



Photo Credit: Visit Sacramento



APPENDIX: 2022 Music Census Data Deck with Full Results

August 2023



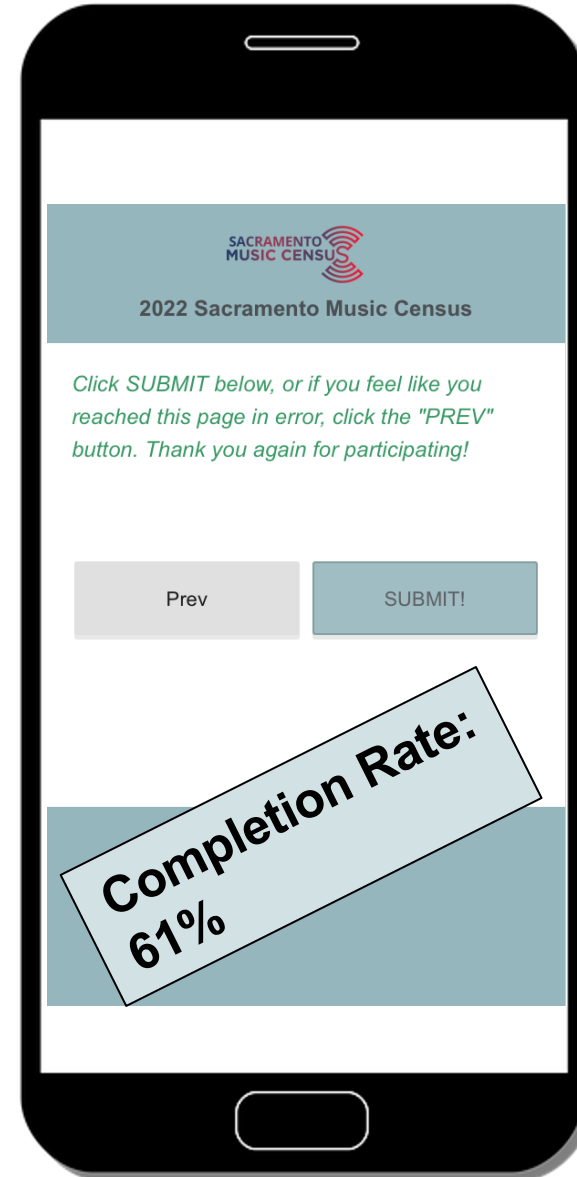
Photo Credit: Visit Sacramento

Participation and Completion Rate

WHO PARTICIPATED?



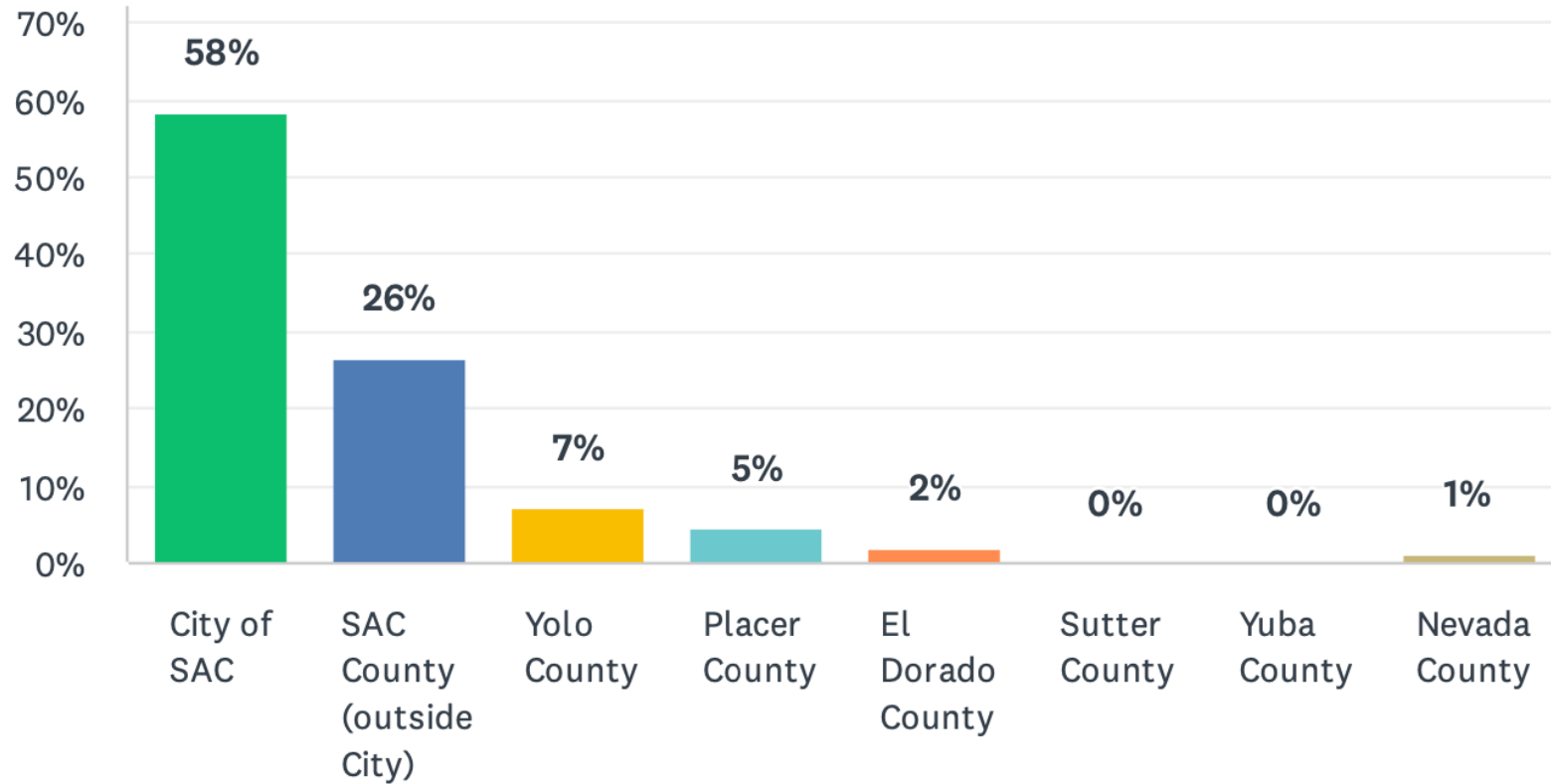
online respondents



Excellent! Industry standard is 42%

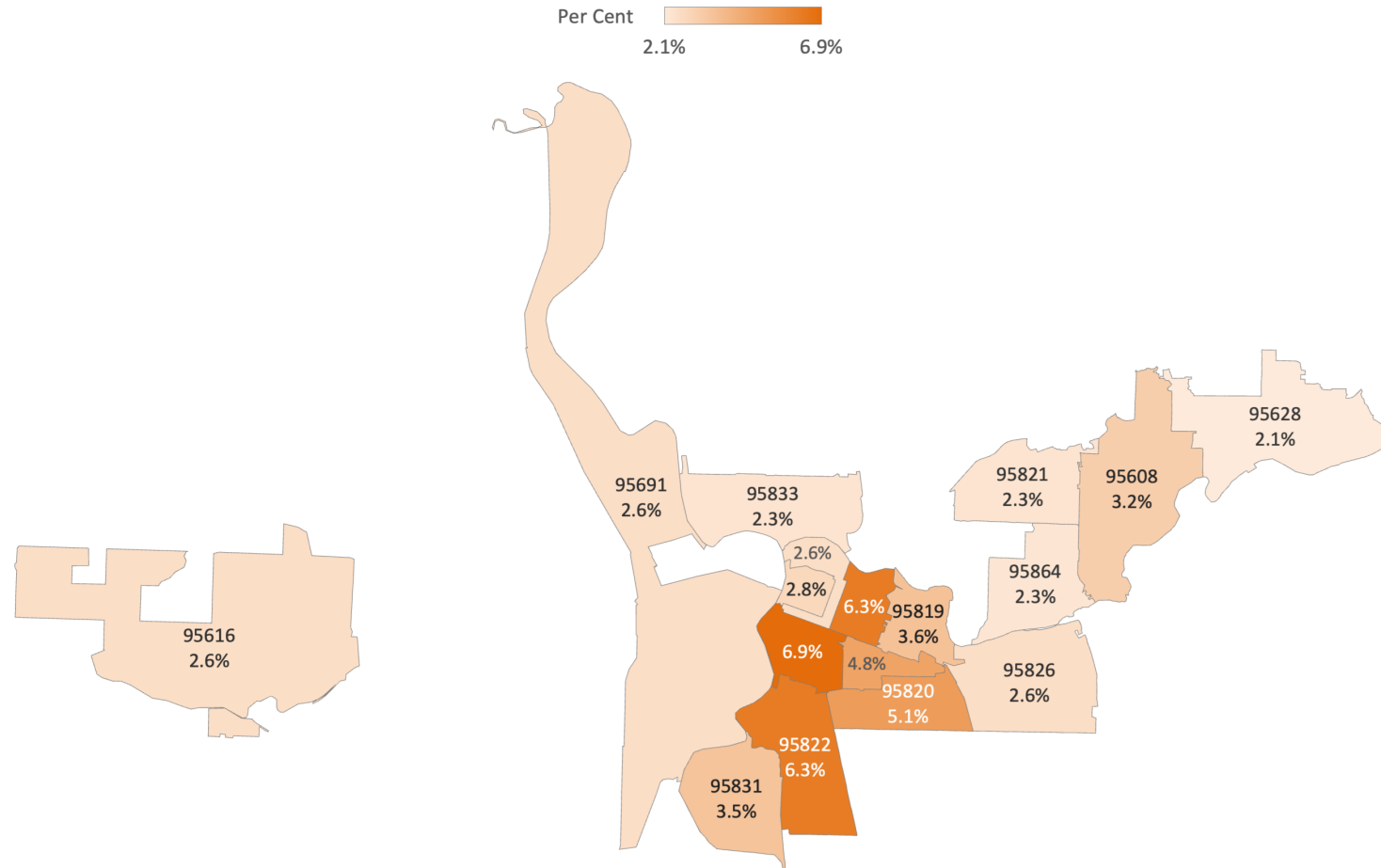
Geography

Geography: City/County of Residence

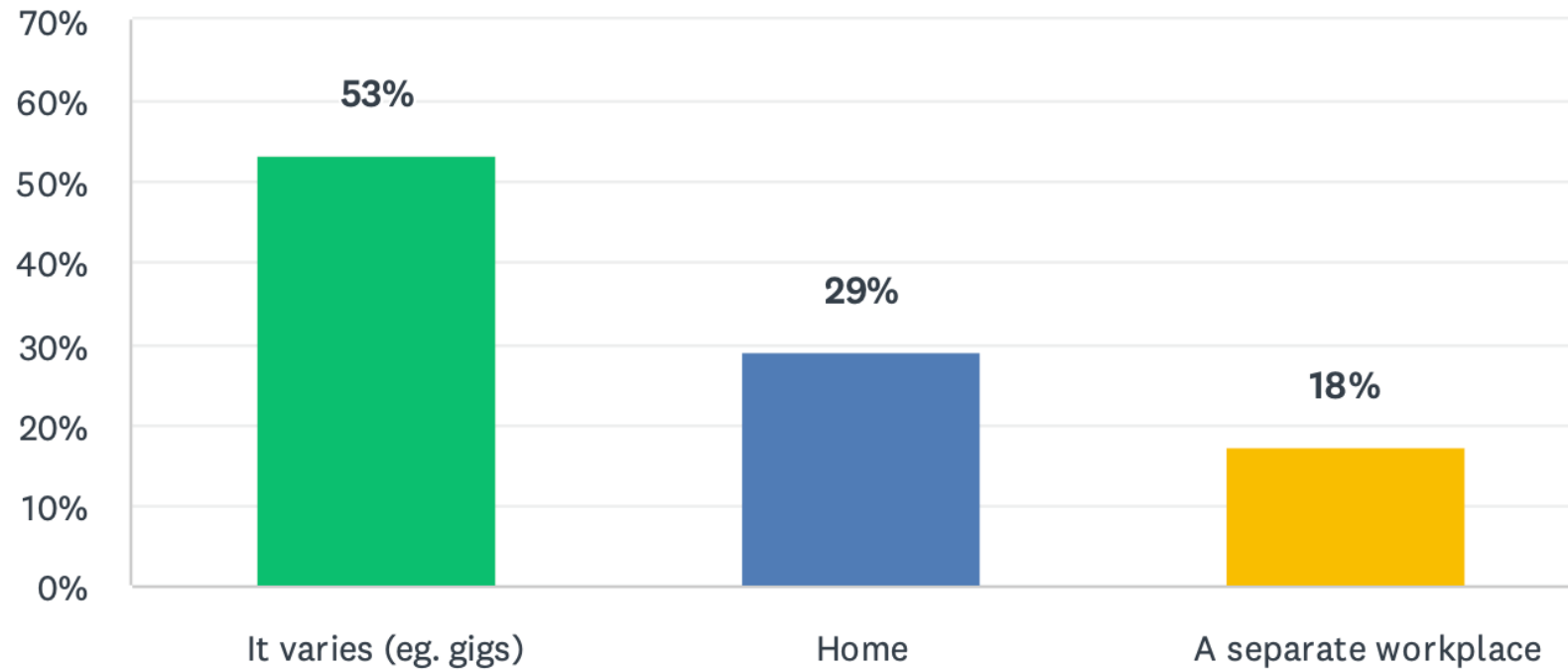


Geography: Top Home Zip Codes (2% or more of total)

Sacramento Music Census 2022 Residence by Zip Code (2% or more)

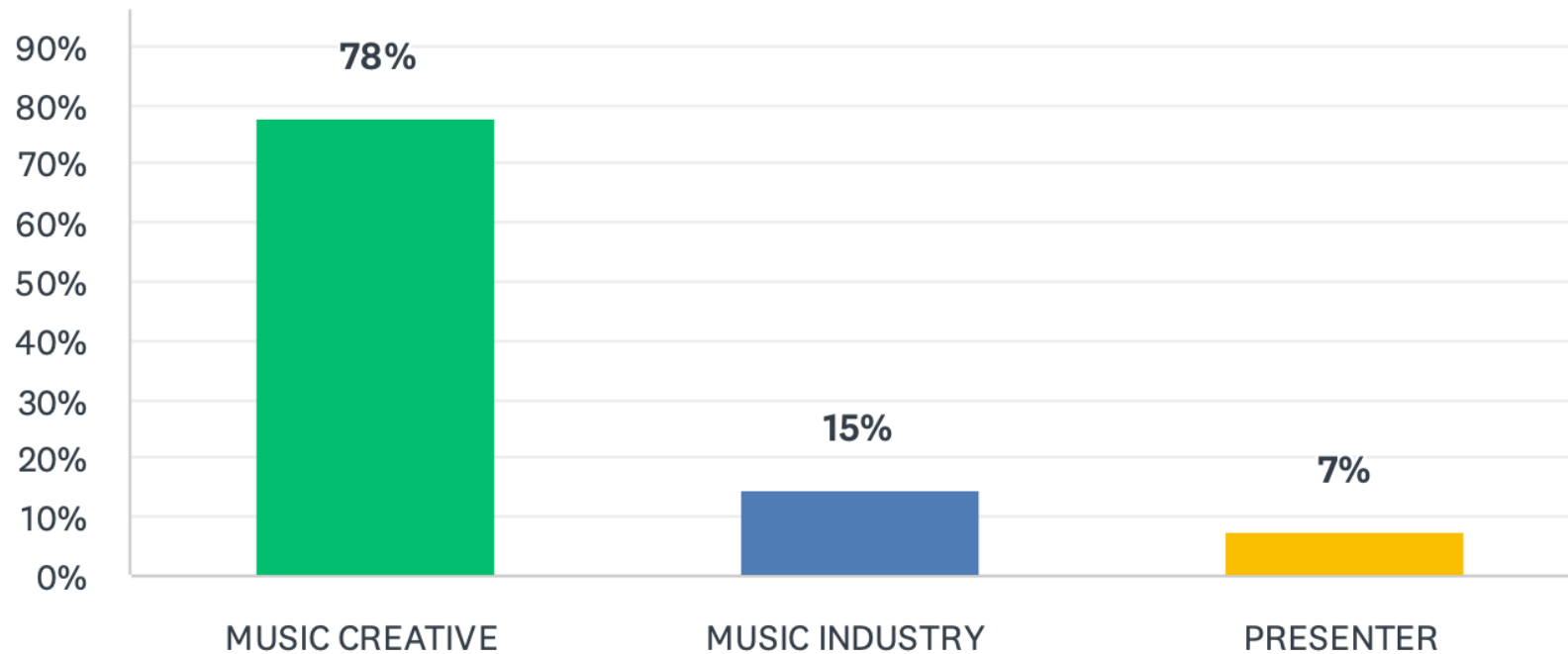


Geography: Work Location

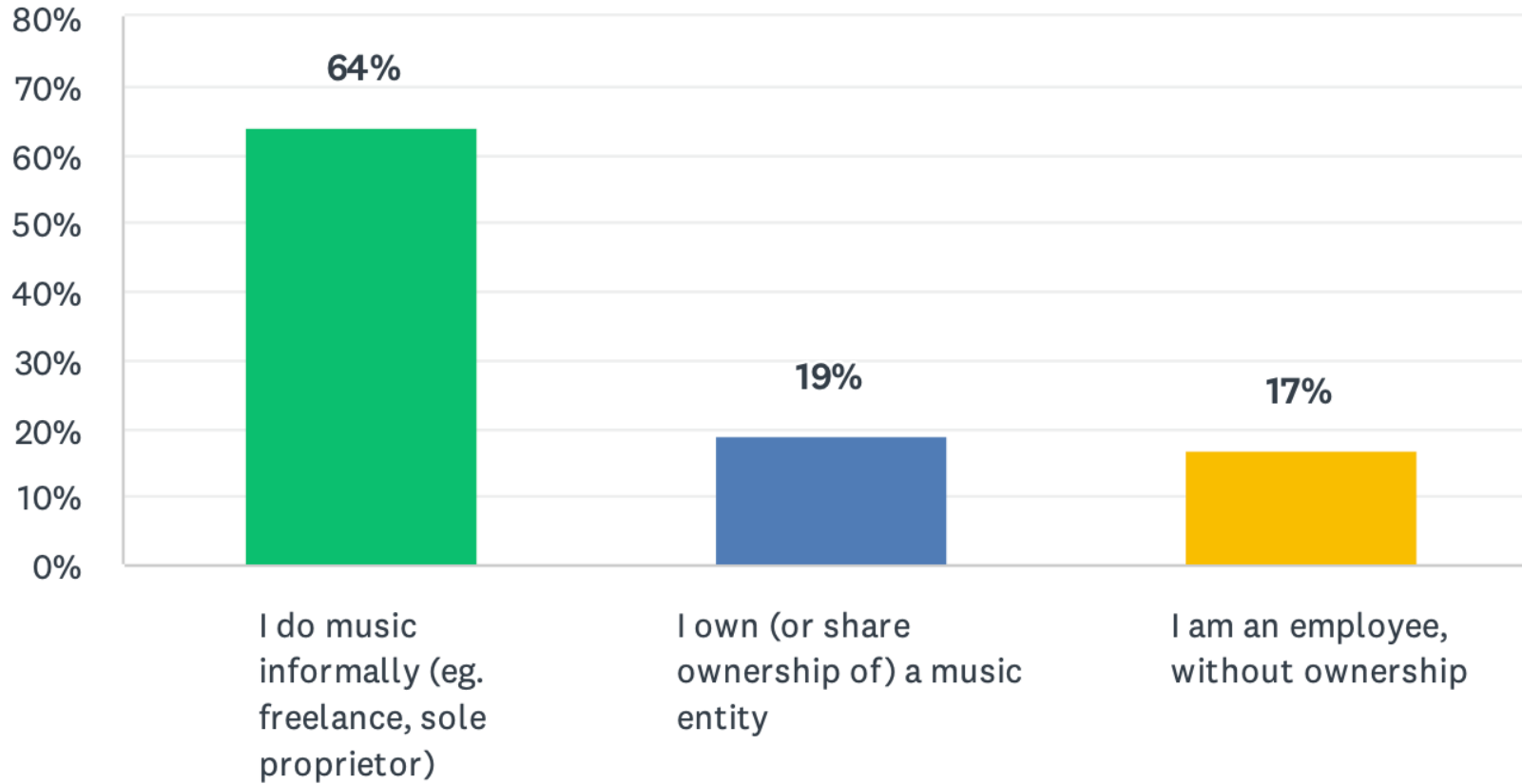


General Questions for All Respondents

Primary Industry Sector



Music Business Structure

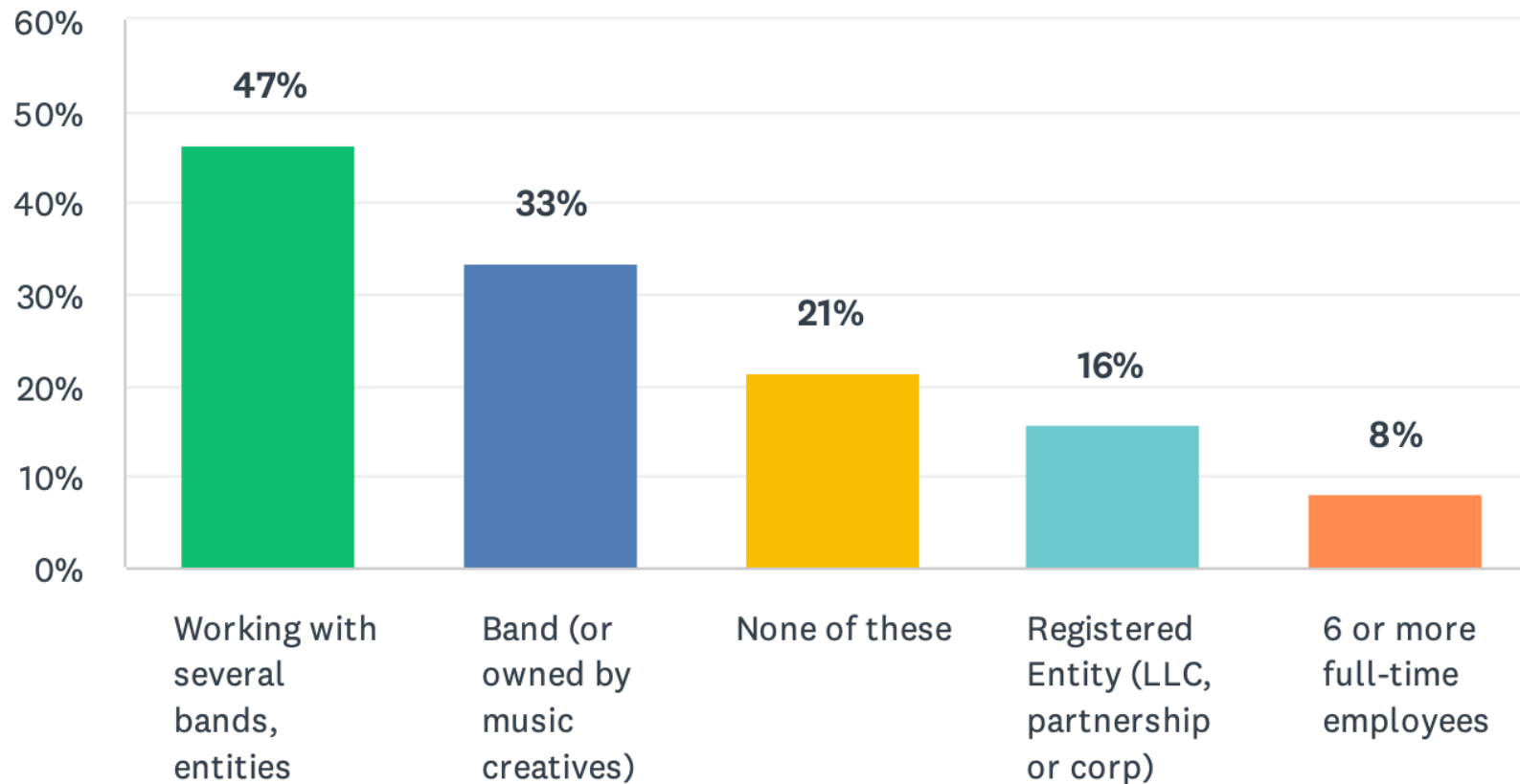


Sample of respondent comments regarding this question featured below:

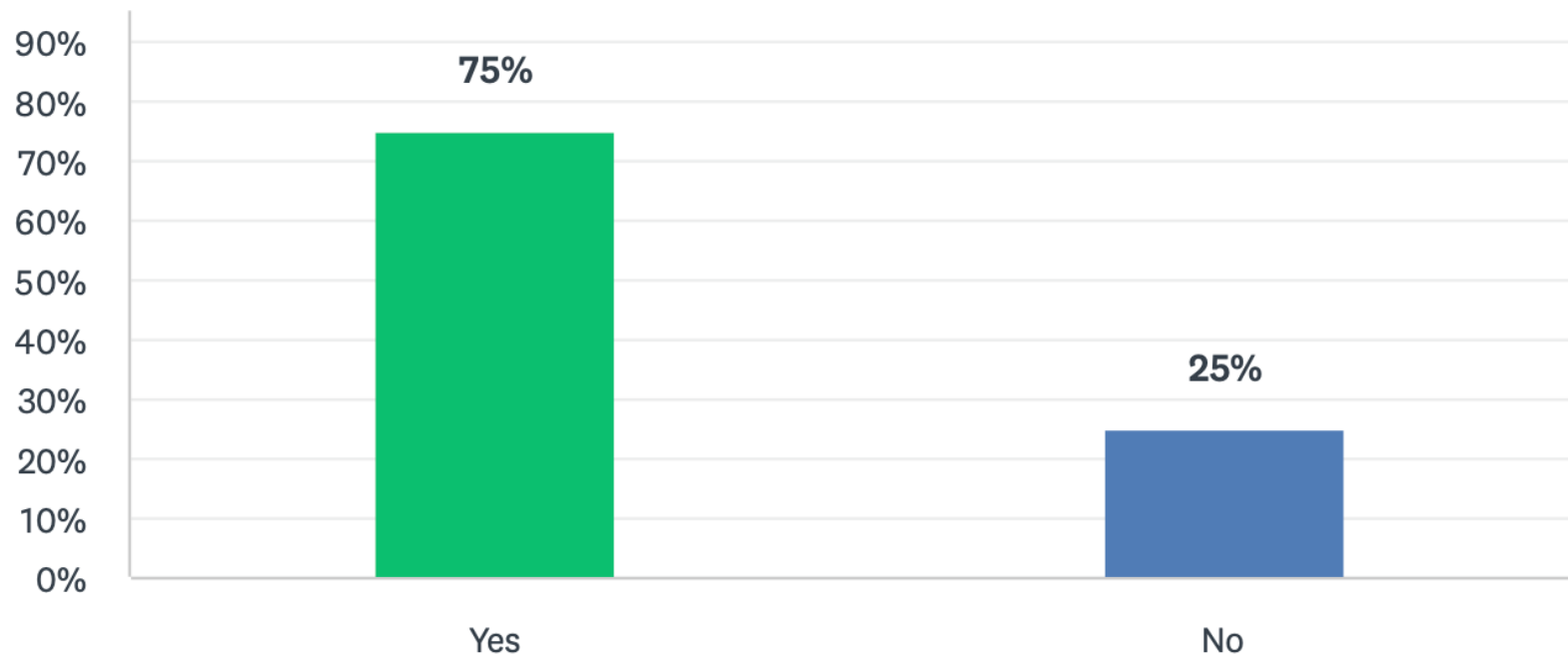
“I am a Board-Certified Music Therapist by day, and a studio musician/performer outside of my music therapy practice”

“I can select all three of these. I also perform with multiple bands, one that comes with ownership. And work as a music teacher at a music school.”

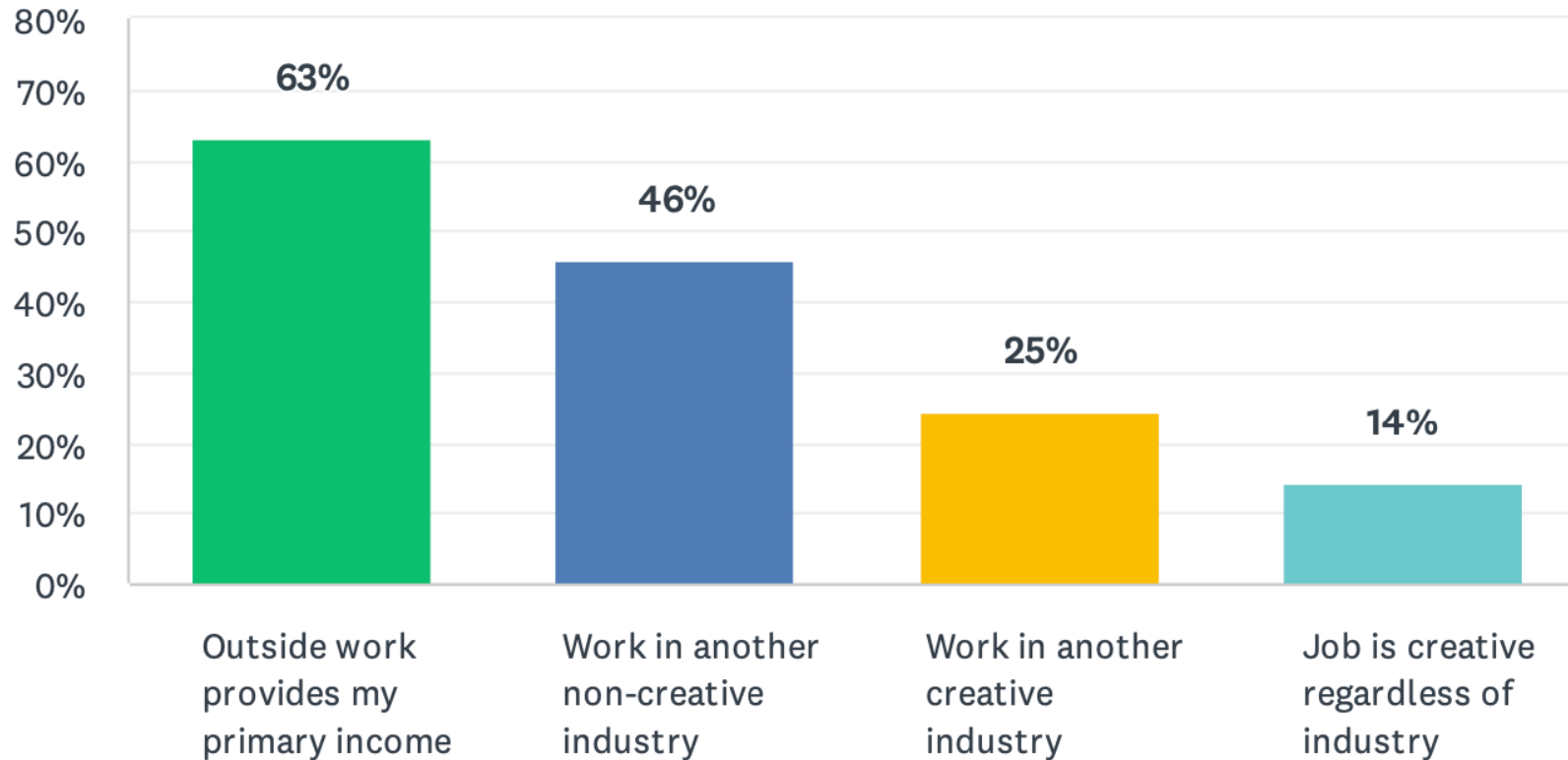
Some Features of Respondents' Music Work



Income Outside of Music Work



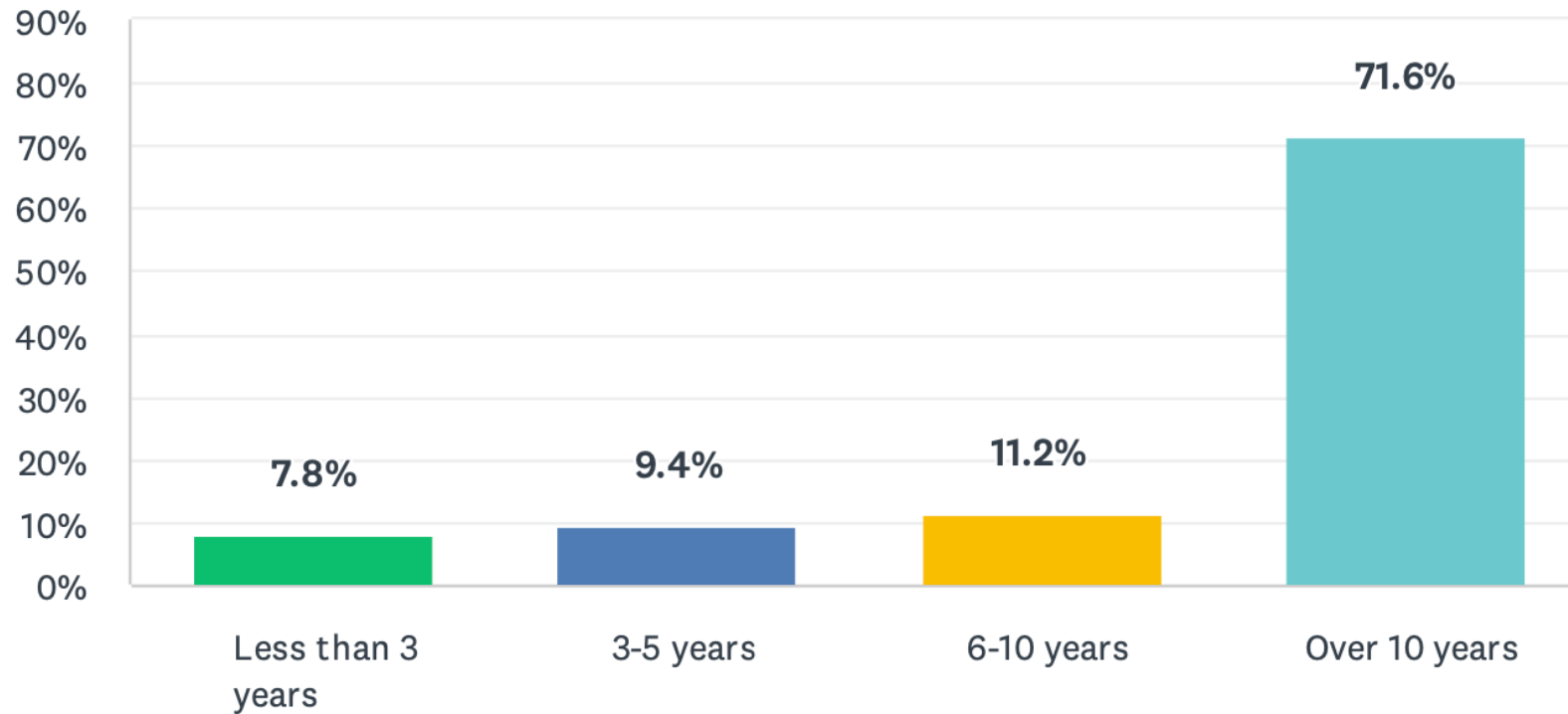
Features of Work Outside of Music



“I work construction during the week.”

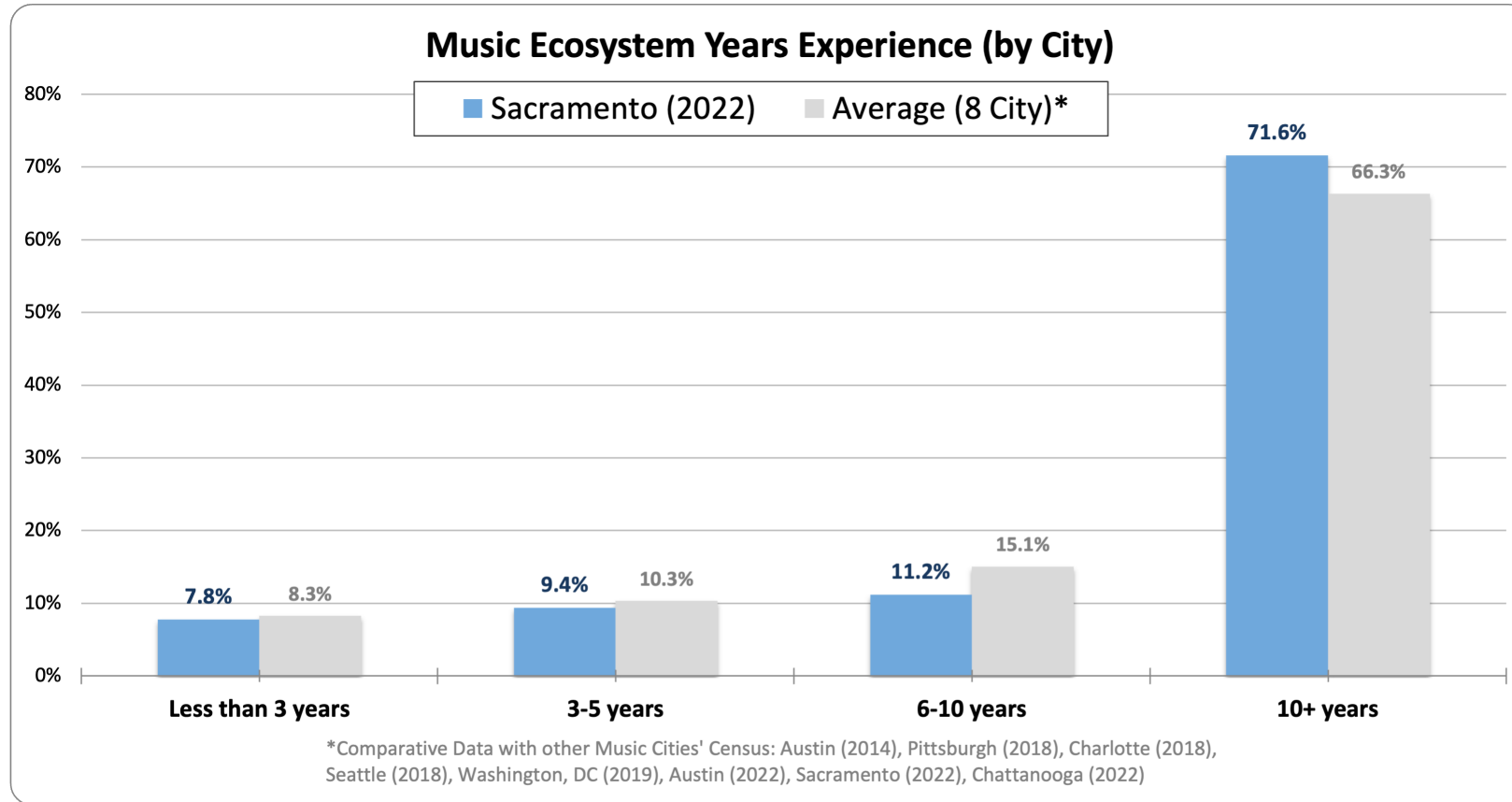
“I’m retired from teaching, now just perform.”

Years Experience in Music

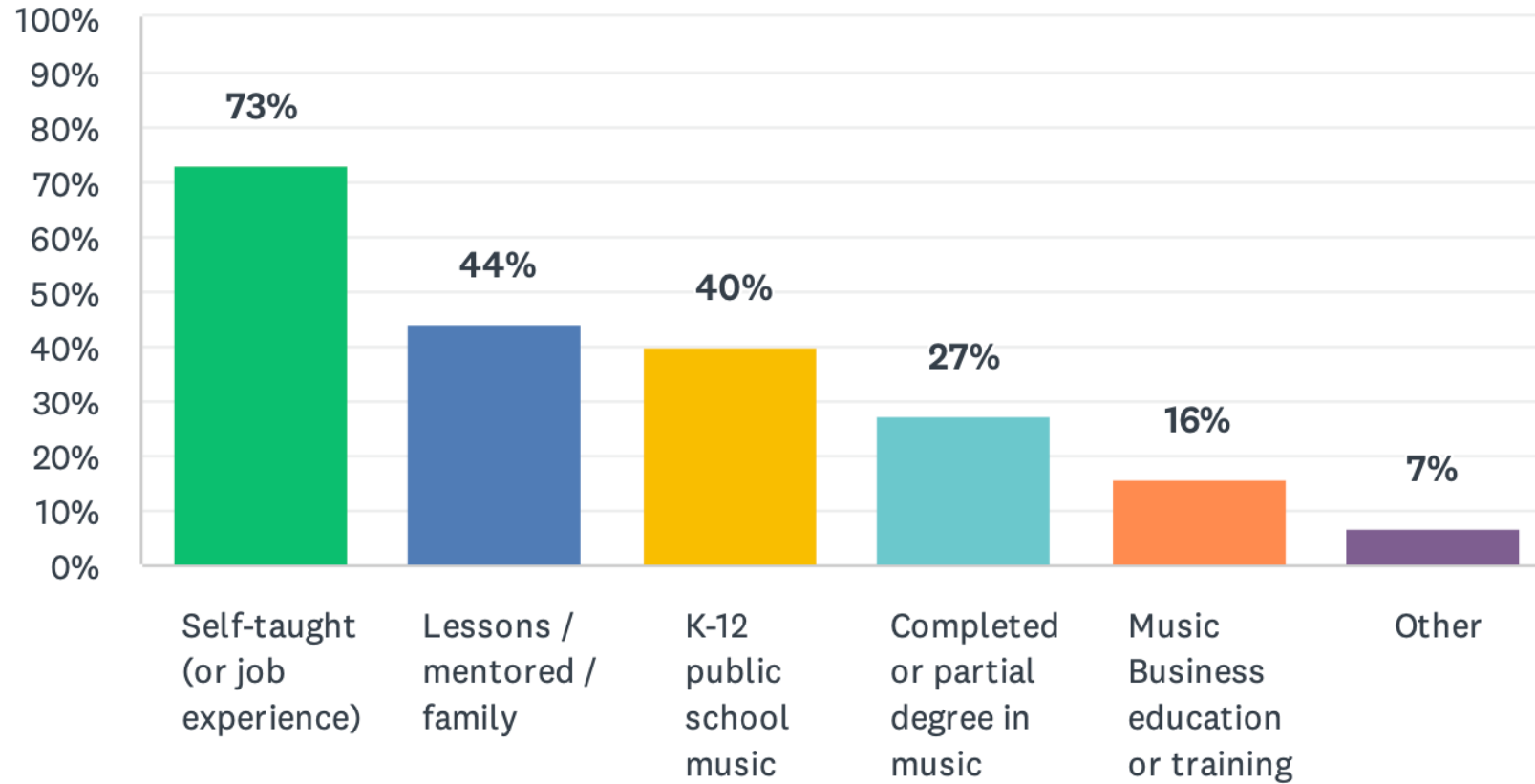


Years Experience in Music

(v. average of 8 other cities)

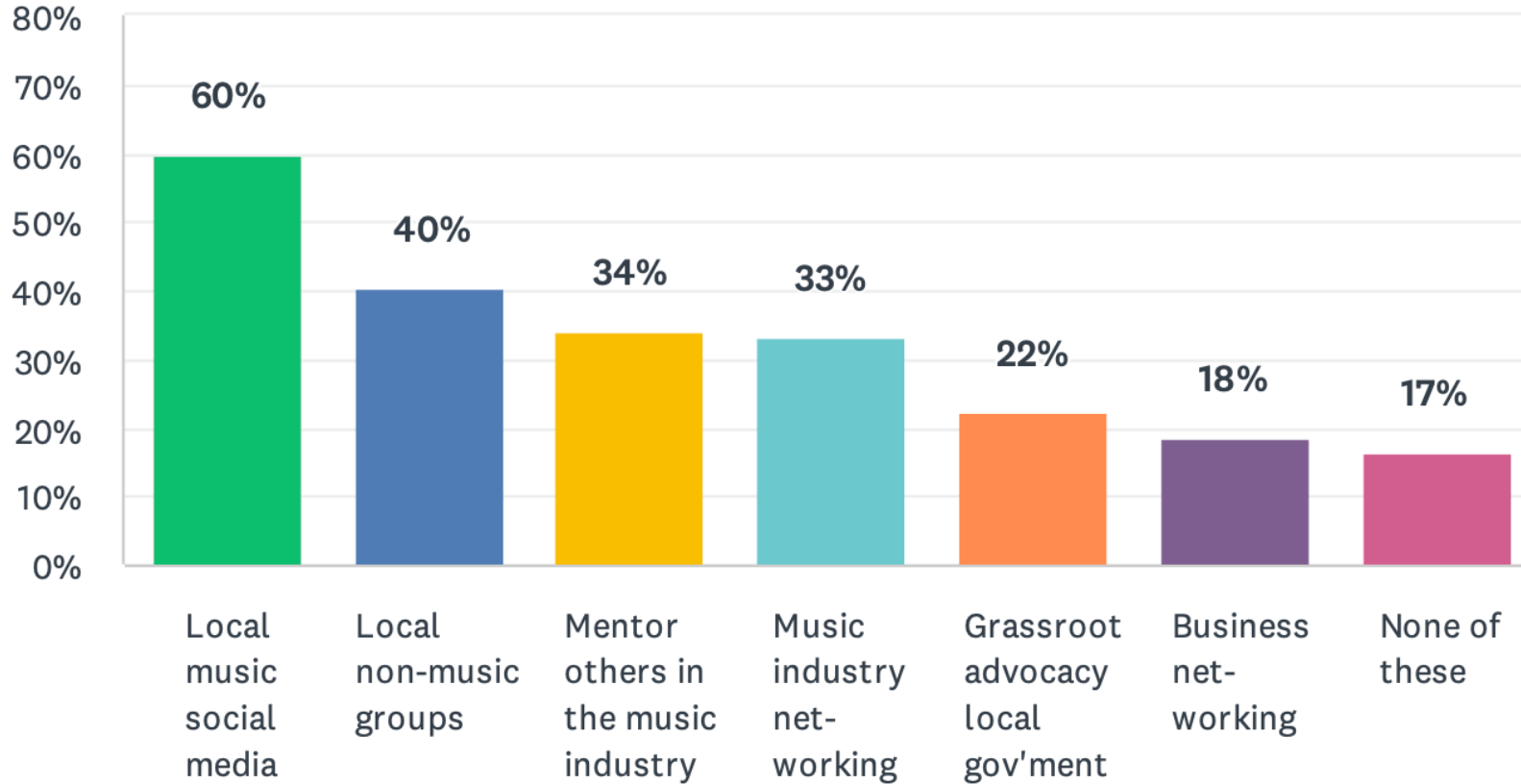


Music Training or Experience



“I am a compilation artist, working in local music only, featuring all original music. As there were no examples to follow, I am self-taught.”

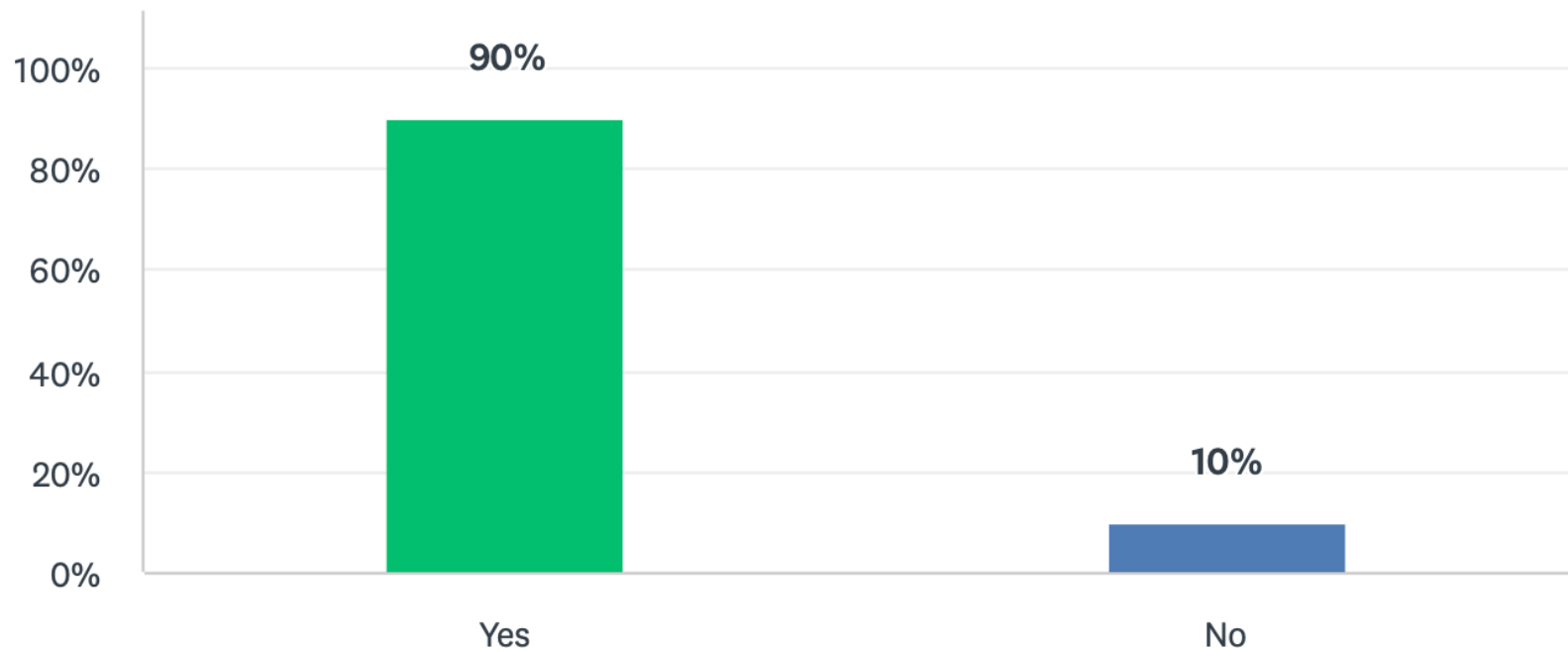
Local Activities



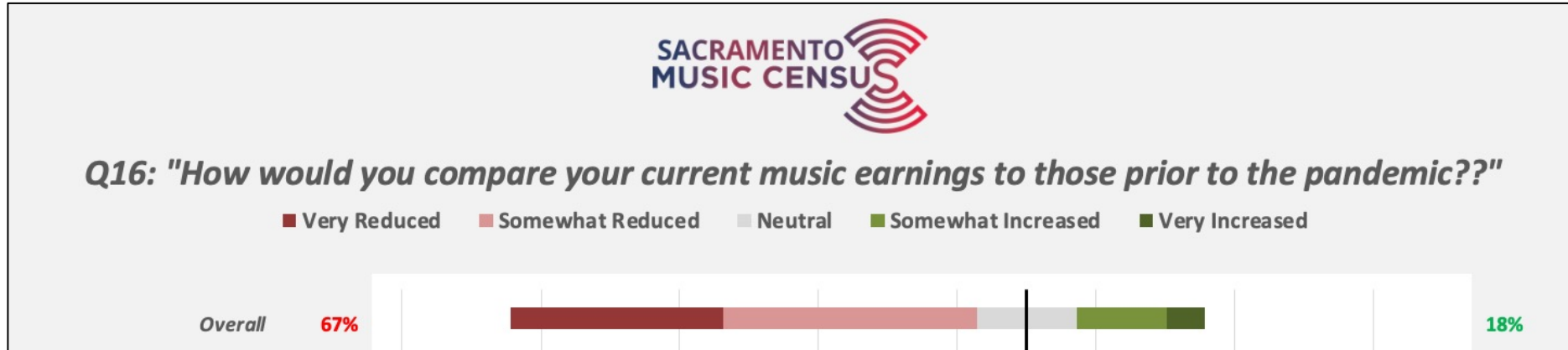
“We have active arts partnerships in the community.”

“Personal friends who are musicians that I met in person, not through social media.”

Worked in Music Industry Prior to Pandemic

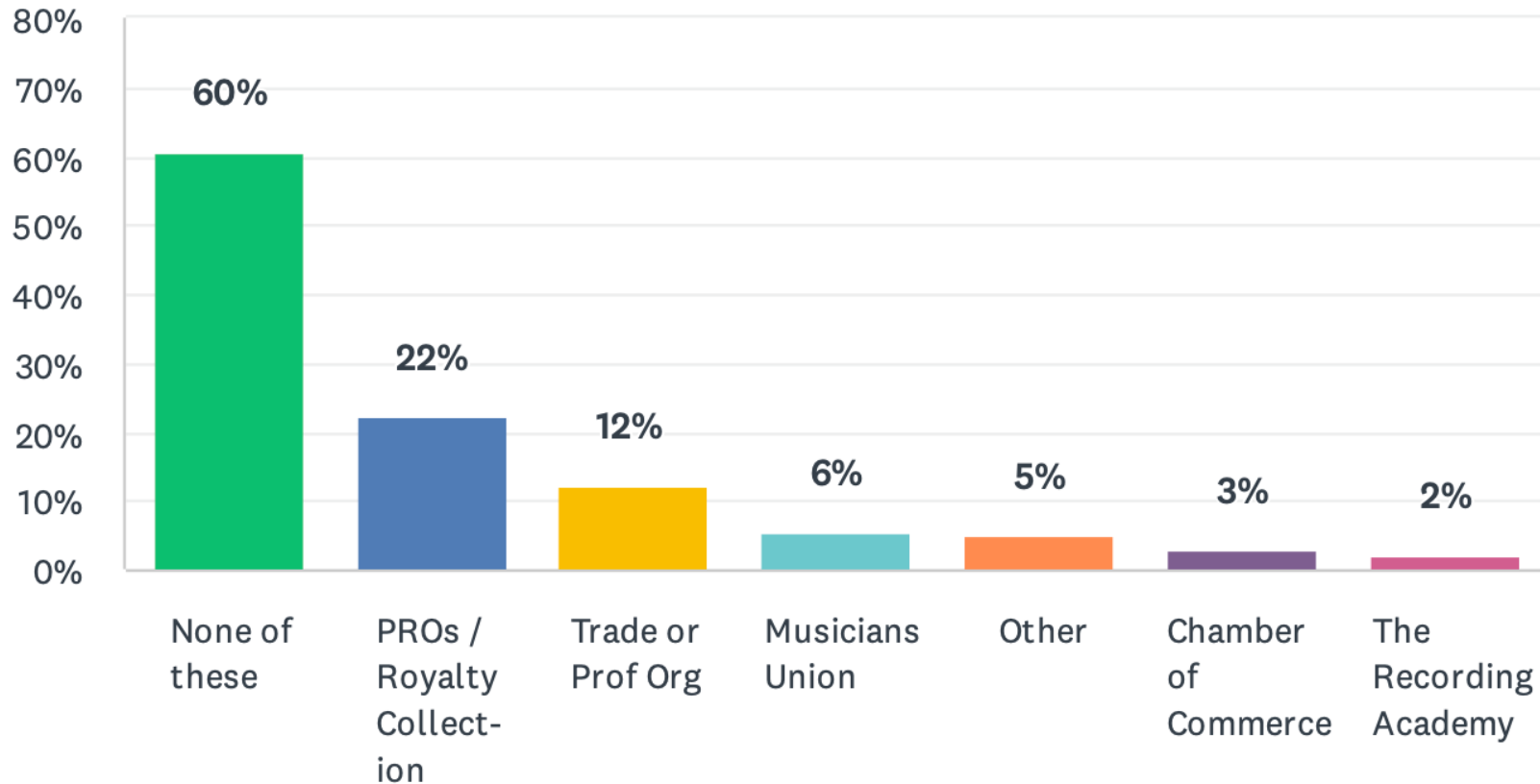


Still Recovering From Pandemic



“67% say earnings are somewhat or very reduced”
“15% say earnings are the same”
“18% say earnings have increased”

Registrations and Memberships

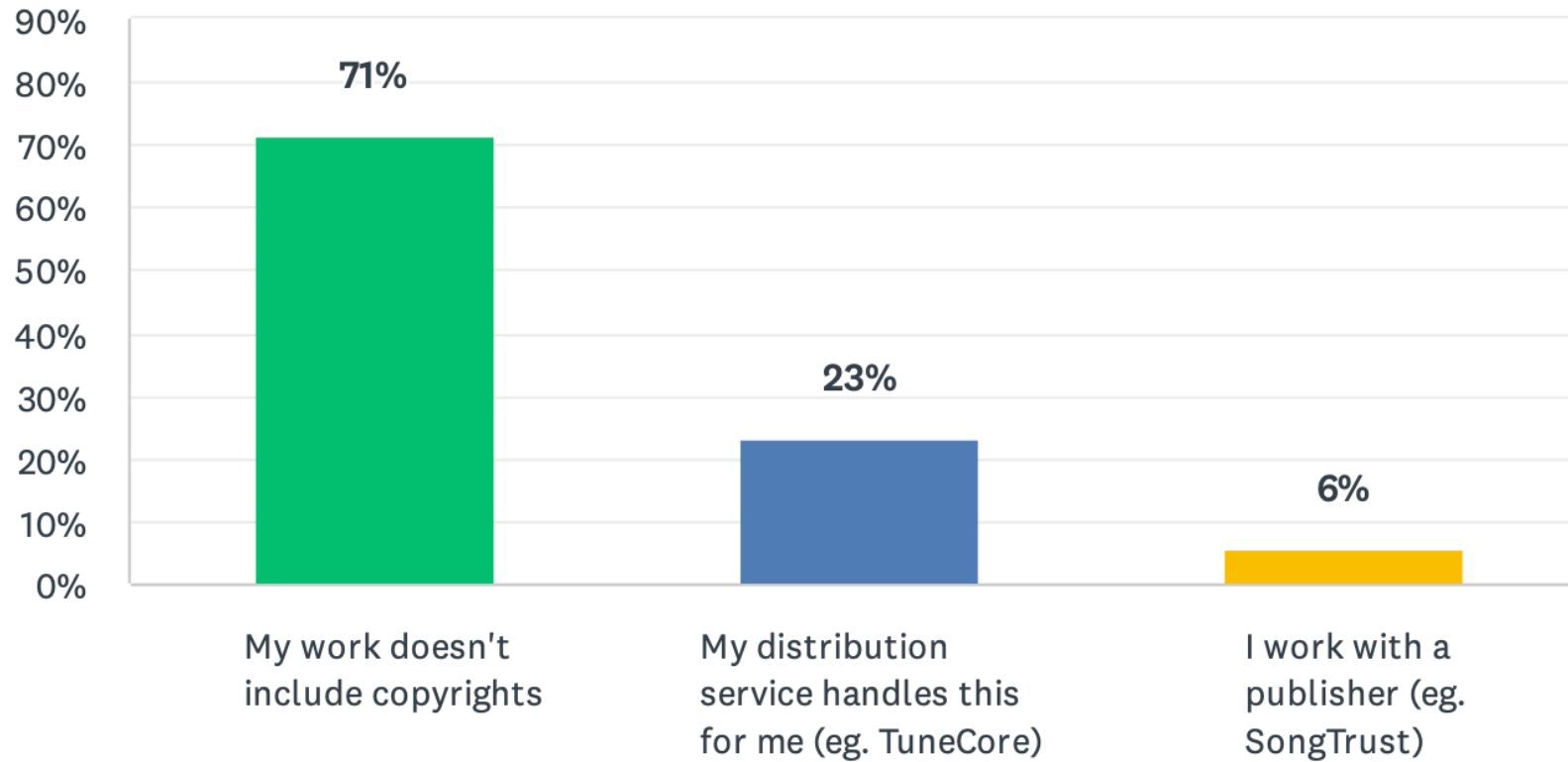


“In process of being a voting member of the GRAMMY’S”

“Not sure”

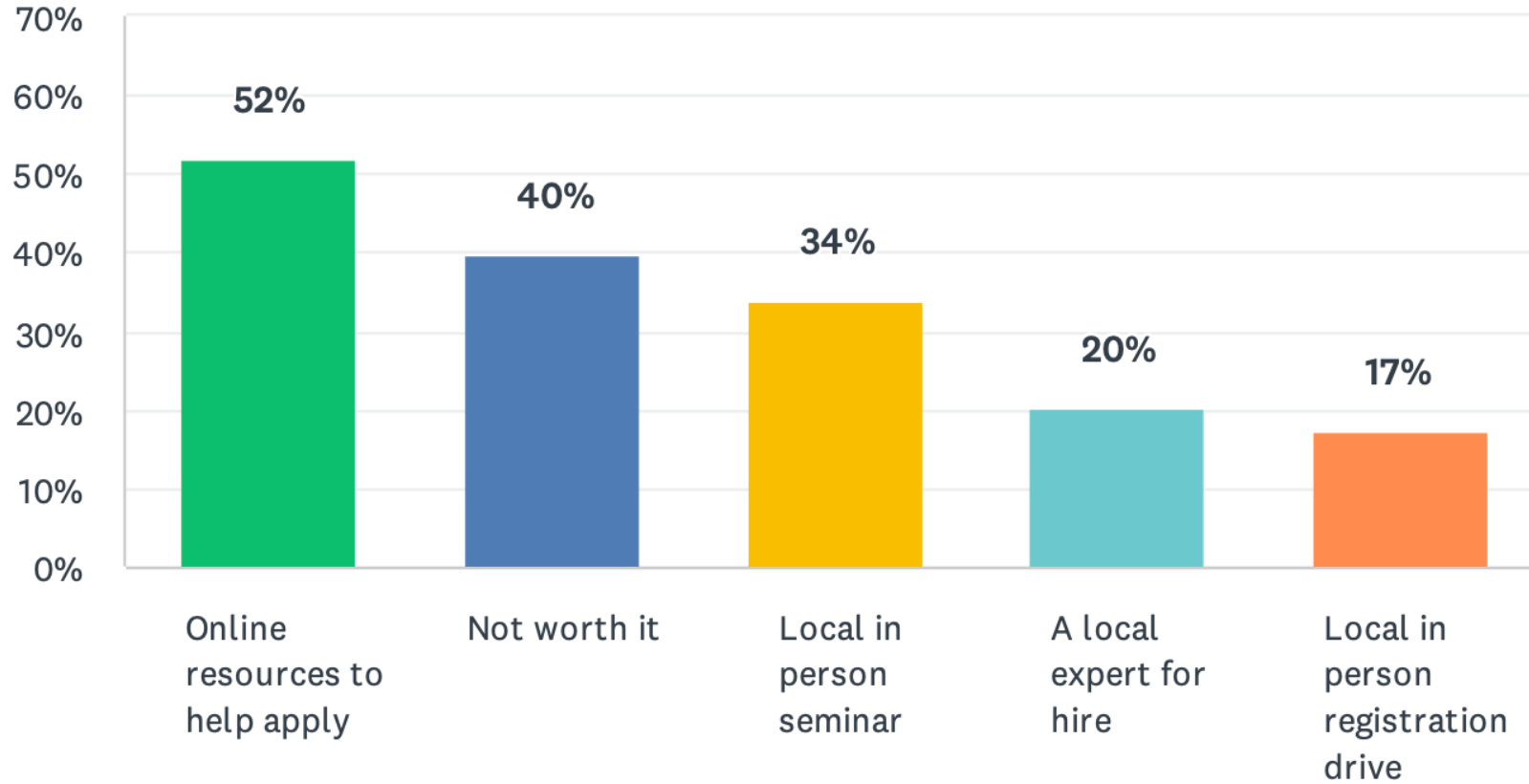
Why Royalty Collection Has Not Been Pursued

(by the subset of respondents who haven't registered for royalty collection)



Suggested Assistance to Register and Collect Royalties

(by the subset of respondents who haven't registered for royalty collection)



“We all need this type of help!!”

“I have no trouble collecting royalties, streaming just provides very little!!”

Resolve to "Stay in Music" v. "Stay in Sacramento"



2022: "Are you planning to continue your professional involvement in music over the next 3 years??"

Very No Somewhat No Neutral Somewhat Yes Very Yes

Overall 1%

87%

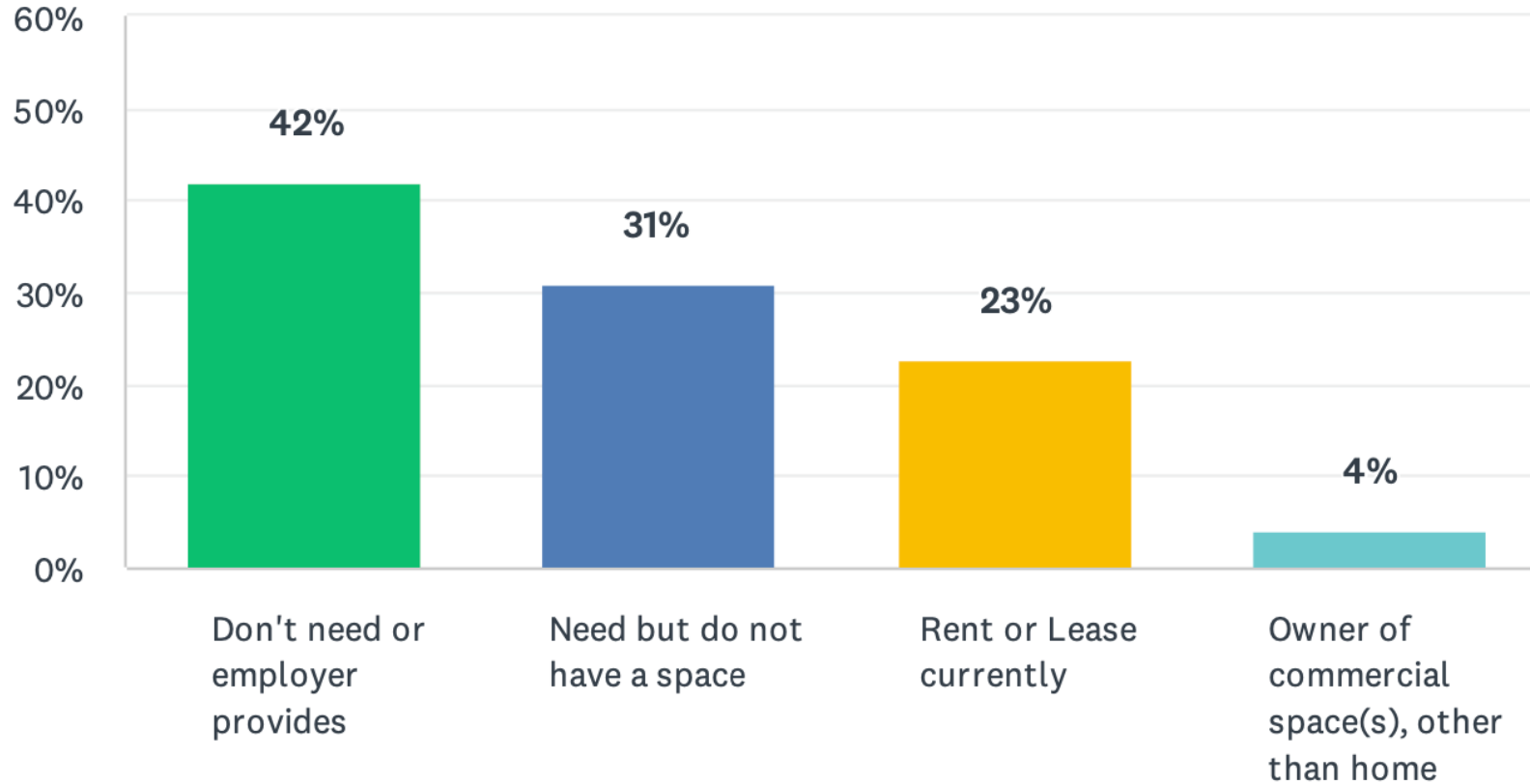
2022: "Are you planning to stay in Sacramento area over the next 3 years??"

Very No Somewhat No Neutral Somewhat Yes Very Yes

Overall 5%

78%

Separate Workspace Needs

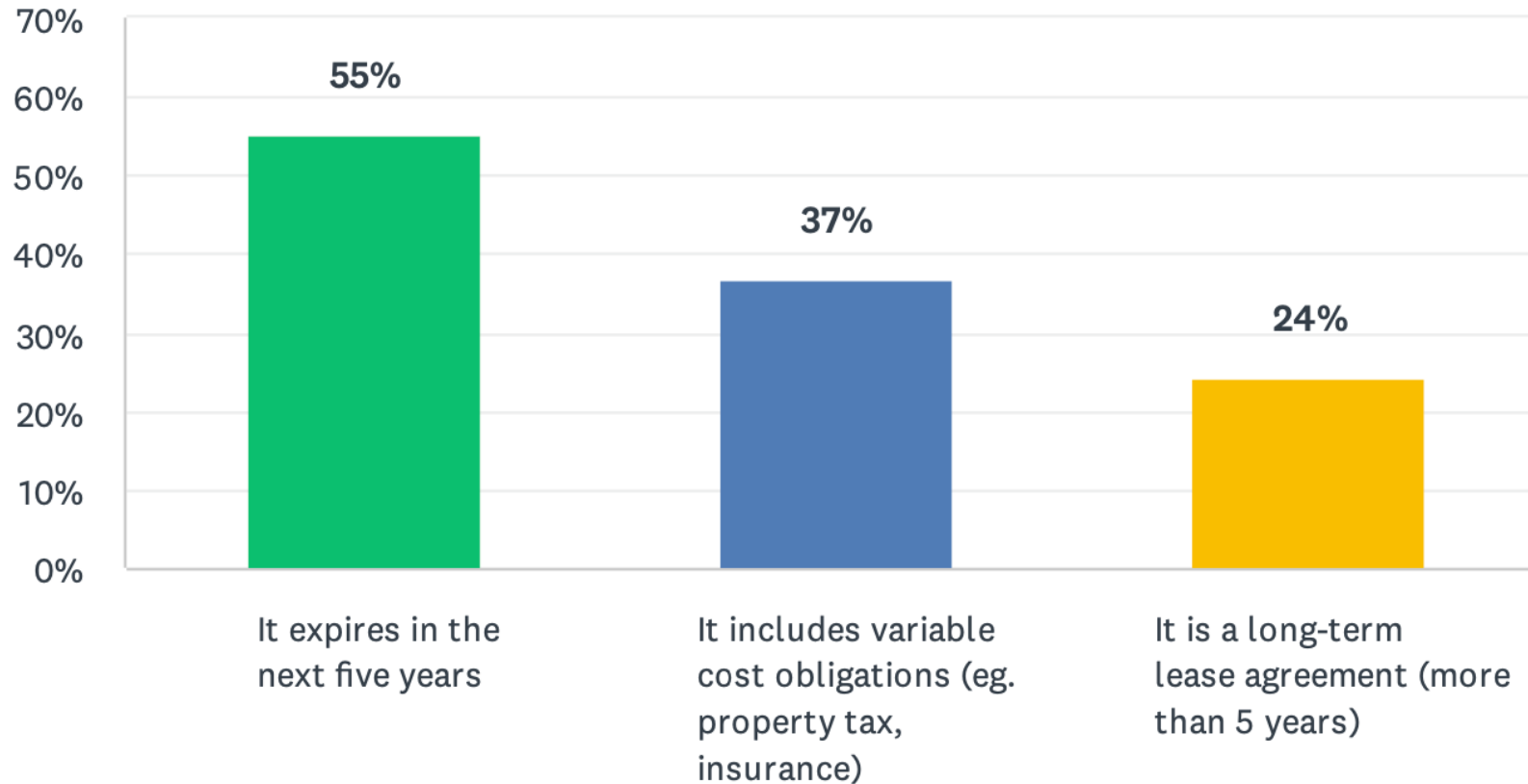


“I mostly work out of my home or go to venue to perform.”

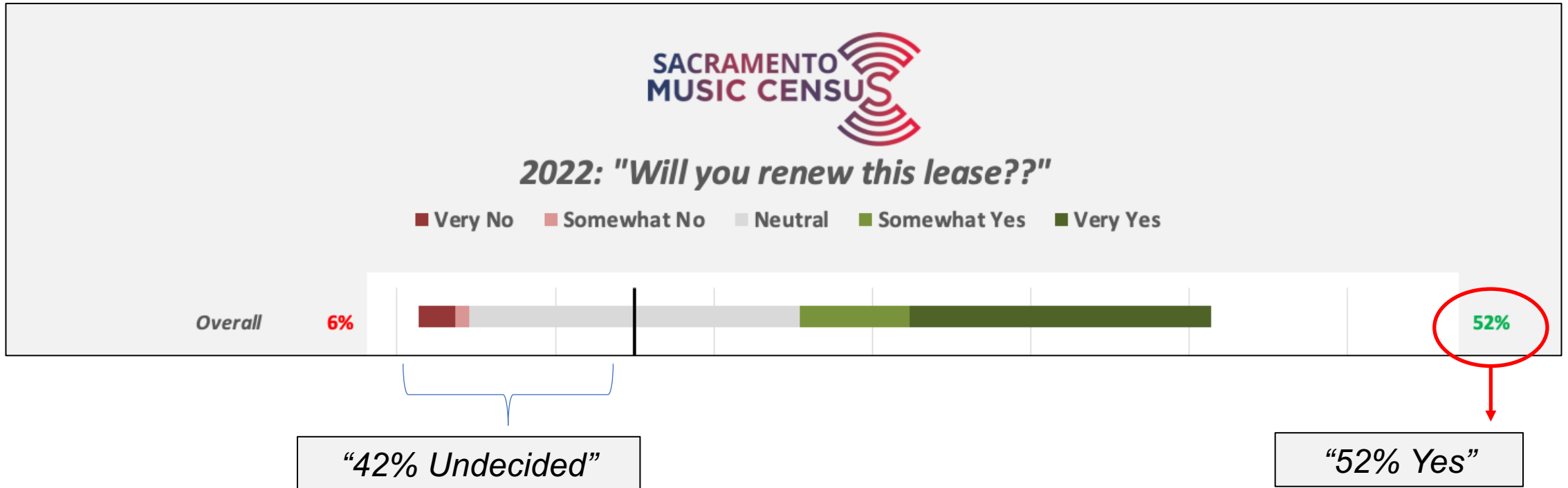
“I rent on a per day basis. Rent the space for a day, pay for the day.”

“Looking for a multi-functional work space for music and other creative endeavors.”

Conditions of Current Lease Agreement



Half of Current Lease Holders Plan to Renew

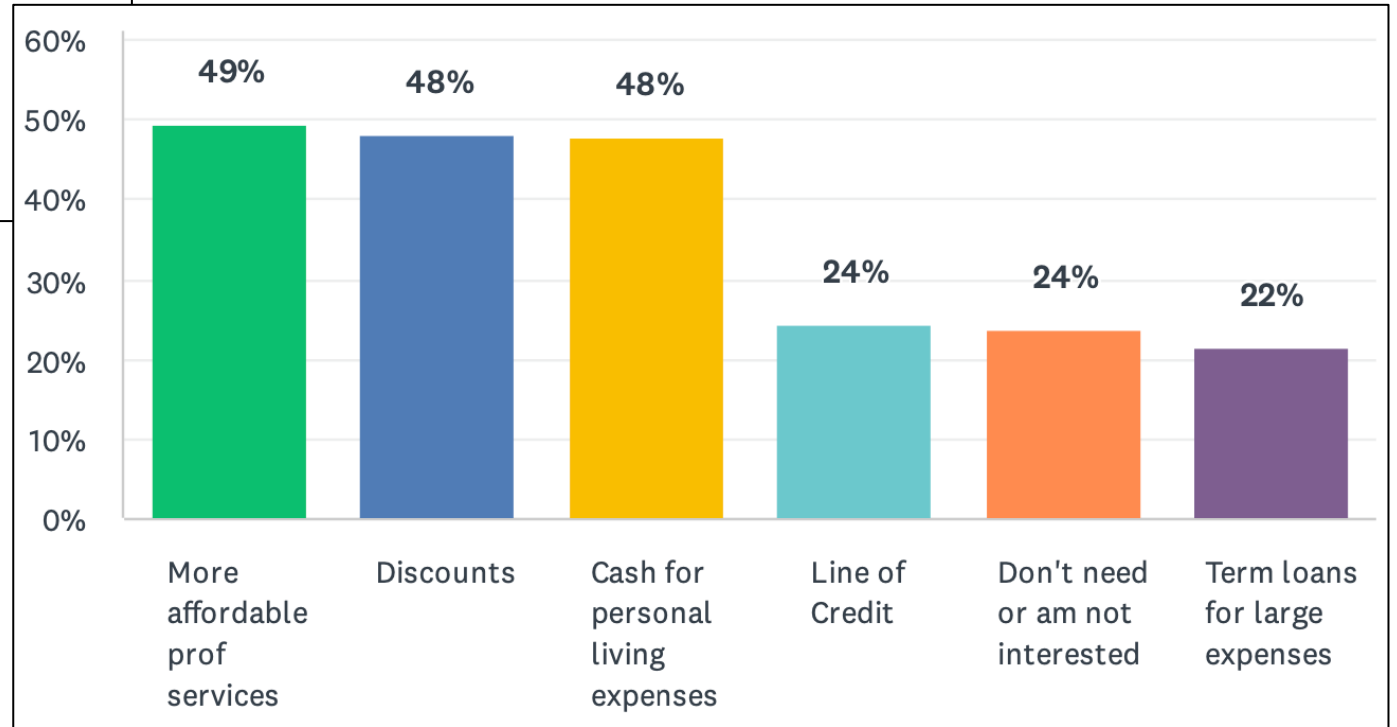


What Financing or Resources Would Help The Most

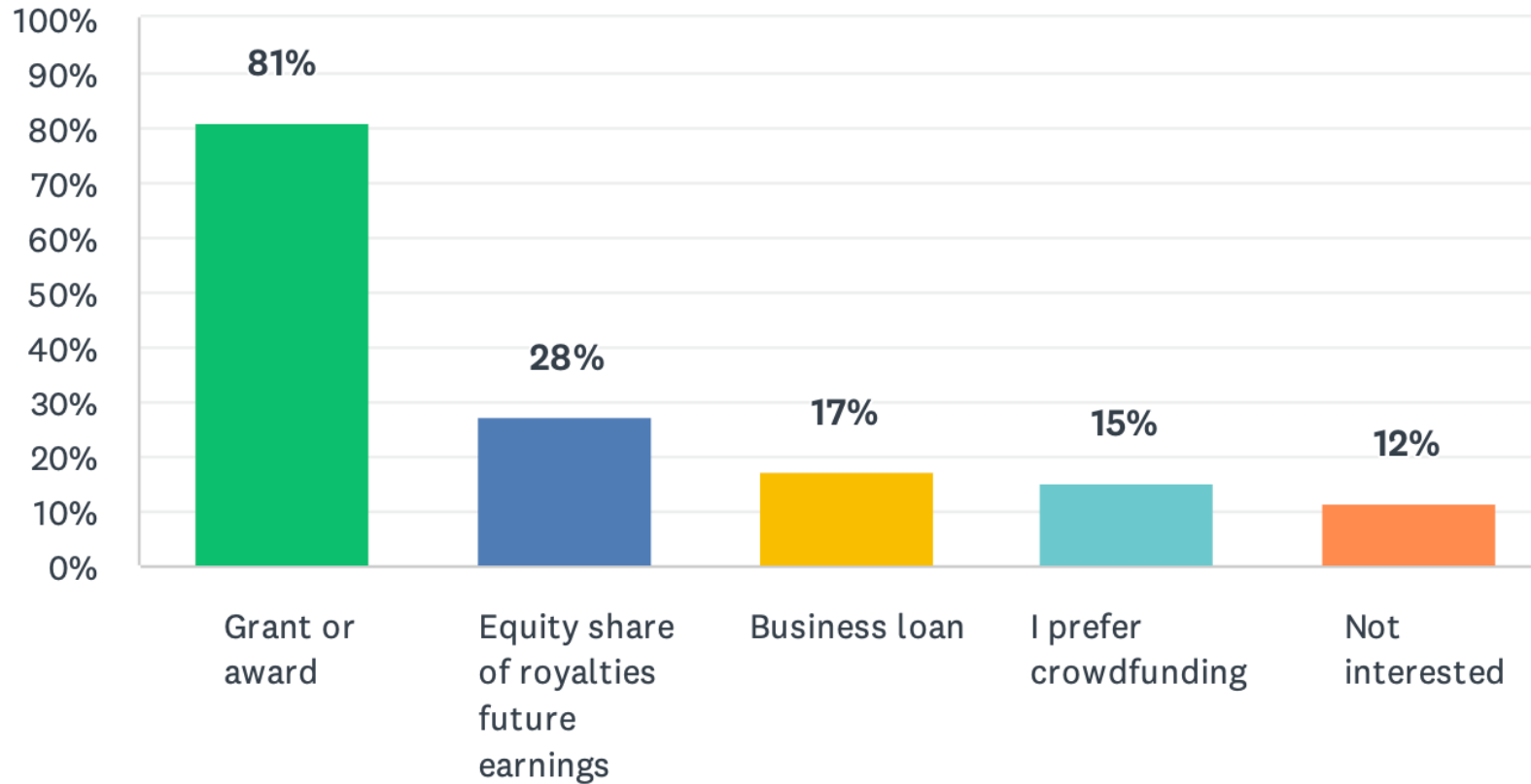
What financing or resources would help your music business the most?

Select all that apply 0

- Term loans** for large expenses (eg. recording projects, gear, vehicle)
- Line of Credit** (eg. to float expenses, instead of a credit card)
- Discounts** (for regular expenses like parking, workspace rent, etc.)
- More **affordable** pro services (eg. marketing, legal, acc'ting)
- Cash** to help with my living expenses
- I don't need this or am not interested

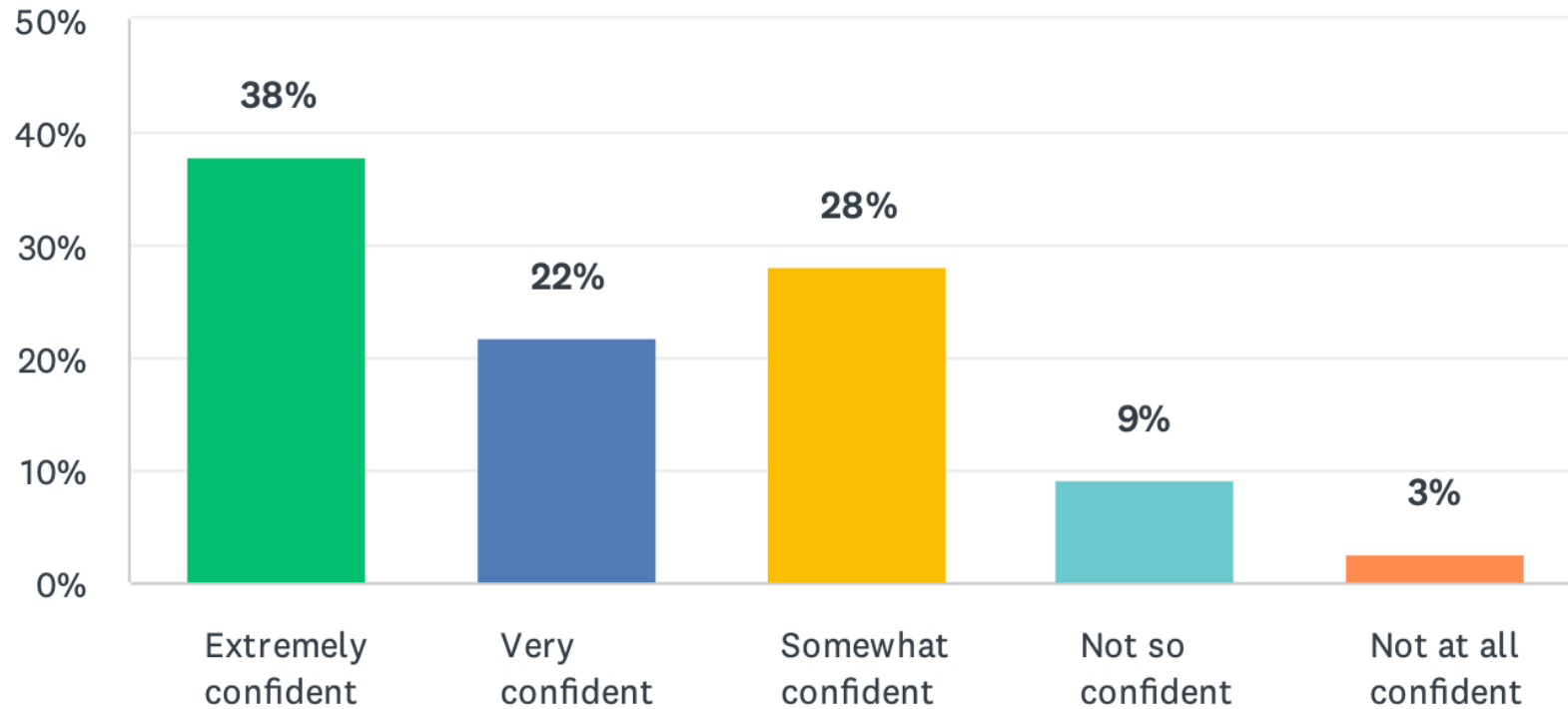


Desired Types of New Funding

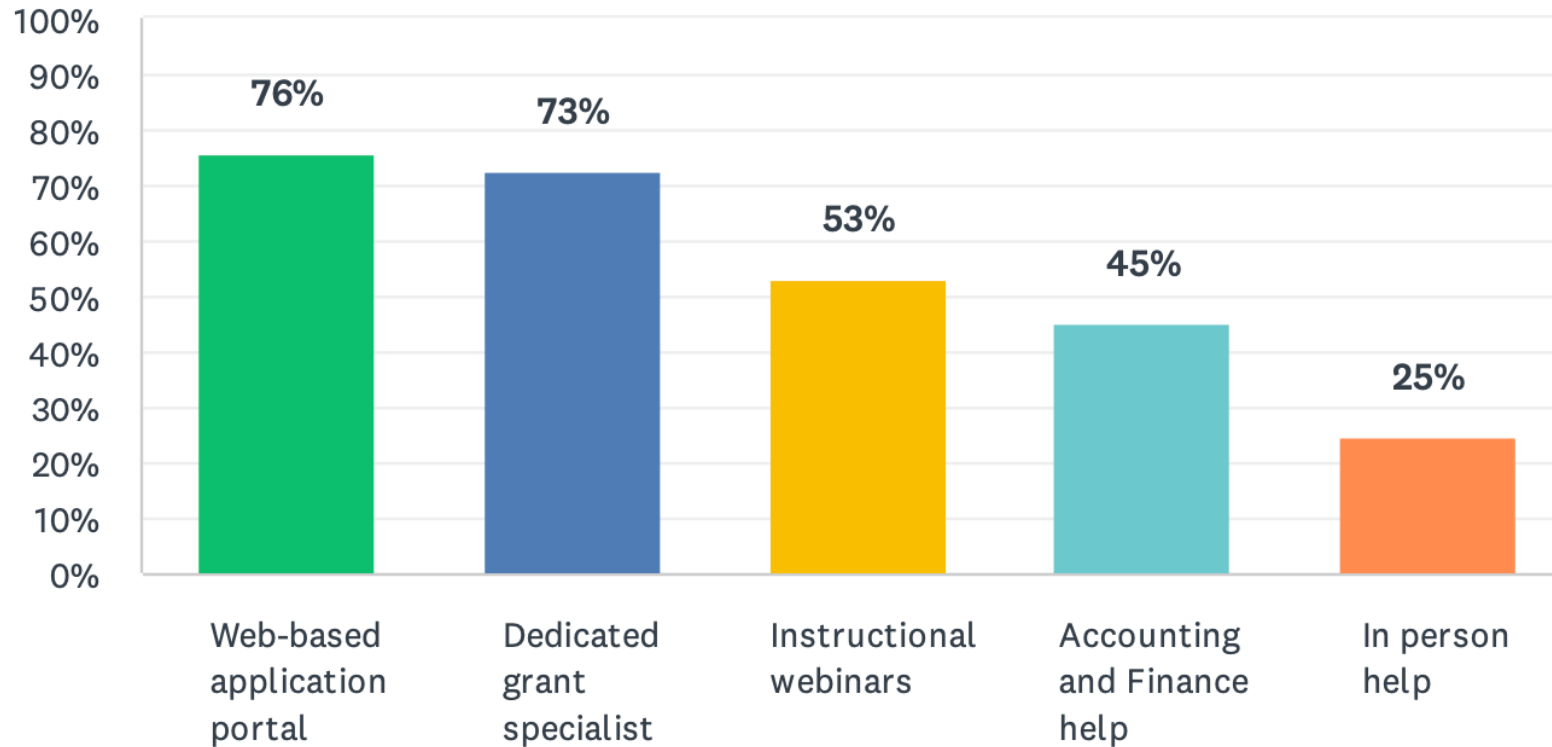


“We make most our money from live performances, most money goes into a band fund to be used for future projects.”

Confidence in Skills to Navigate Grant Process

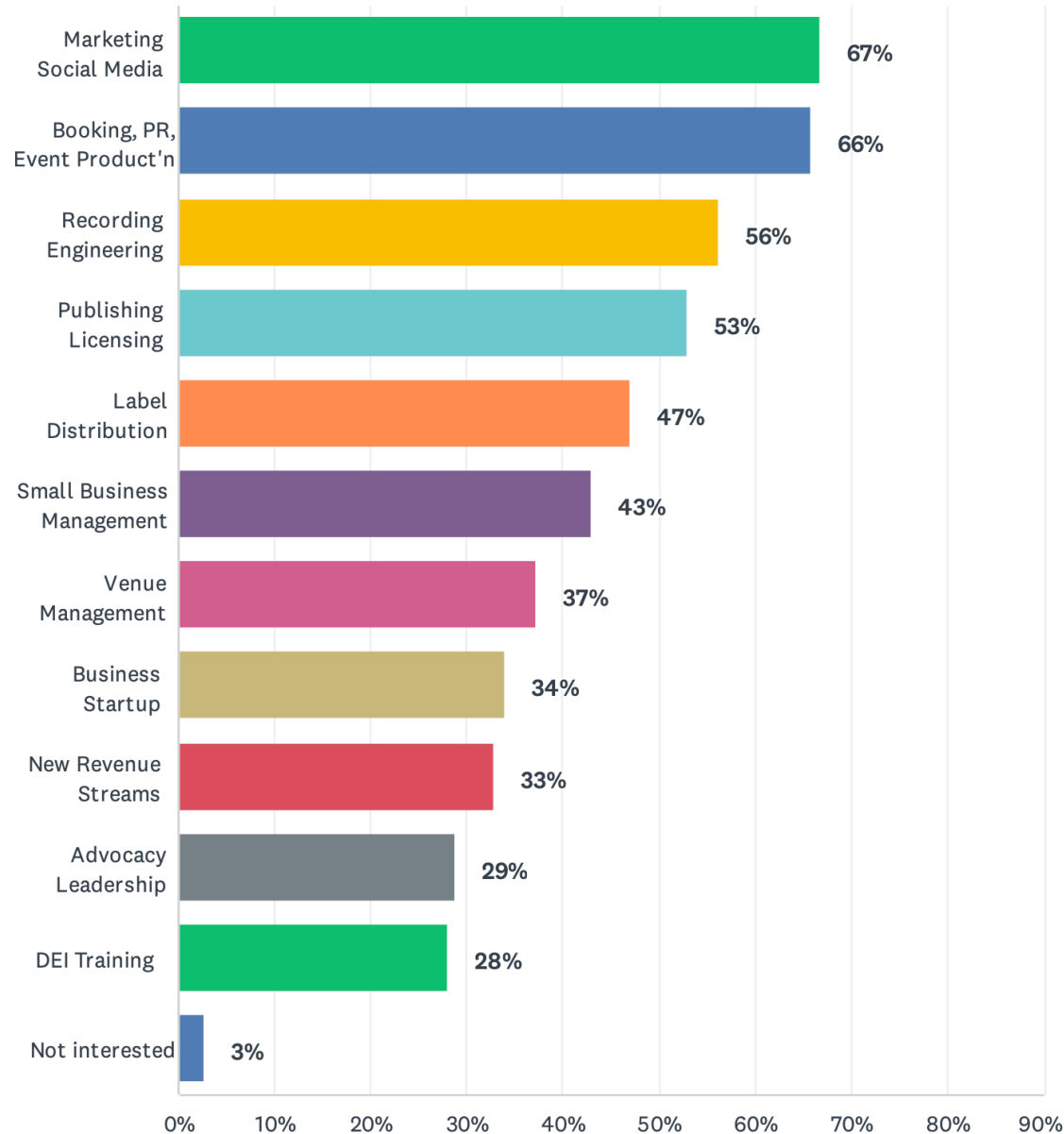


Suggested Grant Assistance (applying and compliance)



“Having a part-time professional grant writer would really propel us.”

Suggested Training Topics

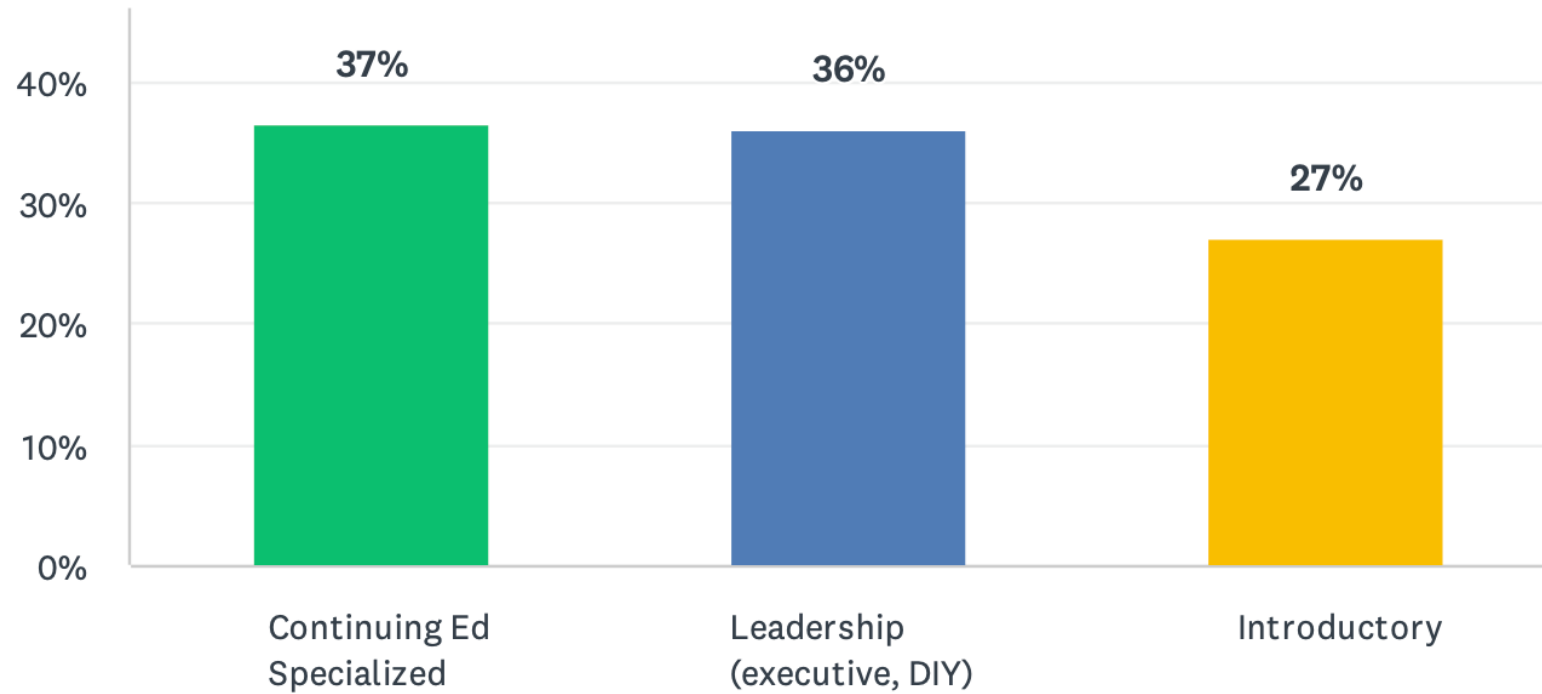


“Interested primarily with city government becoming more accessible to the creative community to assist in building culture and an industry.”

“Don't need training, need the city to be more friendly to local musicians/arts/bands/venues. Provide grants for local venues.”

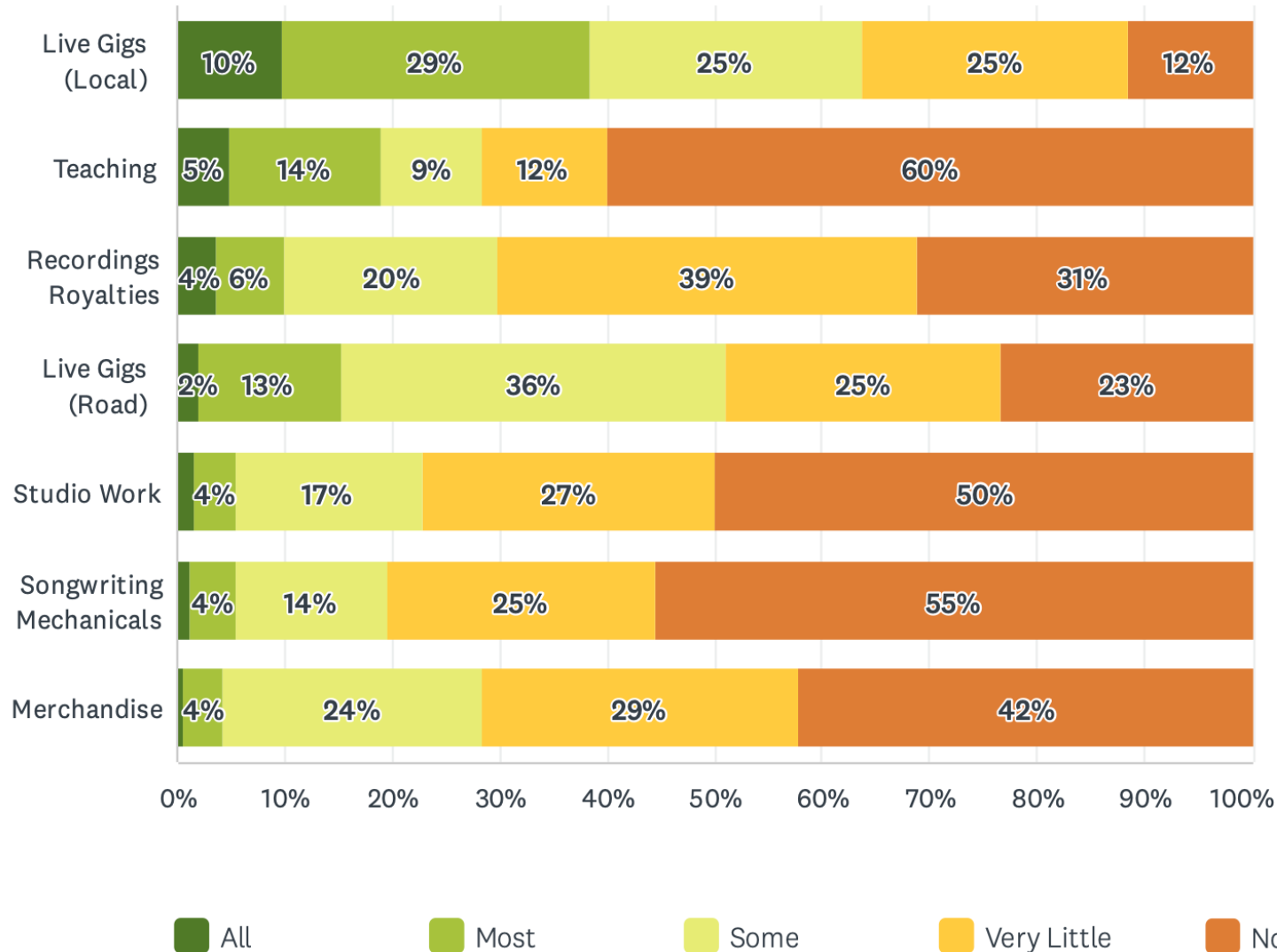
“Our community is loaded with talent who just need a stage and some way to get paid. Artists usually need help with the business end: marketing and promotion. They usually have the artistic part sufficiently developed already.”

Suggested Training Levels



Questions for Creatives Only

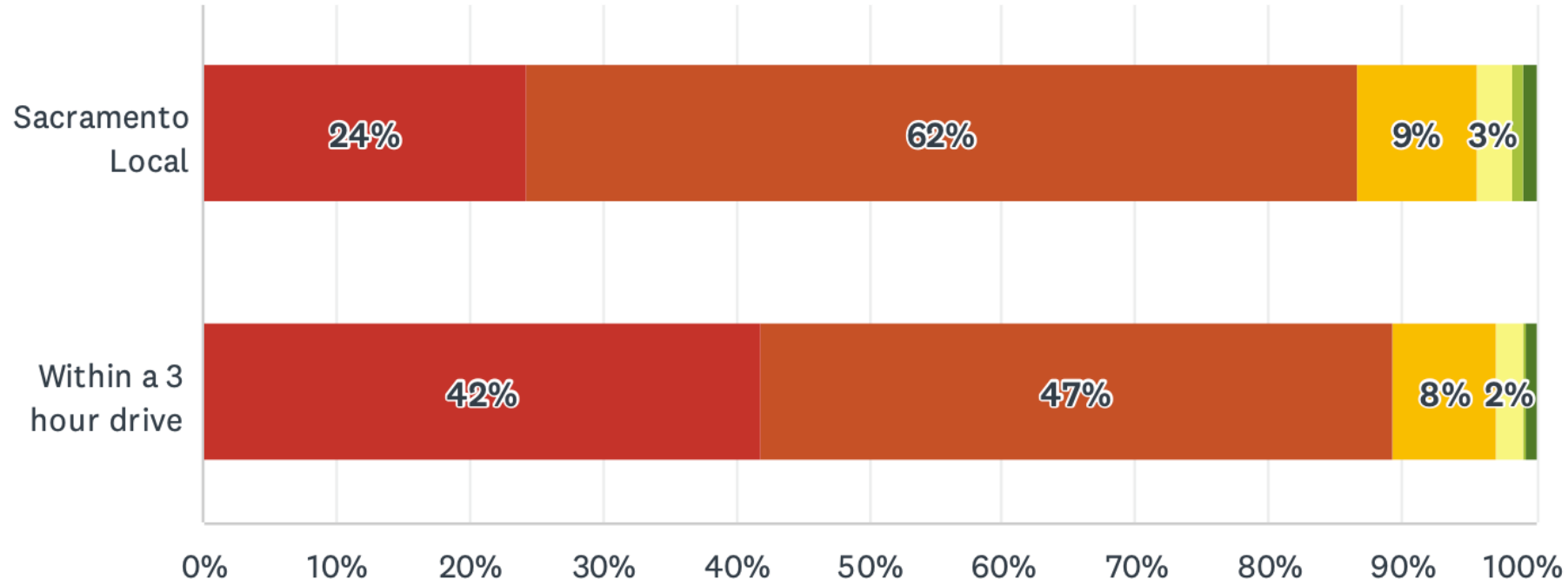
Sources of Current Music Income



“Lol. Music income?”

“Like most mid level working musicians. without the opportunity to teach the next generation, we wouldn’t be able to make a living at all playing music. But it shouldn’t be that way.”

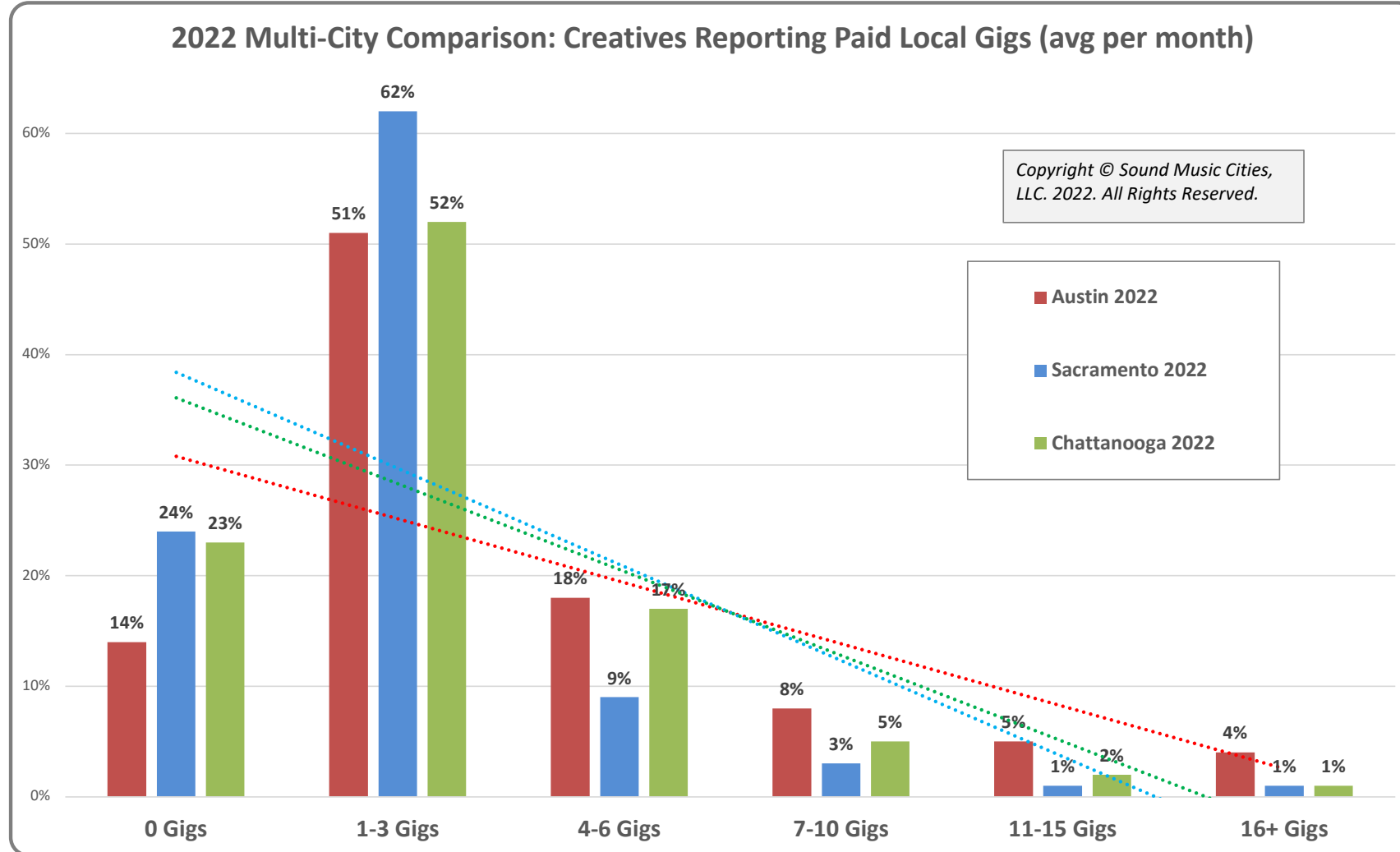
Very Few Paid Gigs Per Month



86% have less than 4 local gigs a month

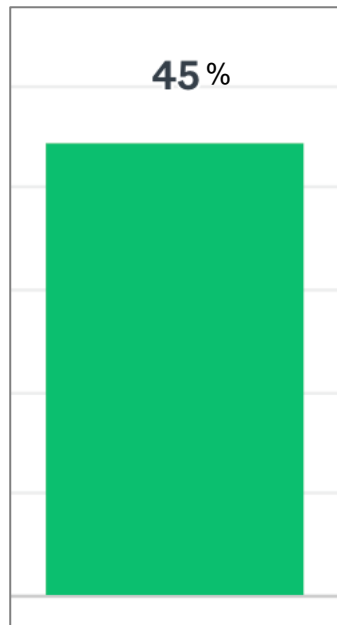


Comparison of Gig Frequency



Guarantees and Why Percentage Deals Are Accepted

Gigs paying a base guarantee



“I accept essentially every gig. I need to play as often as humanly possible to build and maintain excellence. There is essentially no money in music at this point in time so my true goal is absolute excellence.”

“Honestly, I try to avoid shows in which the pay is depending on how many people I can bring. It’s stressful as all heck.”

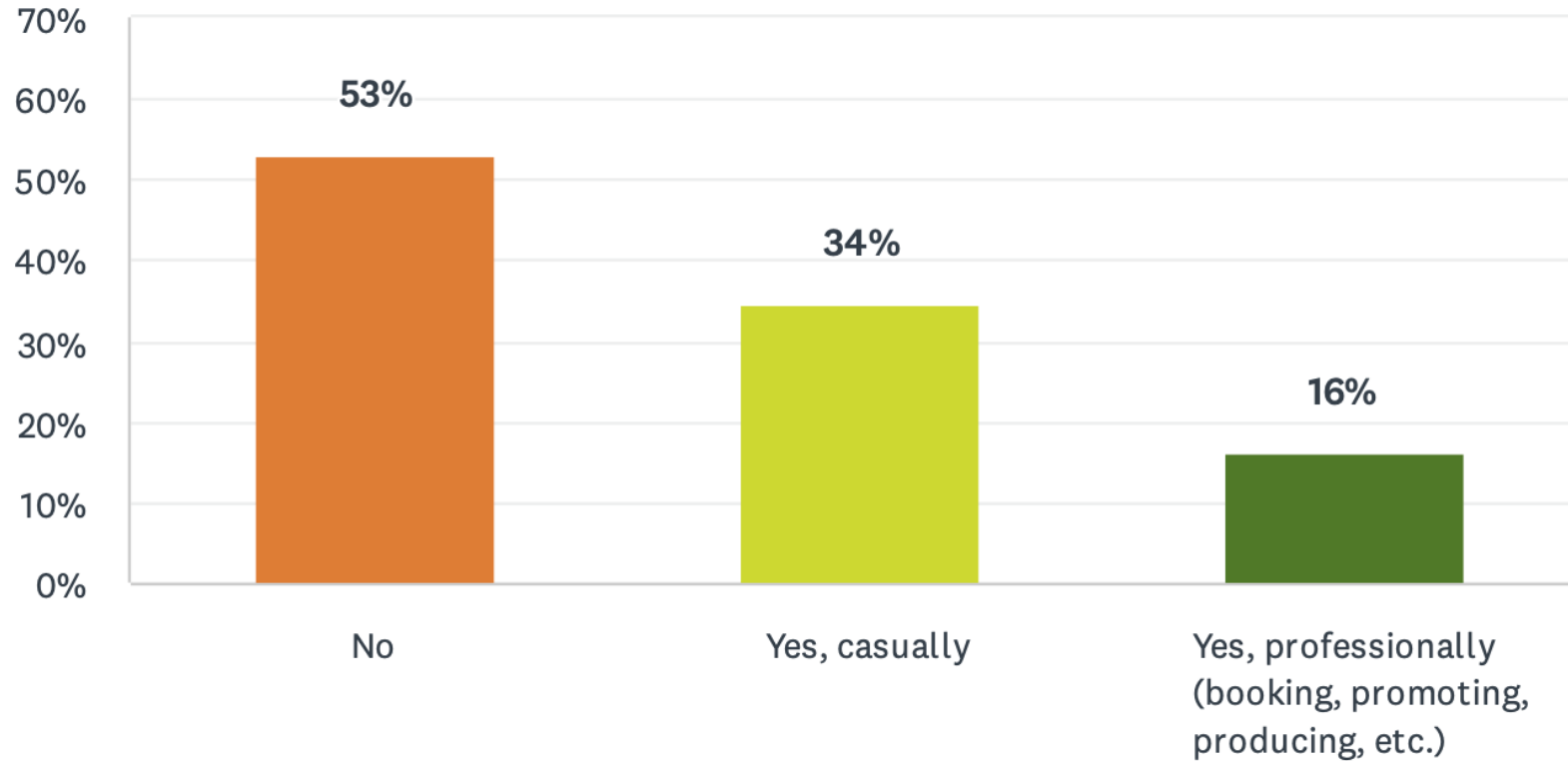
“I do not accept purely percentage gigs. It creates no incentive for the business owner to advertise, and gives owners reason to underpay bands for the business's lack of foot traffic.”

“There are so few venues to work with you kind of have to accept what you can get sometimes.”

“We do this at venues that are small, locally that serve the community, so splitting the pot with the house serves a larger community purpose.”

“I’m desperate for money and exposure. Sometimes I even play for free if the venue is large and there’s a chance for tips.”

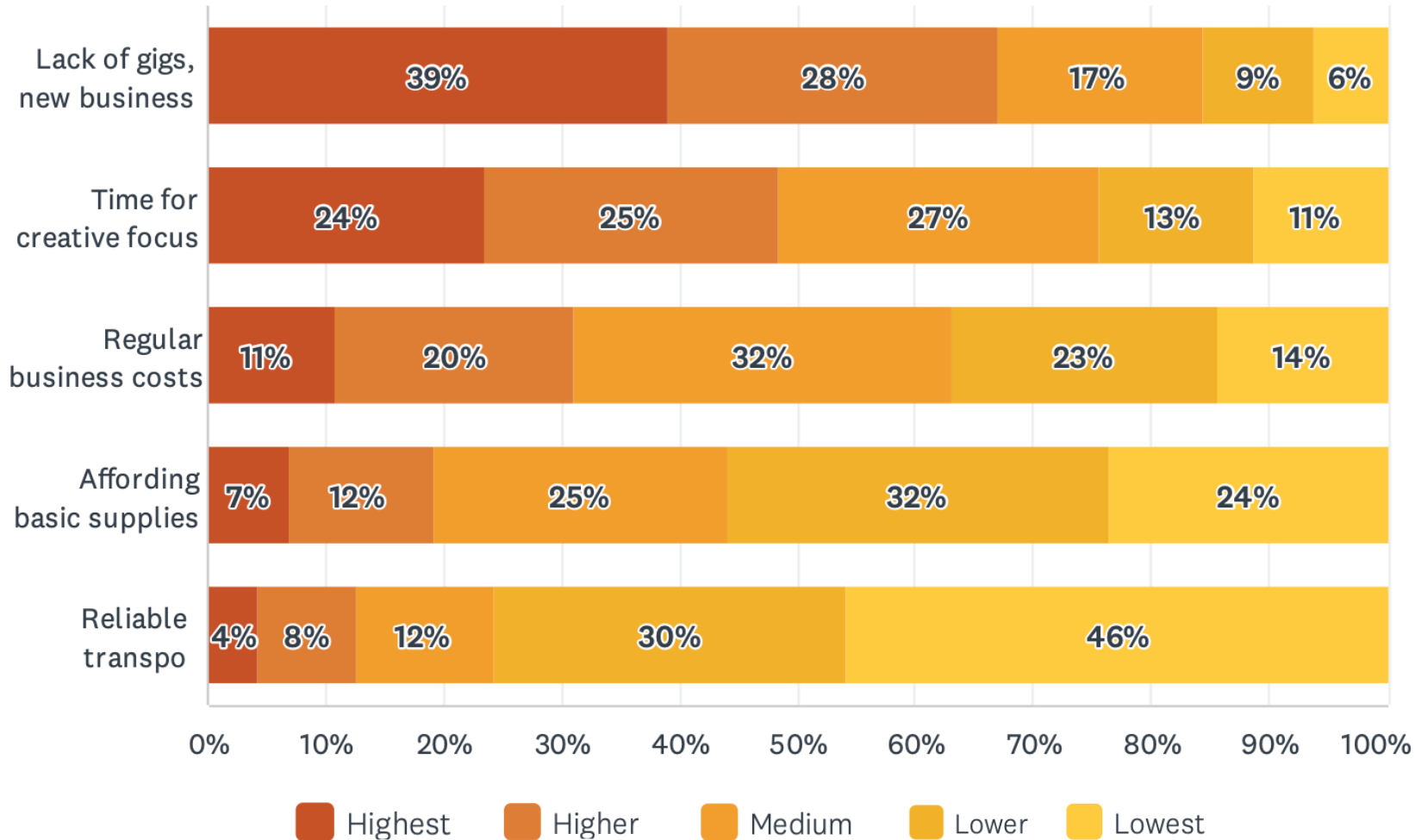
Work as a Gig Presenter/Promoter as Well



Annual Spending by Category, % Local



Ranking of Concerns



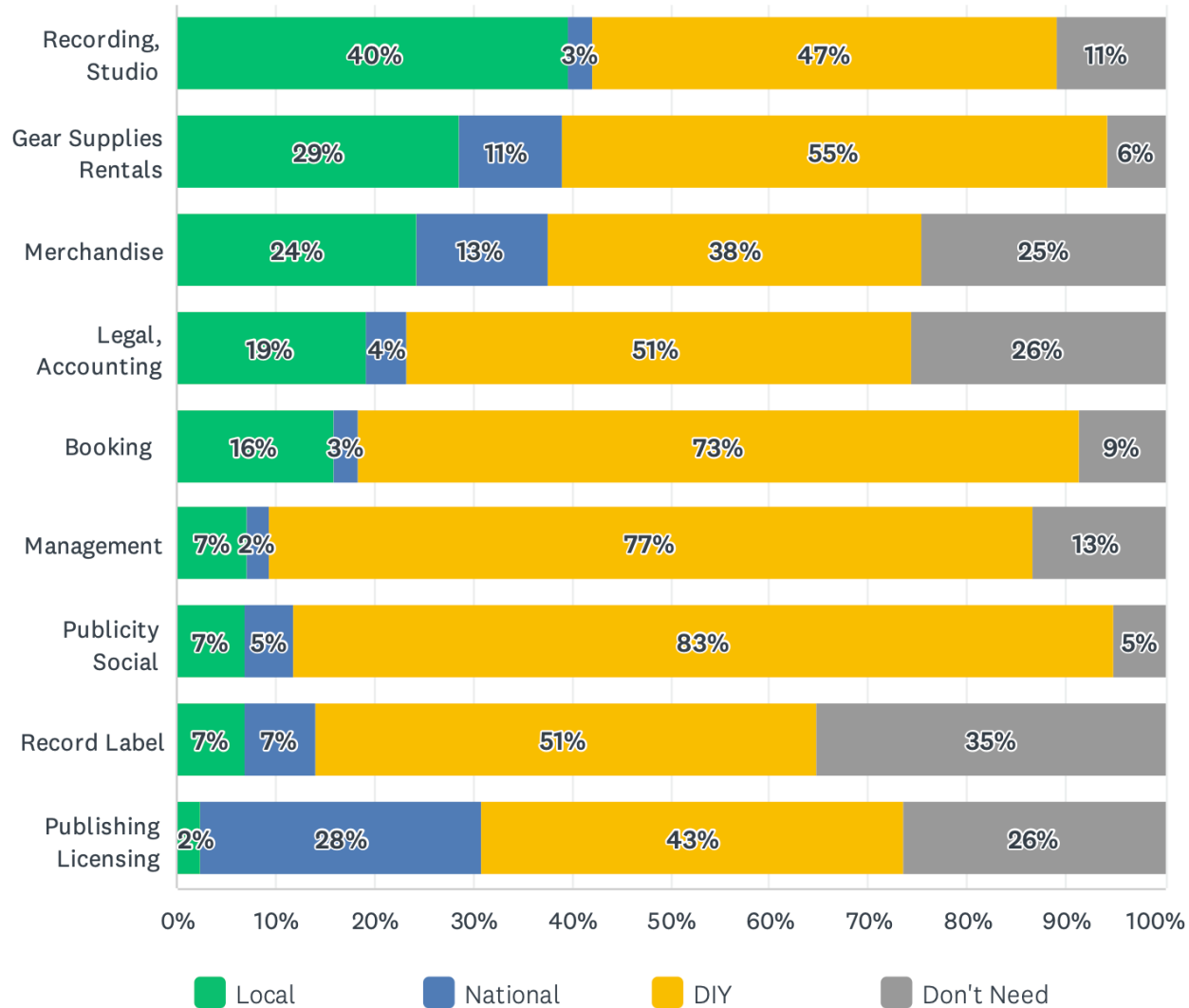
“Lack of public interest and support for live performance.”

“Reliance on volunteers to do what should be paid work.”

“Cost of touring is increasingly more than income from touring.”

“There is a severe lack of small venues that cater to the local community. Most music venues cater to touring bands.”

Where Creatives Go For Music Industry Services



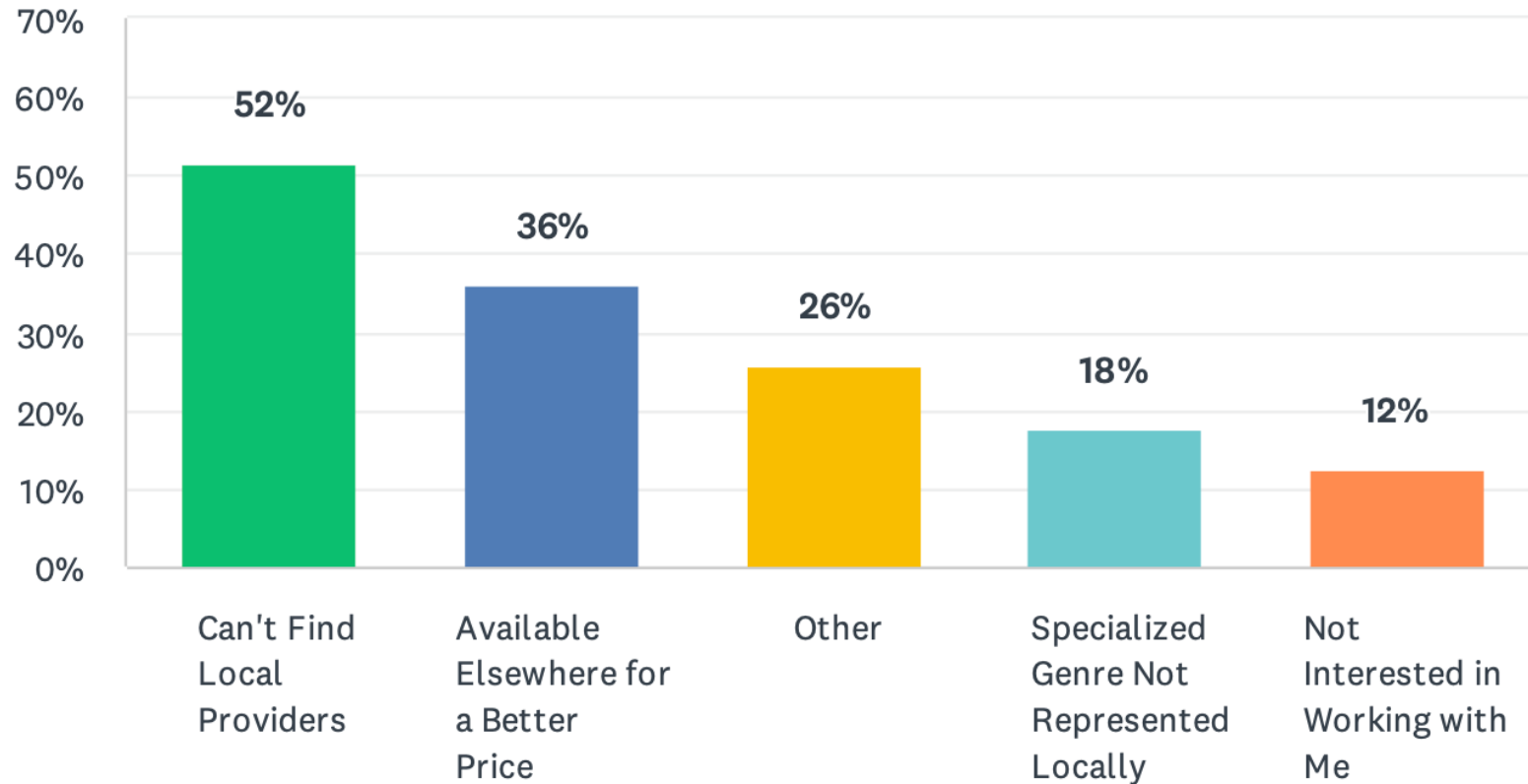
Top Local Service: Recording Studios (40%)

Top Do It Yourself (DIY) Category: : Publicity/Social Media (83%)

Top "Don't Need": Record Label (35%)

Top National Service: Publishing/Licensing (28%)

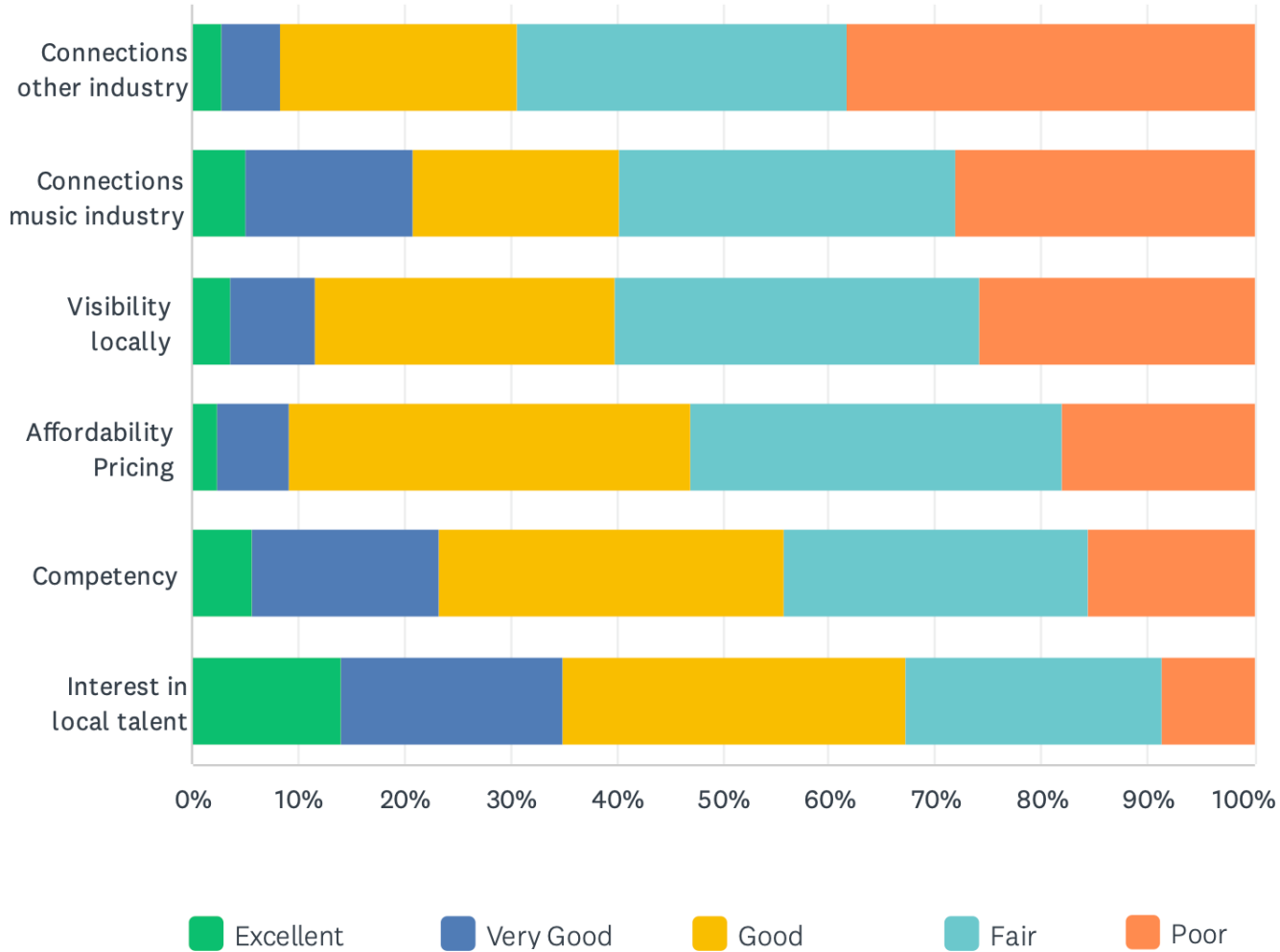
Reasons Local Services Might Not Be Hired



“Happy to work with local providers. Label/management a different story for an Artist, those things usually based in LA as that’s where bulk of music industry relationships are.”

“The local providers are not active on the internet and are therefore extremely difficult to find and work with.”

Assessment of Local Services Strengths/ Weaknesses



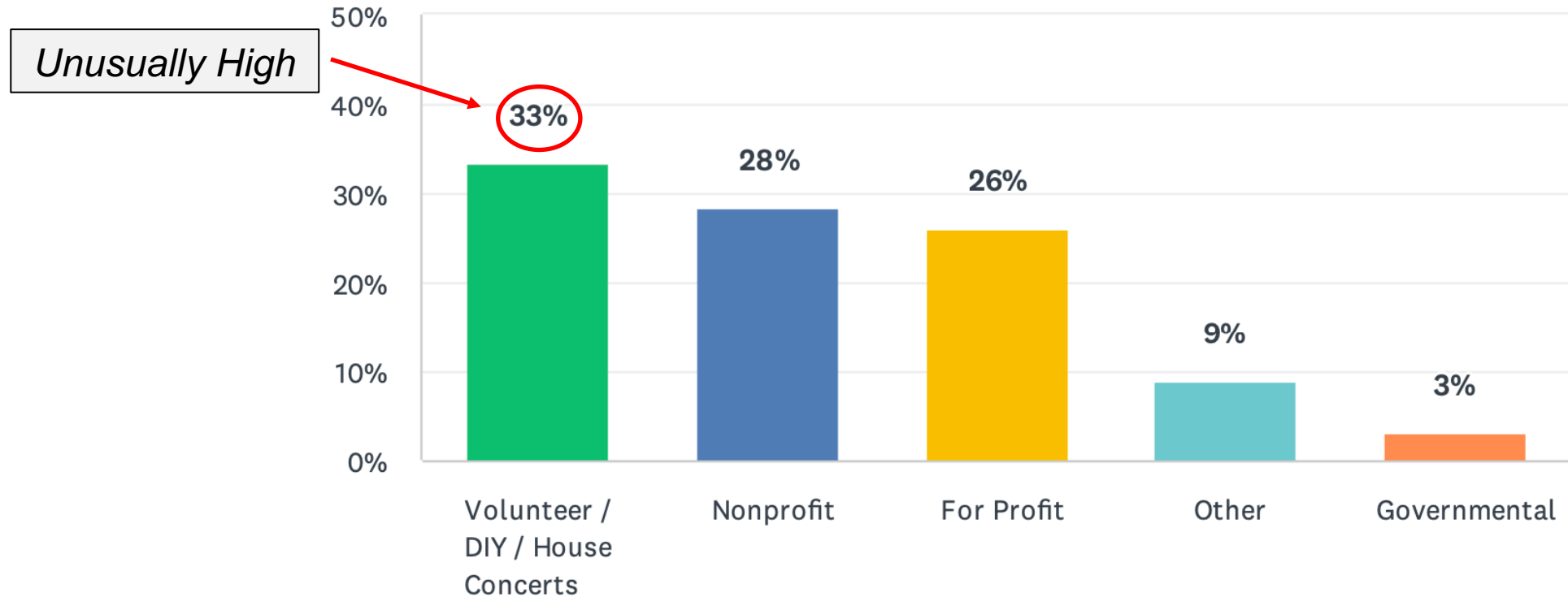
“I feel we have a lot of what we need locally to be successful but there is just a huge disconnect.”

“There is NO hub (not counting sites like gigmasters etc) for local music providers, studios, networking events, established musician-producers who work with higher level artists.”

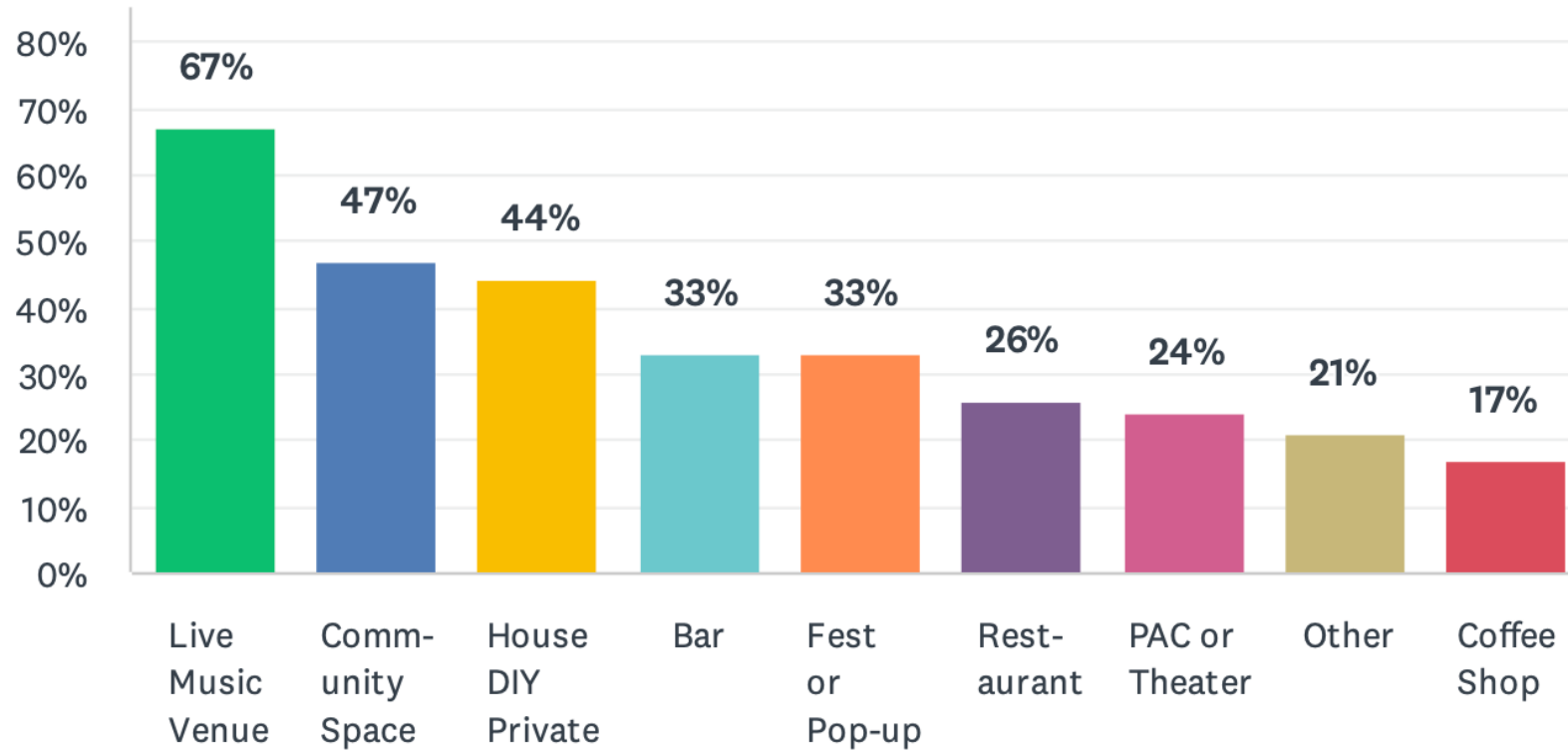
“I would love to work with more local musicians however, people cannot afford services from me that my level of expertise/overhead costs can provide.”

Questions for Venues/Presenters Only

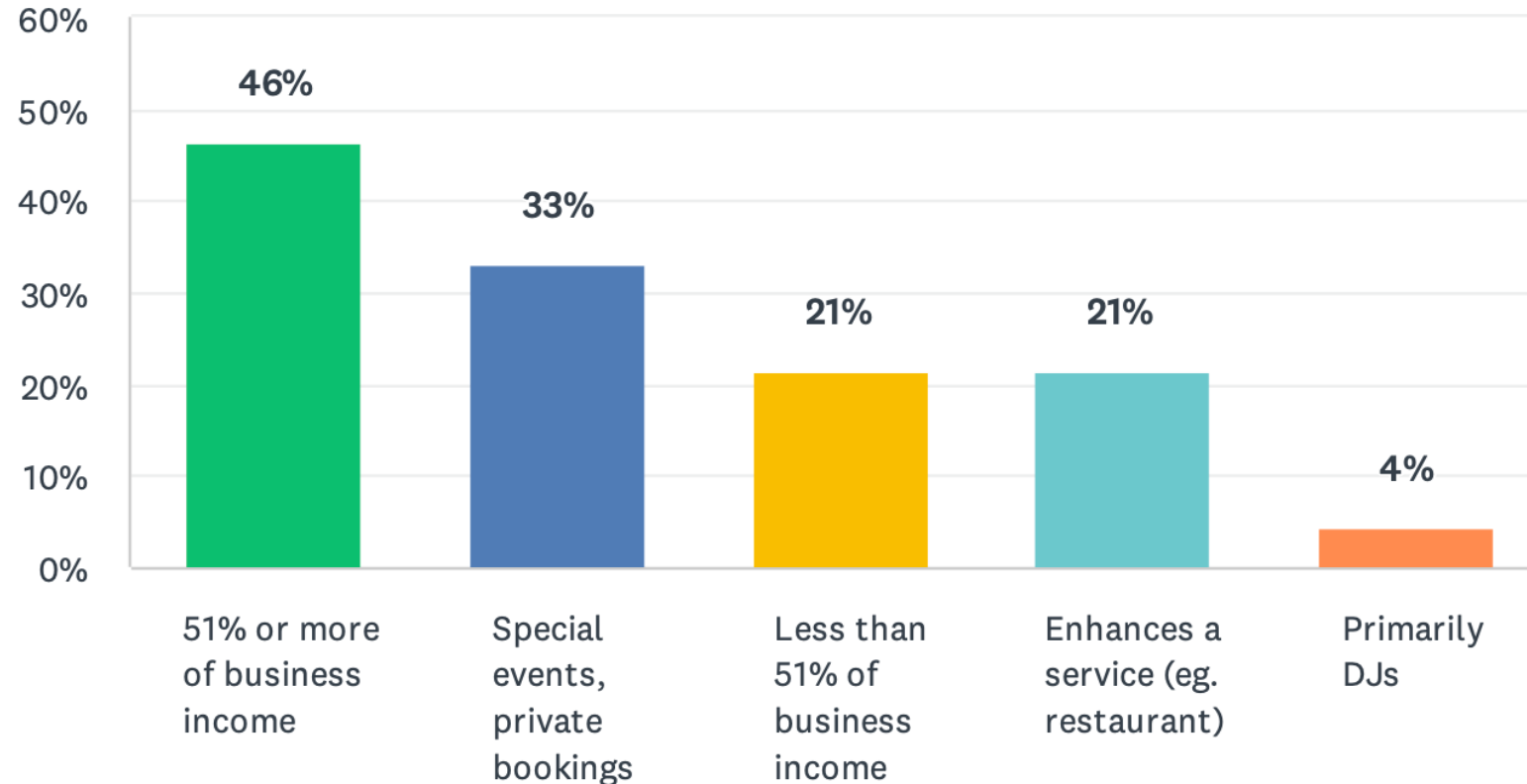
Ownership Structure



Venue Type



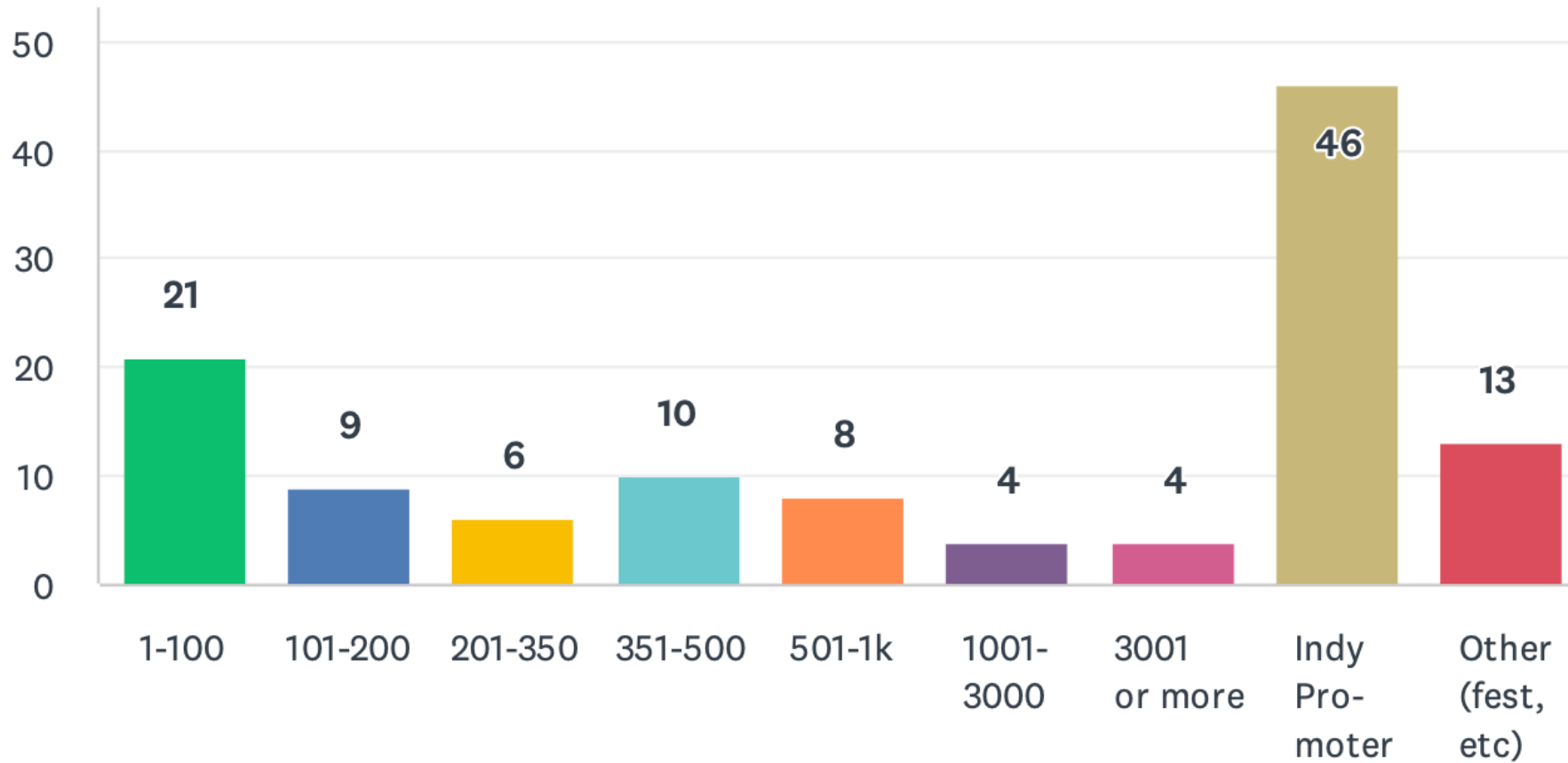
Role of Live Music In Business



“When they existed, I was able book local bands at the smaller community-oriented venues.”

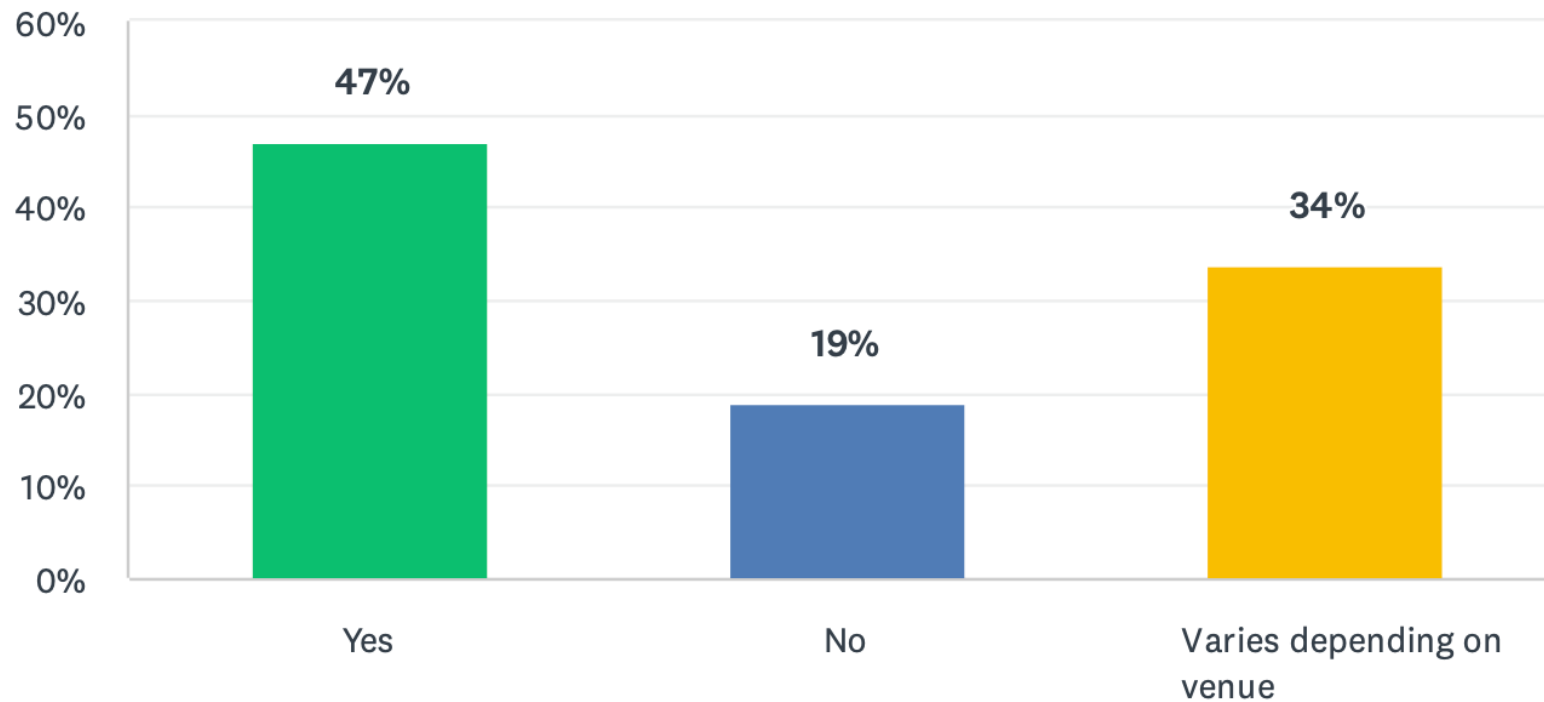
“In addition to presenting music, my business also serves as a gallery in space as well as hosting poetry, comedy, theater as well as community events such as fundraisers.”

Capacity of Venues (Legally Allowed)



"We usually rent spaces ranging from 900-2,500."

Can Host Live Music Outdoors

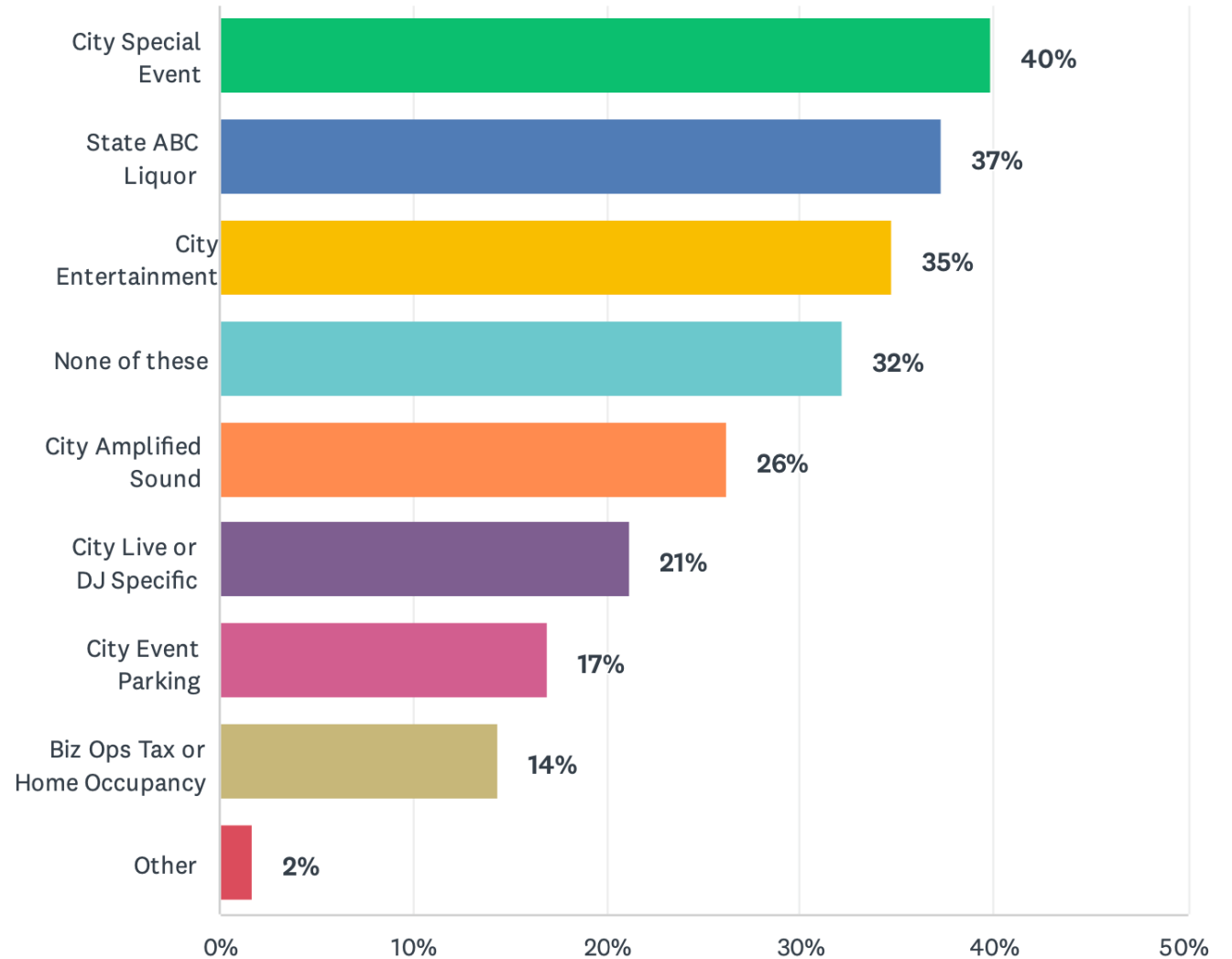


“Only acoustic.”

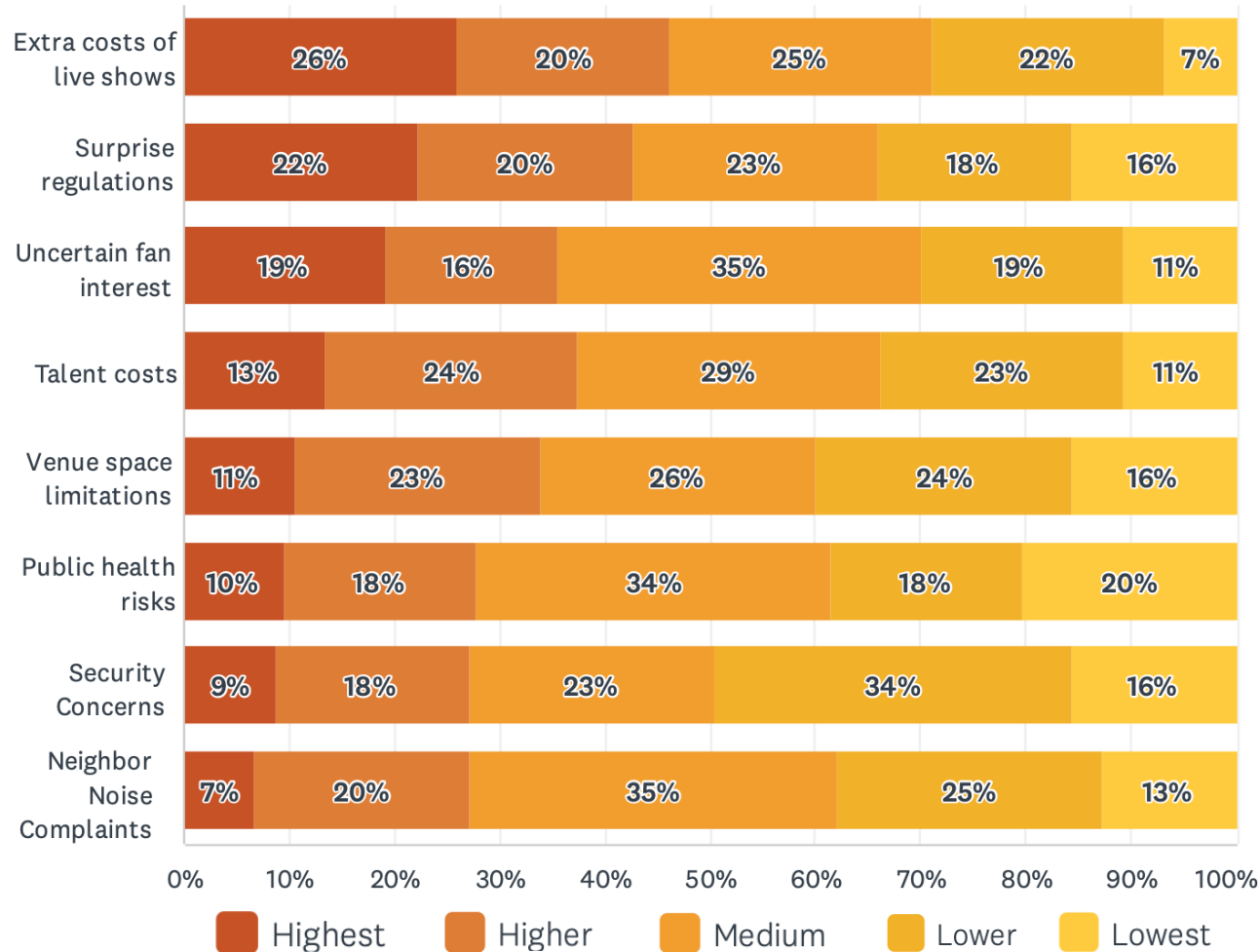
“We have restrictions for outside live music.”

Types of Regulatory Experience

What regulatory requirements do you have experience with?
Select all that apply. 0



Greatest Concerns With Presenting Live Music

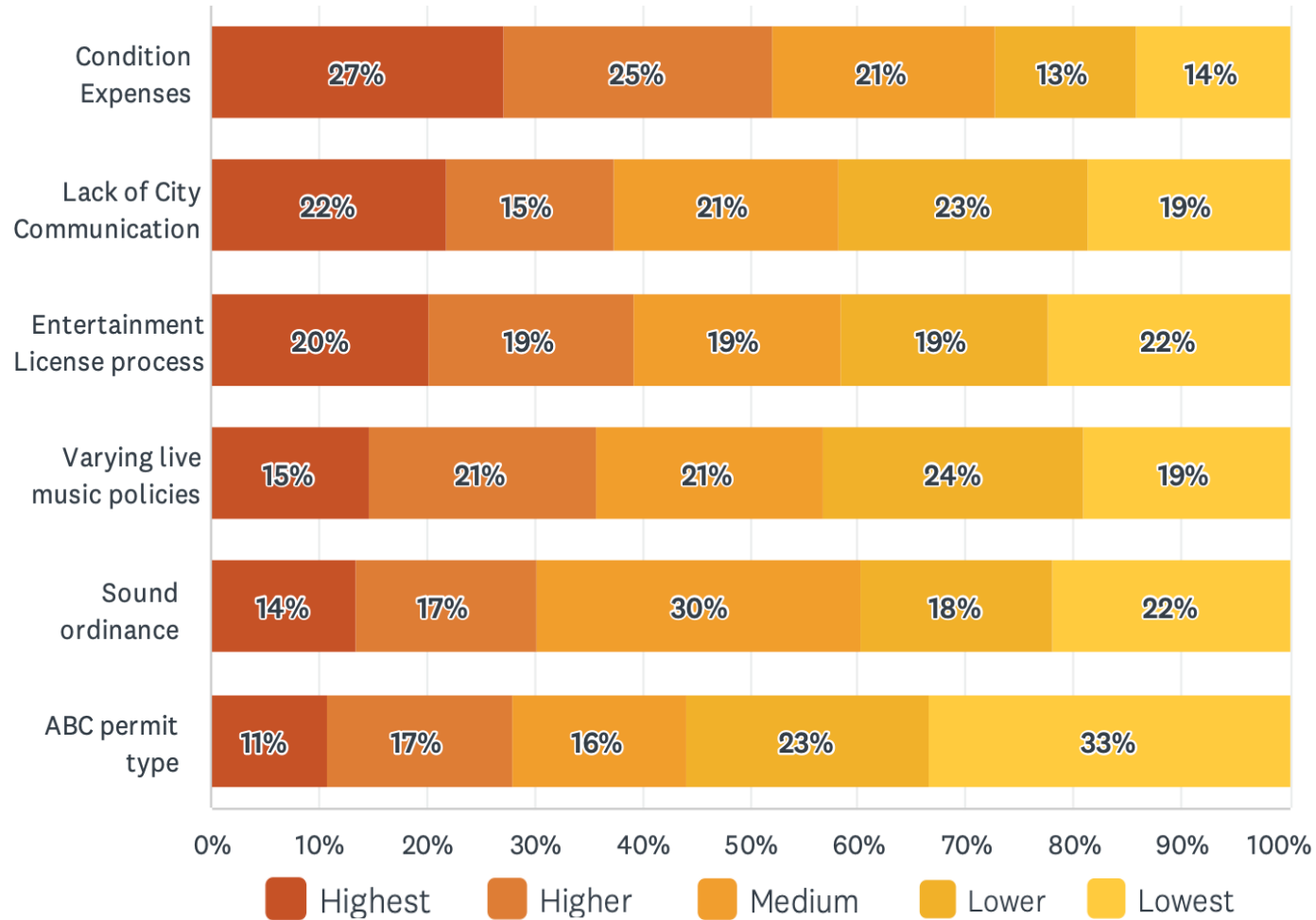


“This city makes it as hard as possible for independent music to thrive. It’s almost malicious in its regulatory structure. Only the big dogs get to play.”

“I’m mostly concerned by the City Council going after live venues.”

“Can’t get Entertainment Permit until you pass all inspections. As long as there isn’t clear and immediate danger, the City should grant the Entertainment Permit and give you a certain amount of time to make the corrections that are found during the inspections.”

Regulations and Policies Impact

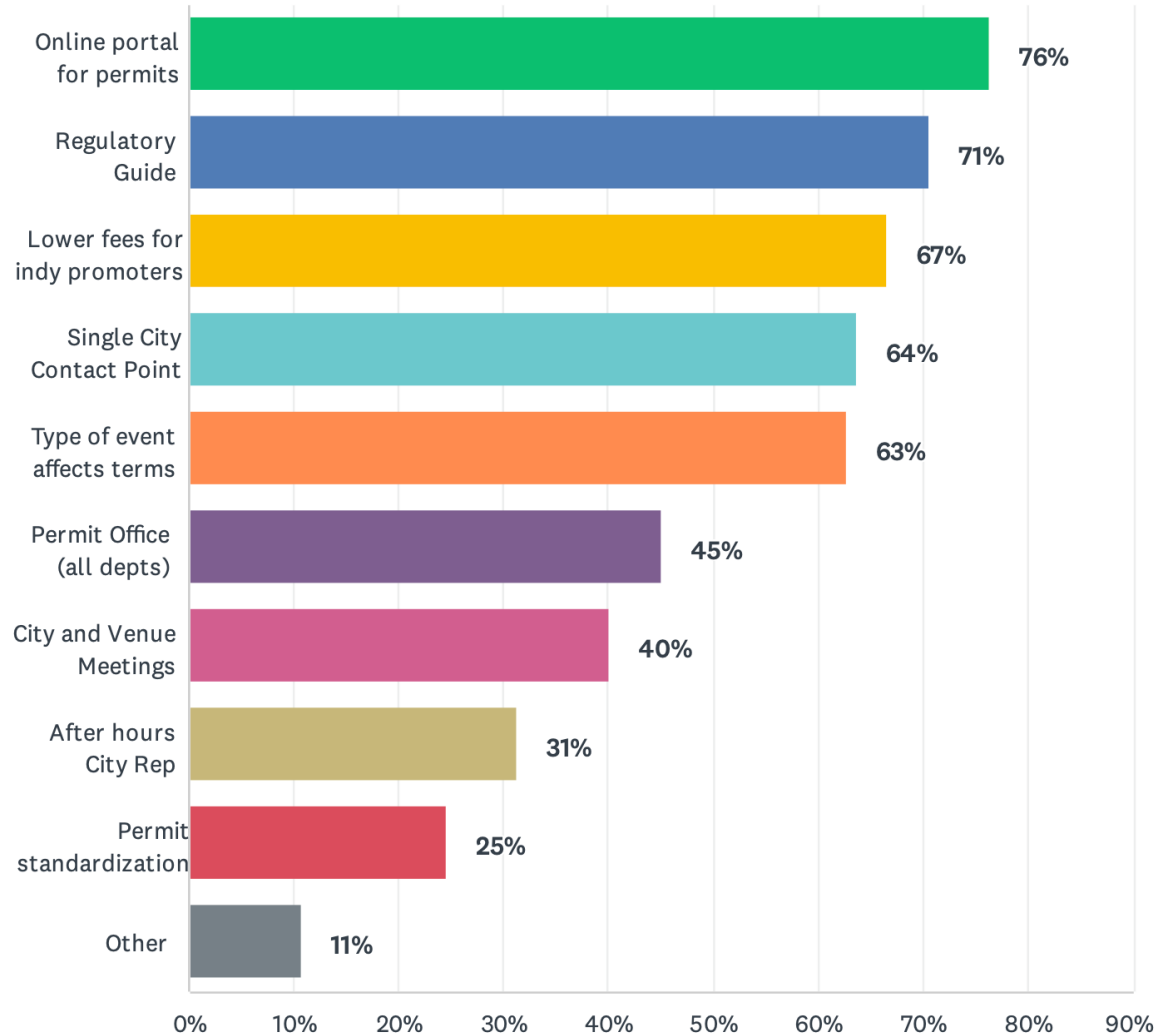


“Small DIY groups struggle constantly to find spaces to hold events and have to resort to underground options.”

“Issuing and uneven support for venues is very frustrating and it feels as if the City is actively trying to discourage live music by putting obstacles in places.”

“The city chased away live music, so it's retreated to houses where the police have little control. That's dumb. We need places for live music where people can legally drink. Advertising for those shows is easier and it attracts creative people that are outside of the scene.”

Suggest Tools To Improve Regulatory Compliance



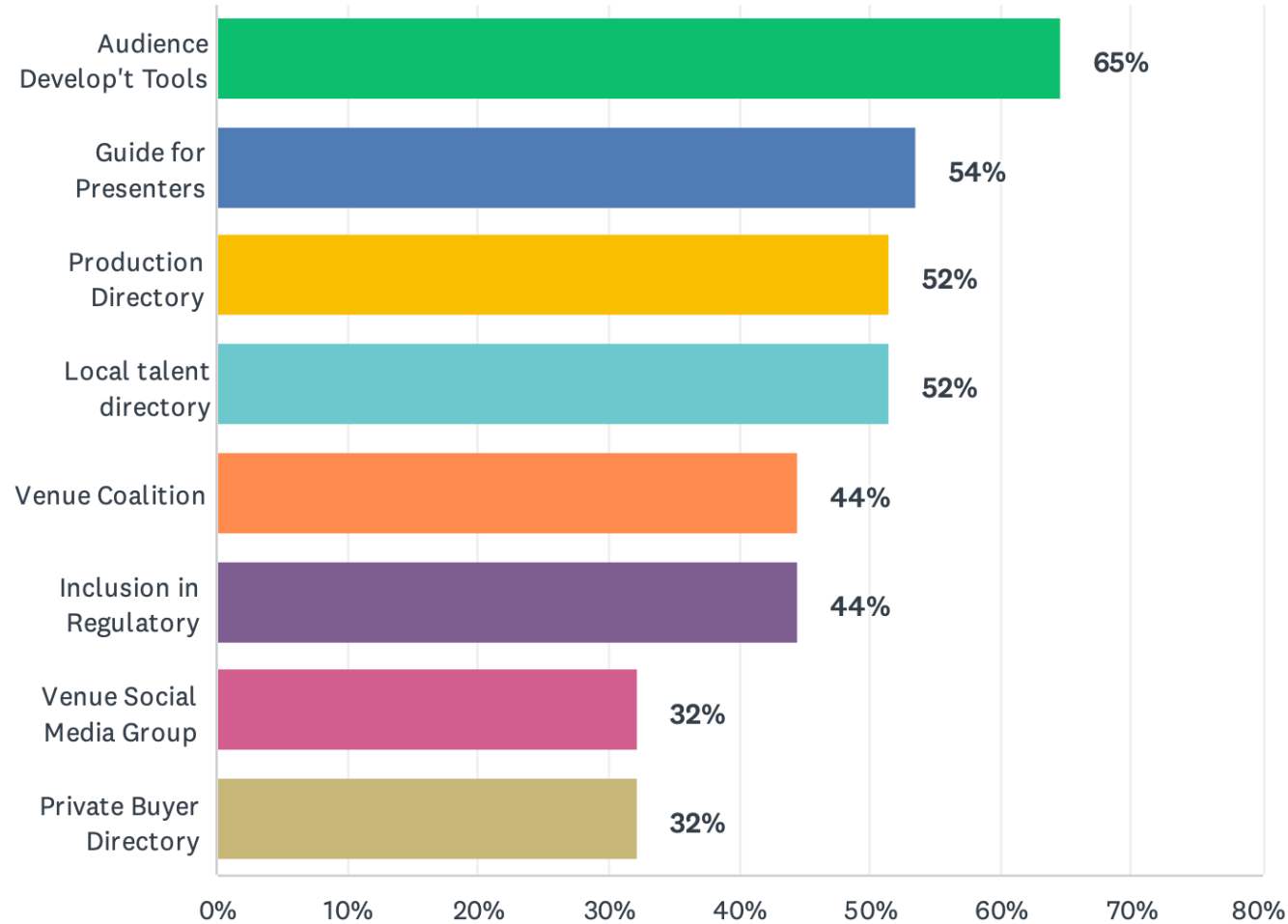
“Yes! A single point of entry for applicants and clear and concise expectations. Stop moving the goal posts, every time is different.”

“Cheaper fees for park use, we do not need the services rendered for the overhead costs incurred.”

“Why not training videos updated with revisions & notices? Not everyone has access to the same ‘training time.’”

“I think it should be easier for the nonprofits than the for profits.”

Desired Tools for Live Music Industry Generally

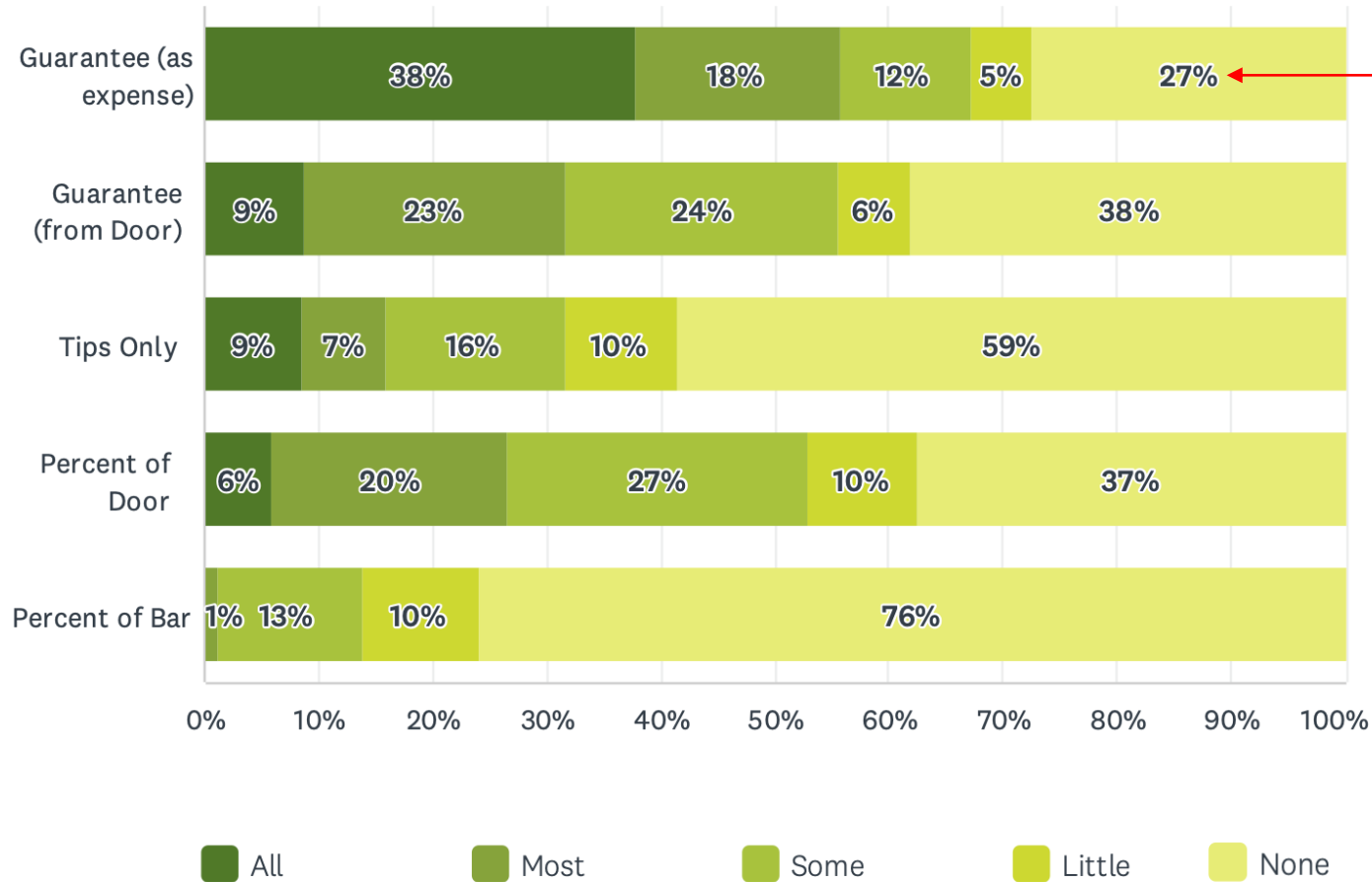


“WE NEED VENUES!”

“We need MORE VISIBILITY for the local music scene (meaning visibility for local bands).”

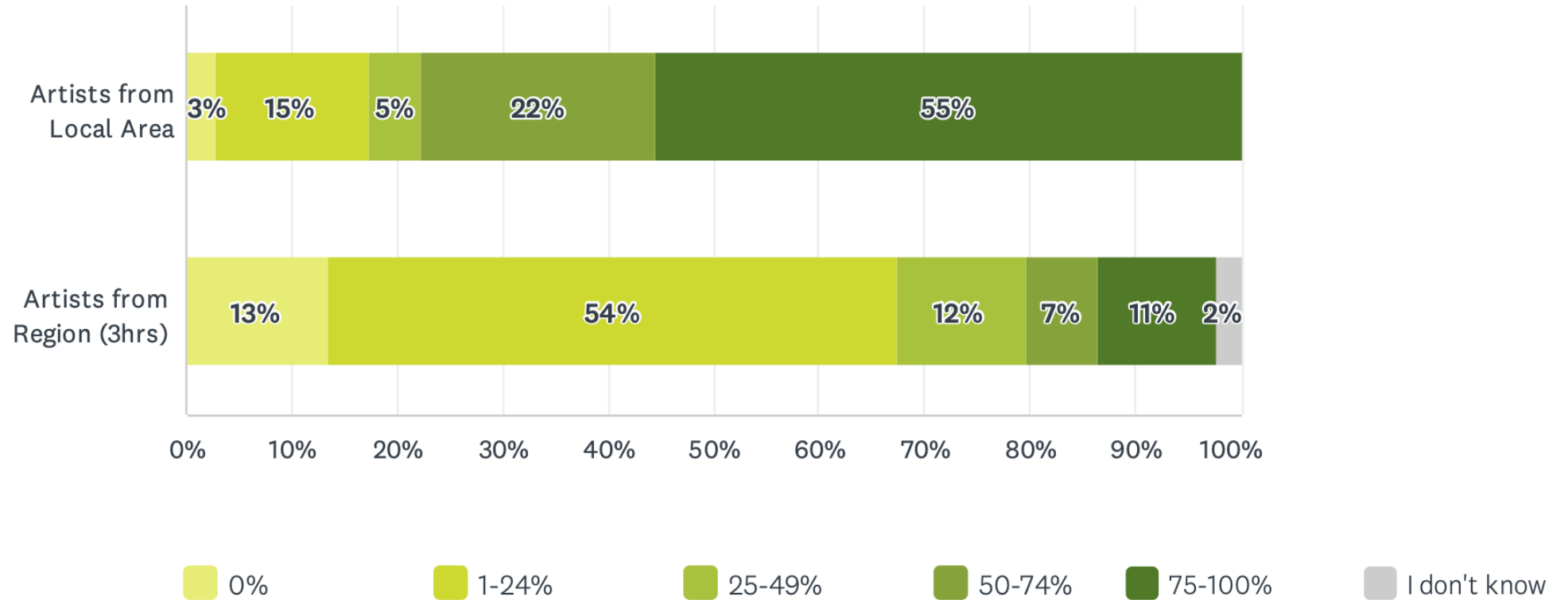
“More affordable concert halls and community theater venues.”

How Talent Is Paid

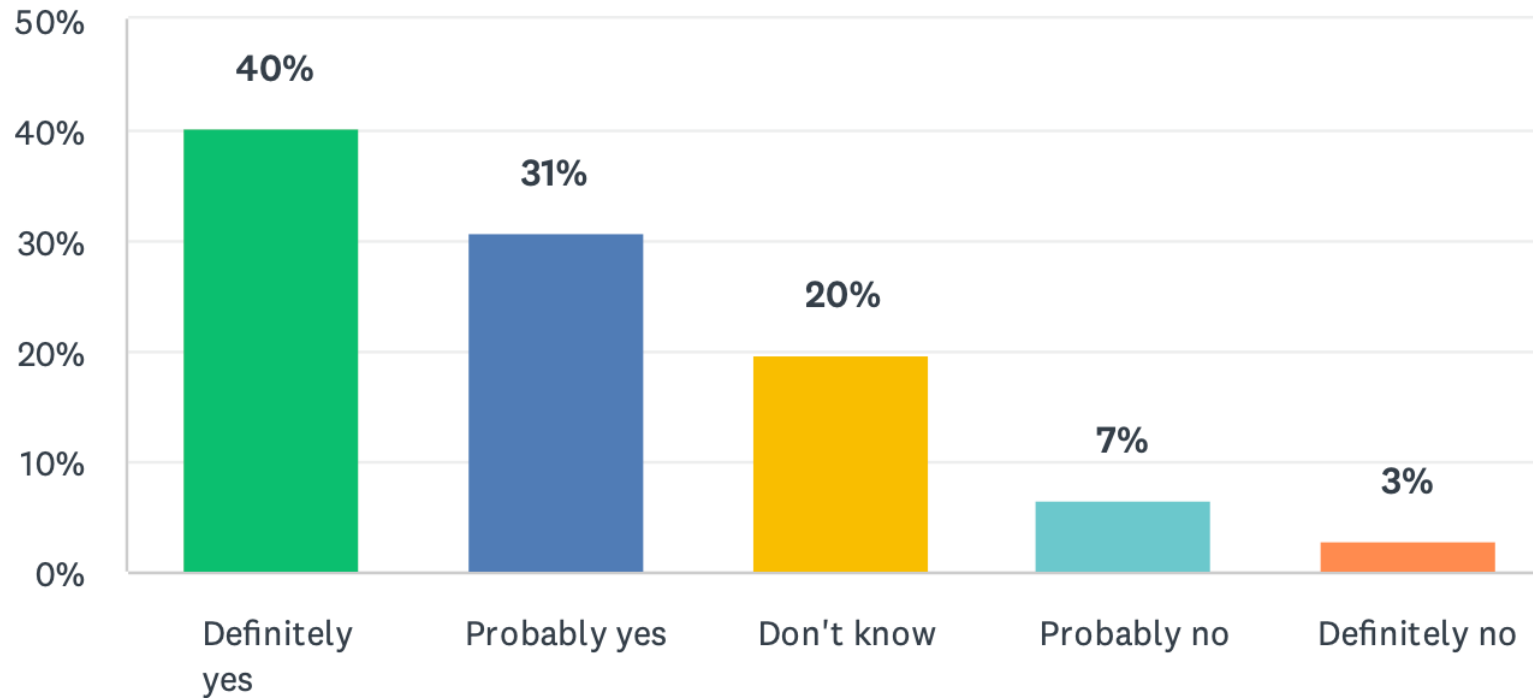


This can be confusing. As an example, you can say: "27% of Venues report that NONE of their deals with artists are Guarantees (as an expense)."

Local v. Regional Talent Bookings



Intent to Book More Local Artists

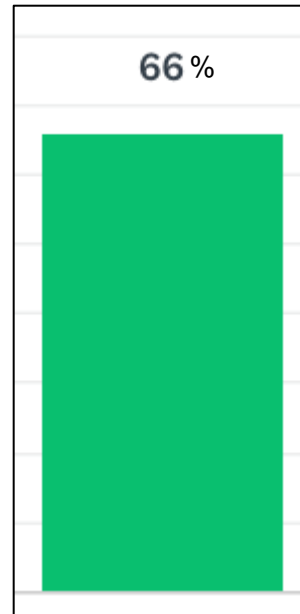


“Sacramento has had a hollowing out of music talent as less work is available here, so the reality is that we often have to bring in musicians from all over the state, and musical guests from other states and countries in order to deliver a quality performance.”

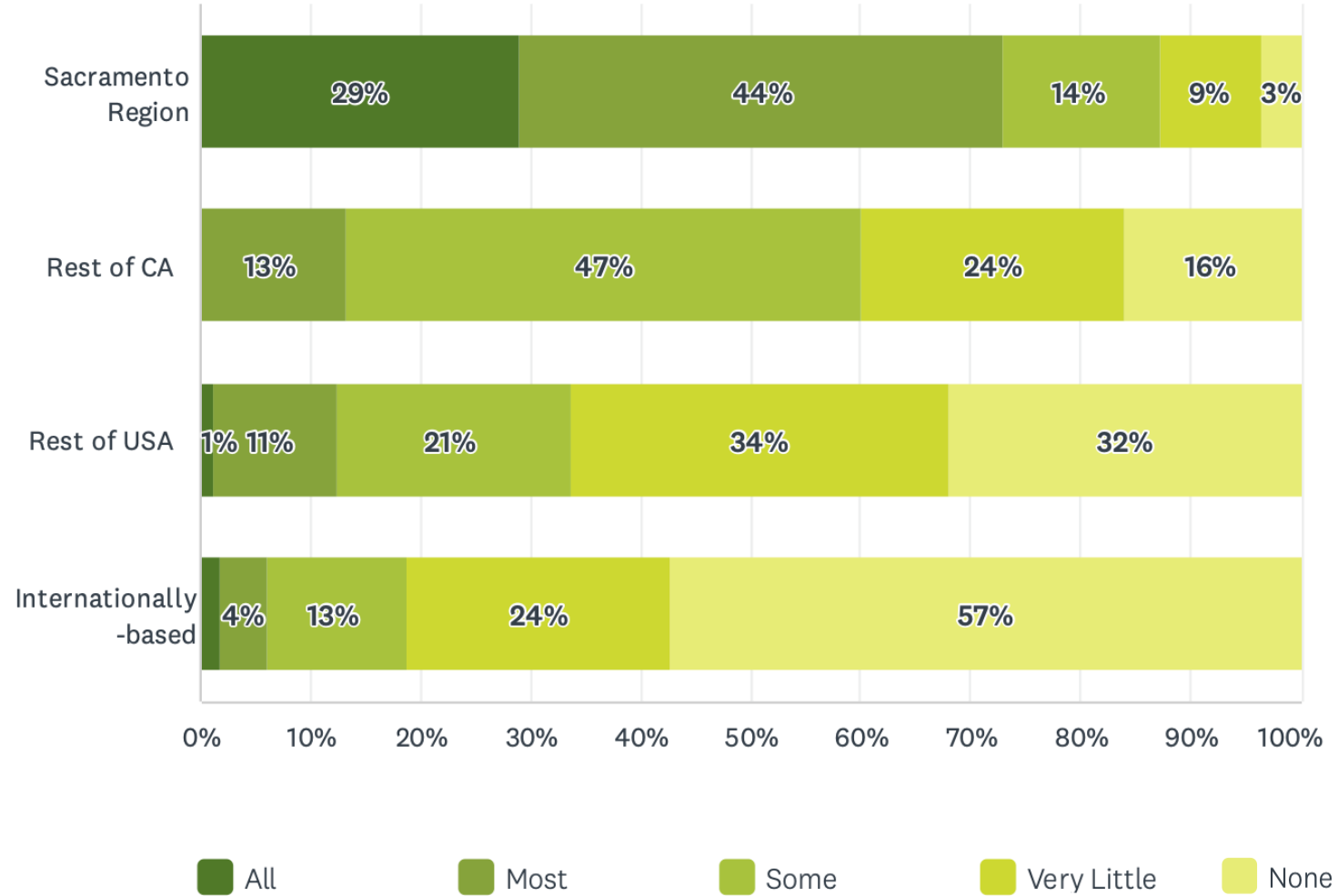
“If there are no spaces accessible to local venues, it’s very hard to predict.”

Questions for Industry Participants Only

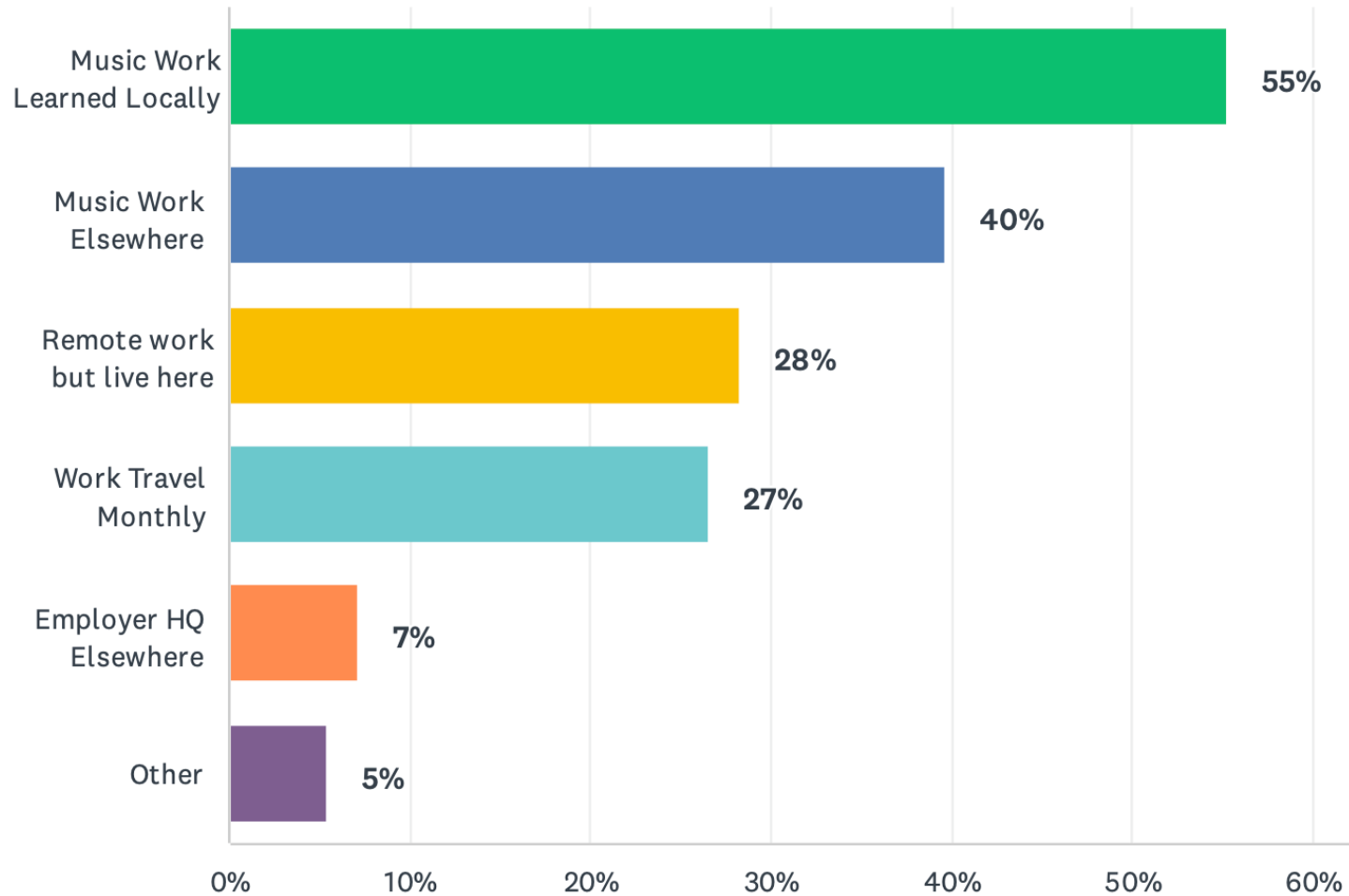
Percentage of All Work That is Music-Related



Geography of Music Clientele



Industry: Features of Music Industry Employment

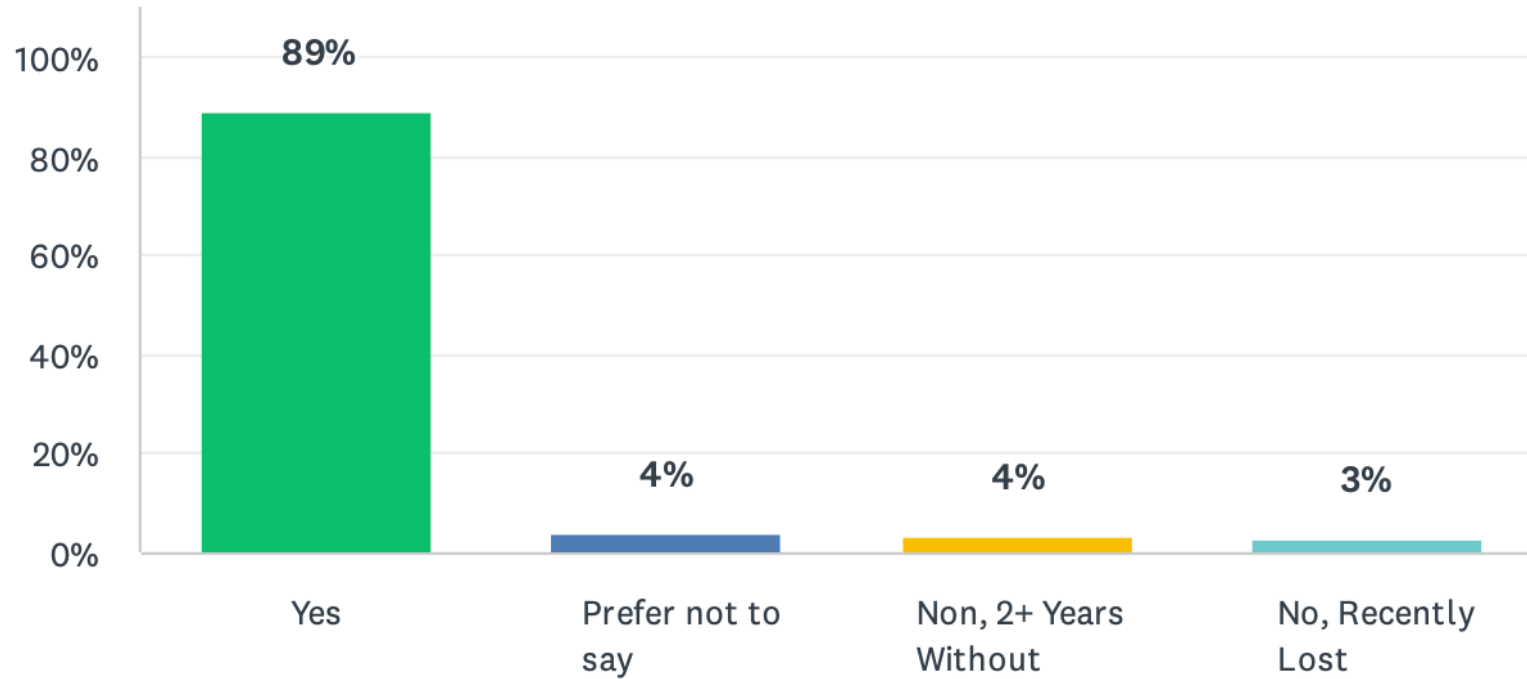


“Travel consistently for music industry events. Mostly to LA.”

“I’ve been a signed artist and I have signed artists!”

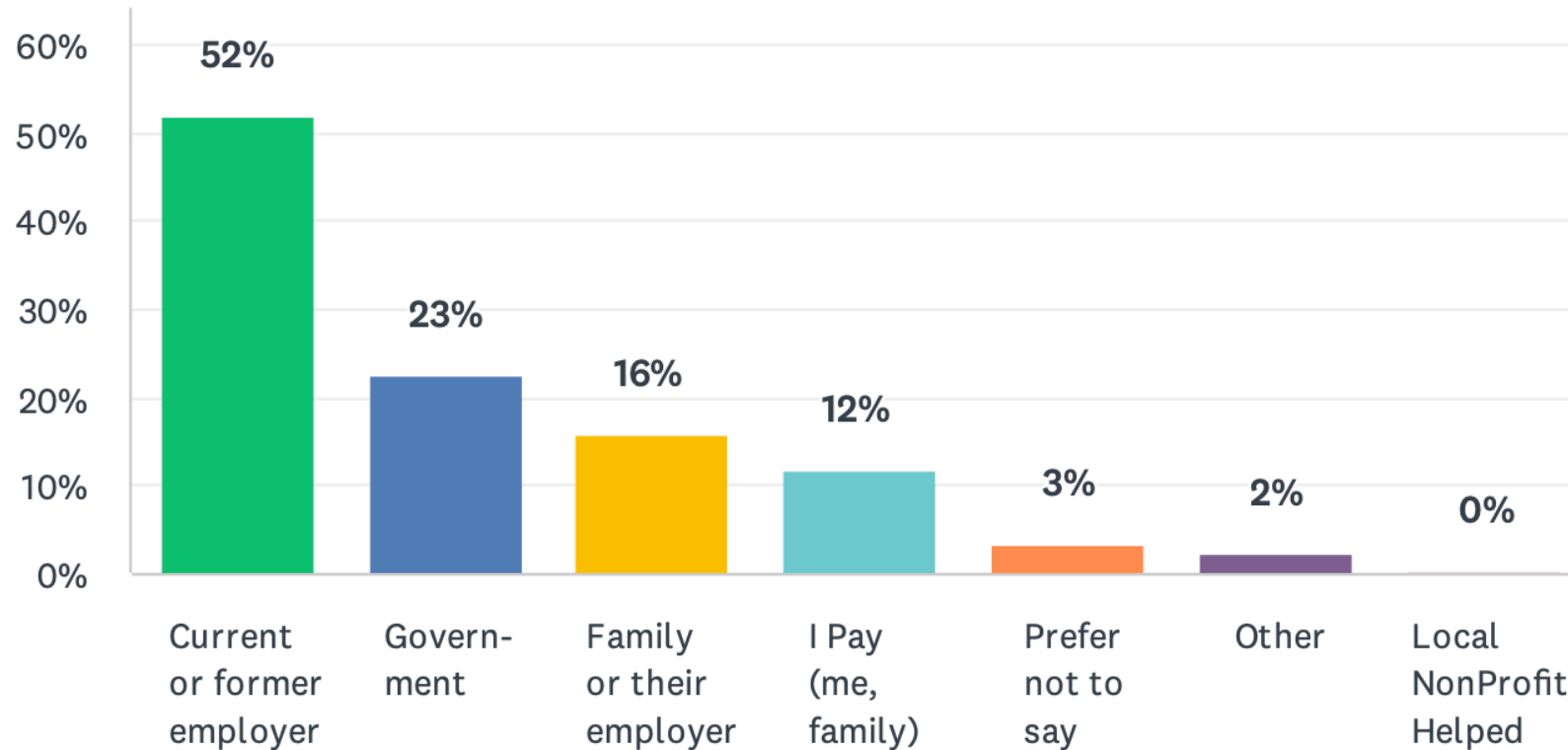
All Respondents: Health, Wellness, Housing and Demographics

Health Insurance: Current Status of Coverage

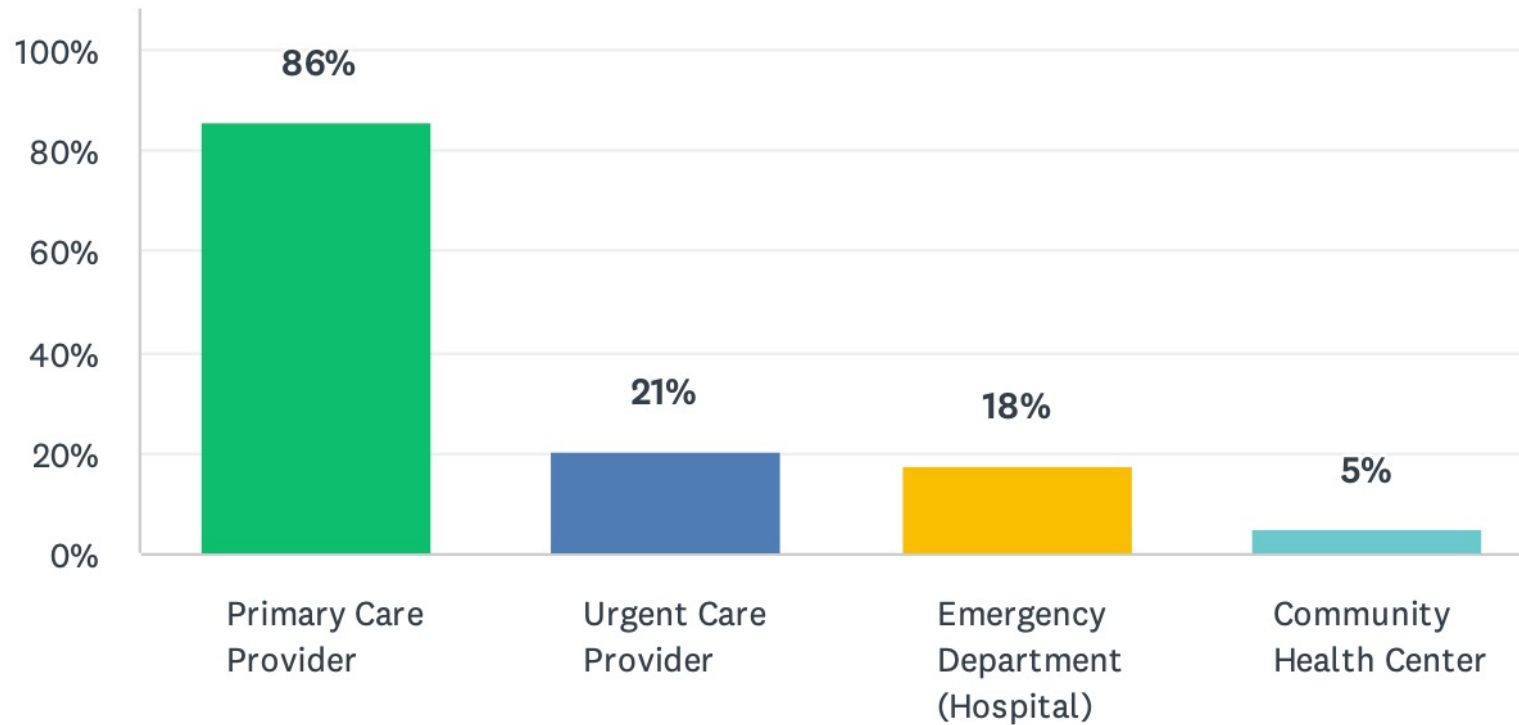


Health Insurance: Current Coverage Provided By...

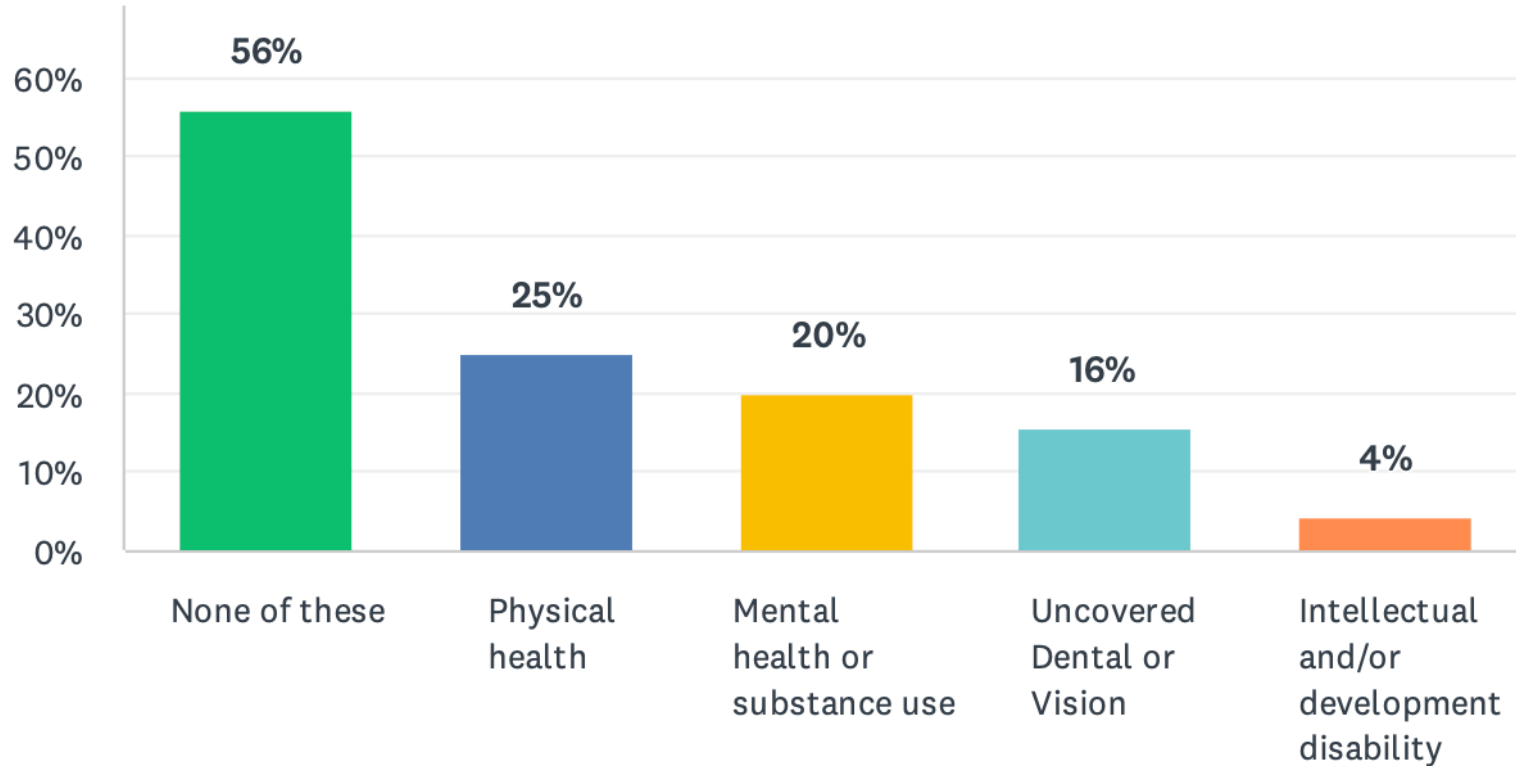
(for the 89% of respondents who currently have health insurance)



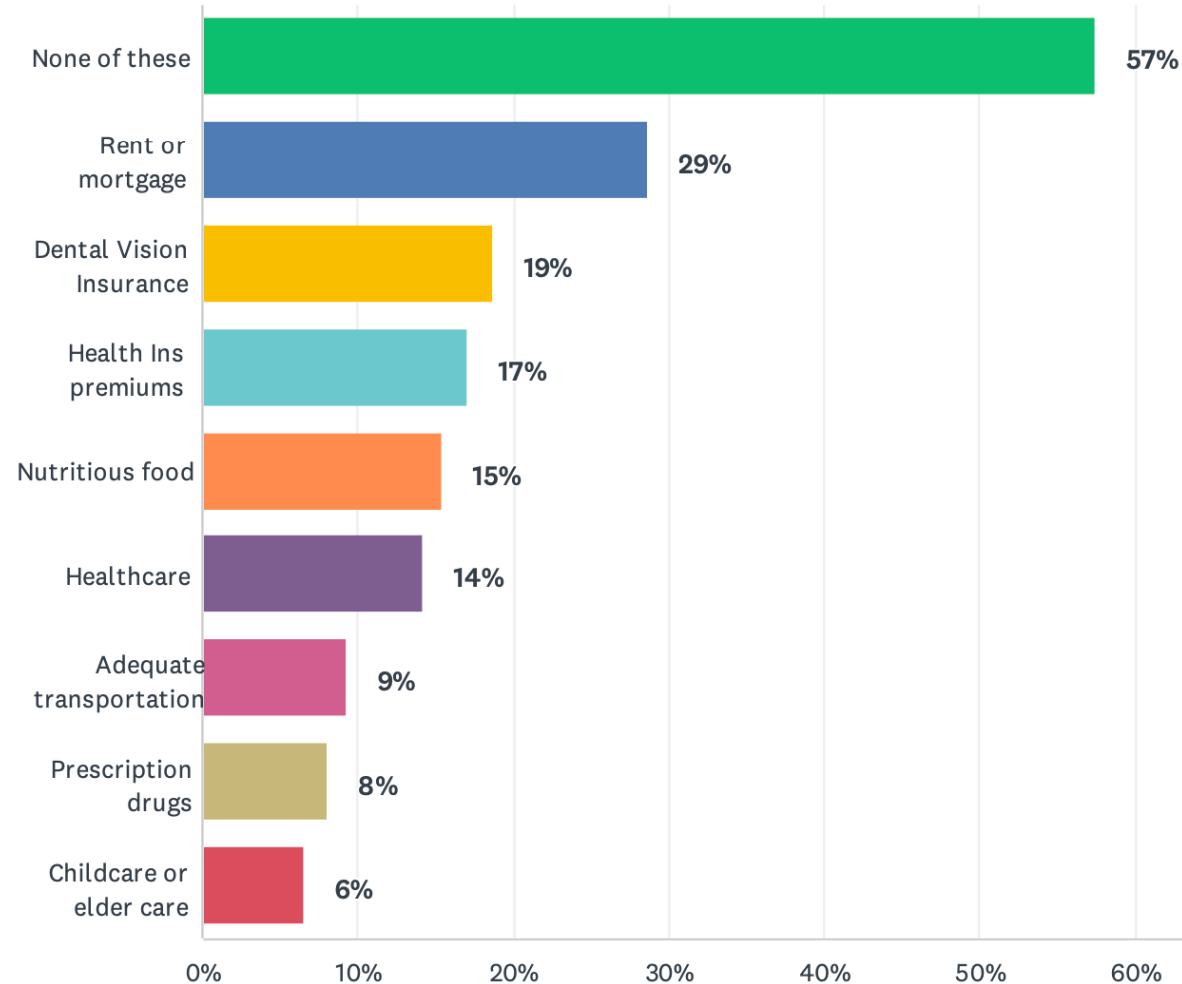
Health Services Provided By...



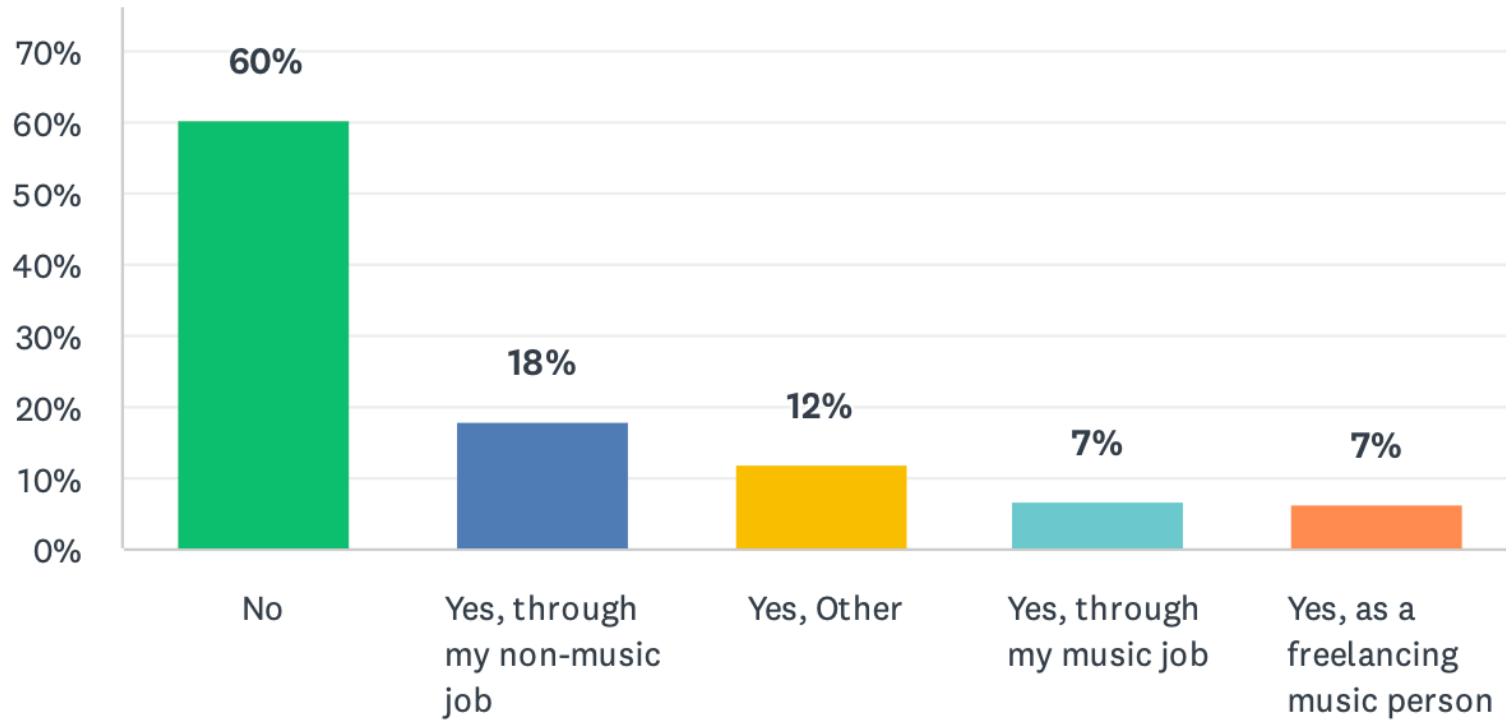
Current Health and Wellness Concerns



Current Needs Struggling to Afford

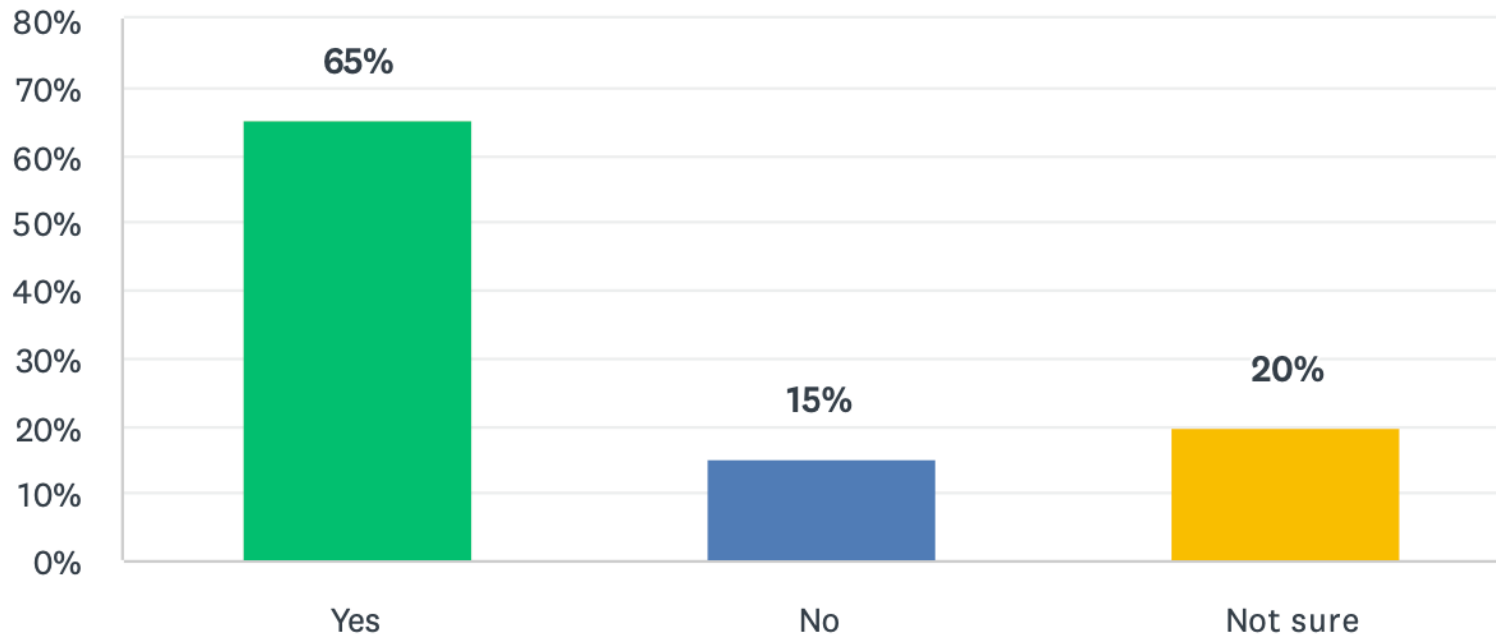


Received Pandemic Relief Funds While Living in Area

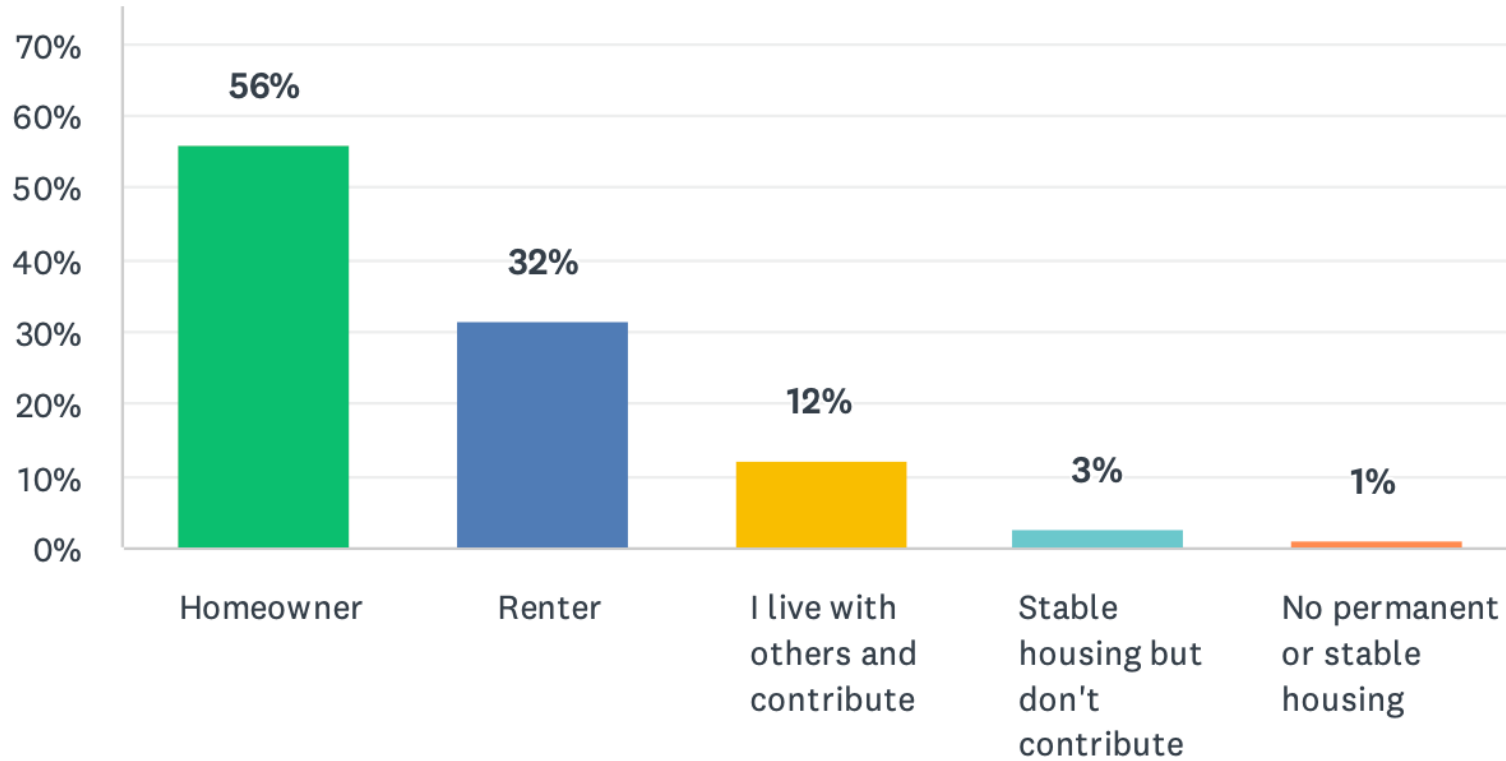


Pandemic Relief Was 1st Government Support Ever, as a Music Professional

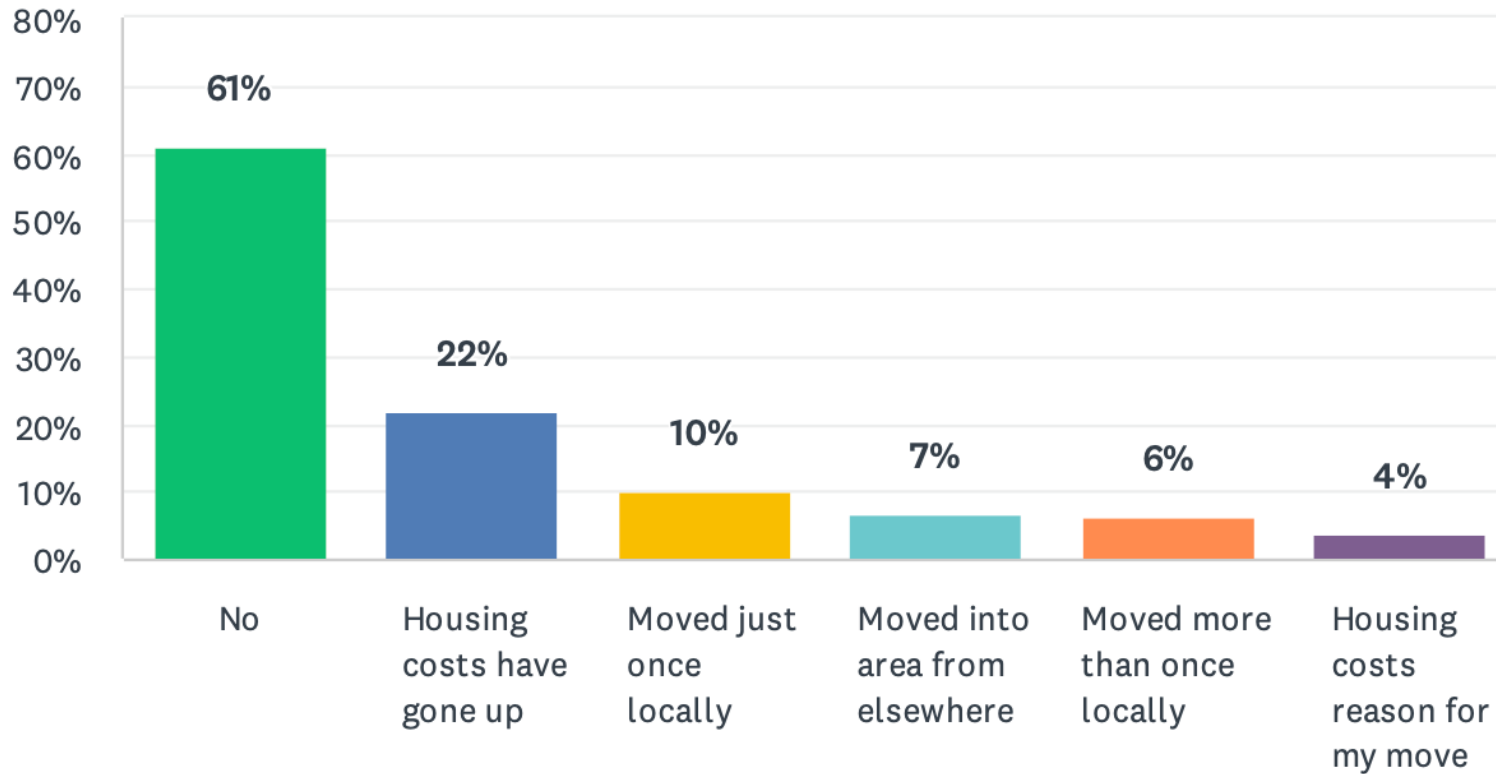
(for the 14% of respondents who received pandemic relief through music work)



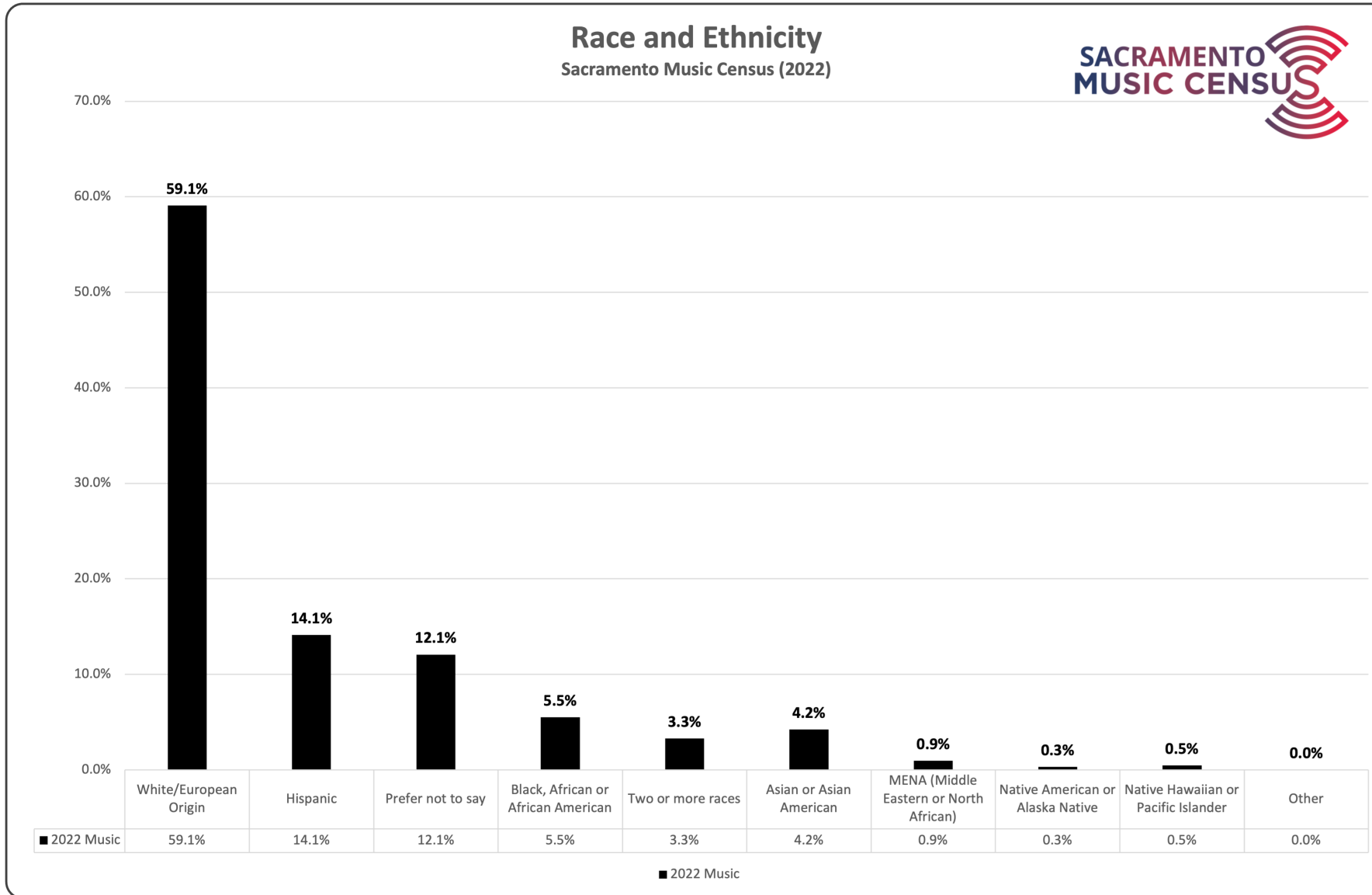
Current Housing



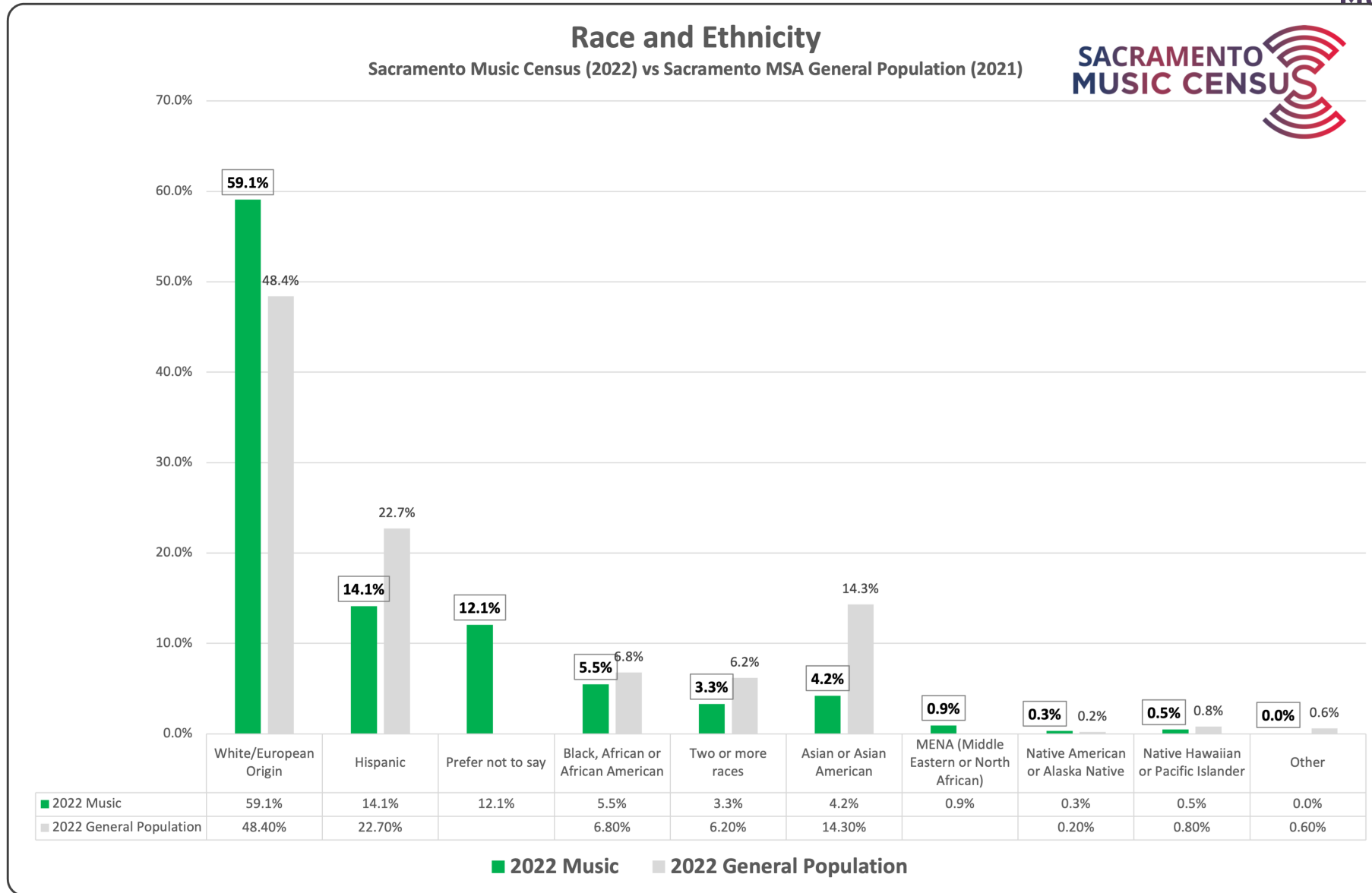
Changes in Housing (within Most Recent Two Years)



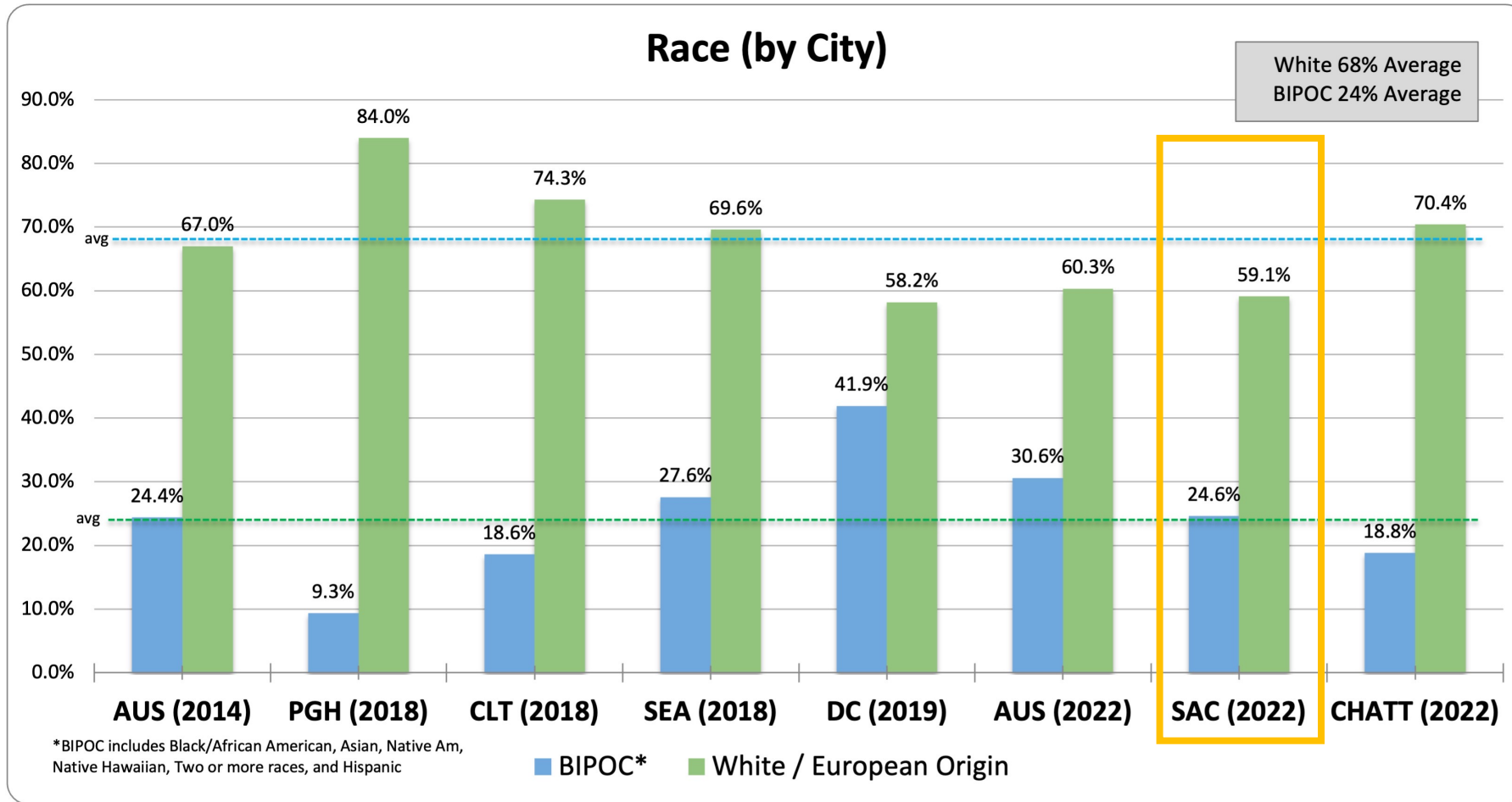
Demographics: Race and Ethnicity



Demographics: Race/Ethnicity: Music v. General Population

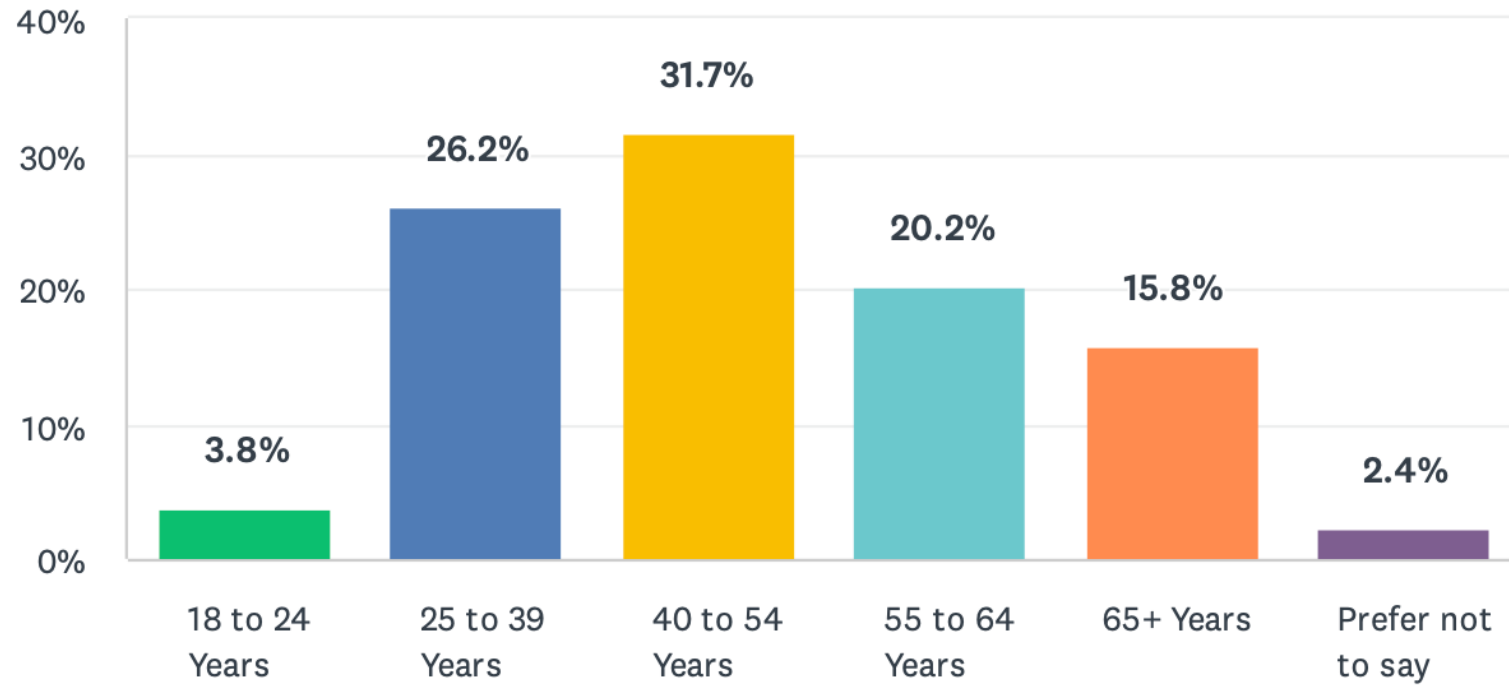


Race: Benchmarking Against 8 Other Music Cities

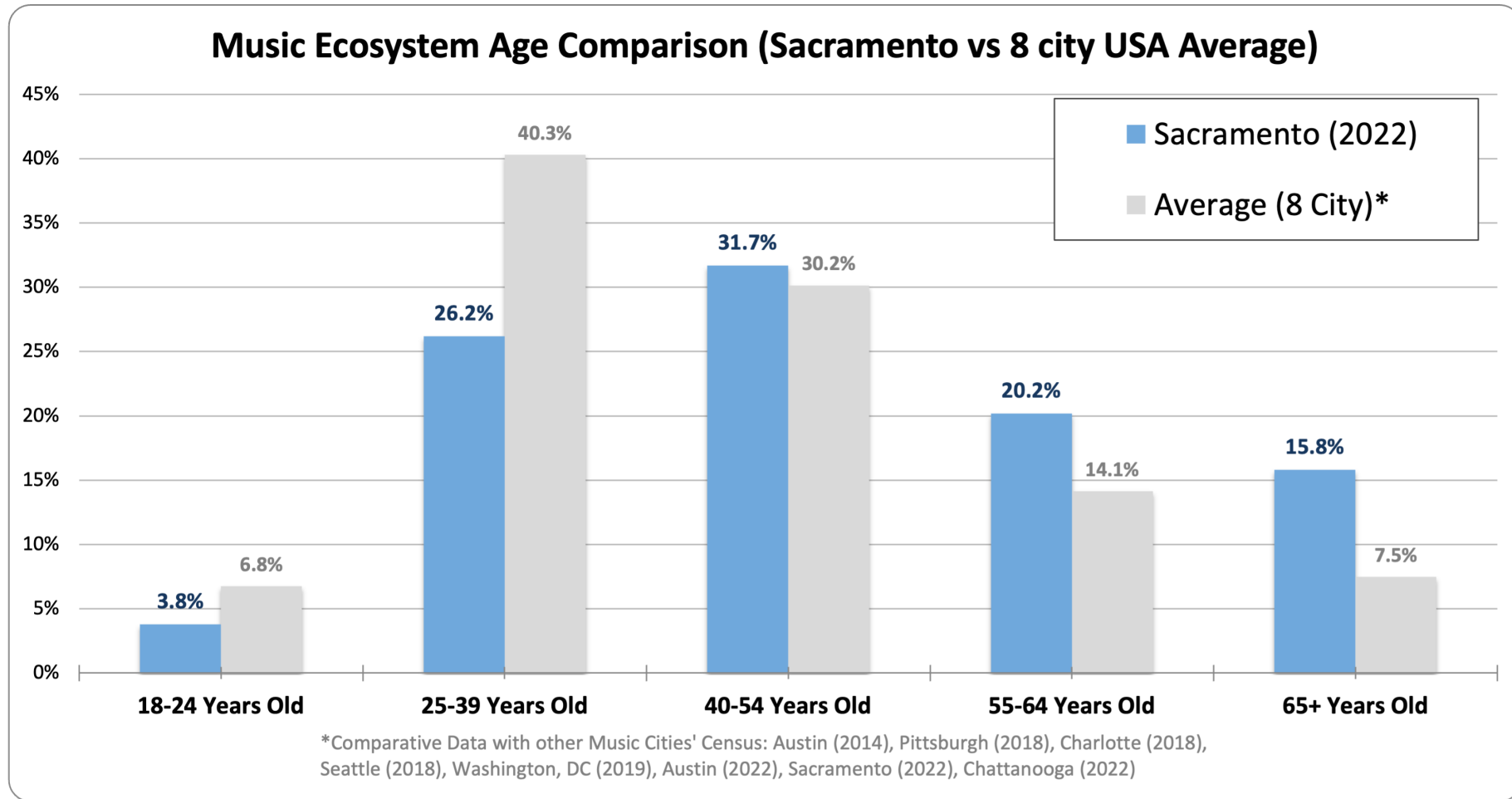


Comparative Data with other Music Cities' Census: Austin (2014), Pittsburgh (2018), Charlotte (2018), Seattle (2018), Washington, DC (2019), Austin (2022), Sacramento (2022), Chattanooga (2022)

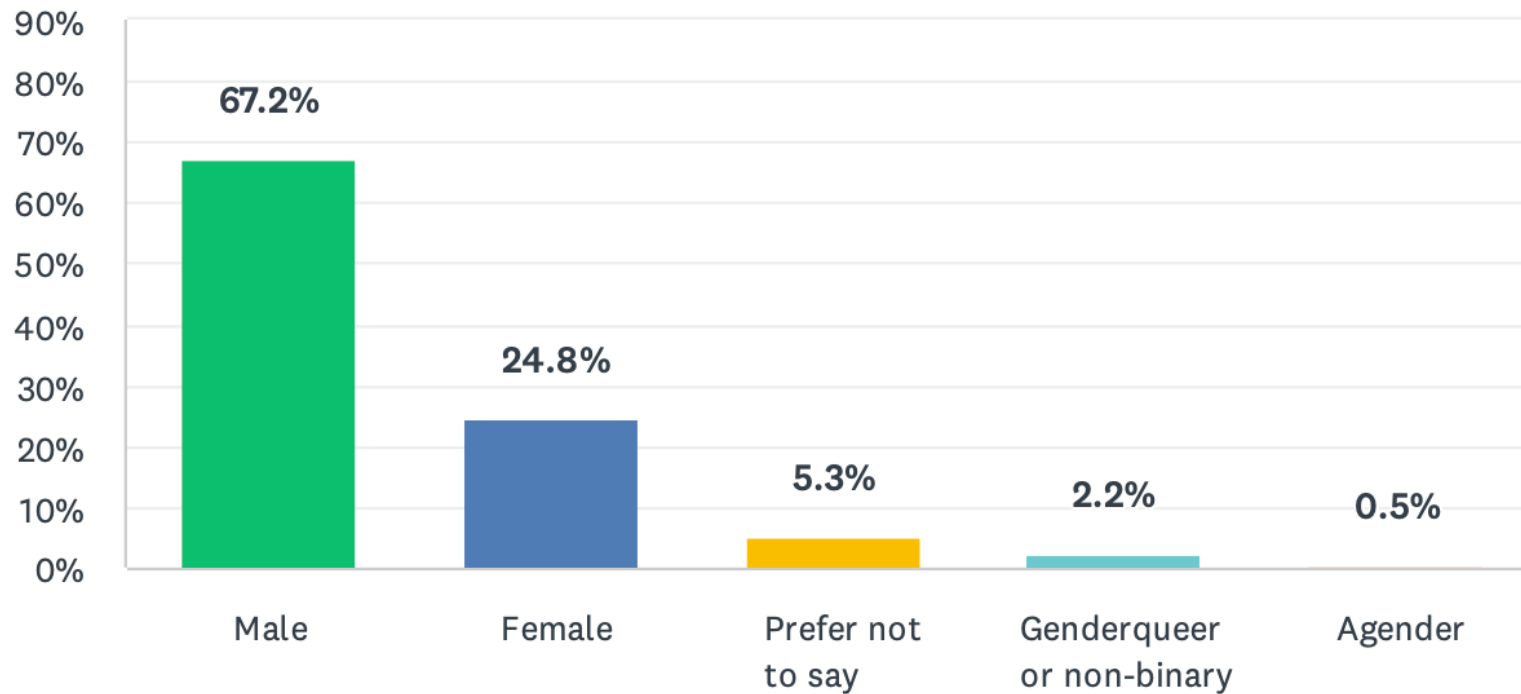
Demographics: Age



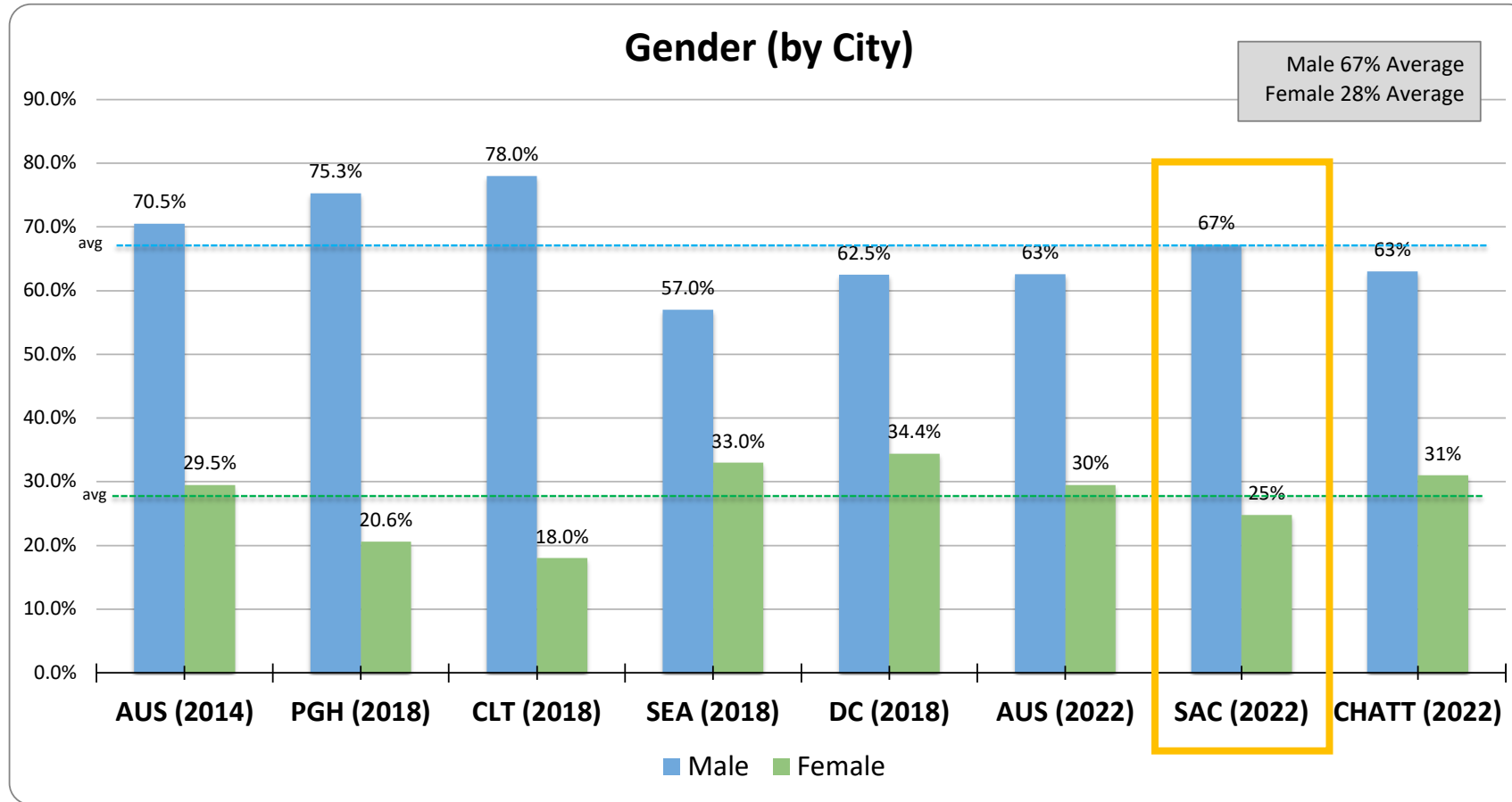
Demographics: Age (v. 8 Other Music Cities)



Demographics: Gender

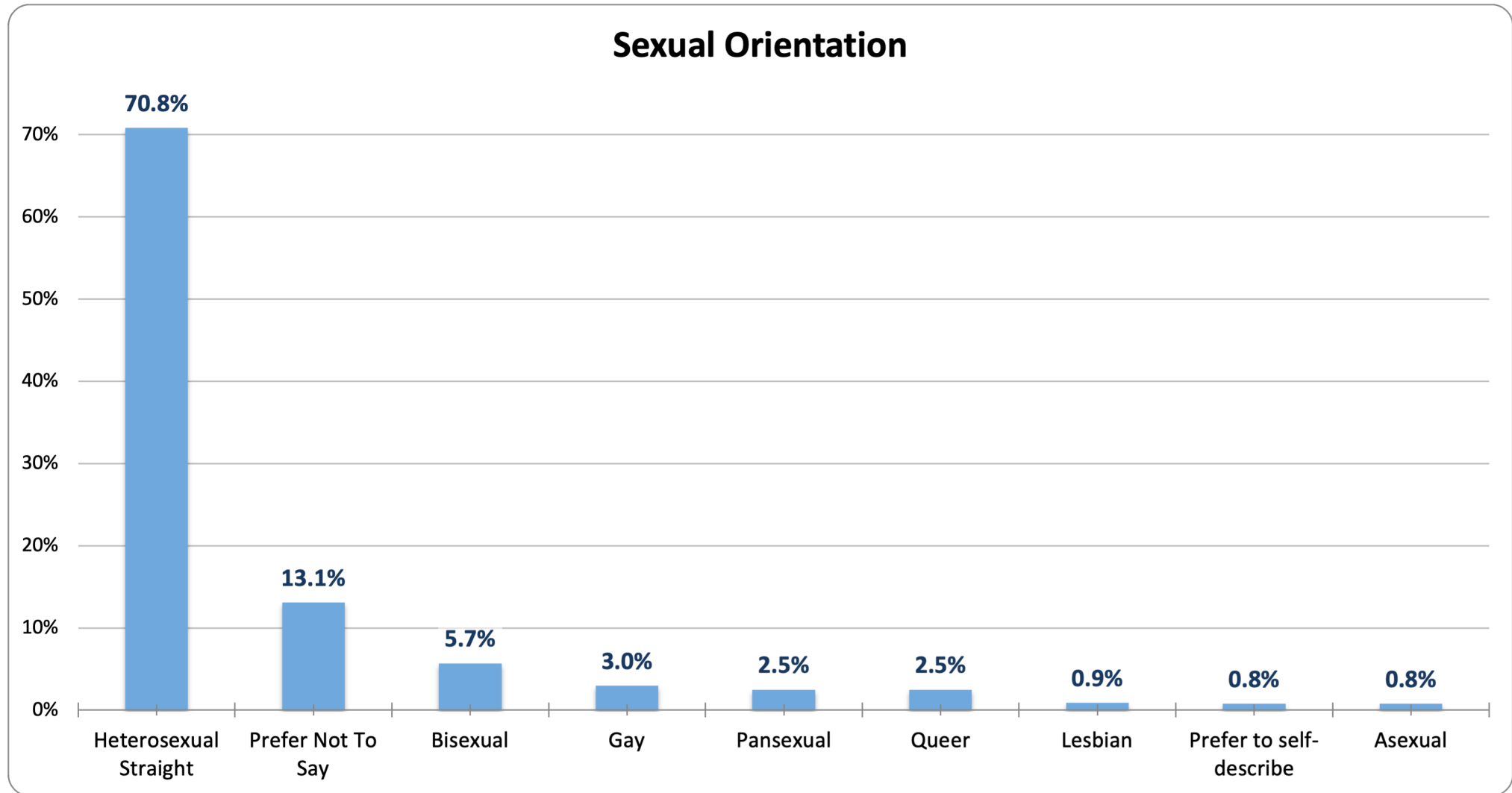


Gender: Benchmarking Against 8 Other Music Cities



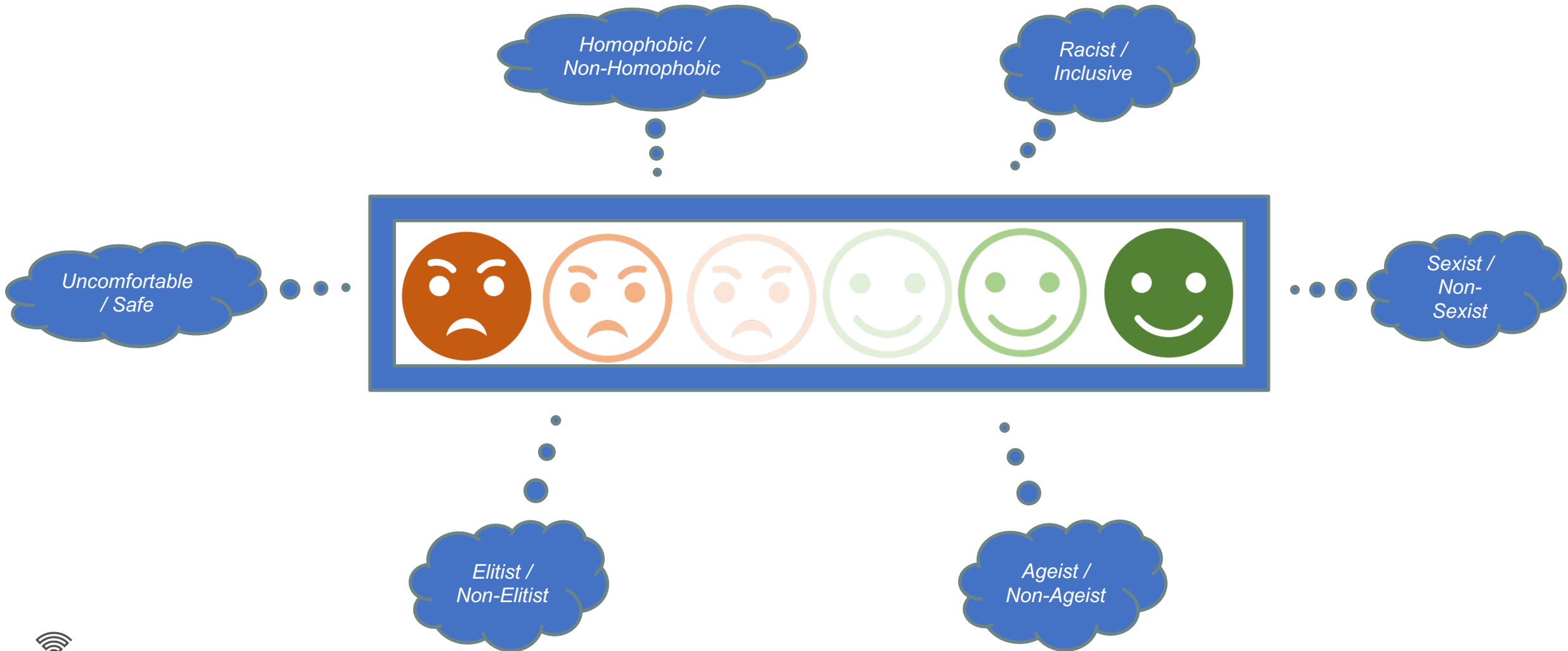
Comparative Data with other Music Cities' Census: Austin (2014), Pittsburgh (2018), Charlotte (2018), Seattle (2018), Washington, DC (2019), Austin (2022), Sacramento (2022), Chattanooga (2022)

Demographics: Sexual Orientation



All Respondents: Diversity, Equity, and Inclusion

Diversity, Equity, and Inclusion Adjective Pairs

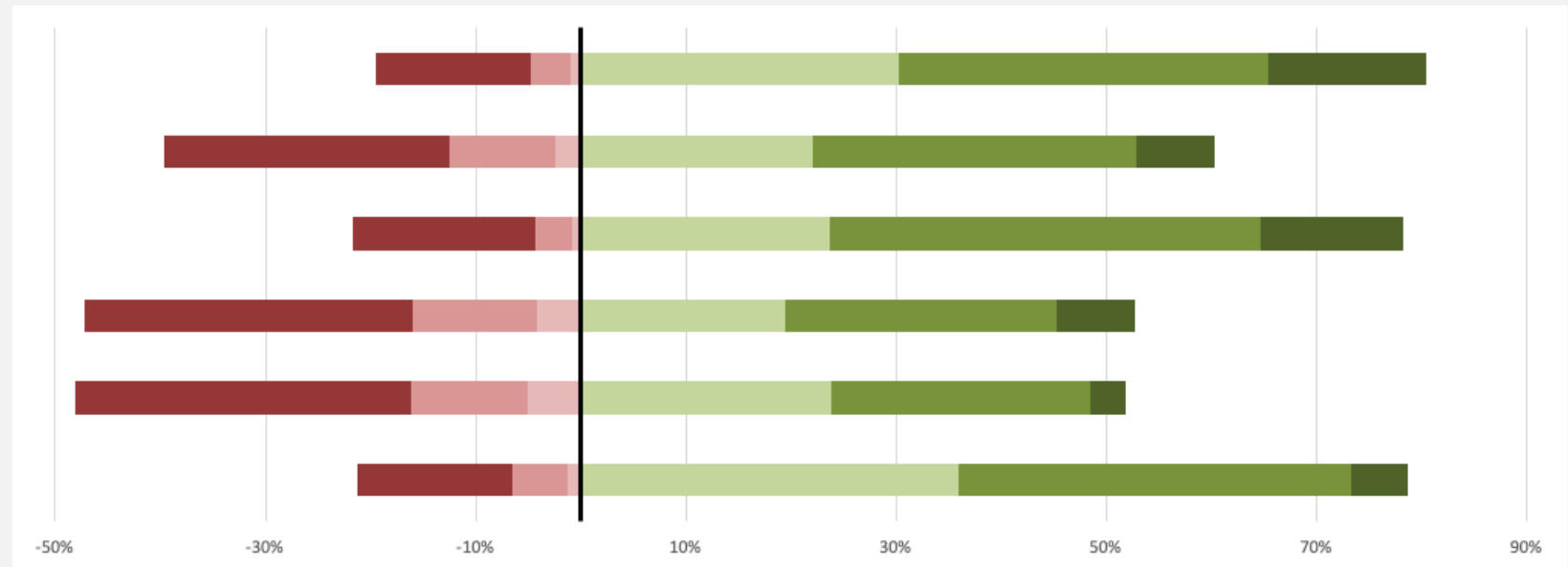


Diversity, Equity, and Inclusion – Overall Results



2022: Diversity Equity and Inclusion Questions (All Respondents)

Very Negative Negative Somewhat Negative Somewhat Positive Positive Very Positive



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DEI: Deeper Analysis of Sub-Groups



**See Appendix:
DEI Deep Dive**

All Respondents: Additional Comments

Comments: How Has Pandemic Changed Things?

<p>“We lost our community-oriented venues. We had venues that were owned by several people, now they are monopolized by one group of people.”</p>	<p>“For manufacturers it’s been supply side difficult but strong for sales.”</p>	<p>“MORE CREATIVE TIME...”</p>
<p>“Performance has changed from in person to online but the tools for people to make income from that are not in place.”</p>	<p>“I feel like events haven’t felt the same since the pandemic. There’s an energy to the people that can’t be explained only felt. The result is the energy expounded at shows. I think it has to do with the fact the we’re struggling to connect on an individual level since the pandemic.”</p>	<p>“We saw a larger need for mental health-based music therapy services in acute psychiatric settings. Also, the absence of music and live music opportunities definitely impacted the mental health of our community.”</p>
<p>“I think many people who took their jobs for granted have a new respect for the work and the people who do it.”</p>	<p>“More online content.”</p>	<p>“More competition.”</p>
<p>“It is harder to meet musicians to collaborate with.”</p>	<p>“I was able to dedicate myself to my instrument and trade.”</p>	<p>“It definitely opened up gigs for younger musicians because older musicians have a fear of going out.”</p>
<p>“I have lost all of my piano students.”</p>	<p>“Live show market over-saturated currently with national touring acts.”</p>	<p>“As a street musician I see a lot more foot traffic.”</p>
<p>“Less students going into music at my high school.”</p>	<p>“It has made audiences more willing to tip musicians, thankfully.”</p>	<p>“None. I have more repair work than before.”</p>
<p>“I returned to my non music job full time and now just volunteer for music opportunities.”</p>		<p>“It has been economically, personally and professionally devastating.”</p>

Comments: Role of Non-Profit Organizations?

<p>“I have worked for non-profits since 2010, and all of them have had a role in training me to work in the music industry.”</p>	<p>“Yes, in that many local nonprofits have presented in my venues. They are a key part of my business.”</p>	<p>“Nope. They ask me to perform for free. Wait, what? Not only do they not pay me, they want me to gig for no compensation. This is wrong.”</p>
<p>“Yes. Nonprofits have been very generous in sharing their physical spaces with our music scene as places to have shows.”</p>	<p>“Besides teaming up with them on permits...no.”</p>	<p>“Other than occasionally providing gigs. No.”</p>
<p>“I’m fortunate to be surrounded by DIY people. This may not fit the definition of an area nonprofit but it is self funded.”</p>	<p>“Offering spaces and services that allow me to connect with others.”</p>	<p>“Somewhat. Locally I have worked with a number of nonprofits in providing production support for events.”</p>
<p>“I would not have a music career if not for nonprofits and churches.”</p>	<p>“Our nonprofit provided me with an opportunity to teach, to teach volunteers and use my networking skills to grow the organization.”</p>	<p>“Music nonprofits here are quite below average in vision, imagination and innovation, in my varied national experience.”</p>

Comments: Common Goal for the Music Scene?

<p>“Respect others as you want them to respect you. We all need to reduce our egos and give each other more smiles and hopefully come together again and Enjoy Music and Art once again !!!”</p>	<p>“Support all-ages venues. More small venues. Block corporate and corporate partnered ownership of venues. Promote local ownership of small venues.”</p>	<p>“I think we all share a common goal to be granted the opportunities to express ourselves musically without having to make compromises in our lifestyle which are unhealthy, unsustainable or flat out dangerous.”</p>
<p>“The basic notion that MUSIC CONNECTS AND HEALS PEOPLE.”</p>	<p>“Investment.”</p>	<p>“Support busking, create music reviews in local media especially for local home grown musicians.”</p>
<p>“More collaborative efforts amongst all arts organizations.”</p>	<p>“Organize. Demand higher pay. Demand local hiring first.”</p>	<p>“Need a forum for discussion.”</p>
<p>“There is so much undeniable raw potential and talent in this city.”</p>	<p>“Getting more people out to see live music.”</p>	<p>“Bring music outdoors (we have incredible weather 9 months out of the year).”</p>
<p>“We have to get the City and County in consensus with our desire for enhancing the scene.”</p>	<p>“Facilitating city events and festivals that will give local area talent a chance to showcase their art.”</p>	<p>“Keep being open, inclusive and supportive of all creatives.”</p>
<p>“We need many more suitable venues!”</p>	<p>“We need money to keep creating. Please help us.”</p>	<p>“It would be nice if the capitol city of California had a professional orchestra again.”</p>
<p>“We need money to keep creating. Please help us.”</p>	<p>“Striving for a more diverse group of leaders that have true experiences in the industry and a record and history of success.”</p>	<p>“We need to build that ecosystem first.”</p>

Comments: Suggestions for Government Support?

<p>“Lighten up on Venues with the permitting process.”</p>	<p>“Pay attention to us.”</p>	<p>“Invest in school music programs.”</p>	<p>“a sustainable future requires a paradigm shift where the fuel of the cities creative juice is mixed by artists with rent, families, responsibility.”</p>
<p>“Invest in school music programs.”</p>	<p>“Kids need to see that they're not alone in their angst, and that there is always going to be a SAFE place for them to go and let it out. Without independent all ages venues, there is no arts and culture in Sacramento.”</p>	<p>“Yes -- we could benefit from city-supported rehearsal space. I rent a private room at a rehearsal facility and it is more than \$500/month. A subsidized rehearsal hub with different kinds of rooms would be a boon to the community and cultivate more interactions across a variety of musicians.”</p>	<p>“Grants for nonprofits that support the music scene, grants and loans for venues, focus and funding to support public safety.”</p>
<p>“An easier interface to make music public would be nice. I've had a festival shut down by the cops, despite having a sound permit and community event filed. In the end they have discretion to shut it down.”</p>	<p>“Give grants to the nonprofits that already support the music scene and music education.”</p>	<p>“We lack infrastructure to build bigger models of sustained success.”</p>	<p>“Get rid of the Dance permit. Make flyer posting legal again.”</p>
<p>“Fill the mid size venue holes.”</p>	<p>“Stay out of the way.”</p>	<p>“Venues are a massive weak spot for the Sacramento creative community.”</p>	<p>“The goal of publicly-supported arts programs should be to bring people together.”</p>

Word Cloud: Suggestions for Government Support?



Comments: What Did We Miss?

<p>“There used to be a lot more small venues and house shows, which can be really valuable for nurturing music scenes and newer artists. I don't know how this can be fostered, but the lack of such outlets really has a negative impact on the music community.”</p>	<p>“How can artists, both freelance and those employed by performing arts non-profits, be engaged in education at the K-12 level?”</p>	<p>“Love the ideas of creating a collaborative - a NIVA chapter. A knowledge base of best practices, mentorship opportunities, talent and tech pool!</p>
<p>“We should be talking about how to get more folks to the gigs.”</p>	<p>“This process is encouraging and I'd love to help out in any way I can.”</p>	<p>“Is every music professional paid the same amount regardless of Race, Gender or Sexual Orientation?”</p>
<p>“What is your greatest challenge as a musician?”</p>	<p>“How can I help?”</p>	<p>“Have you been fined or penalized for your music activities?”</p>
<p>“If there would be value in having a contact person from the city to help venues with compliance issues and access to grants or funding (loans, etc)”</p>	<p>“About radio and promotional opportunities?”</p>	<p>“What genre are you in? I am in the gospel music field.”</p>
<p>“Are you happy with the way the music scene is going in Sacramento?”</p>	<p>“What is the one thing Sacramento needs? More musical festivals.”</p>	<p>“Is the entertainment license process preventing more opportunities for local musicians?”</p>



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