



NORTH CAROLINA

THE FIRST ECONOMIC RESEARCH STUDY
OF THE INDEPENDENT LIVE SECTOR

WHAT IS

INDEPENDENT LIVE?

Independent live entertainment stages are independently owned and operated, meaning they are not controlled by a multinational corporation or a publicly traded company, and their primary mission is to present live performances to the public. This includes venues, promoters, festivals and more.

OVERVIEW IN

NORTH CAROLINA

North Carolina's independent live entertainment industry drives \$1.2 billion in state GDP, \$2.4 billion in economic output, and \$85.6 million in tax revenue, supporting 16,740 jobs and \$725.8 million in wages. With \$193.8 million in off-site tourism spending, the sector is both a cultural anchor and a major economic force.

ECONOMIC IMPACT



\$2.4 BILLION
TOTAL ECONOMIC OUTPUT



\$1.2 BILLION
CONTRIBUTION TO STATE GDP



STATE AND LOCAL
\$85.6 MILLION
TAXES PAID



7,241
TOTAL EMPLOYEES



4,919,192 MILLION
FANS SERVED



\$725.8 MILLION
WAGES AND BENEFITS PAID



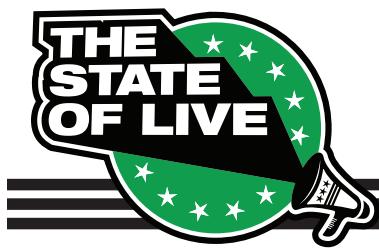
16,740
JOBS SUPPORTED

PROFITABILITY



29%
OF STAGES WERE
PROFITABLE

In North Carolina, despite the sector's clear economic impact, **only 29%** of independent stages identified themselves as profitable in 2024, underscoring the urgent need for solutions to ensure their survival and sustainability.



TOURISM BREAKDOWN



\$193.8 MILLION
OFF-SITE TOURISM SPENDING

In 2024 alone, fans attending independent shows generated \$193.8 million in off-site spending — filling hotel rooms, crowding local restaurants, supporting shops, and tipping drivers.



\$162.1 MILLION
SPENT ON LODGING



\$16.9 MILLION
SPENT AT RESTAURANTS AND BARS



\$8.4 MILLION
SPENT ON SHOPPING



\$4.6 MILLION
SPENT ON GAS, PARKING AND TRANSPORT



\$1.7 MILLION
SPENT ON OTHER ENTERTAINMENT AND REC

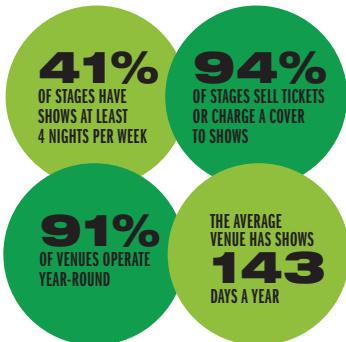
IMPACT TABLE

Impact Type	Employment	Labor Income	Value Added	Output	Local/County Tax Revenue	State Tax Revenue	Federal Tax Revenue
Direct Effect	7,241	\$241.60	\$431.30	\$951.30	\$5.70	\$13.20	\$54.30
Indirect Effect	7,051	\$340.10	\$562.80	\$1,025.00	\$15.50	\$25.70	\$76.80
Induced Effect	2,410	\$142.30	\$271.10	\$442.00	\$10.30	\$14.80	\$34.20
Total Effect	16,702	\$724.00	\$1,265.30	\$2,418.30	\$31.50	\$53.70	\$165.20
Multiplier	2.31	3	2.93	2.54			

This table shows the full economic ripple effect of North Carolina's independent live entertainment sector, including the jobs, income, business activity, and tax revenues (in millions of dollars) generated directly by venues and festivals, through their in-state suppliers, and from the additional local spending of workers in those jobs. For the full methodology, see the national report at stateoflive.org

NATIONAL OVERVIEW

INDUSTRY OPERATIONS SNAPSHOT



ACROSS ALL STAGES, THE TOP OPERATIONAL CHALLENGES RANKED BY FREQUENCY INCLUDE

1. MARKETING & BRINGING IN AN AUDIENCE
2. ARTIST COSTS RISING DRIVING HIGHER ARTIST FEES
3. STAFFING COSTS
4. INFLATION
5. MONOPOLIES
6. RISING INSURANCE COSTS
7. SCALPERS & PREDATORY RESALE PLATFORMS
8. COST OF RENT AND MORTGAGE
9. UNCAPPED, UNLIMITED PERFORMING RIGHTS ORGANIZATION FEES
10. DECREASING ALCOHOL SALES