Business Case
Music Industry
Cluster

Sumner County, TN
45 Minute Drive Time

**1598 GreenLea Boulevard
Gallatin, TN 37066**

615-206-6624

www.forwardsumner.org

Parameters

Industries:

Code	Description
339992	Musical Instrument Manufacturing
451140	Musical Instrument and Supplies Stores
512230	Music Publishers
512240	Sound Recording Studios

Code	Description
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
711130	Musical Groups and Artists

Regions:

Code	Description
21213	Simpson County, KY
47037	Davidson County, TN
47111	Macon County, TN
47147	Robertson County, TN

Code	Description
47149	Rutherford County, TN
47165	Sumner County, TN
47169	Trousdale County, TN
47189	Wilson County, TN

Datarun: 2021.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# Music Study Industry Groups for 8 Counties vs. Nation

2020 Jobs

	6,289
	260 to 6,288
	237 to 259
	141 to 236
	43 to 140
	0 to 42

Executive Summary

579	6,993	5.84	$90.5K
Payrolled Business Locations	**Jobs**	**Concentration**	**Earnings Per Job**
Payrolled business locations increased by 99 over the last 5 years.	Jobs increased by 903 over the last 5 years. Projected to increase by 384 over the next 5 years.	Regional job concentration is 5.84 times the national job concentration.	Regional earnings per job are $25.2K above the national earnings per job of $65.3K.

- Jobs for your selected industries increased by 903 jobs (14.8%) from 2015-2020, outpacing the national growth rate of -7.2%. The industries are projected to increase by 384 jobs (5.5%) from 2020-2025, outpacing the national growth rate of -0.6%.
- Regional job concentration for your selected industries is 5.84 times the national job concentration. In other words, there are 484% more jobs at your selected industries in this region than we would expect to find in the average region.
- Cost of labor in the region is above average. The regional earnings per job for your selected industries is $90.5K, which is $25.2K above the national average of $65.3K.

Regional Trends
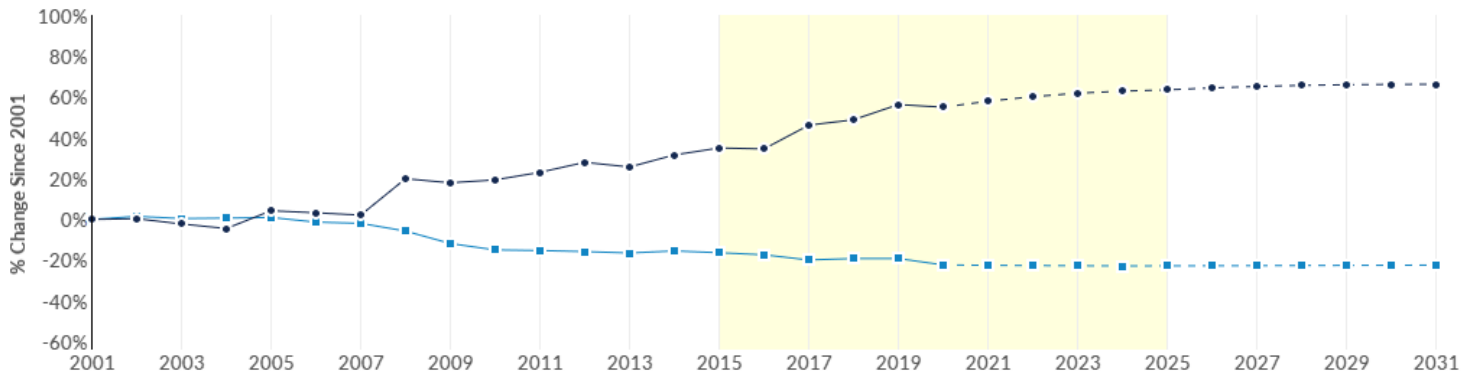
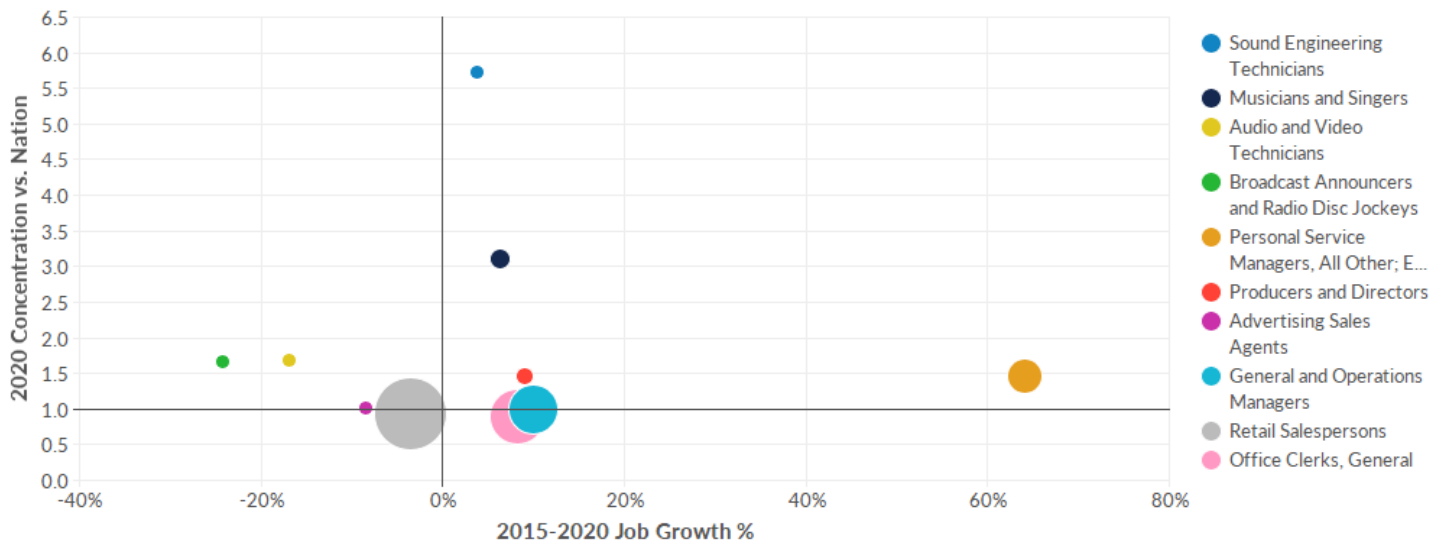| Region	2015 Jobs	2020 Jobs	2025 Jobs	Change	2015-2020 Growth %	2020-2025 Growth %
● 8 Counties	6,090	6,993	7,376	1,286	14.8%	5.5%
■ Nation	241,324	224,053	222,716	-18,608	-7.2%	-0.6%

Workforce Availability

Key occupations for your selected industries have an overall concentration of 2.33, indicating **above average workforce availability.** These occupations experienced overall job growth of 7.5% from 2015-2020, indicating that **the regional talent pool is increasing.**

SOC	Key Occupation	Concentration	2015 Jobs	2020 Jobs	2025 Jobs	Median Hourly Earnings	Average Hourly Earnings
27-4014	Sound Engineering Technicians	5.73	575	596	705	$29.43/hr	$39.08/hr
27-2042	Musicians and Singers	3.10	2,897	3,081	3,242	$33.04/hr	$44.77/hr
27-4011	Audio and Video Technicians	1.69	971	806	898	$24.63/hr	$27.53/hr
27-3011	Broadcast Announcers and Radio Disc Jockeys	1.67	392	297	296	$17.17/hr	$33.40/hr
11-9198	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	1.46	4,521	7,421	7,888	$32.11/hr	$38.13/hr
27-2012	Producers and Directors	1.45	1,065	1,161	1,257	$27.21/hr	$35.89/hr
41-3011	Advertising Sales Agents	1.02	802	734	751	$20.43/hr	$27.43/hr
11-1021	General and Operations Managers	1.00	11,966	13,163	14,311	$47.56/hr	$57.52/hr
41-2031	Retail Salespersons	0.94	22,009	21,213	22,120	$11.94/hr	$15.00/hr
	Total	2.33	59,182	63,601	67,103		$29.45/hr

43-9061	Office Clerks, General	0.90	13,984	15,128	15,634	$16.08/hr	$17.15/hr
	Total	2.33	59,182	63,601	67,103		$29.45/hr

Supply Chain Requirements

76%

Satisfied In-Region

76% of the goods and services that your selected industries require to operate are provided within the region.

NAICS	Industry	Total Requirements	% Satisfied In-Region
711510	Independent Artists, Writers, and Performers	$82,159,448	99.7%
515210	Cable and Other Subscription Programming	$58,673,930	14.1%
515120	Television Broadcasting	$55,948,390	91.6%
551114	Corporate, Subsidiary, and Regional Managing Offices	$25,529,641	89.2%
531110	Lessors of Residential Buildings and Dwellings	$23,258,592	77.2%
711211	Sports Teams and Clubs	$23,047,750	99.4%
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	$19,910,315	99.8%
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	$19,754,866	98.0%
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	$18,840,767	99.5%
531210	Offices of Real Estate Agents and Brokers	$18,071,233	99.3%

Appendix A - Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Occupation Data

Emsi occupation employment data are based on final Emsi industry data and final Emsi staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates also affected by county-level Emsi earnings by industry.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

State Data Sources

This report uses state data from the following agencies: Arizona Department of Administration, Office of Employment and Population Statistics; Arkansas Department of Workforce Services; California Labor Market Information Department; Colorado Department of Labor and Employment; Connecticut did not provide us with a data source; Delaware Office of Occupational and Labor Market Information, Delaware Wages 2004; District of Columbia Department of Employment Services; Florida Department of Economic Opportunity; Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit; Hawaii Department of Labor and Industrial Relations, Research and Statistics Office; Idaho Department of Labor; Illinois Department of Employment Security, Employment Projections; Indiana Department of Workforce Development; Iowa Workforce Development; Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Kentucky Office of Employment and Training; Louisiana Department of Labor; Maine did not provide us with a data source; Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information; Massachusetts Executive Office of Labor and Workforce Development; Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives; Minnesota Department of Employment and Economic Development; Mississippi Department of Employment Security; Missouri Department of Economic Development; Montana Department of Labor and Industry, Research and Analysis Bureau; Nebraska Workforce Development; Nevada Department of Employment, Training and Rehabilitation, Information Development and Processing Division, Research and Analysis Bureau; New Hampshire Department of Employment Security; New Jersey Department of Labor and Workforce Development; New Mexico Department of Labor, Bureau of Economic Research and Analysis; New York Department of Labor, Division of Research and Statistics; North Carolina Department of Commerce, Labor and Economic Analysis Division; North Dakota Job Service, Labor Market Information Center; Ohio Department of Job and Family Services, Labor Market

Information Division; Oklahoma Employment Security Commission; Oregon Employment Department, Oregon Labor Market Information System; Pennsylvania Department of Labor and Industry, Center for Workforce Information and Analysis; Rhode Island did not provide us with a data source; South Carolina Employment Security Commission, Labor Market Information Department; South Dakota Department of Labor, Labor Market Information Division; Tennessee Department of Labor and Workforce Development, Research and Statistics Division; Texas Workforce Commission; Utah Department of Workforce Services; Vermont did not provide us with a data source; Virginia Employment Commission, Economic Information Services; Washington State Employment Security Department, Labor Market and Economic Analysis Branch; West Virginia Bureau of Employment Programs, Research Information & Analysis Division; Wisconsin Department of Workforce Development, Bureau of Workforce Information; Wyoming Department of Employment, Research and Planning