

REPORT OF THE GEORGIA HOUSE MUSIC INDUSTRY STUDY COMMITTEE

COMMITTEE MEMBERS:

**Honorable Ben Harbin, Chair
Representative, District 122**

**Honorable Matt Hatchett
Representative, District 150**

**Honorable Lee Hawkins,
Representative, District 27**

**Honorable Margaret Kaiser
Representative, District 59**

**Honorable Brian Strickland
Representative, District 111**

TABLE OF CONTENTS

- I. INTRODUCTION**
- II. EXECUTIVE SUMMARY**
- III. FINDINGS**
- IV. RECOMMENDATIONS**

I. INTRODUCTION

The Georgia House of Representatives created the House Georgia Music Industry Study Committee (“Committee”) in 2013 through the passage of House Resolution 529. Recognizing that the music industry has long generated significant economic, educational and cultural benefits statewide but that globally, music business models are dramatically changing as the digital marketplace shifts the way music is created, delivered, marketed and consumed, the Committee was formed to evaluate the issues facing Georgia’s music industry, identify opportunities and explore strategies to retain existing industry and talent and ensure future growth, investment and jobs.

The Committee was chaired by Representative Ben Harbin (122nd) and included four (4) additional legislative members: Representative Matt Hatchett (150th); Representative Lee Hawkins (27th); Representative Margaret Kaiser (59th); and Representative Brian Strickland (111th). The legislative staff member assigned to assist the Committee was Ms. Jeneé Burke, House Budget and Research Office.

The Committee held five public meetings in Savannah, Athens, Macon, Augusta and Atlanta to hear from the general public. During the course of the public meetings, the following individuals presented testimony to the Committee:

September 25, 2013 – Savannah, Georgia at Holiday Inn Express, Azalea Room

Dr. Carol Benton of Armstrong Atlantic State University’s Department of Art, Music and Theatre; Theron Carter and Grace Curry of WHCJ 90.3 FM at Savannah State University; Davena Jordan of All Walks of Life (AWOL); Frankie Smith, Music Student at AWOL; Peter Doliber of West Broad Street YMCA; Howard Paul of Benedetto Guitars; Jody Espina of JodyJazz Saxophone and Clarinet Mouthpieces; Robert Carter of Randy Wood Guitars; Cody Slatten of Salty Moss Productions; Jerry Portman of Portman’s Music; Joe Marinelli of Visit Savannah; Skip Jennings of the Coastal Jazz Association and Savannah Jazz Festival; Chris Desa of the Savannah Folk Festival; Kayne Lanahan of Savannah Stopover Music Festival and RevivalFest; Ryan McMaken and Jenny Woodruff of Savannah Music Festival; Bea Wray of

The Creative Coast; Robin Beauchamp of Savannah College of Art & Design's Sound Design Program; Peter Mavrogeorgis and Blake Olmstead-Mavrogeorgis of Dollhouse Productions; Harry DeLorme of Telfair Museum and Pulse Art & Technology Festival; Filmmakers James Kicklighter and Beau Turpin; Roger Moss of Savannah Children's Choir; Violinist Ricardo Ochoa of Savannah Philharmonic; Kristin Gustafson King of New Arts Ensemble; and Musician Colleen Heine.

October 11, 2013 – Athens, Georgia at The Classic Center, Olympia Room

Chuck Jones of Athens Convention and Visitors Bureau; Athens-Clarke County Commissioner Jared Bailey of AthFest; Brian Broadrick of Jackson Spalding; Dr. Noris Price of Clarke County School District; Shil K. Patel of Team Clermont; Bob Sleppy of Nuci's Space; David Barbe of Chase Park Transduction and the Music Business Program at Terry College of Business at the University of Georgia; Scott Shamp of the New Media Institute at the University of Georgia; Barrie Buck of the 40 Watt; Ellie McKnight of Brown Cat, Inc.; Kevin O'Neill of R.E.M. HQ; Troy Aubrey of Foundry Entertainment; Tour Manager Dewitt Burton; Tommy Robinson of New West Records; Susan Thomas of the Athens Music Project at the Willson Center for Humanities and Arts, University of Georgia; Jeff Montgomery of City of Athens and AthensMusic.net; and Music Writer Rachel Bailey.

October 23, 2013 – Macon, Georgia at Townsend School of Music, Fickling Hall

Dean C. David Keith of Townsend School of Music at Mercer University; Tim Regan-Porter of Center for Collaborative Journalism at Mercer University; Heather Holder of College Hill Alliance; Jessica Walden of Rock Candy Tours; Dr. Nadine Cheek of Wesleyan College; Monica Smith of Macon-Bibb County Convention and Visitors Bureau; Karla Redding-Andrews of Otis Redding Foundation; Wes Griffith of Moonhanger Group; Steve Moretti of Macon Pops Orchestra; Andy Ambrose of Tubman African American Museum; Everett Verner of Bragg Jam Music and Arts Festival; Michael Outlaw of Outlaw Drums in Albany; and DJ/Columnist Roger Riddle.

November 15, 2013 – Augusta, Georgia at Augusta Museum of History

Mayor Deke Copenhaver of City of Augusta; Matt Kwatinetz of Augusta Regional Collaboration; Jill Brown of The First Tee of Augusta; Brenda Durant of Augusta Area Arts Council; Joe Stevenson of 12 Bands of Christmas; Charles Scavullo of Imperial Theatre; Chris Rucker of Kruhu Design + Creative; Joe Mullins of Mullins Entertainment Group; Promoter Karen Gordon of Garden City Jazz; Music Writer and Historian Steven Uhles of Georgia Regents University; and Nancy Glaser of Augusta Museum of History.

December 12, 2013 – Atlanta, Georgia at High Museum of Art, Hill Auditorium

Stanley Romanstein of the Atlanta Symphony Orchestra; Michele Caplinger of The Recording Academy© Atlanta Chapter; Tammy Hurt of Placement Music and Georgia Music Partners; Mala Sharma of City National Bank; Simon Horrocks of Affix Music; Jini D. Thornton of Envision Business Management Group; Chaka Zulu of Disturbing Tha Peace Records; Iain Bluett of Ticket Alternative; Brandon Bush of Sugarland and Songs of the Architect; Shachar Oren of Neurotic Media; David Claassen of Broadcast Music Inc. (BMI); Producer, Mixer and Composer Ben Allen; Music Composer for Video Games Chris Rickwood; and Attorney Lee Morin on behalf of WRAS at Georgia State University.

The Committee also toured businesses and attractions in each community including: The Gretsch Company and Randy Wood Guitars (Savannah); the Allman Brothers Band Museum at the Big House and the former Capricorn Studio space owned by NewTown Macon (Macon); New West Records and Athens Music History Tour (Athens); Symphony Orchestra Augusta's Miller Theatre revitalization project (Augusta); Evans Towne Center Park and Lady Antebellum Amphitheatre (Columbia County); and Silent Sound Studios (Atlanta).

II. EXECUTIVE SUMMARY

Music has always been a part of Georgia's collective identity, a cultural thread melding tradition with innovation while connecting generations and transcending differences. Consistently demonstrating artistic excellence, Georgians have influenced the evolution of gospel, blues, R&B, soul, rock and roll, country, hip hop and Christian music. In addition to cultural value,

Georgia’s music industry generated a \$3.8 billion economic impact and supported 19,955 jobs according to a 2011 study¹.

Music, along with film, television, digital media, the performing and visual arts, advertising, publishing and design, is a key sector within the creative industries, which are identified in an increasing number of studies as powerful new engines for economic development. In December 2013, the U.S. Bureau of Economic Analysis (BEA) and the National Endowment for the Arts (NEA) published findings² from the first-ever federal study measuring how the arts and culture affect the economy. The study estimates the creative industries contributed 3.2 percent—approximately \$504 billion—of Gross Domestic Product (GDP) in 2011, compared to the U.S. travel and tourism industry’s 2.8 percent. The addition of arts and culture to the BEA’s data gathering and reporting activities emphasizes the emerging role of the creative industries in a 21st century economy driven by innovation, information and knowledge.

The creative industries also impact economic and community development in other ways. The 2009 report “Using Arts and Culture to Stimulate State Economic Development”³ highlights the connection between economic competitiveness and the creative industries by noting that “companies’ decisions about where to locate their businesses often are influenced by factors such as the ready availability of a creative workforce and the quality of life available to employees.” Talent-driven companies recognize that the ability to attract sought-after executives and skilled young professionals depends not only on having desirable housing, schools and healthcare, but also on the vitality and diversity of a community’s cultural and leisure amenities.

A 2011 study⁴ by South Arts estimated that the creative industries in Georgia represent 12,768 businesses, employing a total of 199,921 people who earn annual wages totaling more than \$8 billion, and generating almost \$29 billion in annual revenue. Those numbers are likely to have significantly increased since the study due to the staggering growth of the state’s film and television industry spurred by the enactment of the Georgia Entertainment Industry Investment Act. The economic impact of film and TV grew from \$244 million in FY 07 to over \$3.5 billion in FY12.

¹ Economic and Fiscal Impact Analysis of the Music Industry in Georgia, Georgia Music Partners, May 2011

² NEA Guide to the U.S. Arts and Cultural Production Satellite Account, National Endowment for the Arts, 2013

³ “Using Arts and Culture to Stimulate State Economic Development,” National Governors Association Center for Best Practices, 2009

⁴ Creative Industries in the South, South Arts, 2011

With the current strength of its combined creative industries, its business-friendly climate, easy access and attractive tax incentive program, Georgia is poised to continue its ascension as an internationally recognized entertainment and media hub. A robust music industry is an essential part of that equation, and although the state is fortunate to have an extraordinary music heritage; an influential and diverse talent base; an established recording and production infrastructure; a concentration of high-tech businesses; multiple live music and performing arts venues; signature festivals; a growing music tourism market; and specialized music education programs, in a highly competitive global marketplace, the development of a transformative business strategy to retain, expand and aggressively market these assets will best position Georgia music for future sustainability and growth.

III. FINDINGS

Given the influence, impact and growth potential of Georgia's music industry, the Committee sought to better understand the business of music while examining the successes, opportunities and challenges across the state.

The Music Industry

Music is a form of artistic expression that, when translated into a commercial enterprise, encompasses numerous individuals, companies and organizations. For decades, the primary revenue streams in music were music publishing, recorded music sales and music performance. Traditionally, the business model revolved around the creation of intellectual property—a song or composition—that was then produced, recorded and manufactured into a physical product (record, tape, CD) to be distributed and sold to consumers via bricks-and-mortar retail locations. But in the 1990s, the introduction of digital technology allowed recordings to be saved as data files, rather than physical objects, ultimately upending the music industry.

While disruptive technology always claims its casualties, great change creates great opportunity. The digital age has altered the way the public discovers, accesses and engages with music, contributing to an almost insatiable consumer appetite for content. New business models have emerged including download stores, subscription services and streaming services. The

digital landscape has, in many ways, democratized music creation, marketing and distribution, and ideas and innovation continue to give rise to new hardware and software opportunities

Though the industry is still exploring how to successfully monetize digital content and achieve desirable profit margins, recorded music sales topped \$16.5 billion globally⁵ in 2012, the first increase since 1999, driven by a 9% increase in digital revenue including digital music downloads, performance rights revenue and synchronization (licensing music for usage in film and television).

In addition to the sales, royalties and licensing fees derived from recorded music, there are other key revenue generators within the music industry. In 2012 concert ticket sales in the United States earning a record-breaking \$4.7 billion, according to trade publication *Pollstar*.

Music content is in demand for use in other entertainment sectors, particularly film, television and gaming. Advertisers and brands from American Express to the Coca-Cola Company are increasingly using music content to engage with their consumers across multiple media, social and experiential platforms. Artists are diversifying their own revenue streams as they exploit branding opportunities including merchandise sales, product endorsements, corporate sponsorship of tours and videos, licensing their name or likeness for multi-media usage, and generating ad revenue through their websites or YouTube’s Partner Program.

Music in Georgia

To gain an overview of the music industry in Georgia, the Committee conducted five public meetings in Savannah, Athens, Macon, Augusta and Atlanta, and learned that numerous individuals, companies and non-profits conduct business throughout the state as part of the “creative chain” of music-making, including, but not limited to:

Artists & Performers	Composers & Songwriters	Producers
Engineers & Mixers	Recording studios	Performing Arts Facilities
Rehearsal Studios	Software & App Developers	Musical Instrument Manufacturers
Musical Equipment Manufacturers	Record Labels	Publishing Companies
Booking agents & agencies	Entertainment Lawyers	Music Licensing Companies
Music Stores	Digital Music Retailers	Music Merchandisers
Music Festivals	Music Attractions	Sound & Lighting Companies

⁵ IFPI Digital Music Report 2013, International Federation of the Phonographic Industry

Business Managers	Talent Managers	Music Supervisors
Tour Managers	Music Publications	Music Journalists
Music Educators	Music Education Programs	Performing Rights Organizations

With talent as one of its greatest natural resources, Georgia has long produced influential and award-winning artists, including Gertrude “Ma Rainey” Pridgett, Dr. Thomas A. Dorsey, Blind Willie McTell, Brenda Lee, Johnny Mercer, Ray Charles, James Brown, Otis Redding, Little Richard, the Allman Brothers Band, Alan Jackson, the Atlanta Symphony Orchestra, R.E.M., the B-52s, the Indigo Girls, Travis Tritt, Widespread Panic and Trisha Yearwood, to name but a few. Native Georgians or artists (including band members) who live here who are topping the charts today include 2 Chainz, Jason Aldean, Luke Bryan, Casting Crowns, Ciara, Florida Georgia Line, Future, Cee-Lo Green, Lady Antebellum, Lecrae, Mastodon, Janelle Monae, Philip Phillips, Laura Story, Sugarland, T.I., Chris Tomlin, Third Day, Usher, Zac Brown Band and many more. Georgia has also produced a wealth of technical talent and business visionaries working behind the scenes to develop artists and hits in all genres. Many of these artists, composers and producers are economic engines themselves, with a variety of employees, businesses and often, philanthropic endeavors that their music and brand supports.

Talent is not limited to metro areas; the artists who have, and continue to, impact American music are born in and live in cities and towns all across the state. Local musicians, orchestras, school bands and church choirs are vital to the cultural and social fabric of virtually every community in Georgia.

There are numerous music-related businesses operating throughout the state and while there are similarities, different cities have different personalities and specialties. Savannah is home to The Gretsch Company, a fourth generation, internationally-known musical instruments manufacturer; Benedetto Guitars, the world’s foremost maker of custom archtop jazz guitars; JodyJazz, a manufacturer of saxophone and clarinet mouthpieces; and Randy Wood Guitars, where one of the country’s most renowned luthiers crafts guitars and mandolins. Athens, once named by *Rolling Stone* magazine as “the #1 College Music Scene in America,” is home to dozens of live music clubs, hundreds of musicians, and companies that revolve around talent and working musicians, including the Georgia outpost for New West Records, Team Clermont, a music PR, publicity and radio promotion firm, and Nuçi’s Space, a non-profit working to prevent suicide and assist in the emotional, physical and professional well-being of musicians.

Macon's rich music heritage draws visitors to the Allman Brothers Band Museum at the Big House, the Otis Redding Statute on the Ocmulgee and the Tic Toc Room, named for the original club where Little Richard once performed, while Augusta draws on its own heritage with branded performing arts venues including the James Brown Arena, Jessye Norman Amphitheatre and Lady Antebellum Amphitheatre. Augusta has also been successful in using music to raise money for charitable causes, including 12 Bands of Christmas, which supports the Children's Hospital of Georgia, the annual Rock Fore! Dough concert, which supports First Tee of Augusta, and Friends With Benefits, a local organization utilizing music to raise money for non-profits.

As the state's industry hub, Atlanta's music business makeup is the most diverse with recording studios of all sizes responsible for hit singles and albums in every genre; venues from Philips Arena with a capacity of over 17,000 to the nationally recognized singer/songwriter venue Eddie's Attic, with a capacity of about 175; a variety of production services, from rehearsal studios to sound and lighting companies; and professional services from business management companies serving national artists, to entertainment and law practices including the Atlanta office of international firm Greenberg Traurig LLP, to the Atlanta branch of City National Bank, which serves a large segment of the entertainment industry and has offices in California, Nevada, New York and Nashville. Kobalt Music Group, an independent music publisher and music services company with offices in London, New York, Nashville, Los Angeles, Berlin, Sydney and Stockholm opened an office in Atlanta in 2013, signaling a continued confidence in the city's talent base and influence.

As a growing digital media and high tech market, Atlanta benefits from Georgia Tech's Center for Music Technology, where its research and development work has brought products to market including the successful music apps ZOOZbeat and LaDiDa. In addition, the university's Advanced Technology Development Center (ATDC) is a successful incubator that assists technology entrepreneurs with launching companies in the state.

Atlanta's business-friendly assets are instrumental in fostering the growth of entrepreneurial companies like Neurotic Media, a digital entertainment marketing company providing download services and products; TicketAlternative, a boutique ticketing provider that sells advance tickets to events at over 400 venues nationwide; SixthMan, which produces themed

cruise experiences for bands, brands and their fans; and AffixMusic, a music licensing company specializing in placing pre-cleared music in film, television, advertising and games.

Member-based organizations in Georgia include The Recording Academy® Atlanta Chapter (the Academy produces the Grammy Awards), Georgia Music Partners, an advocacy organization, and the Atlanta Federation of Musicians Local 148-462. The major performing rights organizations, ASCAP, BMI and SESAC, which collect royalties for copyright holders, all have offices in Atlanta. Throughout the state, there are non-profit organizations serving a variety of music education and professional development needs.

Music tourism—based on travelers visiting cities to attend music-related performances, festivals, attractions and landmarks—is a growing segment of both the music and tourism industries that generates benefits for communities statewide. The Savannah Music Festival, celebrating its 25th anniversary this spring, is a 17-day presentation of the musical arts that has been recognized by national and international media as one of the most distinctive cross-genre festivals in the world. Georgia hosts annual festivals of all sizes, from the Gram Parsons Guitar Pull and Tribute Festival in Waycross to The Thomas A. Dorsey Birthplace and Gospel Heritage Festival, Inc. in Villa Rica to Music Midtown, the signature Atlanta festival. New festivals launched in 2013 included TomorrowWorld (the first international edition of TomorrowLand, a Belgian electronic dance music (EDM) festival that draws over 180,000 people annually), produced on sprawling farmland in Chattahoochee Hills; Shaky Knees Music Festival, a two-day concert event in Atlanta; Magnetic Music Festival, an EDM festival produced on the Kennesaw State campus by the nationally recognized Liquified & Disco Donnie Presents; CutBait Music Festival, a spring weekend of music in Columbus that preceded the opening of the city's whitewater rafting course; Revival Fest, a day of music and local food in Savannah; and Athens Intensified, a fall weekend festival of independent music in the Classic City.

Georgia has numerous music education programs. In addition to public and private pre-K through 12 programs, after-school programs and private music instruction studios, there are more than 50 post-secondary public and private schools offering degrees and certificates in majors including music performance, music business, music technology, audio technology, sound design, music education, music theory, music composition, musical theatre, music therapy, church music and more. The Georgia Music Educators Association, an affiliate of the national

Association for Music Education, has more than 2,700 members in Georgia who teach at public and private schools, colleges and universities and private instruction studios.

Challenges in Georgia’s Music Industry

Though Georgia’s music industry is clearly deep-rooted and diverse, speakers delivering testimony during the five public meetings were very candid in discussing challenges facing the industry.

The lack of awareness of Georgia’s considerable music assets was an area that was repeated often. Artists, business owners, festival producers and historic theatre operators were among those who noted that investments in projects, companies and public programming leave little funding for marketing, particularly promotions outside their local markets. Others expressed that while there have been significant individual successes by artists and businesses in multiple genres over the decades, Georgia’s music industry is “fractured,” often separated by genre and without a cohesive brand or identity. Speakers acknowledged that states including Louisiana, Texas and Tennessee aggressively market and advertise their music industries and music tourism destinations, and that campaigns to specifically promote Georgia’s music assets would attract more businesses, creative productions, tourists, investment and jobs.

Industry insiders expressed serious concern over the “talent drain” of the last few years, as artists and producers, in particular, move their headquarters to larger markets including Los Angeles, Nashville and New York, where the critical mass of entertainment businesses creates more job opportunities. Similarly, David Barbe, director of the Music Business Program at the Terry College of Business at the University of Georgia, noted that talented students in all of Georgia’s music business programs graduate and frequently migrate to the top three markets for jobs. Chaka Zulu, CEO of Disturbing Tha Peace Records and manager for Chris “Ludacris” Bridges, likens Atlanta and Georgia to a farm system, where all too often, talent is discovered and nurtured before being sent to the “big leagues.”

Artists and businesses also advocated incentives to grow the music industry, noting the profound impact the Georgia Entertainment Industry Incentive Act is having on the state’s film and television industry. Several speakers suggested that a music-focused tax incentive may help to ease the talent drain and create more interest in investing in business expansion and location in Georgia. Film industry professionals pointed out, however, that, unlike music, film and

television location decisions are based primarily on the availability of incentives, but that as Georgia's film industry matures and the infrastructure continues to grow, opportunities for post-production services, especially music, will be cultivated. The Committee was encouraged to learn that the current Investment Act does, in fact, include the direct costs associated with sound recordings and musical compositions (excluding license fees) as approved expenditures for qualified productions including feature films, television projects, music videos, interactive entertainment and animated projects.

The lack of venture capital for music- and technology-related projects was also expressed as a factor hindering expansion and investment and that exploration of ideas to seed a music startup fund would be beneficial to incentivize growth. The Committee urged exploration of the Invest Georgia Exemption, which was enacted by the legislature in 2012 to make it possible for businesses to raise capital through equity-based crowdfunding, an investment tool that is prohibited in most states. (Crowdfunding sites like Kickstarter and Indiegogo are donation-based). Atlanta company Bohemian Guitars was profiled by WABE in August 2013 as having engaged another Atlanta business, SparkMarket, an equity-based crowdfunding startup, to assist it in raising the capital necessary to expand.⁶

Music education was a major topic during the public meetings with individuals representing Georgia school districts and after school programs appeared before the Committee to share data and anecdotal evidence articulating the value of music education. Speakers noted that students who participate actively in music increase cognitive development; improve math and reading skills; develop critical thinking and leadership skills; foster self-esteem and the ability to work cooperatively in groups; and graduate at a higher rate. Frankie Smith, a Savannah at-risk teenager who studies sound design and music education in the AWOL youth development program, passionately shared with the Committee how the program had changed his life.

All representatives speaking on behalf of school districts and after school programs alluded to an ongoing lack of funding and funding sources for music education, but Dr. Noris Price, Deputy Superintendent of the Clarke County School District (CCSD), shared with the Committee how the Athens community had initiated a successful after school program. The UGA String Project, a collaborative effort between the CCSD and UGA's Hugh Hodgson School of Music, engages string majors to teach beginning students grades 2-5 and continuing students

⁶ "Georgia Exemption Opens Door for Equity-Based Crowdfunding," Jim Burrus, WABE 90.1, Aug. 9, 2013

through 8th grade, twice a week. They are supervised by faculty, including Dr. Skip Taylor, Director, and Ruth Monson, Co-Director, of the UGA String Project, and the pilot program has expanded to include the Clarke County Boys and Girls Club through a 21st Century Federal Grant.

With such compelling testimony on behalf of music education in Georgia, the Committee looks forward to forthcoming policy recommendations for multidisciplinary arts education in the state from the newly formed Task Force on Arts Education, a statewide initiative led by the Georgia Council for the Arts in collaboration with The Office of the Governor.

Speakers representing arts organizations and festivals noted that the 85% reduction in state funding for the Georgia Council for the Arts since 2009 has seriously impacted the grant funding available to local communities. Additionally, the closure of the Georgia Music Hall of Fame in Macon was mentioned as having impacted the state's music communities by creating a void in the documentation, preservation and perpetuation of the state's music heritage.

IV. RECOMMENDATIONS

As a result of this study, the Committee is of the opinion that Georgia's music heritage, the multiculturalism of its musical artists and communities, and the diversity of its businesses are assets that distinguish it from any other music city or state in America, and that the opportunities for the future growth statewide far outweigh the challenges. Further, the Committee finds that the dialogue that has resulted from this study and its meetings, not only between the Committee and the public, but very importantly among representatives of segments of the music industry and musical arts throughout Georgia, should be the catalyst for continued dialogue and collaboration to facilitate and foster the state's position as an entertainment and media hub. Therefore, the following recommendations have been identified:

1. **Marketing.** The Committee recommends the state fund the development and implementation of a strategic marketing plan in FY 15 to aggressively promote Georgia music talent, business, education and tourism—as well as the music component of the Georgia Entertainment Industry Investment Act—across multiple platforms through the

Film, Music and Digital Entertainment Office (FMDE) of the Georgia Department of Economic Development (GDEcD).

2. **Measurement.** The Committee recommends that the state facilitate a comprehensive economic impact analysis of Georgia’s music industry to provide a baseline from which to measure future growth. The study should be as inclusive as possible in measuring the direct and indirect impact of music in Georgia and take into account that an industry based on intellectual property, significant sole proprietorships, an expansive structure of micro-businesses and numerous intersections with other creative industries is difficult to categorize solely by standardized classification systems like the North American Industry Classification Systems (NAICS). Further, the Committee recommends that the Georgia General Assembly consider forming a Joint House-Senate Music Industry Oversight Committee for the purpose of reviewing the process, participation and findings of the economic impact analysis.
3. **Preservation/Heritage.** The Committee recommends that the University of Georgia Special Collections Library examine opportunities to expand public access and extend the reach of its music-related archives through partnerships with other organizations. UGA’s Special Collections Libraries hold the Georgia Music Hall of Fame Collection, deposited there following the museum’s closure in 2011, as well as a growing number of special collections documenting Georgia music and the music industry. The Special Collections Libraries also house an extensive media archive, including the Peabody Awards collection, while the Music Library and the Main Library house the University’s voluminous music-related holdings.