our Soul work to preserve and honor the city's culture. The non-profit economic development corporation New Orleans Tourism and Cultural Fund aims to support and fund local culture bearers with an eye to sustainable tourism. New Orleans has a larger supply of venue space than ever before, though many of the new rooms are not independent.[318] Meanwhile, post-Katrina gentrification has eaten away at the affordability of this service industry-heavy music city and exposed New Orleans' unique cultures and communities to some jeopardy. Conflicts related to noise, public space, and social mores have arisen in outlying corridors and neighborhoods.[319]

New Orleans, like Nashville, has recently invested in municipal nighttime governance. Howie Kaplan, New Orleans' first, recently-minted **Director of Nighttime Economy**, is the longtime proprietor of the Howlin' Wolf Den, a venerable independent music venue between the Garden District and French Quarter. Kaplan's first actions have involved engagement—building relationships where the government is seen as an ally. Kaplan has been mediating between venues and neighbors, dealing with "bad actor" nightlife establishments, and convincing the government to see the hospitality industry as a critical partner.

Meanwhile, tourism campaigns and institutionally supported events are not as diverse as the city itself, with traditions like Mardi Gras Indians (also known as Black Masking Indians[320]) and locally famous second-lines (a "quintessential New Orleans art form" in weddings, funerals and other processions[321]) lacking official support. New Orleans' tourism and marketing commission lists 95 venues citywide, though with few listings in lesser-frequented districts such as Treme and Mid-City.

But in addition to more formal entities and offices, Kaplan thinks the "culture bearers"—the cab driver or hospitality worker who tells you about a great restaurant or music venue—are key to informing out-of-towners about the breadth of experiences they can have. Kaplan says the key to New Orleans' enduring popularity is that people "leave New Orleans infected" with the culture, and that tourists exposed to independent music culture in New Orleans develop a deeper, longstanding relationship with the place.

314 *New Orleans, Stats and Facts.*
315 *Clark, Price, and Yawn, New Orleans Glaring Racial Wealth Gap.*
316 *Nashville Music City, Tourism Generates Record Economic Activity.*
317 *Souther, A City Built on Baubles.*
318 Kaplan, H. Personal Communications, August 2023.
319 *Akinlana, Gentrification Threatens New Orleans' Brass Bands.*
320 *MacCash, Should We Call Them Mardi Gras Indians.*
321 *New Orleans, New Orleans Second Line Parade.*

Appendix 2: Venue Database and Venue Characteristics

Note: This venue database strives to provide the most accurate information possible as of September 2023, but recognizes that inaccuracies may be present. These data were gathered from expert members of Nashville's music community through paid focus groups, public events, and paid local project researchers, and validated to the best of the project team's ability. Due to the large dataset, some venues' limited promotional footprint, and the practical challenges of contacting and receiving information from every venue, some data points could not be ascertained with a high degree of certainty; best-available information was used. Categories here are based on expert consensus regarding the *likelihood* of certain aspects of the nature of the venue (particularly independence of programming), and should not be taken as definitive.

Addresses listed here may not be the same as published or mailing addresses: venues' administrative tax parcel addresses were used *instead* of property mailing addresses, as the former provides more data for analysis (e.g. assessed prices and sale dates). Tax parcels are sometimes larger than the venue building.

Appendix 2A: Venue Database

Dedicated Music Spaces

IMVs	Business Name	Address
	3rd & Lindsley	805 PRESIDENT RONALD REAGAN WAY
	404 Bar & Grill	404 ELYSIAN FIELDS RD
	DRKMTTR Collective	1111 DICKERSON PIKE
	Jane's Hideaway	403 GALLATIN AVE
	Layla's Honky Tonk	418 BROADWAY
	McNamara's Irish Pub	2740 OLD LEBANON PIKE
	Nashville Jazz Workshop	1012 BUCHANAN ST
	Nectar Urban Cantina	206 MCGAVOCK PIKE
	Play Dance Bar	1517 CHURCH ST
	Rosemary and Beauty Queen	1102 FORREST AVE
	Rudy's Jazz Room	600 9TH AVE S
	Skull's Rainbow Club	222 4TH AVE N
	Sonny's Patio Pub and Refuge	1318 6TH AVE N
	The 5 Spot	1006 FORREST AVE
	The Basement	1604 8TH AVE S
	The Bluebird Cafe	4104 A HILLSBORO PIKE
	The Cobra	2511 GALLATIN AVE
	The East Room	2412 GALLATIN AVE
	The Electric Jane	1221 DIVISION ST
	The End	2219 ELLISTON PL
	The Lipstick Lounge	1400 WOODLAND ST
	The Listening Room	618 4TH AVE S
	The Station Inn	402 12TH AVE S
	Twelve Keys Saloon	4719 ANDREW JACKSON PKWY

Quasi-IMVs	Business Name	Address
	AJ's Good Time Bar	421 BROADWAY
	Acme Feed & Seed	101 BROADWAY
	Alley Taps	162 4TH AVE N #205

American Legion Post #82	3204 GALLATIN PIKE
Anzie Blue	1803 21ST AVE S
Bobby's Idle Hour Tavern	9 MUSIC SQ S
Bootleggers Inn	207 BROADWAY
Bourbon Street Blues and Boogie Bar	218 4TH AVE N
Bowie's	174 3RD AVE N
Bucanas 2009	3802 NOLENSVILLE PIKE
cë gallery	425 CHESTNUT ST
Cheekwood Botanical Garden and Museum of Art	111 CHEEK RD
Dee's Country Cocktail Lounge	102 E PALESTINE AVE
Delgado Guitars	919 C GALLATIN AVE
Eastside Bowl	1508 GALLATIN PIKE
Famous Nashville	110 2ND AVE N
Flamingo Cocktail Club	509 HOUSTON ST
Grimey's New & Preloved Music	1060 E TRINITY LN
HOME (Helping Our Music Evolve)	615 MAIN ST
Honky Tonk Central	329 BROADWAY
Legends Corner	424 BROADWAY
Live Oak	1530 DEMONBREUN ST
Lucky Bastard Saloon	408 BROADWAY
Luke's 32 Bridge Food & Drink	301 BROADWAY
Nashville Underground	105 BROADWAY
Ole Red	300 BROADWAY
Ray Stevens CabaRay	5724 RIVER RD
Robert's Western World	416 B BROADWAY
Solberg Studios	1618 JEFFERSON ST
Southern Grist Brewing East Nashville	754 DOUGLAS AVE
Star Rover Sound	1400 ADAMS ST
Tequila Cowboy	305 BROADWAY
Texas Troubadour Theatre	2416 MUSIC VALLEY DR
The Basement East	917 WOODLAND ST
The Big Bang Dueling Pianos	209 3RD AVE N
The Blue Room at Third Man Records	623 7TH AVE S
The Bowery Vault	2905 GALLATIN PIKE
The Donelson Pub	945 ALLEN RD
The Eighth Room	2106 8TH AVE S
The Local Nashville	110 28TH AVE N
The Office Nashville	604 GALLATIN AVE
The Roadside Bar & Grill	4617 OLD HICKORY BLVD
The Row Kitchen & Pub	110 LYLE AVE

The Second Fiddle	420 BROADWAY
The Stage on Broadway	412 BROADWAY
The Vinyl Lounge	1414 3RD AVE S
Vinyl Tap	2038 GREENWOOD AVE
Zanies Comedy Showplace Nashville	2025 8TH AVE S

Non-IMVs

Business Name	Address
Analog at Hutton Hotel	1808 WEST END AVE
Andrew Jackson Hall-TPAC	301 REP JOHN LEWIS WAY N
Ascend Amphitheater	310 1ST AVE S
Bavarian Bierhaus	433 OPRY MILLS DR
Belcourt Theatre	2100 BELCOURT AVE
Black Rabbit	218 3RD AVE N #100
Bongo Java After Hours Theatre	2007 BELMONT BLVD
Brooklyn Bowl Nashville	915 3RD AVE N
City Winery Nashville	600 MIDDLETON ST
Commodore Grille (Holiday Inn Vanderbilt)	2613 WEST END AVE
Country Music Hall of Fame and Museum	222 REP JOHN LEWIS WAY S
Dream Nightclub	210 4TH AVE N
EXIT/IN*	2208 ELLISTON PL
General Jackson Showboat	577 OPRY MILLS DR
Grand Ole Opry	2804 OPRYLAND DR
Hard Rock Cafe	108 2ND AVE N
James K Polk Theater-TPAC	301 REP JOHN LEWIS WAY N
Jason Aldean's Kitchen + Rooftop Bar	309 BROADWAY
Jimmy Buffett's Margaritaville	322 BROADWAY
Johnny Cash's Kitchen & Saloon	121 3RD AVE S
Marathon Music Works	1404 CLINTON ST
Music City Center	201 REP JOHN LEWIS WAY S
Musicians Corner	2500 WEST END AVE
Nashville Municipal Auditorium	417 4TH AVE N
Nashville Nightlife Theater	2416 MUSIC VALLEY DR
Nashville's War Memorial Auditorium	301 6TH AVE N
Analog at Hutton Hotel	1808 WEST END AVE
Andrew Jackson Hall-TPAC	301 REP JOHN LEWIS WAY N
Ascend Amphitheater	310 1ST AVE S
Bavarian Bierhaus	433 OPRY MILLS DR
Belcourt Theatre	2100 BELCOURT AVE
Black Rabbit	218 3RD AVE N #100
Bongo Java After Hours Theatre	2007 BELMONT BLVD
Brooklyn Bowl Nashville	915 3RD AVE N

City Winery Nashville	600 MIDDLETON ST
Commodore Grille (Holiday Inn Vanderbilt)	2613 WEST END AVE
Country Music Hall of Fame and Museum	222 REP JOHN LEWIS WAY S
Dream Nightclub	210 4TH AVE N
EXIT/IN*	2208 ELLISTON PL
General Jackson Showboat	577 OPRY MILLS DR
Grand Ole Opry	2804 OPRYLAND DR
Hard Rock Cafe	108 2ND AVE N
James K Polk Theater-TPAC	301 REP JOHN LEWIS WAY N
Jason Aldean's Kitchen + Rooftop Bar	309 BROADWAY
Jimmy Buffett's Margaritaville	322 BROADWAY
Johnny Cash's Kitchen & Saloon	121 3RD AVE S
Marathon Music Works	1404 CLINTON ST
Music City Center	201 REP JOHN LEWIS WAY S
Musicians Corner	2500 WEST END AVE
Nashville Municipal Auditorium	417 4TH AVE N
Nashville Nightlife Theater	2416 MUSIC VALLEY DR
Nashville's War Memorial Auditorium	301 6TH AVE N
Nudie's Honky Tonk	409 BROADWAY
Oz Arts Nashville	6172 COCKRILL BEND CIR
Plaza Mariachi	3955 NOLENSVILLE PIKE
Puckett's Grocery & Restaurant Downtown	201 REP JOHN LEWIS WAY N
Riverside Revival Nashville	1600 RIVERSIDE DR
Rocketown (Main Building)	601 4TH AVE S
Ryman Auditorium	116 REP JOHN LEWIS WAY N
Sambuca (Restaurant)	1209 PINE ST
Schermerhorn Symphony Center	1 SYMPHONY PL
Skydeck on Broadway	600 B BROADWAY
The Countrypolitan Bar & Kitchen (inside Hotel Indigo)	301 UNION ST
The Nashville Palace	2611 A MCGAVOCK PIKE
The Valentine	312 BROADWAY
Tootsie's Orchid Lounge	422 BROADWAY

* This venue is corporate-owned but independently-booked, connoting an outlier within the non-independent category.

Occasional Music Spaces

IMVs

Business Name	Address
Dawg House Saloon	1522 DEMONBREUN ST
Decker & Dyer	807 CLARK PL
Deep Tropics (Music Festival)	900 ROSA L PARKS BLVD

Jefferson Street Jazz & Blues Festival	1215 9TH AVE N
Larry's Grand Ole Garage	549 E MAPLE ST
Minerva Avenue	1002 BUCHANAN ST
Mirror Mirror	2623 LEBANON PIKE
Out Loud Music Festival	14 JAMES ROBERTSON PKWY
Phat Bites Deli & Bar	2730 LEBANON PIKE
Rosie's Twin Kegs	413 THOMPSON LN
Santa's Pub	2225 BRANSFORD AVE
Springwater Supper Club & Lounge	2701 POSTON AVE
The Local Distro	614 GARFIELD ST
Tribe	1515 CHURCH ST

Quasi-IMVs

Business Name	Address
6th and Peabody	423 6TH AVE S
Bar Sovereign	514 REP JOHN LEWIS WAY S
Betty's Grill	4900 CHARLOTTE AVE
Big Shotz	115 2ND AVE N
Cafe Coco	210 LOUISE AVE
Caney Fork River Valley Grille	2400 MUSIC VALLEY DR
Carl's Corner Pub & Bar	3755 NOLENSVILLE PIKE
Corner Bar at Elliston Place	2200 ELLISTON PL
Crow's Nest	2221 BANDYWOOD DR
Dierks Bentley's Whiskey Row Nashville	400 BROADWAY
Doc Holidays	112 2ND AVE N
Drifters BBQ	1008 WOODLAND ST
Ellingston's	241 4TH AVE N
Fanny's House of Music	1101 HOLLY ST
Helen's Hot Chicken	1801 JEFFERSON ST
Hubba Hubba Tiki Tonk	922 MAIN ST
Inglewood Lounge	3914 GALLATIN PIKE
Island Vibes	1316 ANTIOCH PIKE
John A's Restaurant	2425 MUSIC VALLEY DR
Kid Rock's Big Honky Tonk Rock N' Roll Steakhouse	221 BROADWAY
La Costa Mexican Seafood	5332 CANE RIDGE RD
Las Cazuelas	4112 NOLENSVILLE PIKE
Las Fogatas	5560 NOLENSVILLE PIKE
Little Harpeth Brewing	1 TERMINAL DR
Lonnie's Western Room	300 CHURCH ST
Los Arcos	3798 NOLENSVILLE PIKE
Loser Most Wanted Bar & Grill (Midtown)	111 4TH AVE S

Loveless Cafe	8400 HIGHWAY 100
Marisqueria 7 Mares	931 RICHARDS RD
Miss Kelli's Karaoke Bar	207 3RD AVE N 101
Music City Bar & Grill	2416 MUSIC VALLEY DR
Music Makers Stages at Delgado Guitars	919 A GALLATIN AVE
Noble's East Nashville	974 MAIN ST
Old Glory	1200 VILLA PL
Primm's Appetit	2830 GALLATIN PIKE
Rebar at the Dam	3248 BLACKWOOD DR
Redneck Riviera	208 BROADWAY
Rippy's Smokin' Bar & Grill	429 BROADWAY
Sinema	2600 8TH AVE S
TailGate Brewery East	811 GALLATIN AVE
TailGate Brewery Music Row	1538 DEMONBREUN ST
Tailgate Brewery-HQ	7300 CHARLOTTE PIKE
Tennessee Brew Works	809 EWING AVE
The Getalong	700 A FATHERLAND ST
The Green Light	833 9TH AVE S
The Hideout Salon and Lounge	2605 GALLATIN AVE
The JamNasium—Nashville City Center	511 UNION ST
The Rum Room	2116 MEHARRY BLVD
The Stillery (Downtown)	113 2ND AVE N
The Treehouse	1011 CLEARVIEW AVE
The Underdog	3208 GALLATIN PIKE
The Wedge Pizza Pub	2020 LINDELL AVE
Thirsty Turtle Sports Grill	1307 BELL RD
Tin Roof Broadway	316 BROADWAY
Twin Kegs II	327 HERMITAGE AVE
Urban Cowboy Public House Bar	1603 WOODLAND ST
Van Gogh's Ear Wine Bar	1112 WOODLAND ST
Wildhorse Saloon	120 2ND AVE N
Yay Yay's	1903 JEFFERSON ST
Yolan	401 KOREAN VETERANS BLVD

Non-IMVs

Business Name	Address
Aloft Nashville West End	1719 WEST END AVE
Assembly Food Hall	500 BROADWAY
Barbershop Theater	4003 INDIANA AVE
Barlines (Omni Nashville Hotel)	250 REP JOHN LEWIS WAY S
Big Jimmy's	109 2ND AVE N

Big Machine Brewery	120 3RD AVE S
Bridgestone Arena	501 BROADWAY
CMA Theater	224 REP JOHN LEWIS WAY S
Cross-Eyed Critters Watering Hole	101 20TH AVE N
Drury Plaza Hotel Downtown-Bar	300 KOREAN VETERANS BLVD
ERGO	1001 BROADWAY
Florida Georgia Line House	120 3RD AVE S
Frist Center for the Visual Arts	919 BROADWAY
GEODIS Park	0 RAINS AVE
Hifi Clyde's Nashville	1700 CHURCH ST
Hopsmith Tavern	1903 DIVISION ST
Joe's Place	2227 BANDYWOOD DR
L27 Rooftop Lounge	807 CLARK PL
Lipscomb University Dept of Theatre	1 UNIVERSITY PARK DR
LoulNa	1000 BROADWAY
Martin's BBQ Joint - SOBRO	410 4TH AVE S
Maxwell Lounge at Millenium Maxwell House	2025 ROSA L PARKS BLVD
Mellow Mushroom (Broadway)	423 BROADWAY
Mickey's Tavern	2907 GALLATIN PIKE
Miranda Lambert's Casa Rosa	308 BROADWAY
Moonlite Drive-in	941 B MAIN ST
Moxy Nashville	110 3RD AVE S
Music City Walk of Fame Park	121 4TH AVE S
Musicians Hall of Fame and Museum	417 4TH AVE N
NashHouse Southern Spoon and Saloon	1222 DEMONBREUN ST
Nashville Children's Theatre	700 PRESIDENT RONALD REAGAN WAY
Nashville Farmers' Market	900 ROSA L PARKS BLVD
Natl Museum of African American Music	500 BROADWAY
Neighbors of Sylvan Park	4425 MURPHY RD
Nissan Stadium	1 TITANS WAY
Opry Backstage Grill	2401 MUSIC VALLEY DR
Patron Event Center	709 RIVERGATE PKWY
Pearl Diver	1010 GALLATIN AVE
Red Door Saloon	1816 DIVISION ST
Red Door Saloon East	1010 FORREST AVE
Renaissance Nashville Hotel-Bridge Bar	611 COMMERCE ST
Scoreboard Restaurant & Sports Bar	2416 MUSIC VALLEY DR
Shamblin Theater	1 UNIVERSITY PARK DR
Sheraton Downtown Nashville	623 UNION ST
Sidebar Nashville	401 B PRESIDENT RONALD REAGAN WAY
Snitch	210 4TH AVE N

Sobro Sports Bar and Grill (Hilton Garden Inn Downtown)	419 3RD AVE S
Symphony Lounge at Hilton Nashville Downtown	121 4TH AVE S
TRUE Music Room and Bar (Cambria Hotel & Suites)	118 8TH AVE S
TSU Performing Arts Center	3401 JOHN A MERRITT BLVD
The Back Corner	1401 5TH AVE N
The Ballad of Emerson Hall	2510 GALLATIN AVE
The Cowan	500 COWAN ST
The District Bar & Kitchen (Hotel Indigo Downtown)	315 UNION ST
The Fairgrounds Nashville	0 RAINS AVE
The Fisher Center for the Performing Arts	2020 BELMONT BLVD
The Goat	1226 2ND AVE N
The Hampton Social	201 1ST AVE S
The Parthenon	2500 WEST END AVE
Tomato Art Fest	1106 WOODLAND ST
Tootsie's Orchid Lounge (Nashville Intl. Airport)	1 TERMINAL DR
UP, a rooftop lounge	901 DIVISION ST
WannaB's Karaoke Bar	305 BROADWAY
Whiskey Bent Saloon	306 BROADWAY
Winners Bar & Grill	1913 DIVISION ST
Yee Haw Brewing Co.	423 6TH AVE S

Appendix 2B: Study variables and data sources

The following table describes the venue-related variables collected through desk research, spatial analysis, administrative data research, community-engaged data gathering and expert programming assessment.

Variable	Description	Data Source(s)
name	Venue name.	PennPraxis, Focus Groups and Community Researchers, Nashville Area Chamber of Commerce
address_admin	Address adjusted to match administrative data records.	PennPraxis, Focus Groups and Community Researchers, Nashville Area Chamber of Commerce, Nashville Metro
APN	Assessor's Parcel Number; a unique identifier for a tax parcel can be used to link address information to attributes found in other administrative datasets.	Nashville Metro
TotlAppr	Total appraised value.	Nashville Metro
LandAppr	Appraisal value of land.	Nashville Metro
ImprAppr	Appraised value of improvements.	Nashville Metro
OwnDate	Date of most recent sale/transfer.	Nashville Metro
AssessDate	Date of last assessment.	Nashville Metro
TotlAssd	Total assessment value.	Nashville Metro
LandAssd	Assessed value of land.	Nashville Metro
ImprAssd	Assessed value of improvements.	Nashville Metro
ParID	Parcel ID; unique parcel identifier.	Nashville Metro
SalePrice	Sale price at last sale.	Nashville Metro
Acres	Area in acres.	Nashville Metro
FinishArea	Finished area in square feet.	Nashville Metro
LUDesc	Land use code description.	Nashville Metro
Owner	Property owner name.	Nashville Metro
OwnAddr1	Property owner address.	Nashville Metro
OwnAddr2	Property owner address secondary address.	Nashville Metro
OwnCity	Property owner city of residence.	Nashville Metro
OwnState	Owner state of residence.	Nashville Metro
OwnZip	Owner zip of residence.	Nashville Metro
Council	Council district.	Nashville Metro
Area_sqft	Area square feet of parcel.	Nashville Metro
X	ObjectID.	PennPraxis
ownership_structure	Ownership structure: Is the venue independently owned and operated? (No association with another business through common ownership or affiliation: ex. sharing of employees, resources, branding, etc..)	Focus Groups and Community Researchers

chamber_capacity	Capacity information published by the Chamber of Commerce.	Nashville Area Chamber of Commerce
independent_booking	Corporate booking: Are booking or promotion contracted to corporate partners?	Focus Groups and Community Researchers
events_per_month	Events per month: What is the average number of public music events per month? (no weddings, no private birthday parties, no private corporate events).	Focus Groups and Community Researchers
years_operating	Years of Operation: What is the length of time for creative usage (overall time/not just recent operator)?	Focus Groups and Community Researchers
interdisciplinarity	Interdisciplinarity: Does the venue offer events for non-music presentations, such visual art, performing art, panel discussions or film screenings?	Focus Groups and Community Researchers
event_promotion	Q: Is the promotion and marketing of this space focused on artistic content (artists, lineups, performances)?	Focus Groups and Community Researchers
purpose	Main Purpose: Is the music program the main purpose why people attend this venue, and not e.g. food, drink, products?	Focus Groups and Community Researchers
community_focus	Community Focus: Is the venue likely to be any of the following... a consistent platform for a niche genre, a space for underrepresented communities or music scenes, a neighborhood community hub, and not solely walk-in tourists?	Focus Groups and Community Researchers
experimentation	Experimentation: Compared to other venues in the city: Is this venue a platform for niche or experimental trends, sounds and art forms? Is it a place for experimental performers or extraordinary event concepts?	Focus Groups and Community Researchers
threats_neighbors	Threats: Is there an urgent threat to the venue related to… …relationships with neighbors? …rents or operation costs? …licensing or regulations?	Focus Groups and Community Researchers
description	Qualitative information about the venue.	PennPraxis
zip	Zip Code.	PennPraxis
county	County.	PennPraxis
city	City.	PennPraxis
Communit_1	Community Planning Area.	Nashville Metro
fd_capacity	Venue capacity.	Nashville Metro Fire Dept.
Capacity	Highest capacity measured by either Fire or the Chamber of Commerce.	Nashville Metro, Nashville Area Chamber of Commerce
Capacity_source	Source of venue capacity data.	Nashville Metro
ZONE_DESC	Zoning description.	Nashville Metro
ZONE_TYPE	Zoning code type.	Nashville Metro
ZONE_NAME	Zoning code name.	Nashville Metro
ZONE_ORDINANCE	Zoning ordinance.	Nashville Metro
music_space	Is it an Occasional or Dedicated Music Space?	Focus Groups and Community Researchers
IMV	Independence status - IMV, Quasi-IMV or non-IMV.	Focus Groups and Community Researchers

Condition	Assessed building condition.	Nashville Metro
YearBuilt	Building year built.	Nashville Metro
BUSNAME	Business Name associated with APN (selected by researchers in the case of 1-to-many relationships).	Nashville Metro, PennPraxis
PropAddr	Address of business.	Nashville Metro
BIZ_ACCOUNT	Business account number.	Nashville Metro
BUSTYPE	Business license type.	Nashville Metro
BIZ_OWNER	Business owner.	Nashville Metro
BIZ_APPRVALUE	Business appraisal value at venue address.	Nashville Metro
BIZ_ASSD_VALUE	Business assessment value at venue address.	Nashville Metro
secondary_source	Additional business accounts that might be associated with this parcel (Many parcels have multiple businesses on site).	Nashville Metro
site_control	Is the property owner's listed address or name the same as that of the property or the business associated with the property?	PennPraxis, Nashville Metro
x	Longitude coordinate.	Nashville Metro
y	Latitude coordinate.	Nashville Metro
geometry	Geolocated shape associated with venue parcel.	Nashville Metro
venue_density	Number of venues per square kilometer in the Community Planning Area.	PennPraxis, Nashville Metro
centroid_dist	Distance in feet from venue address to average center of all venues in Nashville.	PennPraxis
value_sqft	Total appraisal value of venue address per square foot (entire parcel).	Nashville Metro
progamming_sum	Index of programming engagement, sum of ordinal rank scores for experimentation + community focus + event promotion.	PennPraxis
appraisal_ratio	Median of appraised sales in nearby half mile since 2021, normalized per square foot and divided by specific venue value per square foot.	Nashville Metro
cumulative_risk	Metric created to estimate risk from nearby development cost and intensity.	Nashville Metro, PennPraxis

Appendix 3: Risk Exposure Framework

This "Risk Index" was developed by the research team to estimate each dedicated music space's risk of displacement (see *Findings: Venues at Risk* for further discussion). The below details the factors used in this assessment.

Indicator	Description	Values
Local development intensity	The number of real estate transactions since 2021 in the venue's square mile area, relative to other venues in Metro Nashville.	1 (lowest quartile) to 4 (highest quartile)
Local price index	The median appraised cost per square foot of real estate transactions since 2021 within a square mile of a venue, relative to other venues in Metro Nashville.	1 (lowest quartile) to 4 (highest quartile)
Unrealized land value	The ratio of appraised cost per square foot of real estate transactions since 2021 (within a square mile) to the appraised square footage value of the venue's parcel, relative to other venues in Metro Nashville.	1 (lowest quartile) to 4 (highest quartile)
Physical condition	The graded condition of the property from property tax assessment records, sourced from Metro cadastral data.	1 ("average"), to 4 ("poor" or "very poor")
Community program assessment: experimentation	Local experts and community members describe the venue's likelihood of presenting experimental programming— an indicator of programming risk.	1 ("Not at all likely") to 4 ("Extremely likely")
Community program assessment: community focus	Local experts and community members describe the venue's likelihood of presenting community focused programming—an indicator of programming risk.	1 ("Not at all likely") to 4 ("Extremely likely")
Site Ownership	Is the property owner listed in records with the same name or address as the venue or a licensed business located there?	-4 the venue has site control to 4: the venue does not have site control
Community threat assessment	Have community panels or focus groups identified a threat to the venue from costs, licensing or neighborhood conflicts?	0 (no threats listed) to 4 (multiple threats listed)

Appendix 4: Glossary of Terms

Agent of Change: A legal framework that holds new development in an area (the "agent of change") responsible for mitigation of conflicts with existing uses, including issues with sound and congestion. This is designed to ensure that existing businesses or community spaces do not experience significant adverse effects.

Appraised Value: The worth of a property for purposes of mortgage or market valuation.

Approvals: The permits, licenses, and certifications the government grants to a developer or business owner to certify proposed or ongoing real estate development plans. During the building phase, this process involves certification of compliance with building codes.

Assessed Value: The worth of a property for the government's tax assessment purposes.

By-Right: A use that is explicitly permitted by a property's zone. Also called "as-of-right."

Community Benefits Agreement: A Community Benefits Agreement is a "contract between a developer and community-based organizations representing residents' interests."[322]

Community Planning Area: Geographies that Metro Nashville uses when making plans for future land use and development. These usually consist of one or more "neighborhoods." Davidson County has 14 such areas[323].

Conservation Easement: A legal agreement that limits the right to develop land despite its use or zoning. The right to develop the land can be held by a trust or entity that enforces the terms of the agreement. The current owner of the land can continue to use the land based on the terms of agreement[324].

Dedicated Music Space: An establishment where the music program is likely the main purpose why people attend the venue (not for food, drink, or other products), and there are, on average, 5+ public music events per month (or typically more than 1 per week).

DIY: "DIY[325] events" ("do-it-yourself") refers to arts and cultural events that use unconventional spaces. The spaces are considered unconventional as a space, not intended for assembly occupancy, is repurposed into a live performance venue. Spaces range from warehouses and factories to vacant stores, rooftops, parking lots and laneways. Some spaces are industrial, others commercial or residential; some are outdoors and others indoors. Any space has the potential to be repurposed for a DIY event and become a DIY venue[326].

Form-Based Code: A set of development regulations that specify the form of buildings (height, design, materials), but have fewer rules and regulations about their use. This type of zoning is used in Downtown Nashville.

Governance: Norms and rules related to government action. Good governance means having a conscientious approach: applying programs effectively and in good faith, and supporting structures to execute policy and achieve goals.

Honky Tonk: A Southern and Western American term for a bar where country music is played, possibly with a rowdy atmosphere. In Nashville it refers to the bars that characterize Lower Broadway Downtown.

IMV: An "Independent Music Venue" is a dedicated music space where the venue has no association with another business through common ownership or affiliation (no sharing of employees, resources, branding, etc.). Booking or promotion are not contracted to corporate partners.

Quasi-IMV: A "Quasi-Independent Music Venue" is a dedicated music space where the venue has no association with another business through common ownership or affiliation (no sharing of employees, resources, branding etc.). Booking or promotion are sometimes or always contracted to corporate partners.

Land Trust: A non-profit organization dedicated to the acquisition and stewardship of land for a specific purpose, usually affordable housing, commercial business and/or conservation. It operates by purchasing land, and then leasing the land to a tenant, who sometimes buys the building atop the land to build equity.

Land Use: The activity happening in a building or on a lot. Allowable land uses are usually regulated in a zoning code.

Music venue: A performance venue that regularly presents live music programming. Some definitions specify that live music programming should be the primary business function, and/or that it be known as a destination for music audiences[327]. Other definitions explicitly include DJing within live music if it is done to a level of artistic excellence[328].

MVAN: Music Venues Alliance Nashville (MVAN) formed in mid-2020 to unite Nashville's independent venues, regardless of capacity or genre. Their goal is "to stay and remain as wholly independent organizations, in full and continuing control of our own calendars, every aspect of our employment structures, and all elements of our production and infrastructure." MVAN currently has 15 members, including 3rd and Lindsley, the Bluebird Inn and Rudy's Jazz Room[329].

Night Mayor: Also called 'managers' and 'czars,' among other designations, night mayors are individuals selected by cities to act as a liaison between nightlife establishments, citizens and local governments[330].

NIVA: The National Independent Venue Association is a group of over 3,000 independent venues in 50 US states and Washington D.C., who came together in 2020 to lobby Washington for "targeted legislation to help us survive" the pandemic's closure of live music spaces[331].

Non-IMV: A "Non-Independent Music Venue" is a dedicated music space where the venue is associated with another business through common ownership or affiliation and booking or promotion are sometimes or always contracted to corporate partners.

Occasional Music Space: An establishment where the music program is unlikely to be the main purpose why people attend the venue (and not for food, drink, or other products) and/or there are, on average, 4 or fewer public music events per month (1 or fewer per week).

Public-Private Partnership: Cooperative relationships between government and the private sector that include joint ventures, cooperative partnerships, and privatization of public assets. Common PPP forms include Business Improvement Districts and Special Services Districts where private business coalitions or neighborhood associations are delegated some government powers. Community development banks are a PPP arrangement designed to target lending[332].

Right-of-Way: A road or sidewalk designated for public travel, maintained and governed by a government entity and subject to its authority.

Save Our Stages Act: Proposed in October 2020 by Senators John Cornyn (R-TX) and Amy Klobuchar (D-MN) and Representatives Peter Welch (D-VT) and Roger Williams (R-TX), this bipartisan bill provided long-term assistance for shuttered live music spaces via a $10 billion grant program. The bill was supported by NIVA, the largest coalition of independent music spaces in the U.S.[333].

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322 *LISC, Community Benefits Agreements Toolkit.*
323 *Nashville.gov, Community Plans.*
324 *Institute for Local Government, The Basics of Land Use and Planning.*
325 *24HrPHL, Philadelphia Venue Starter Playbook.*
326 *Sethi, DIY Events in Toronto.*
327 *AustinTexas.gov, Resolution No. 20201203-013.*
328 *LiveKomm, Definition und Schwerpunkte.*
329 *Music Venue Alliance Nashville, MVAN.*
330 *Seijas and Gelders, Governing the Night-time City.*
331 *SaveOurStages, About Us.*
332 *Sagalyn, Focus on Public Private Partnerships.*
333 *SaveOurStages, About Us.*

Transfer of Development Rights: Relocation of potential development (e.g. additional density or floor area) from a given site to another ("receiver") site, usually owned by the same land owner[334].

Transport Demand Management (TDM): TDM[335] refers to a set of strategies aimed at reducing the demand for roadway travel, particularly single occupancy vehicles. TDM strategies address a broad variety of constraints related to driving, including traffic congestion, health in communities, peak period travel demand, and air quality.

Urban Mobility: A form of mobility that takes place in urban areas. Modes of transportation may include road networks, public transit, walking and cycling as well as new services such as rideshare and other smartphone-enabled services[336].

Variance: A specific legal waiver from zoning ordinance rules affecting a property. This might mean being able to change the amount of parking, the number of stories, or the use on that site. A variance is required if a landowner wants to have a land use (like live entertainment) on a property that isn't entitled "by right." A request for a variance triggers a process that involves community groups, and requires approval from City Council, the Planning Commission and the Mayor's office.

Zoning: The framework cities use to regulate land use. Every lot of land is assigned a zone that controls the size and shape of the building as well as the activities that are allowed inside it[337]. Broadly, zoning falls into categories of Residential, Commercial, Industrial, Institutional or various "Mixed" use types.

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334 *Institute for Local Government, The Basics of Land Use and Planning.*

335 *Tennessee Department of Transportation, Transportation Demand Management.*

336 *Science Direct, Urban Mobility.*

337 *24HrPHL, Venue Starter Playbook.*


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