



SOUND
DIPLOMACY

FULTON COUNTY

MUSIC ECOSYSTEM STRATEGY

RECORDING AND REHEARSAL SPACES ACTION PLAN

Executive Summary



September 2020

FOREWORD

Dear Fulton County,

The world has changed from when we began this study in July 2019 of the county's music ecosystem with Georgia Music Partners. Despite all the changes, music remains a constant in people's lives over the past months. Now more than ever, music is proving to be a valued asset in our local economies as well as a fundamental part of who we are, our culture, and our way of socializing.

This strategy demonstrates this. Music is a profitable sector in Fulton County. The economic impact shows direct employment in the music ecosystem grew six times the growth of the rest of the Fulton County economy between 2001 and 2018. Also, one in three music ecosystem businesses in Georgia are based in Fulton County. This accounts for 10,500 jobs and almost \$1.7 billion in output in Fulton County alone in 2017.

But figures alone don't capture the influence Fulton County has in the global recording music industry. Although this study focuses on recording studios and rehearsal places, we acknowledge that the music ecosystem would not exist without musicians and recording talent – without them, there would be no music. This action plan places them at the center of the economic, social, and cultural driver of Fulton County's music industry during the next three years.

Music unites us, and can be a powerful tool to foster equitable recovery efforts and better, more community-led decision-making. This strategy is the playbook, a key step for Fulton County to overcome the negative effects of the COVID-19 pandemic in its music sector and leverage its full potential in the global music industry. This study shows Fulton County is one of the best places in the U.S. to start a music business. We believe Fulton County can be a leader and catalyst that brings all entities of government and the music ecosystem together to ensure music remains Fulton County's most profitable sectors in the years to come.

To everyone who contributed to this study, thank you for welcoming us into your community and providing your insight and direction. This action plan is yours. We are confident it is one of the most progressive efforts any U.S. city or region is doing in regards to its recording music sector, and it will put the spotlight on the great talent and industry opportunities happening in Fulton County.

This is only the beginning.

Shain Shapiro, PhD
Founder and CEO, Sound Diplomacy

Front & Back Cover Photo:
Image © Nomad_Soul/Adobe Stock

Fulton County's rich musical history crosses many genres, from the first country hit ever recorded in 1923 by Fiddlin' John Carson to today's record-breaking hits from hip-hop artists like Lil Baby. Fulton County recording artists, producers, and record labels continue to be recognized across the globe, but many here at home may not realize how music contributes to the Fulton County brand.

That's why we partnered with Sound Diplomacy to understand and document just how much music helps drive Fulton County's workforce development and economic growth and diversification. This report also shows us how the role of music empowers our communities and enhances the quality of life not only for our residents and business owners, but the entire region.

As a result of this study, we've learned that Fulton County is the center of the economic music industry in Georgia, with one-third of the state's music businesses calling our County home. And we've been provided with strategies for further growth, including how to capitalize and enhance the relationship between the recorded music ecosystem and our burgeoning film, TV and digital entertainment industries to promote the use of more Fulton County-made music.

It's important to note that our region's artists and recording talent will be a primary economic, social, and cultural driver of Fulton County's recovery from the COVID-19 pandemic crisis.

This strategy is just the first step to accomplish more for the music industry in Fulton County. Its implementation will lay the foundation to keep and attract music businesses and talent to Fulton County year over year, making us the best place in the U.S. to start a music business.

We're grateful to Sound Diplomacy and everyone who contributed to this study – studio and rehearsal space owners, engineers and producers, representatives from the live music sector and so many more. Your insights will help shape the future of Fulton County's impact on the music industry for generations to come.

This study and the implementation of its recommendations would not be possible without the leadership and support of the Fulton County Board of Commissioners and Georgia Music Partners.

Robert L. (Robb) Pitts
Chairman, Board of Commissioners of Fulton County



ABOUT THE PROJECT

Together with Georgia Music Partners (GMP), Sound Diplomacy was engaged by Fulton County Commission in July 2019 to lead this study of the county's music ecosystem, with a specific emphasis on recording studios and rehearsal spaces. GMP had previously commissioned a study focusing on the economic and fiscal impact analysis of the music industry in Georgia, which estimated in 2011 the total output of the music industry at almost \$3.8 billion.¹

While the scope of the Fulton study began as an analysis of recording studios and rehearsal spaces only, it quickly became apparent that we could not simply map and address these spaces without incorporating a wider group of stakeholders. While the focus of the strategy and action plan remains on that sector, the work is more holistic as a result of the addition of live performance venue mapping.

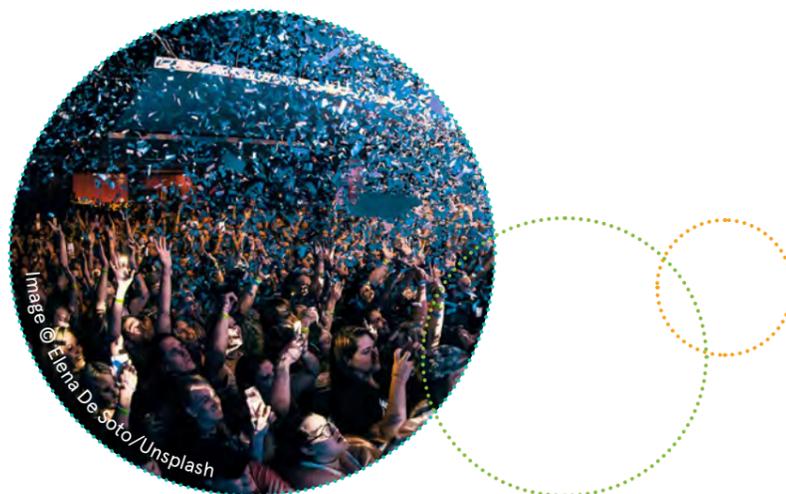
Fulton County and its largest city, Atlanta, are home to premier recording studios and facilities that have produced some of the most **culturally influential songs and albums** in the past century. In 1923, the recording studio at 152 Nassau Street in Atlanta produced the first recording in the U.S. South and the first ever recorded hit in country music – selling an estimated 500,000 copies.² Since then, the region has accumulated an impressive roster of award-winning musicians, composers and producers in virtually every music genre, from pop to hip-hop, gospel to country music, rock and opera.

Fulton County is also home to over a hundred live performance venues. Most musicians today make the majority of their livelihood from live performances.³ When we conducted our mapping in 2019, Fulton's venues thrived and generated income for hundreds of artists every month. They also supported the livelihood of thousands of full-time and part-time jobs – ticket sellers, sound technicians, front-of-house staff, lighting experts, stage hands, shippers, caterers, bartenders, booking agents, and so on. They even promoted traffic for adjacent restaurants and bars. As we pen the final version of this strategy document in the early fall of 2020, those venues have been dormant now for six long months, their stages bare, their walls silent, their employees largely unemployed.

If we allow venues to shutter, not only will scores of music industry professionals permanently lose their jobs, our community will lose a cultural nexus. Once it is safe again to produce live shows and tours, there might be an acute shortage of venues to actually perform in. It can take several long years for the industry to recover.

With less music in our lives, and with music playing a diminished role in our culture and in our economy, we all lose. Indeed, the vibrant tapestry of local culture that has made Fulton County's major cities a magnet for young professionals in recent years may suffer. Therefore, as part of our strategy, we encourage all levels of government to do all that is possible to help our venues survive this crisis.

Shachar Oren
President, Georgia Music Partners



METHODOLOGY

Sound Diplomacy deployed its unique four-step methodological approach to deliver a comprehensive assessment of Fulton County's music ecosystem.

ECONOMIC IMPACT

Analysis of official statistics, primary data developed by Sound Diplomacy and results from the survey enabled an in-depth study of the economic impact of the music ecosystem in Fulton County. It provides a reliable measure of the economic importance of the music ecosystem in the local economy on three different scales: direct, indirect and induced impacts.

The results contained in this report correspond with data from 2017 and previous years and do not include the impact of COVID-19. This is because most of the official data sources used have a three year delay. The most updated version available for the County Business Patterns and RIMS II multipliers was data from 2017.

STAKEHOLDER ENGAGEMENT

A critical piece of the study has been the direct engagement with stakeholders in the music industry in Fulton County through interviews and a short questionnaire targeted at owners and managers of recording and rehearsal spaces, applying both qualitative and quantitative research methods. The research strategy follows a case study approach rather than a cross-sectional approach. In total 34 owners responded to the online survey and 27 stakeholders were interviewed.

Sound Diplomacy conducted additional desk research to further understand the topics addressed in the interviews and develop the contextual framework for the action plan.

ECOLOGICAL ASSESSMENT

We did an assessment of Fulton County's existing music policies and produced a mapping of music infrastructure in Fulton County with our proprietary mapping tool and cross-referencing manually by our team, with inputs from Georgia Music Partners (GMP). The mapping initially focused on mapping recording studios and rehearsal spaces, but it was later agreed with GMP that live music venues should be included in the mapping as well.

ANALYSIS OF FINDINGS AND RECOMMENDATIONS

A comprehensive plan for the development of the Fulton County recording industry ecosystem, focusing on recording studios and rehearsal spaces, based on the analytical work previously completed.

1 William Riall, B. (2011) Economic and Fiscal Impact Analysis of the Music Industry in Georgia.

2 Daley, J. (2019) The Site of Country Music's First Recorded Hit Is Set to Be Demolished. Smithsonian Mag.

3 Hogan, M. (2019) The Record Industry Expects a Windfall. Where Will the Money Go?. Pitchfork.

OVERVIEW OF MUSIC ASSETS IN FULTON COUNTY⁷

⁴ Source: mapping tool,
Sound Diplomacy research.

RECORDING STUDIOS **132**

6 REHEARSAL SPACES (INCLUDING STUDIOS)

21 MULTI-PURPOSE VENUES

12 NIGHTCLUBS (WITH MUSIC PROGRAM)

7 DEDICATED VENUES

BARS, CAFES AND RESTAURANTS WITH MUSIC **73**

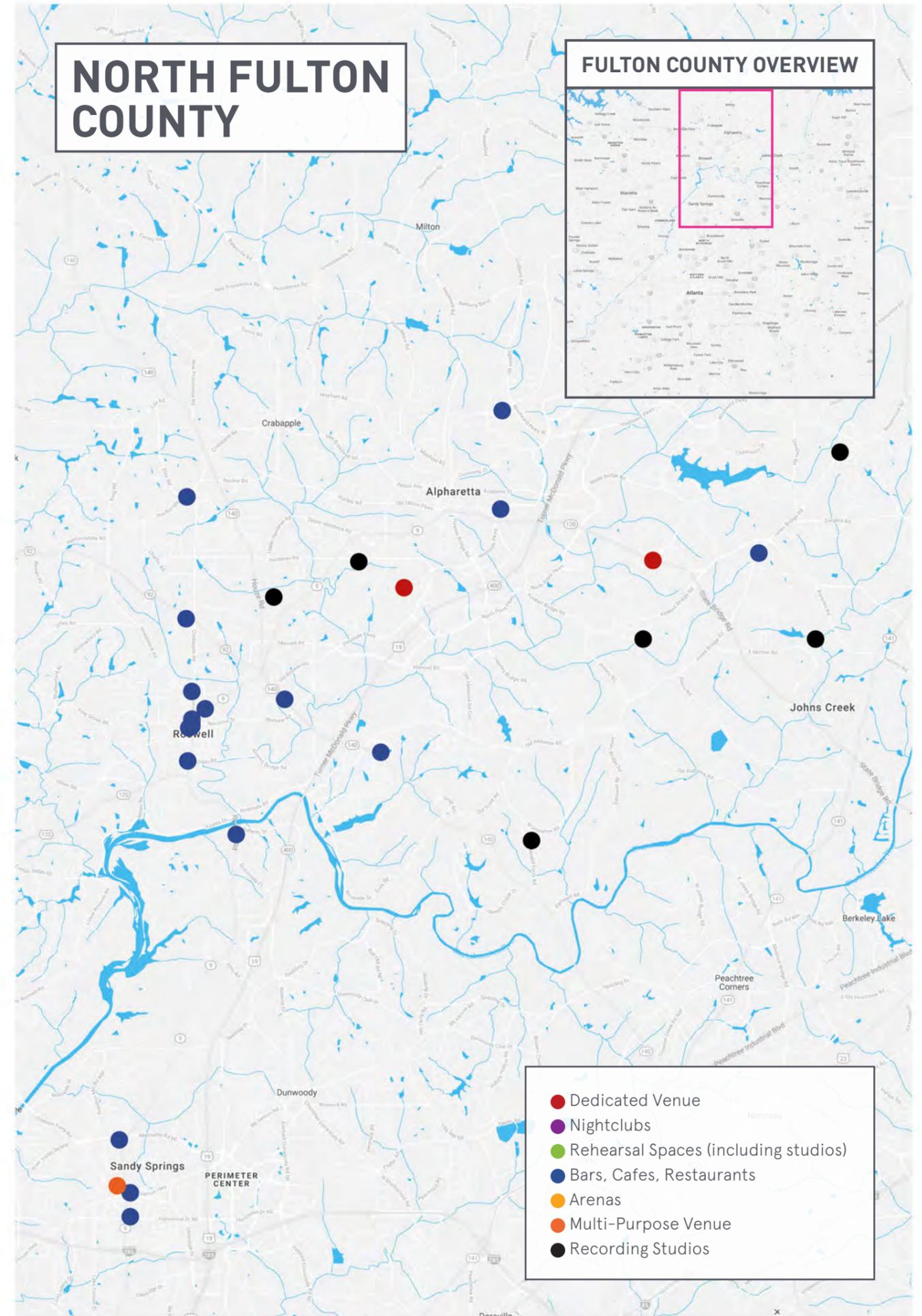
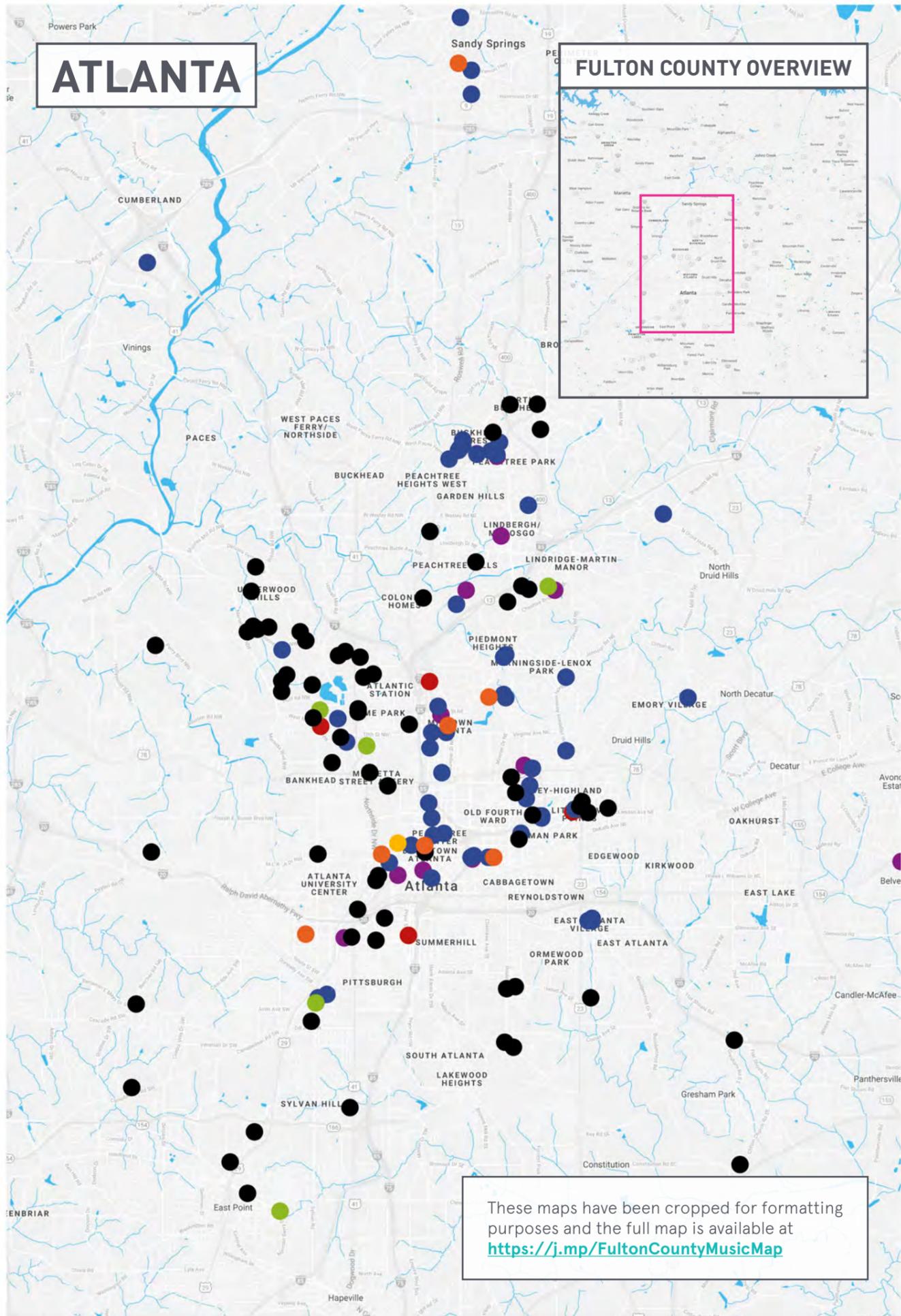
3 ARENAS

STUDIO ECOSYSTEM

MUSIC PLACES



Image © F1photo/Shutterstock



FULTON COUNTY AT A GLANCE

STRENGTHS

- Our economic impact shows Fulton County is the **center of the economic music activity in Georgia**. It has one-third of the music businesses in the state.
- Our economic impact research also shows **Fulton County's music economy is among the top 10 in the U.S.**, with a music output per capita that surpasses vibrant music areas like New York and Seattle, mainly thanks to its live music sector.
- Atlanta has a **widely-recognized brand as a musical region**, with a prolific history of recorded music and GRAMMY winners in very diverse genres, spanning from rock to Christian music, country to R&B.
- Atlanta has stayed ahead of the curve with **continuous innovation and evolution of the genres**, and Atlanta trap has changed the global sound of mainstream music in the past decade.
- Fulton County has an **advantageous business environment**, with low business/freelancer rates and affordable real estate that attracts tech and other high-skilled jobs
- The **Georgia Music Investment Act and Invest Atlanta's music industry programs** prioritize the value of music to the region, although there are some caveats to it (see weaknesses)
- **Access to abundant musical talent in the county**, particularly emerging independent artists.

WEAKNESSES

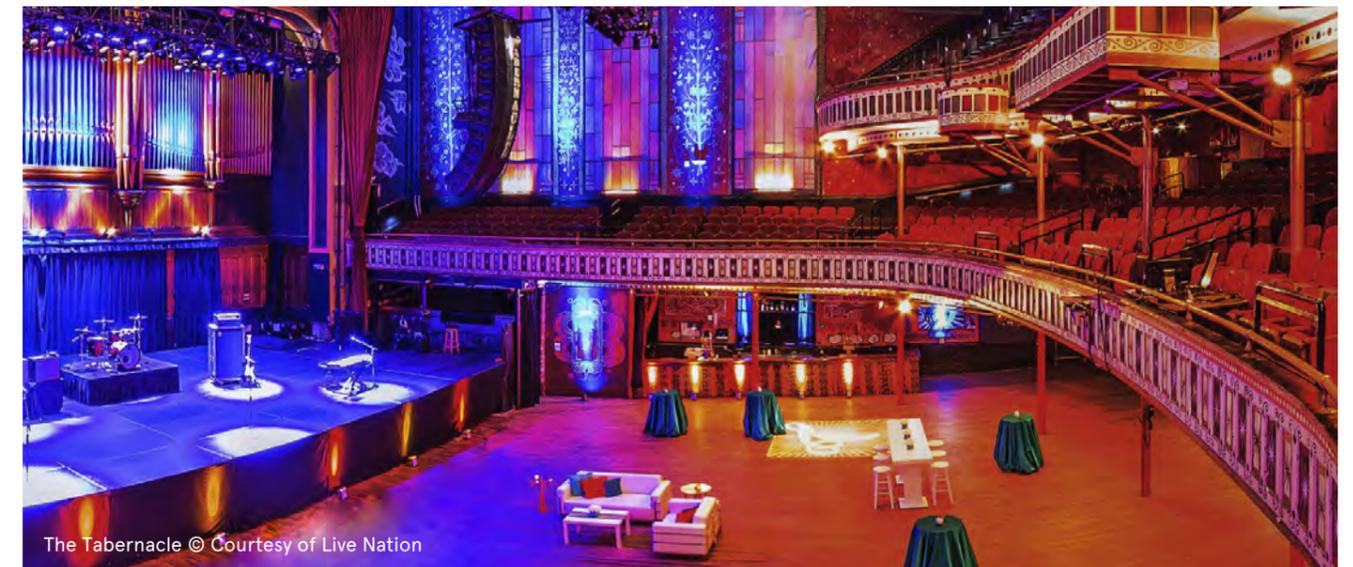
- The importance of **hip-hop culture in Atlanta outshines other genres** and is negatively portrayed by some media outlets and public representatives. Fulton County must continue to maximize this incredible resource of hip-hop talent, but it also must strive to diversify its talent development support to include all other genres.
- **Unregistered music studios** exist at homes across Fulton County. These are valuable businesses, but contribute to a submerged economy and can potentially create nuisances to neighbors due to inadequate soundproofing and frequent traffic of people during odd hours.
- The **lack of major record labels** and international independent record labels based locally hampers the investment into Fulton County's artists, and consequently, its studio ecosystem.
- There are international acts showcased but **shortage of local independent venues** where artists can increase their revenue and fanbase without the investment of touring.
- The Georgia Music Investment Act has a **high investment threshold** and is non-transferrable, meaning it does not benefit the vast majority of local studios.
- Gaps in **marketing, skill training, contacts and tech equipment** to expand the client base of most studios in Fulton County.

THREATS

- The global COVID-19 pandemic is slowing economic development in the music industry around the world, particularly harming the **independent artistic and creative sector** who now has less income to spend on recording sessions and other studio services.
- Access to **traditional forms of finance** (i.e. bank loans) for business development and studio expansion is a major challenge for studios and music industry companies.

OPPORTUNITIES

- **The Recording Academy Atlanta Chapter, the National Association of Record Industry Professionals, and the Atlanta Federation of Musicians** are core business development drivers for studios, freelance professionals and talent in the region; **Georgia Music Partners** is another major industry resource.
- The lack of major labels continues to develop a **flexible and creative ecosystem of studios** offering label services, and/or services for the audiovisual and gaming industries in Atlanta and Georgia.
- There is a yearly influx of **music industry and music tech talent** to the region via Georgia Tech University, Georgia State and the Savannah College of Art and Design, potentially feeding into Fulton County studios and music tech.
- With the increasing number of **music-tech firms**, and a growing crop of **music-related start-ups**, there is an opportunity to cultivate rapid-growth in this sector.



The Tabernacle © Courtesy of Live Nation

ECONOMIC IMPACT SUMMARY

Image © Raftermen/Atlanta Symphony Orchestra



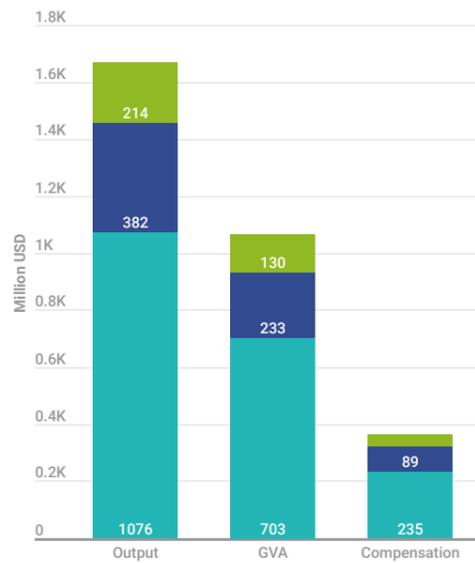
ECONOMIC IMPACT SUMMARY

MUSIC ECOSYSTEM 2017

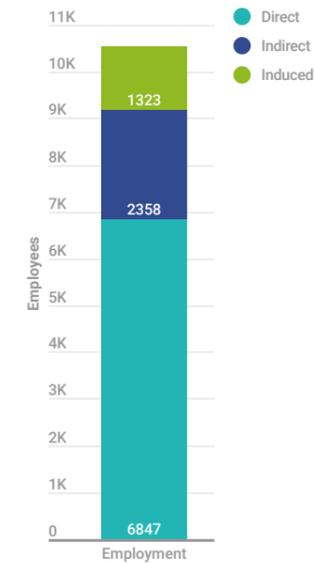
Fulton County's music ecosystem was responsible for generating a total **output** of almost **\$1.67 billion** and a **Value Added (GVA)** of almost **\$1.07 billion** to the local economy in 2017.

The total number of **jobs** generated and supported by the music sector in the area was **10,527**. These people's **earnings** totaled **\$265 million**.

ECONOMIC IMPACT



EMPLOYMENT IMPACT



Source: County Business Patterns (2017), RIMS II (2017), Sound Diplomacy Research

MUSIC ECOSYSTEM DIRECT OUTPUT BY SEGMENT



MUSIC ECOSYSTEM DIRECT EMPLOYMENT BY SEGMENT



Professional & Supporting | Artistic | Live Music | Recording Industry | Other Supporting Activities

Source: County Business Patterns, Sound Diplomacy Research

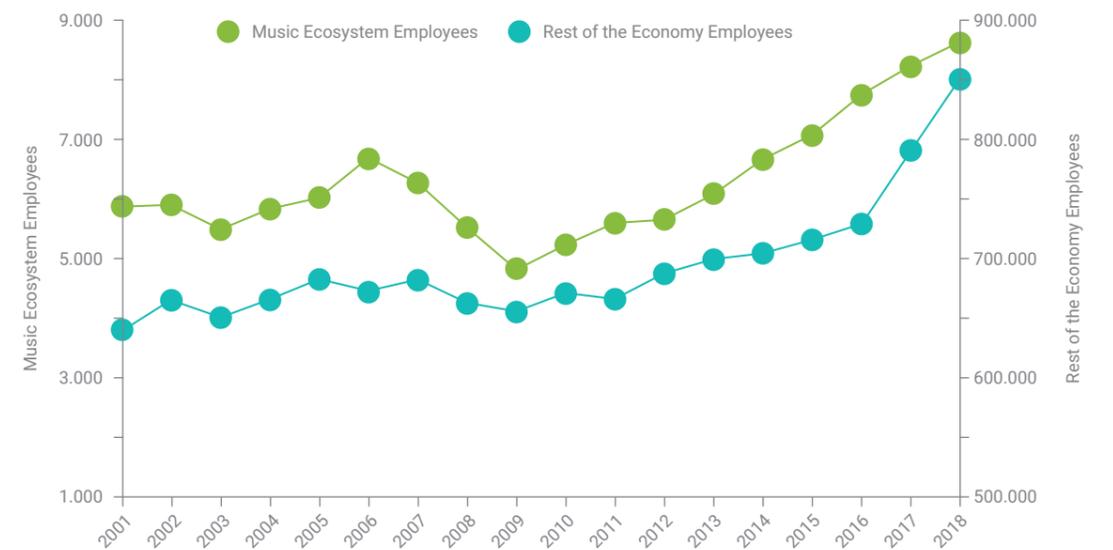


Image © Sahtypan/Shutterstock

The **Artistic & Creative Segment** groups the artists, musicians, creators, and songwriters.⁵

The **Professional & Support** activities include music-related businesses such as manufacturing, publishing and distribution, managers and agents, music venues, radio broadcasting, and music education.

MUSIC ECOSYSTEM OUTPUT PER CAPITA (IN US DOLLARS)



Source: Quarterly Census of Employment 2001-2017, County Business Patterns, Sound Diplomacy Research

MUSIC ECOSYSTEM DIRECT OUTPUT & EMPLOYMENT

Direct employment in Fulton County's music ecosystem grew 110% between 2001 and the end of 2018, which represents **six times the growth of the employment of the rest of the economy over the same period.**

Disclaimer: These numbers do not include the impact of COVID-19.

5 NAICS 2017.

FULTON COUNTY IN COMPARISON

Fulton county ranks number 1 out of the 38 counties in Georgia with available data on the total numbers of music establishments, having 33.8% of the total music ecosystem establishments in the state.

PERCENTAGE OF THE TOTAL MUSIC ECOSYSTEM ESTABLISHMENTS IN GEORGIA, PER COUNTY, 2017⁶

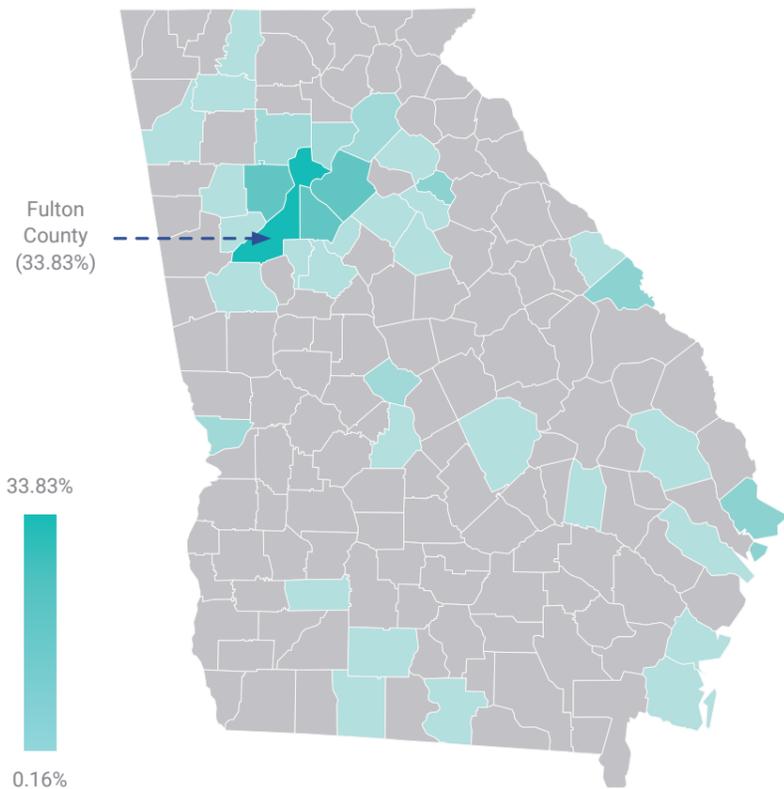
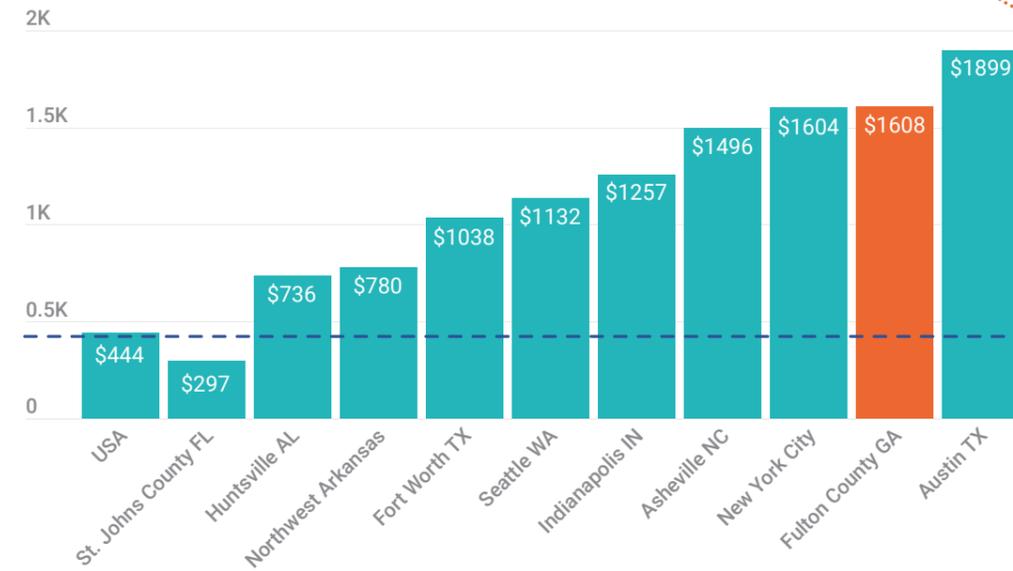


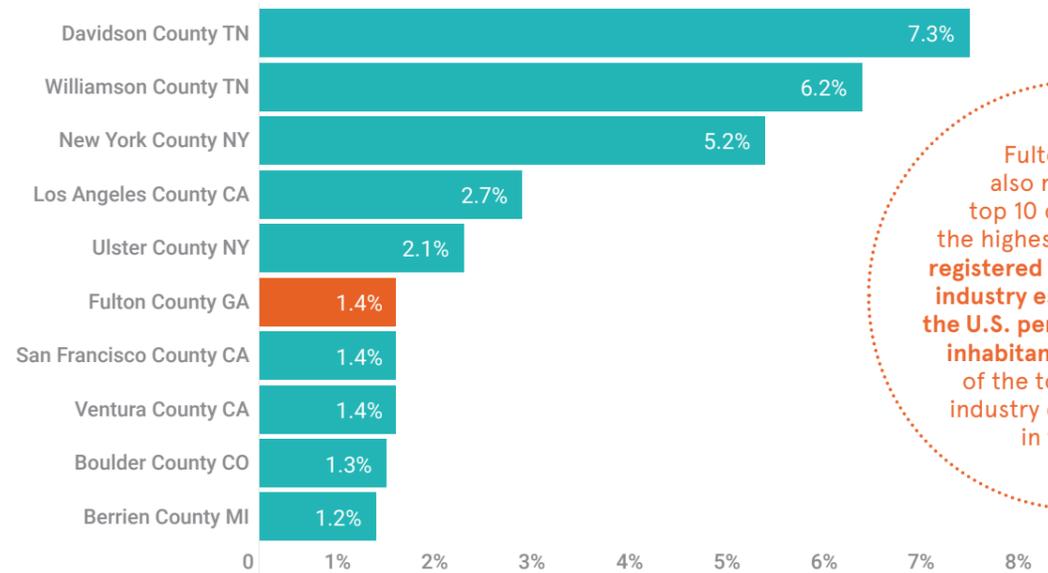
Image © Josh Gordon/Unsplash

MUSIC ECOSYSTEM OUTPUT-PER CAPITA COMPARATOR



The music output per capita of the United States is \$444, while in Fulton County this figure reaches approximately \$1,608, surpassing other regions known for their independent music scenes.

TOP 10 COUNTIES WITH HIGHEST PERCENTAGE OF REGISTERED SOUND RECORDING INDUSTRY ESTABLISHMENTS, PER 100,000 INHABITANTS IN THE U.S., 2017⁷



Fulton County also ranks in the top 10 counties with the highest percentage of registered sound recording industry establishments in the U.S. per 100,000 county inhabitants, having 1.4% of the total recording industry establishments in the U.S.⁸

⁶ Source: County Business Patterns, CBP, 2017.

⁷ Source: County Business Patterns, CBP, 2017.

⁸ County Business Pattern is an official source of information, however it does not include some establishments that might be classified in the incorrect NAICS (standard to classify economic business activity). To offset the gap, Sound Diplomacy performed a mapping of establishments.

Source: BEA County Business Patterns, 2017

KEY FINDINGS



KEY FINDINGS

LEADERSHIP

Fulton County is one of the leading music hubs in the U.S. as of 2020:

- Most of this success comes from the **growth of its largest city, Atlanta**, and its recorded music industry since the decade of the 1990s, particularly in hip-hop and R&B music.
- This accumulated success has attracted other music industry professionals and studios to **relocate to the area** who benefit from a more affordable cost of living than other major U.S. music hubs and easy access to talent.

- The county currently **lacks a strategy for its music industry** from an economic development perspective, but **culture is one of the priority areas for the government** (mainly as a non-profit/community area), allocating resources for its development and closely monitoring resident access and satisfaction.
- Despite the lack of a strategic development framework from the government side, the success of the music sector in Atlanta has attracted **leading international organizations and talent** to Fulton County, and the region is now the main music industry hub in Georgia and the U.S. Southeast.

CASE STUDY: THE RECORDING ACADEMY ATLANTA CHAPTER⁹

What Is It: The Recording Academy, the U.S. leading not-for-profit organization representing and advocating for music makers and professionals, opened its chapter in Atlanta in 1967.

What Has It Done? The chapter provides a wealth of professional development and education opportunities. It also helped pass the Music Investment Act in 2018¹⁰ and supported the celebration of "Georgia Music Day" since 2012 on January 24.¹¹

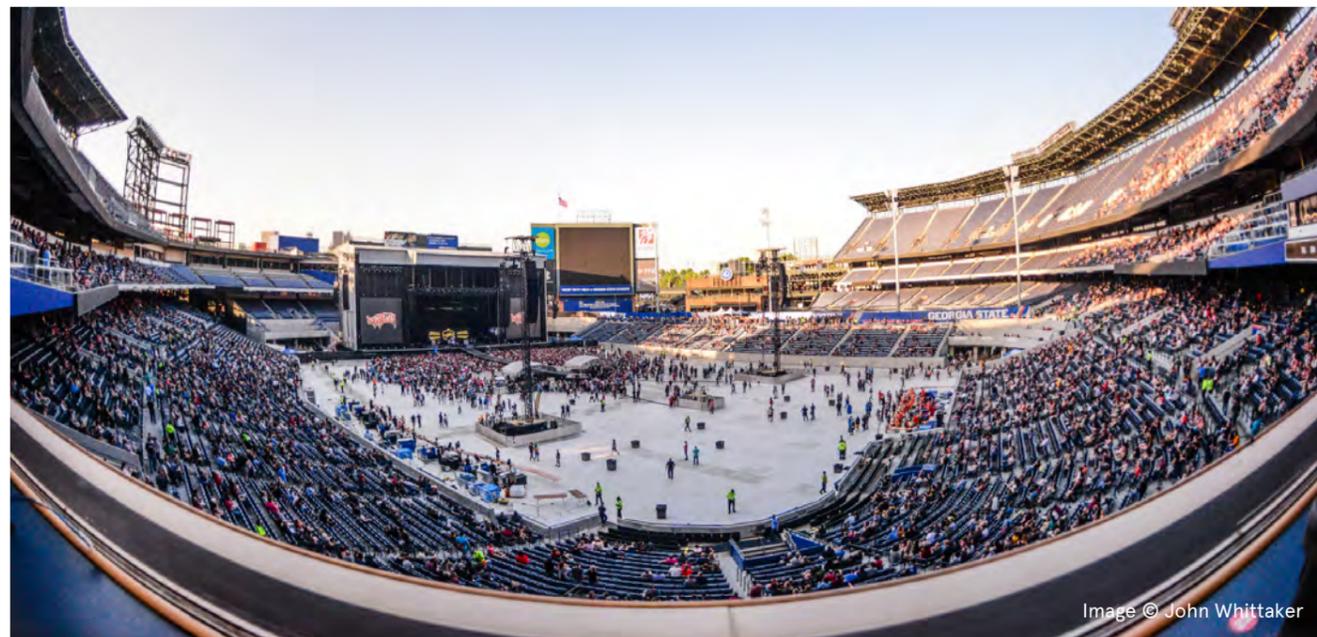


Image © John Whittaker

- Key industries like **gaming and the audiovisual sector work in silos**, with only a few music studios benefitting from the presence of such companies in Georgia, even if temporarily for a film production taking advantage of Georgia's popular film incentive program.
- The tech sector is growing in Fulton County, with several **music tech apps** developing in Atlanta. These companies create high-value jobs in the music ecosystem and attract medium- to-high-pay graduates for jobs in engineering, IT and integral parts of sales teams. There is an opportunity for artists to benefit more from the presence of these music tech companies regionally.

CASE STUDY: GEORGIA TECH CENTER FOR MUSIC TECHNOLOGY¹²

What Is It: They are thought leaders in music technology research and lead innovative events in the region, such as a synthesizer hackathon and a music instrument creation competition.

Who is Responsible? Georgia Tech's professor Gil Weinberg, who is the current director of the center.

What Has It Done? Partnerships with other Georgia Tech units and industry sponsors including Moog, Dolby and Gracenote. The Robotic Musicianship group at CMT has recently introduced to the world Shimon, an AI/Robot who plays instruments, composes lyrics and melodies with humans, and will soon launch its first album.¹³



Image © Austin Neill/Unsplash

9 Grammy.com (2020) Recording Academy Atlanta Chapter.
10 Mitchell, G. (2018) The State of Georgia: Now Open for More Music Business Thanks to Music Investment Act. Billboard.
11 Georgia Music Partners (2012) Georgia Music Partners and the Recording Academy Atlanta Chapter Celebrate Inaugural Georgia Music Day at the Capitol Today, January 24, 2012.
12 Georgia Tech Center for Music Technology (2020).
13 Georgia Tech News (2020) Shimon: Now a Singing, Songwriting Robot.



Image © Seventyfour/Adobe Stock

REGULATIONS, INCENTIVES & MARKETING

Zoning regulations, noise ordinances and incentives all affect where music exists and are key in protecting and propelling the music ecosystem forward in Fulton County:

- The **real estate industry** is a key player in the sustainability of studios and the music ecosystem at large, as music is not yet understood as a value generator for communities, but instead considered a nuisance under current zoning laws and short-term leases.
- The complex socioeconomic context surrounding music studios and artists has not incentivized home and professional studio owners, producers and engineers to **register their business** and invest in appropriate soundproofing that would make studios less vulnerable to **noise-based policing** and reduce nuisance concerns.

There are many untapped opportunities to support the growth of the regional studio ecosystem through targeted incentives and marketing:

- In the past decade, **Atlanta has stayed ahead of the curve with continuous innovation and evolution of the genres.** The locally-born, hip-hop subgenre known as trap has changed the global sound of mainstream music

CASE STUDY: TRAP MUSIC MUSEUM, ATLANTA¹⁴

What Is It: A semi-permanent museum celebrating the artists, DJs and producers that have had the biggest contribution to the trap music genre. It features recreated scenes and rooms of a “trap house” with the aim to explain what a trap house is and why the music it originated exists.

Who is Responsible? Atlanta hip-hop superstar, actor and businessman T.I. alongside his business partner William “Bem” Sparks and the boutique production company The Spice Group.¹⁵

What Has It Done? The museum welcomes approximately 6,000 visitors each weekend, as it is only open on Friday, Saturday and Sunday. It has also become a beacon in its neighborhood of Bankhead, West Atlanta, with staff doing a weekly community clean-up and supporting residents who need help.¹⁶

- Increased promotional and advocacy work is needed from the government and industry organizations to access **financial resources** that would help recording studios and rehearsal spaces secure real estate in the long-term and outfit their facilities to professional standards.

CASE STUDY: GEORGIA MUSIC INVESTMENT ACT¹⁷

What Is It: A Georgia income tax credit equal to 15% of a music production company’s qualified production expenditure in the state, including musical recording; musical recording for film, television or video games; and tour origination and rehearsals.

Who is Responsible? Georgia Department of Economic Development and Georgia Department of Revenue.

What Has It Done? It is currently on hold, waiting for an amendment that would make the credit more accessible for companies, including eliminating time restrictions for touring performances debuting in Georgia and lowering thresholds for applicable companies.¹⁸

- Promoting initiatives like Invest Atlanta’s Creative Industries Loan Fund will be key moving forward, as well as facilitating business registration in Fulton County for freelancers and music professionals to protect community investments.

CASE STUDY: CREATIVE INDUSTRIES LOAN FUND (ATLANTA, GA)¹⁹

What Is It: A loan fund for independent content creators and creative entrepreneurs based in the City of Atlanta with a valid business license. Its loans have low interest rates and flexible repayment terms, and take intellectual property as collateral.

Who is Responsible? A joint program of the City of Atlanta’s Mayor’s Office of Film and Entertainment and Invest Atlanta, the city’s official economic development authority.

What Has It Done? Since January 2019, it has deployed almost \$500,000 into 10 film, music and tech projects.²⁰

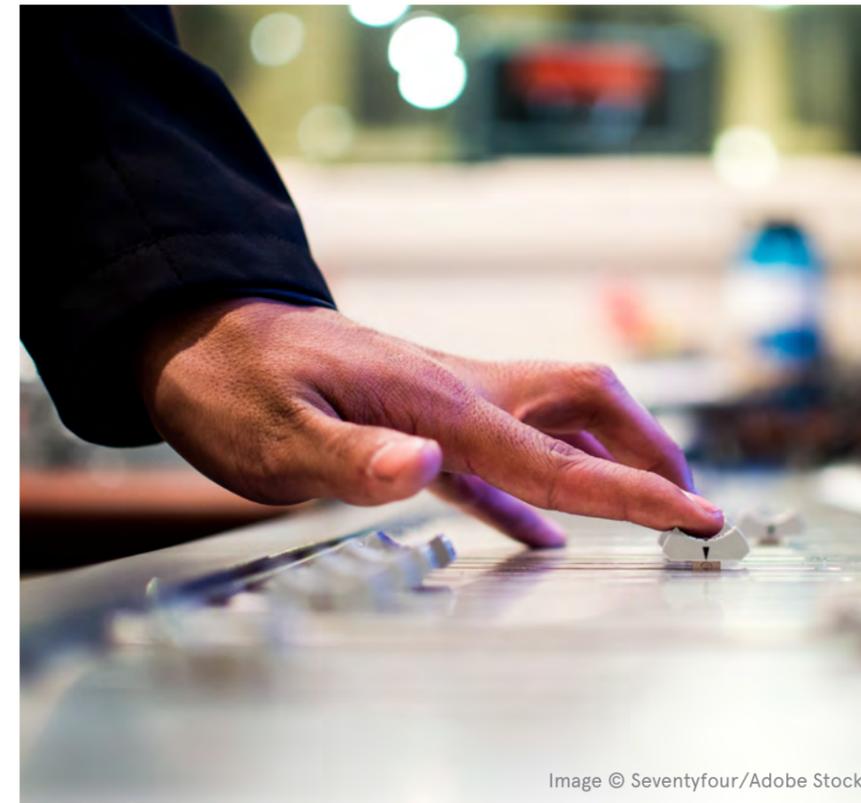


Image © Seventyfour/Adobe Stock

14 Lee, C. (2019) T.I.’s Trap Music Museum and the Preservation of Atlanta’s Hip-Hop Legacy. Red Bull Music Academy.
 15 Daniel, C.A. (2019) The Black Woman Who Helped Turn Trap Music Into A Museum. Black Enterprise.
 16 Keenan, S. (2019) Photos: Inside T.I.’s Trap Music Museum and Escape Room, an English Avenue hit. Curbed Atlanta.
 17 Georgia Music Partners (2020b) Georgia’s Music Investment Act.
 18 Georgia General Assembly (2019) 2019-2020 Regular Session – HB 347.
 19 Invest Atlanta (2020a). Creative Industries Loan Fund.
 20 Invest Atlanta (2020b). 2019 Annual Report.

CREATIVE, PROFESSIONAL AND BUSINESS DEVELOPMENT

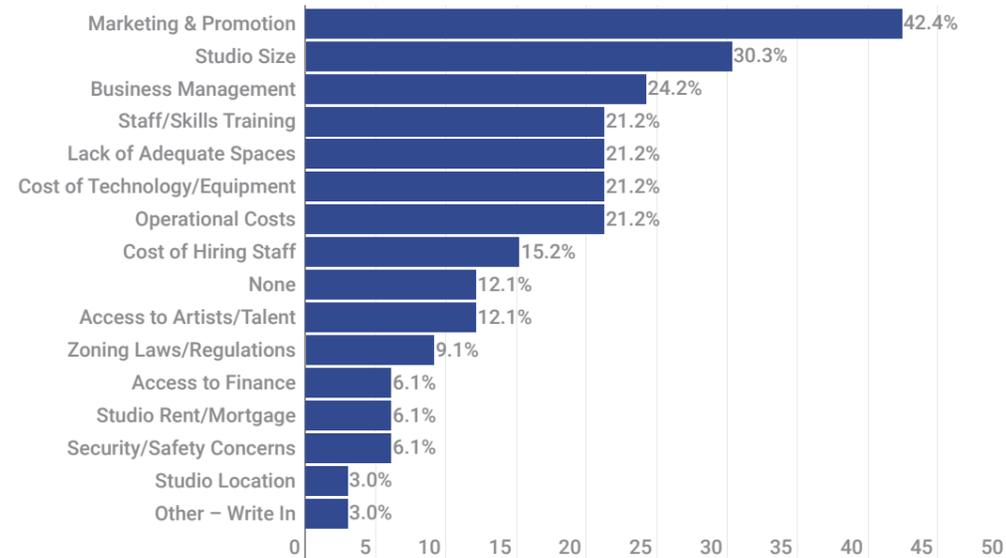
The lack of major labels headquartered in Atlanta has developed a unique and diversified ecosystem of recording studios:

- Certain studios and record labels have implemented a **vertical service integration**, creating “360° music hubs” where artists can record, distribute and promote their music in the same place, and even receive coaching and mentoring.

- Other studios have opted to expand their client network beyond music and now aim to target **gaming and audio/visual companies** to lease the studio or do audio project-based work. However, only few producers and engineers have the adequate skills to compose, score or do audio post-production for these industries.

- Gaps in **marketing and promotional skills** among many professional studios have left them largely dependent on independent artist clients/projects, mainly based in Atlanta and Fulton County.
- It is crucial to **retain Fulton County students in music technology and production degrees** to halt the “brain drain” of creative talent outside the region, incentivizing them to stay with professional development support and attractive job opportunities.

CHALLENGES TO BUSINESS DEVELOPMENT²¹



Source: Sound Diplomacy Survey

²¹ Source: Sound Diplomacy Survey. The question asking about studios’ main business development challenges allowed for up to three responses per studio, hence each category adds up to more than 100%.

²² Source: Sound Diplomacy Survey. The question asking about studios’ main business development challenges allowed for up to three responses per studio, hence each category adds up to more than 100%.

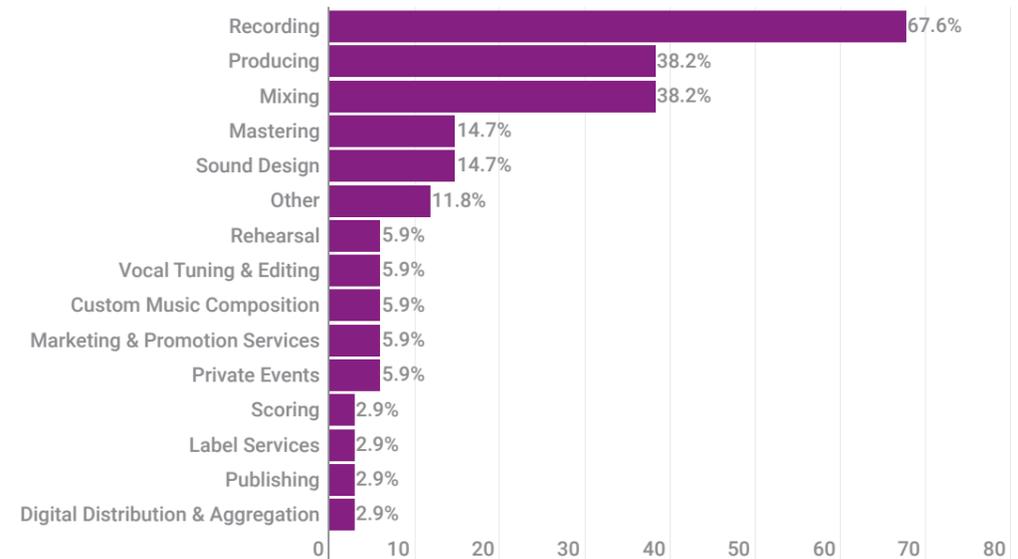
²³ Invest Atlanta (2019) Invest Atlanta Hosts First Creative Industries Exchange Program to Support Music Executives.

Pricing is key to business development, but it is highly subjective and flexible among studios and rehearsal spaces interviewed and surveyed:

- **Long-term rehearsal spaces** are in high demand in the increasingly dense Atlanta, but offering this service exclusively barely allows owners to make a profit, due to high initial investments in development/infrastructure fitting and high overhead costs.

- One of the key advantages of Fulton County’s studio ecosystem compared to other music regions is its **pricing diversity** among independent studios and the abundance of freelance engineers and producers – most of them are sought through word of mouth.

RESPONSES ON THE HIGHEST-REVENUE SERVICES OFFERED BY STUDIOS²²



Source: Sound Diplomacy Survey

CASE STUDY: CREATIVE INDUSTRIES EXCHANGE PROGRAM (ATLANTA, GA)²³

What Is It: An exchange program where music industry professionals from Atlanta were brought to Toronto for one week for a program of workshops, masterclasses, visits to the headquarters of different music organizations and a three-day pass to a music industry summit during Canadian Music Week.

Who is Responsible? The 2019 edition was developed by Invest Atlanta alongside City National Bank, 902 Hip Hop, The Foundation Assisting Canadian Talent On Recordings (FACTOR), and Spotify Secret Genius.

What Has It Done? During the first edition, four industry professionals, one producer and one songwriter participated in the exchange.

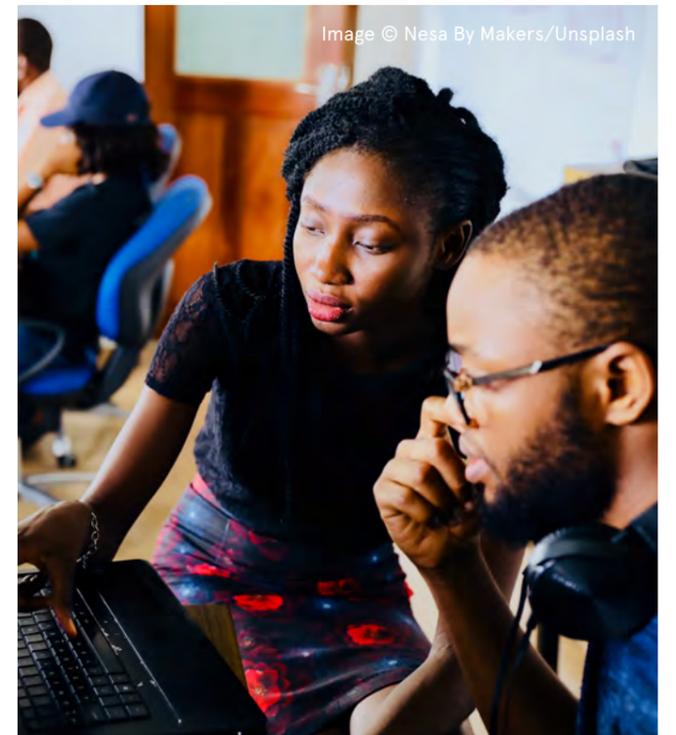


Image © Nesa By Makers/Unsplash

RECOMMENDATIONS AND NEXT STEPS



RECOMMENDATIONS AND NEXT STEPS

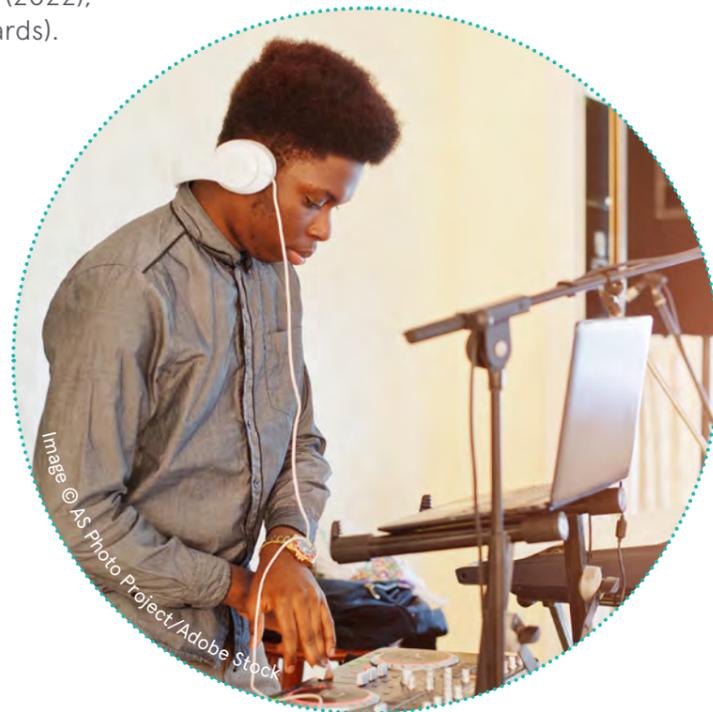
The main scope of the study and its action plan is the Fulton County recording music sector and its assets, including talent and infrastructure such as recording and rehearsal spaces. It is the first step. The impact of the recommendations proposed in the following section will position Fulton County as a global leader in the music cities movement within the next three years.

For the implementation of this action plan, Fulton County will be the catalyst to bring all of the entities together (its 15 cities, county-level organizations, and the industries) in a united effort. Select Fulton, the leader in statewide economic and workforce development, will specifically spearhead all of the initiatives during the first implementation year and leverage the existing arts and culture infrastructure through the Fulton County Arts and Culture Department and Arts Council. It will require a collective effort to partner and deliver on the results for the music sector, the creative industries, and the region of Fulton County as a whole during the next three years.

Each recommendation has been phased according to priority, indicating when they would be best suited for implementation: **Year 1** (by end of 2021), **Year 2** (2022), **Year 3** (2022) and **Long-term** (2023-2024 onwards).

The action plan is aligned into three strategic areas, as outlined through conversations with Georgia Music Partners and Fulton County:

- LEADERSHIP
- REGULATIONS, INCENTIVES & MARKETING
- CREATIVE, PROFESSIONAL & BUSINESS DEVELOPMENT



PHASE 1 (2020-2021)

PHASE 2 (2021-2023)

PHASE 3 (LONG-TERM)

RECOMMENDATION

Create a 'Music Advisory Board' Joining Fulton County, Municipal Leaders and Industry Stakeholders within Select Fulton

RECOMMENDATION

Create the Position of a 'Creative Industries Liaison' in Fulton County

RECOMMENDATION

Foster Increased Collaboration Between Music and Other Creative Industries

RECOMMENDATION

Incentivize the Growth of Registered Studios and Rehearsal Businesses in Fulton County

RECOMMENDATION

Develop a Branding Campaign for Fulton County as the Best Place in the U.S. to Start a Music Business

RECOMMENDATION

Modify the Georgia Music Investment Act to Facilitate Access to Music Industry Incentives

RECOMMENDATION

Position the Fulton County Music Brand with the International Recording Industry through Strategic Partnerships

RECOMMENDATION

Implement a Creative Industries Loan in Fulton County to Incentivise Intellectual Property Creation

RECOMMENDATION

Increase Existing Support for Knowledge Sharing and Professional Exchange Programs

RECOMMENDATION

Establish an Industry Acceleration Program for Fulton County Artists, Producers and Engineers

RECOMMENDATION

Develop a Music Liaison Service to Identify and Promote Fulton County Artists



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ABOUT SOUND DIPLOMACY

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

www.sounddiplomacy.com

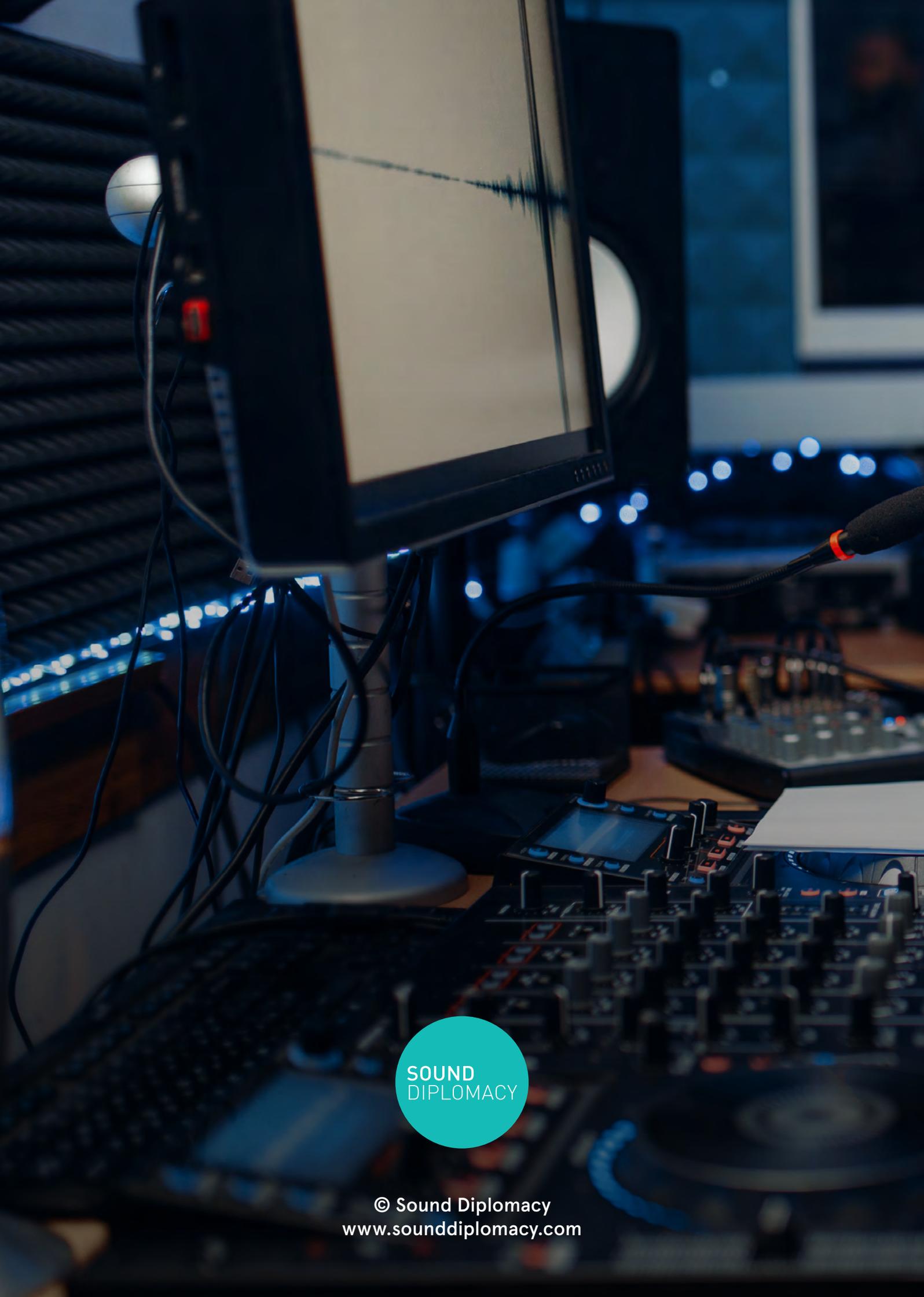
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ABOUT GEORGIA MUSIC PARTNERS

Georgia Music Partners (GMP) is a not-for-profit advocacy organization with the mission to promote the growth and success of Georgia's music industry through partnerships and workforce development. GMP has been instrumental in leading efforts at local, city and state levels from conducting economic impact studies, white papers, to passing the Georgia Music Investment Act in 2017. Georgia Music Partners continues to work proactively with city, county and state leaders to advance policy and legislative initiatives to protect, grow and market opportunities for the 20,000 music industry professionals around the state.

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