



SACRAMENTO MUSIC CENSUS



Arts + Culture
CITY OF SACRAMENTO



SUMMARY REPORT August 2023



Executive Summary

Administered during October–November 2022, the 2022 Sacramento Music Census gathered responses from 1,392 music people. Data was gathered from an online survey of residents 18 years or older who are living in the Sacramento MSA (Sacramento, El Dorado, Nevada, Placer, Sutter, Yolo, and Yuba counties) who participate professionally or semi-professionally in a vast range of sectors connected to music.

Key Findings:

1. Sacramento's Local Live Music Ecosystem Is Out of Balance

- Music Creatives (78%) dominate Sacramento's ecosystem over Music Industry (15%) and Venues/Presenters (7%)
- Achieving a balance between the number of musicians and the availability of venues and resources is important for a healthy and vibrant music ecosystem in any city or region.

2. Design The Regulatory Environment To Bolster Local Live Music

- Sacramento's local live music ecosystem is stifled by an outsized regulatory landscape that prevents the venues from presenting live music, which in turn narrows the opportunity for creatives.
- Live music is lumped in with bar and nightclub restrictions, so the regulations are limiting the local live music and venue business.

3. Creatives are committed to Sacramento and need more opportunity

- There is very little opportunity or diversity for revenue streams for creatives from their music. Reduce barriers for younger, new entrants to join the music ecosystem and find success. Work on diversity, equity and inclusion for women and BIPOC people in the music ecosystem.

Demographics:

- Respondents overall are predominantly male, white, heterosexual and 25–54 years old
- Sacramento music ecosystem's racial diversity doesn't reflect the general population: it's more white and less representative of every other race and ethnicity category.
- Gender inequality is pronounced (67% male/28% female).
- Sacramento's music ecosystem skews older than other cities.
- The lack of younger entrants could be limiting to growth and may signal barriers to entry, which is further confirmed with 71.6% having 10+ years experience.

Creatives Top Needs/Concerns

- More Gigs, More Opportunity - 86% have less than 4 local gigs per month
- More diversity in music income sources beyond live gigs (recording, merchandise, studio work, songwriting, teaching)
- 75% income comes from work outside of music
- More creative time
- 52% of creatives can't find local music industry service providers and 63% need more affordable professional services
- Creatives spend average of \$9,251 annually on industry services - 50% of that is spent locally
- Desired training: Marketing/Social Media, Booking Promotion/Event Production, Recording Engineering, Publishing/Licensing
- Lack of industry affiliation and registration (BMI, ASCAP, SECAC)

Venues/Presenters Needs/Concerns:

- City produced regulatory guide - interpretation of requirements, process for permits/which are needed, etc.
- Surprise regulations
- Better communication from city
- More efficient and effective Entertainment License process
- Single city contact point with city
- Type of event should affect terms (tiered system)
- Online portal for permits
- Inclusion in regulatory design process
- Extra cost of live shows (extra security guards, etc.)
- Uncertain fan interest

“Our community is loaded with talent who just need a stage and some way to get paid.”
-survey respondent

Music Industry Needs/Concerns:

- 52% of creatives can't find local industry service providers
- Lack of industry affiliation and registration (Grammys, Chambers of Commerce, etc.)
- Industry services directory
- Inclusion in regulatory design process
- Professional development
- 43% of music industry participants who have moved into the area in the past 2 years work remotely but live in Sacramento (and don't participate in local ecosystem)

“This city makes it as hard as possible for independent music to thrive.”
-survey respondent

Introduction

The 2022 Sacramento Music Census was a civic-led community initiative administered by Sound Music Cities, a leading Austin, Texas based provider of music ecosystem studies and music census work, and in conjunction with City of Sacramento Department of Convention & Cultural Services, the Office of Arts + Culture, with over 50 local community engagement partners.

The purpose of the study was to gain greater insight into the current needs of the Sacramento music ecosystem, and to foster a practice of increased community engagement in support of developing a vibrant creative economy.

Administered during October–November 2022, the 2022 Sacramento Music Census marks the first time that the Sacramento community has captured data and key information about the local music economy, and ultimately aims to assist the city and community in making more informed, data-driven decisions in support of the music ecosystem.

Who Participated?



SACRAMENTO, A MUSIC CITY

Sacramento has earned its place as a music city with notable contributions to the industry in a variety of genres that go back to the 1920's including Lynn Anderson, Jackie Greene, Betty Inada, Dick Jurgens, Guitar Mac, Rose Maddox, Johnny "Guitar" Knox, Gregory Porter, Jessica Williams, and seminal groups like Cake, Club Nouveau, Deftones, Fanny, Oleander, Tales of Terror, Tesla, The Cramps, Touch, and many more.

From jazz clubs in Sacramento's historic West End and early Japantown through today, music has played a critical role in Sacramento's history and culture, with venues like the Sacramento Memorial Auditorium, Old Ironsides and the Torch Club hosting music events from as far back as the 1930's. Sacramento boasts being the home of Tower Records legendary music retailer Skip's Music.

Today, Sacramento's musical landscape reflects the increasing cultural diversity of the region, including a mix of world-renowned culture-bearing music ensembles such as Mariachi Bonitas de Dinorah Klingler, Sacramento Taiko Dan, and number of ensembles from African, Afro-Caribbean, Mexican, Brazilian, and other world music traditions.

Sacramento continues to forge its place in the music industry hosting both community music festivals, as well as some of the biggest music festivals in the nation like Aftershock and Sol Blume, drawing thousands of attendees from across the world to Sacramento's doorstep. This longstanding tradition continues as three new music venues are in the pipeline to be opened in Sacramento in the coming years.

Prepared by Sound Music Cities, this summary report includes key findings and recommendations to guide immediate and longer-term strategies for the music community, municipal and civic partners. Two appendices showcase the 2022 Music Census Data Deck with Full Results and a DEI Data Deep Dive.

A Community Effort

The 2022 study was sourced and promoted by the City of Sacramento Department of Convention & Cultural Services and the Office of Arts + Culture. This study took a grassroots approach that engaged local partners who hold the relationships with music creatives, venues, and industry, and the structure of the leadership organization reflects these roles.

- **Lead Partners** were composed of a mix of city government departments and expert consultants who offered leadership to the entire census.
- **Community Partners** served as the primary means of outreach to music stakeholders and these organizations were instrumental in shaping the census itself.

This project was made possible by the generous support of many individuals and organizations.

ABLE Community Development Foundation
 American Federation of Musicians Local 12
 Another Planet Entertainment
 Autumn Sky Hall Band
 Bigger than Us Arts
 California Black Chamber of Commerce
 California Capitol Venue Coalition
 Californians for the Arts
 Del Paso Partnership
 Department of Sound
 Downtown Sacramento Partnership
 Dwellpoint
 esoteric levels
 First Three Media
 Group Therapy Music
 Harlow's
 HOF
 Ifamodupe
 Jason Jong
 KDEE 97.5 FM
 Library of MusicLandria
 Life Entertainment Presents, LLC
 Loose Engines/Dog Yard Studio
 Macondo Music/Empire Pop Choir
 Midtown Association
 Music Reconnaissance
 Musician's Eve
 Pocket Change 916
 Point Source Sound
 Sac Cultural Hub Media Foundation
 Sacramento Alliance for Regional Arts

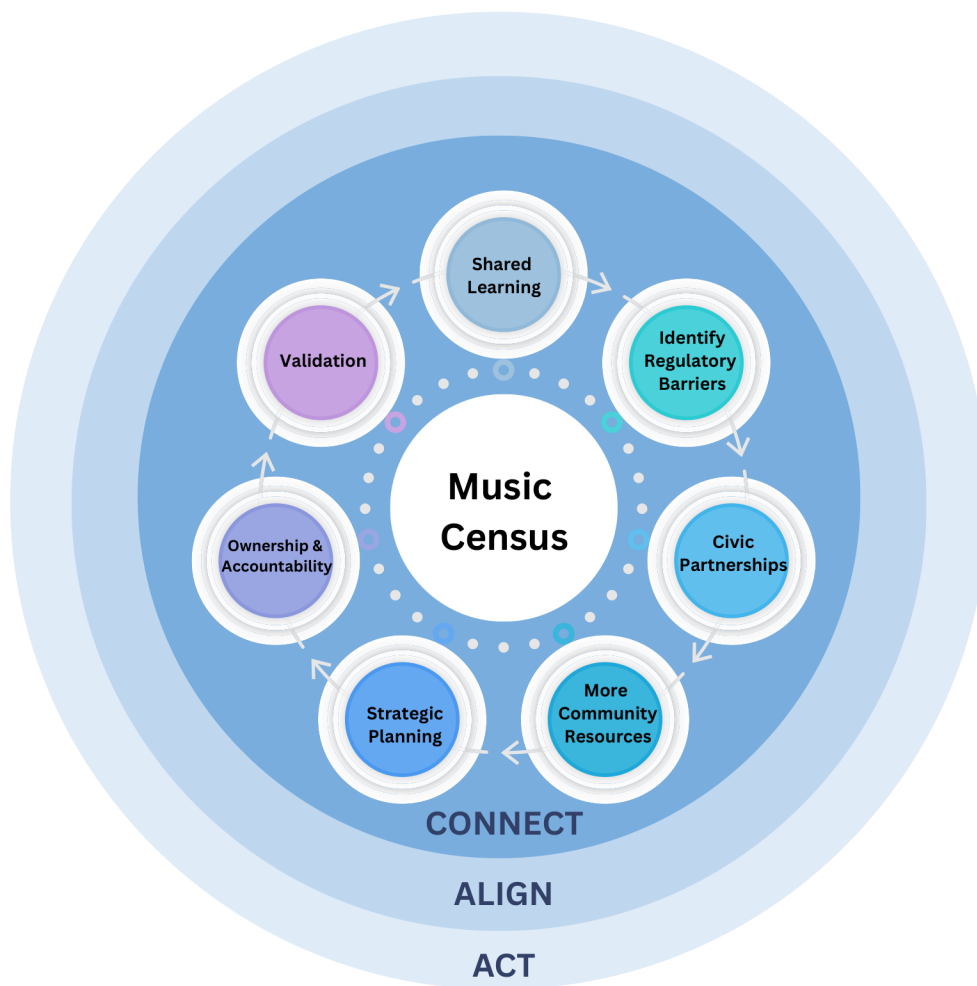
Sacramento Blues Society
 Sacramento Hispanic Chamber of Commerce
 Sacramento Memorial Auditorium
 Sacramento News & Review
 Sacramento Philharmonic & Opera
 School of Rock Sacramento
 SeSu/Npaub Story
 Shughe
 Sofia Center for The Arts
 SOL Blume
 Solomon's Russ Room
 Sound Before Sight Studios
 Super Art Media
 Tavarus Blackmon Art LLC
 The Mondavi Center
 The Rink Studios
 Torch Club
 Tower Brewing Open Mic
 Two Rivers Cider Open Mic
 Valerie V Music
 Visit Sacramento

Brandon Bailey
 Mary Canote
 Shana Dellos
 Hannah Lingrell
 Noah Nelson
 Jon Raskin
 Leslie Whitesel

Data & Insights: The Foundation of Strategy

Any strategy to support and grow a music ecosystem begins with a basic understanding of its population. Professional music communities are not easily discoverable using traditional methods (such as through labor statistics or economic data). A music census collects key data points to better understand music people and their economic activity within a specific geography. It provides a baseline for policymakers and the larger community to understand and take action.

The Census is a robust dataset that can be referenced in the days, months, and years to come, fostering a more evidence-based discipline to the planning stages for action in the music ecosystem. The value of a music census goes well beyond the data itself. Such initiatives ignite a range of activities that are conducive to more strategic and sustainable support for local music scenes over the long term, beginning with validating this economically marginalized group, sharing new learning, activating civic and community resources, and ultimately empowering music people to take ownership of change initiatives.



This summary report offers key takeaways and insights as a starting point and a way to inspire curiosity and to encourage deeper engagement. This dataset is not meant to offer quick fixes, rather it provides a current state of understanding from which to identify challenges and co-create solutions. Data and insights are plentiful given the number and depth of quality responses this community has shared.

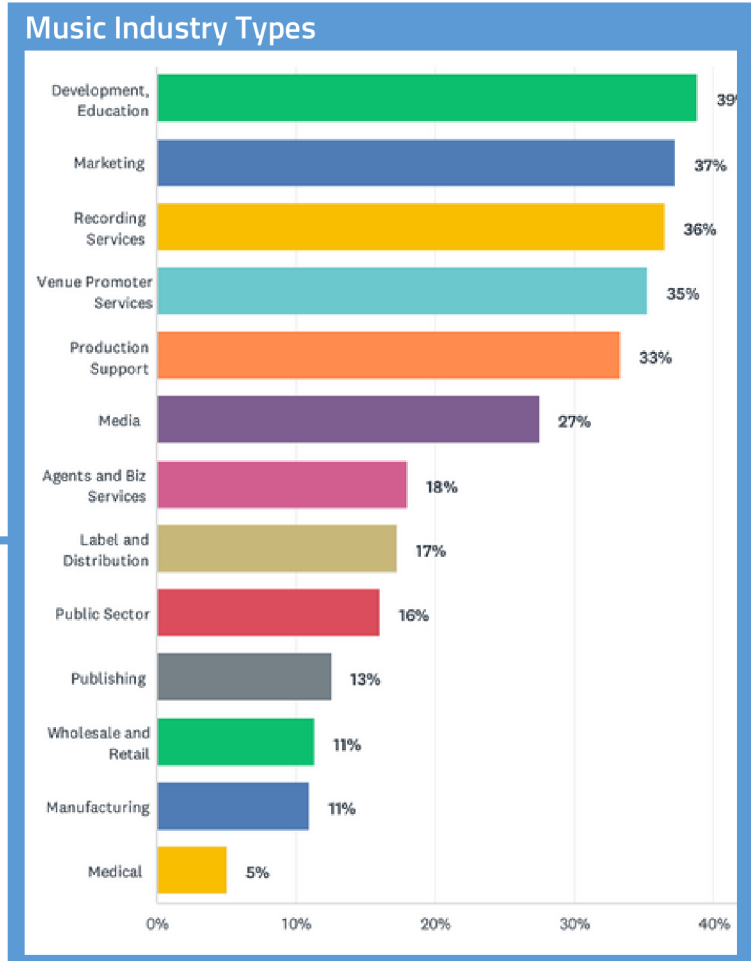
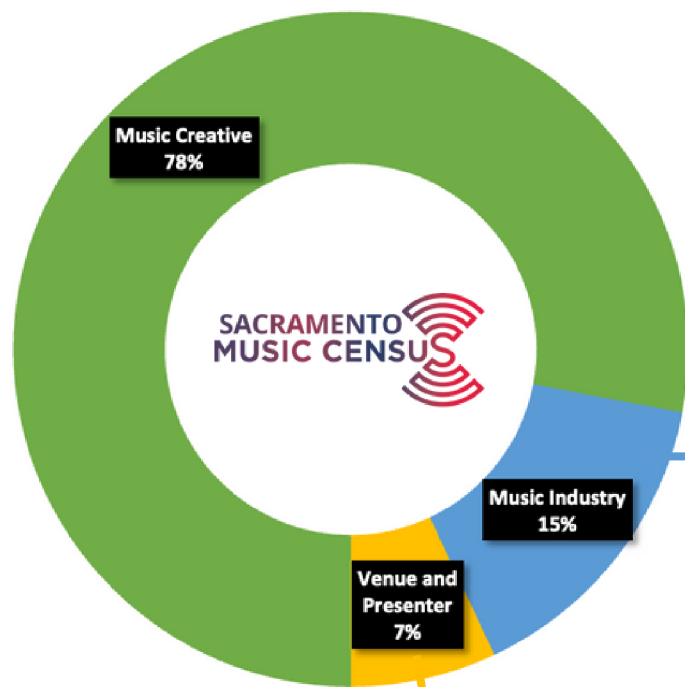
In the next section, we offer a snapshot of the Sacramento music ecosystem as well as key insights to spotlight as a starting place. This summary report is an invitation to dive into the breadth and diversity of topics about which the Census provides data, and we welcome more in-depth analysis in 2023 and beyond.

Sacramento Music Ecosystem Composition by Role

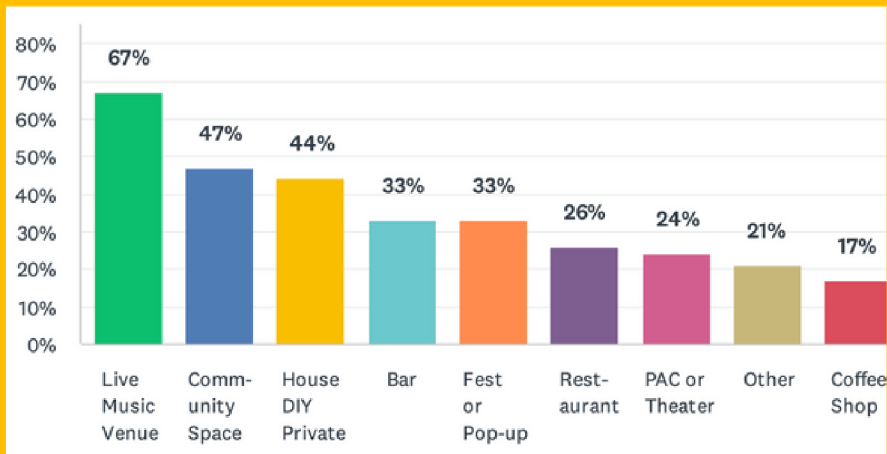
Music Creatives dominate Sacramento's ecosystem

What types of people did the 2022 Sacramento Census survey?

Data was gathered from an online survey of residents 18 years or older who are living in the Sacramento MSA (Sacramento, El Dorado, Nevada, Placer, Sutter, Yolo, and Yuba counties) who participate professionally or semi-professionally in a vast range of sectors connected to music. This includes part-time work, rarely paid or volunteer work, and work that is more administrative than creative. Music creatives (musicians, bands, songwriters, engineers, teachers, producers and more) are the largest group, but it also includes dozens of other roles such as artist managers, agents, studio operators, equipment and music retailers, manufacturers, event producers, presenters, music support services, anyone employed in a space that presents live music, and many more.



Presenter and Venue Types

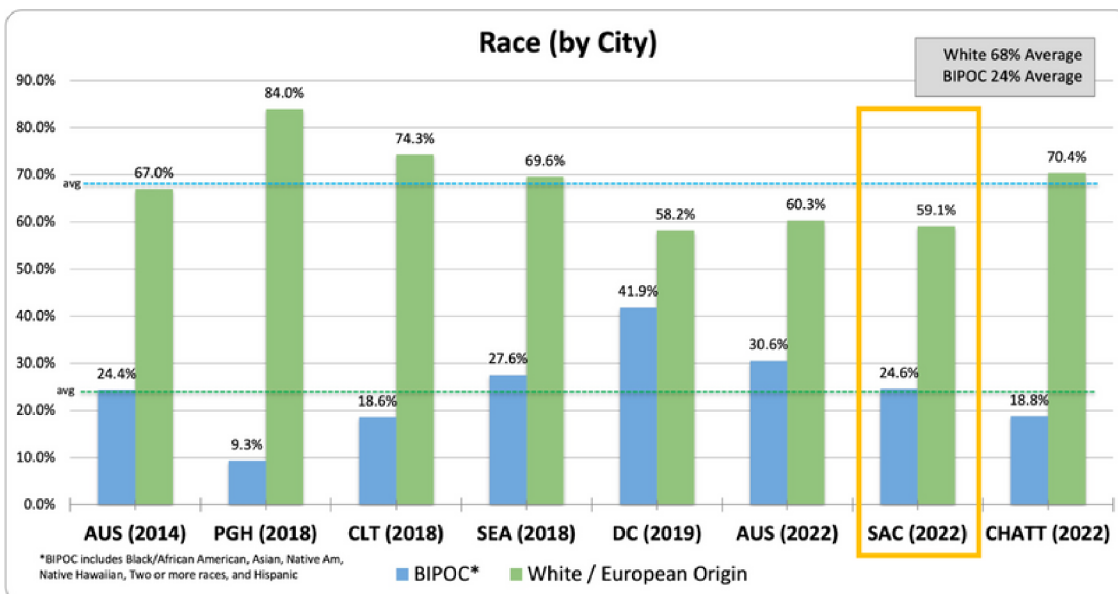
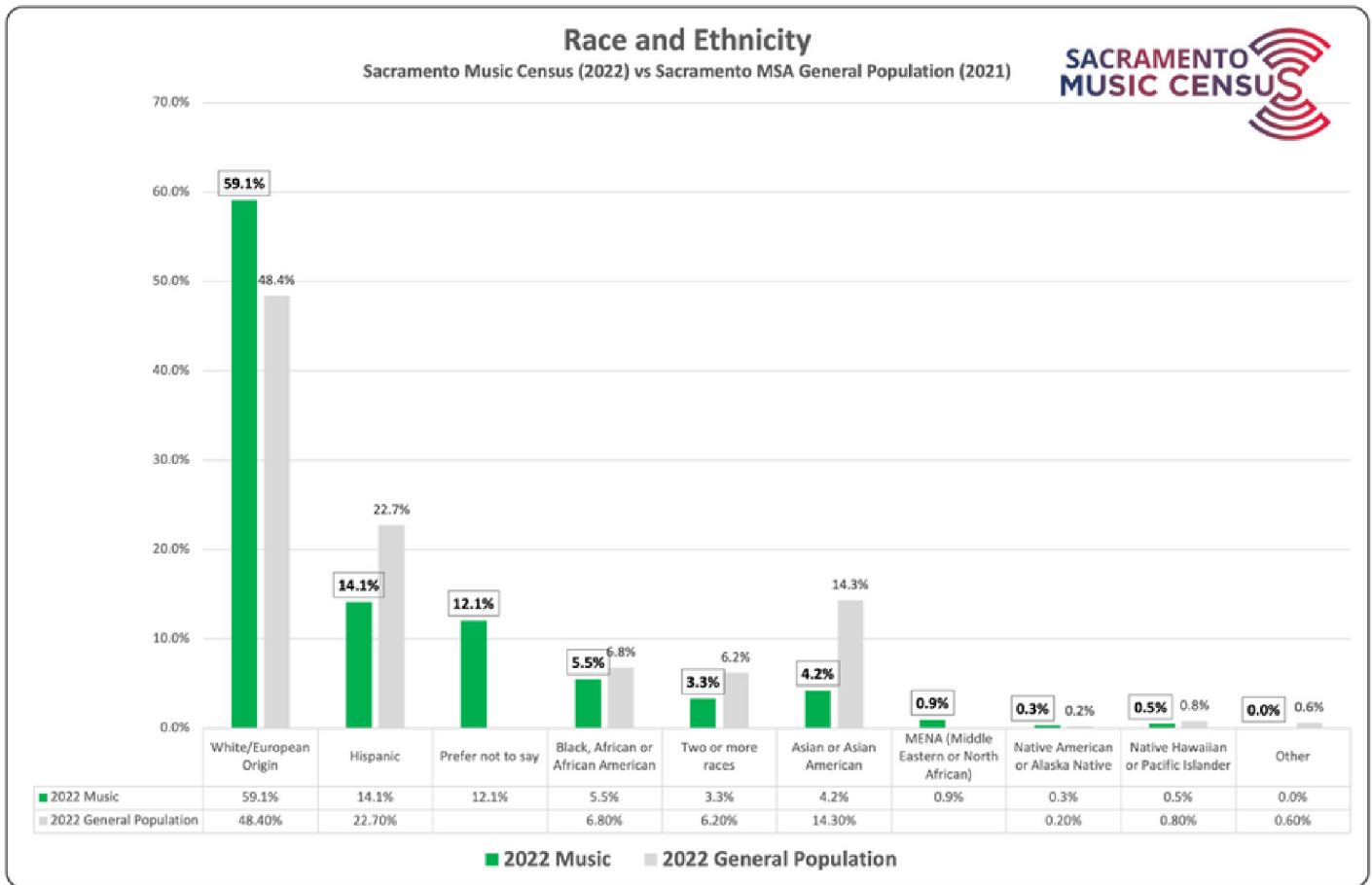


Sacramento Music Ecosystem Demographics

Race and Ethnicity

Notable Trends:

- Respondents overall are predominantly male, white, heterosexual and 25-54 years old
- Sacramento music ecosystem's racial diversity doesn't reflect the general population: **it's more white and less representative of every other race and ethnicity category.** (Note: other music census cities also show a gap in reflecting the general population, which may be due to outreach or may reflect a diversity gap; however, Sacramento's gap is slightly more pronounced than other cities and worth exploring.)



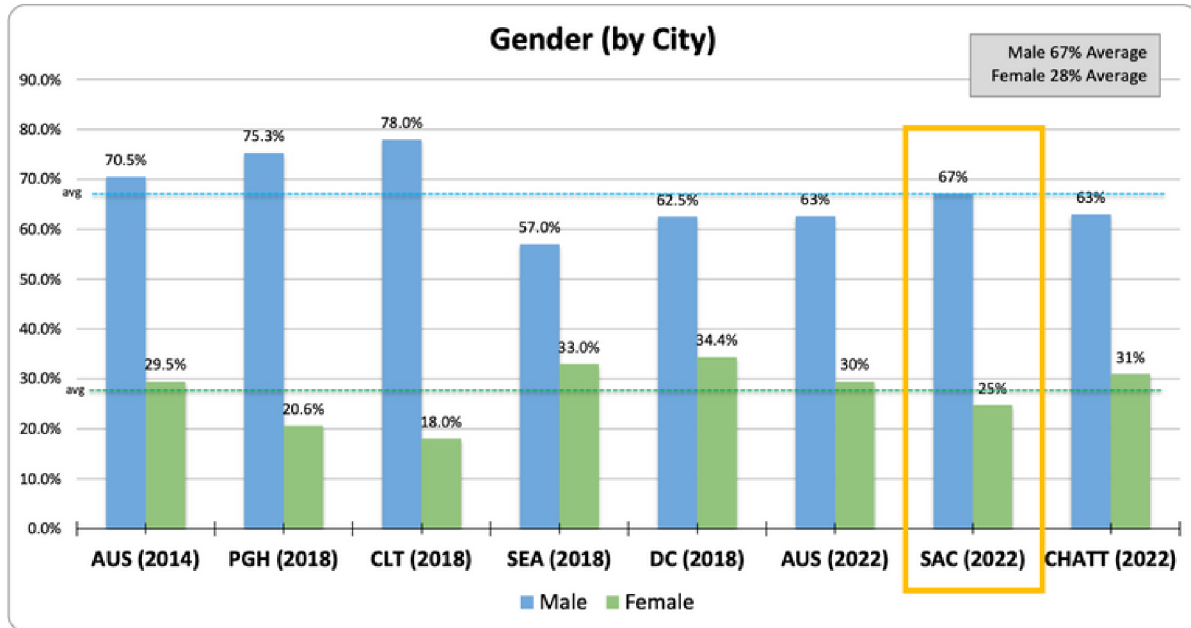
Comparative Data with other Music Cities' Census: Austin 2014, Pittsburgh 2018, Charlotte 2018, Seattle 2018, Washington DC 2019, Austin 2022, Sacramento 2022, and Chattanooga 2022

Sacramento Music Ecosystem Demographics

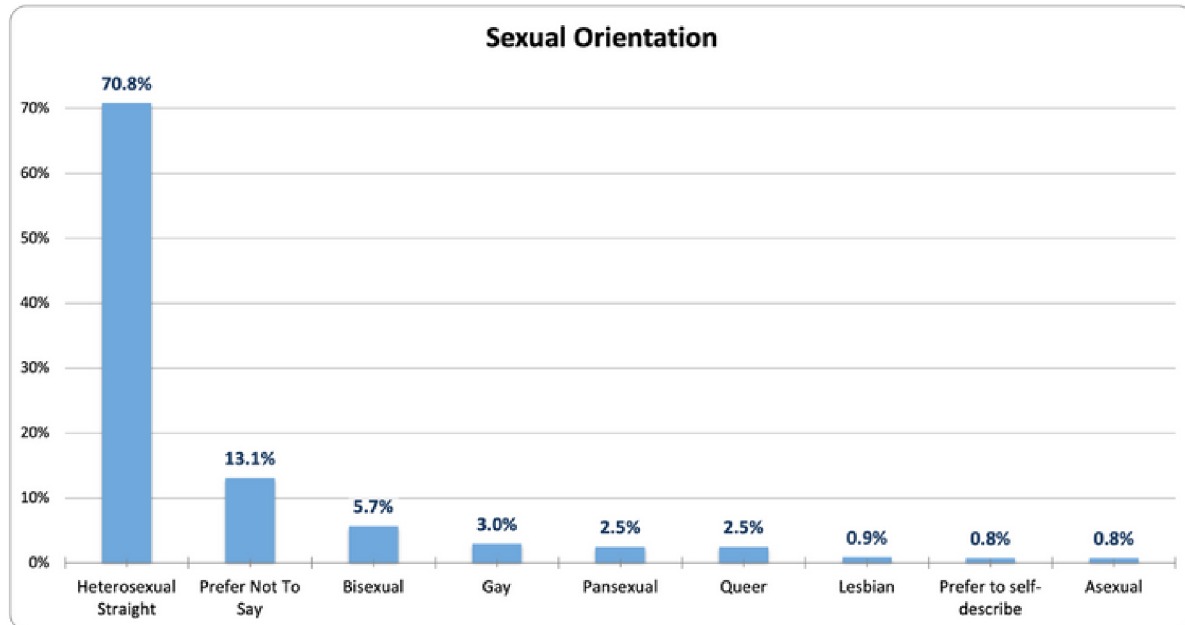
Gender and Sexual Orientation

Notable Trends:

- Gender inequality is pronounced (**67% male/28% female**). While this is consistent with other cities, the female portion is even lower than the average of other cities.



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

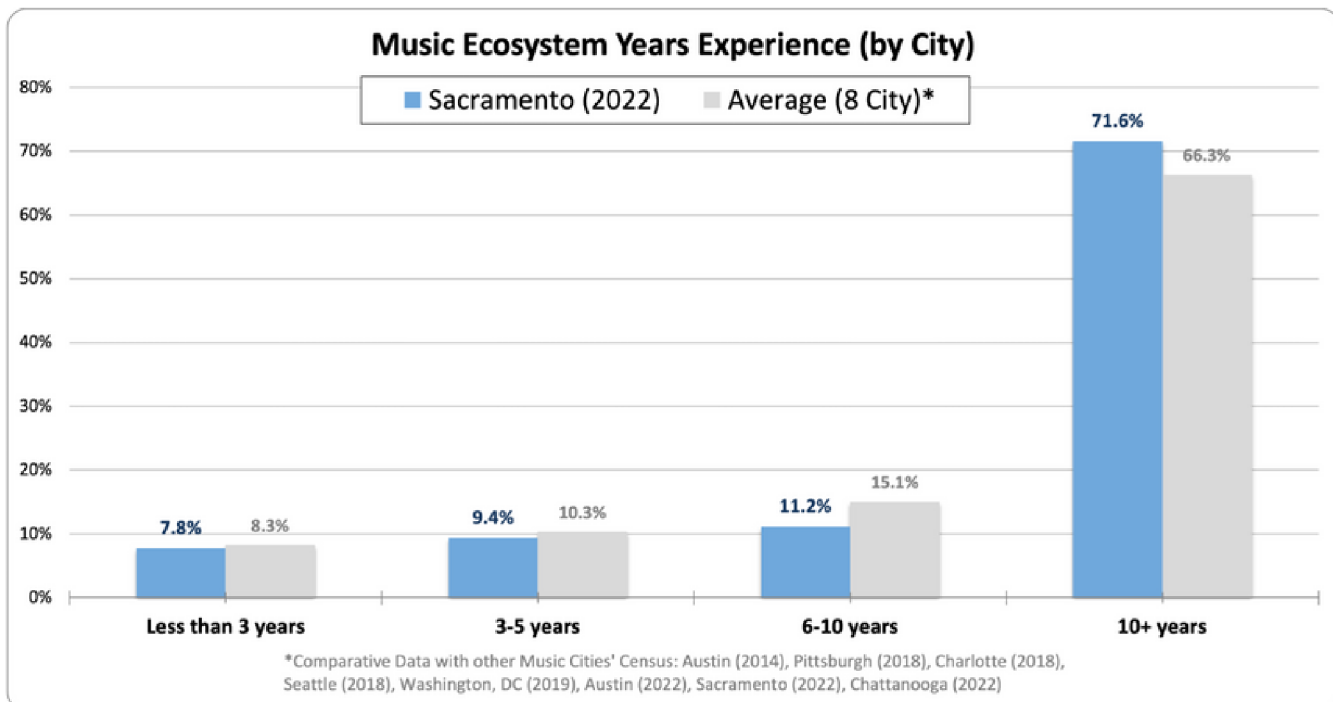
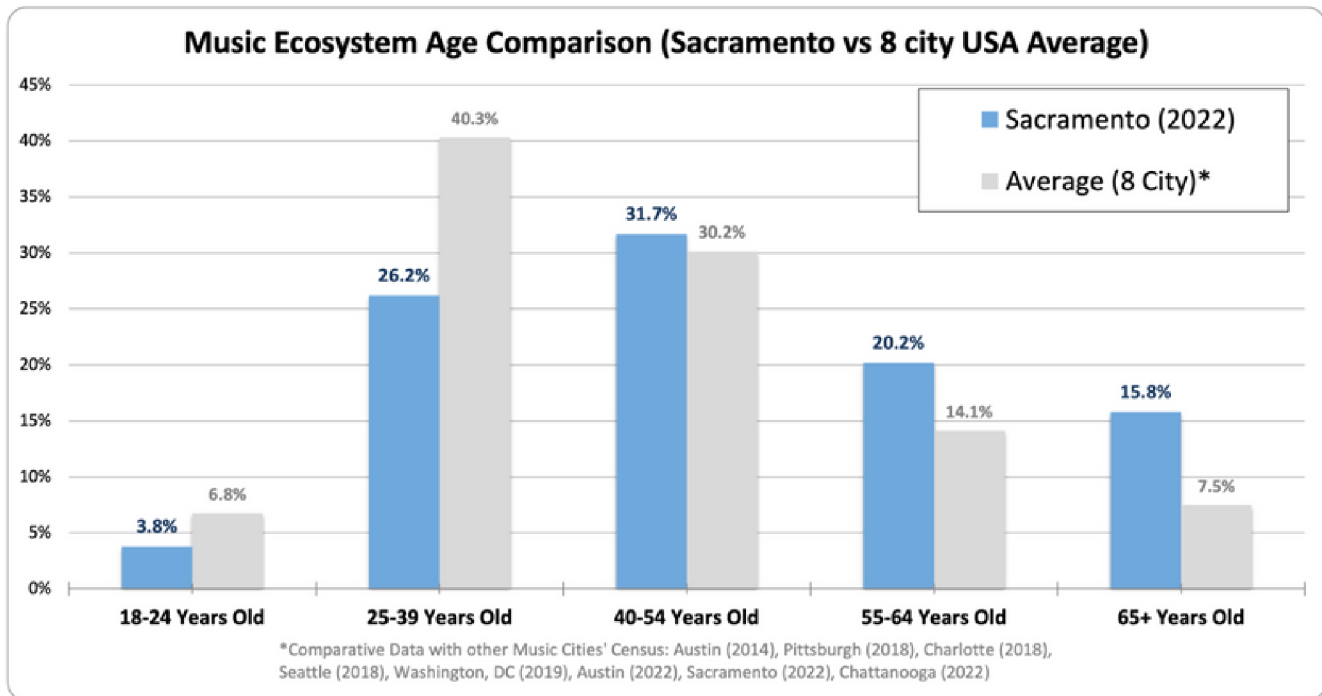


Sacramento Music Ecosystem Demographics

Age and Years Experience in Music

Notable Trends:

- Sacramento's music ecosystem skews older than other cities.
- The lack of younger entrants could be limiting to growth and may signal barriers to entry, which is further confirmed with 71.6% having 10+ years experience.



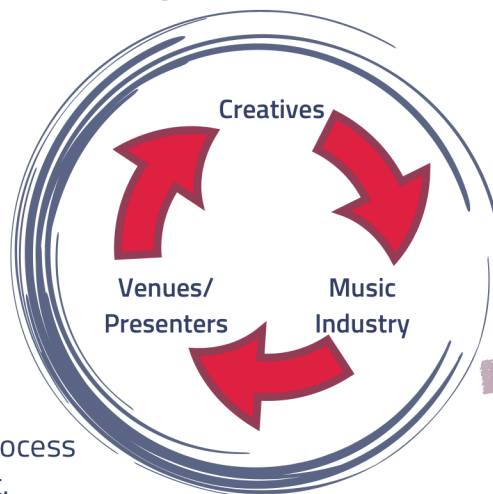
OVERVIEW

Sacramento's Music Ecosystem Needs/Concerns

Understanding the needs and concerns of each part of Sacramento's Music Ecosystem brings empathy to each segment and reveals the interdependency of the component parts. When we see the system as a whole, it becomes possible to identify the actions and levers that can improve the overall environment, encourage collaboration between the parts, and address specific needs of each segment that will strengthen the entire ecosystem.

Creatives Top Needs/Concerns

- More Gigs, More Opportunity - 86% have less than 4 local gigs per month
- More diversity in music income sources beyond live gigs (recording, merchandise, studio work, songwriting, teaching)
- 75% income comes from work outside of music
- More creative time
- 52% of creatives can't find local music industry service providers and 63% need more affordable professional services
- Creatives spend average of \$9,251 annually on industry services - 50% of that is spent locally
- Desired training: Marketing/Social Media, Booking Promotion/Event Production, Recording Engineering, Publishing/Licensing
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Venues/Presenters Needs/Concerns:

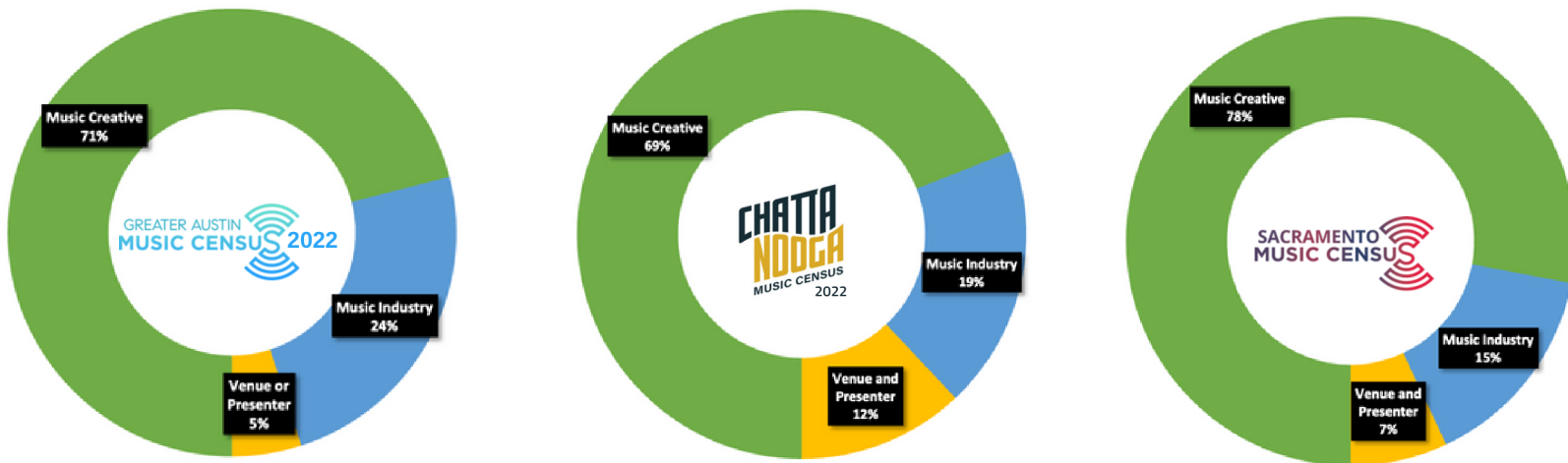
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- 43% of music industry participants who have moved into the area in the past 2 years work remotely but live in Sacramento (and don't participate in local ecosystem)

Sacramento's Local Live Music Ecosystem Is Out of Balance

The composition of Sacramento's music ecosystem is a vivid example of the interdependence of the component parts of the music ecosystem. If the musician-to-venue and industry resources ratio is out of balance, as it is in Sacramento, it can be considered out of balance in terms of the local music scene and industry dynamics. This can impact the availability and accessibility of venues for musicians to perform, as well as the availability of resources such as funding, marketing, and a general lack of opportunities for musicians and industry professionals. An imbalance in these factors can potentially hinder the growth and sustainability of the local music scene, making it difficult for musicians to thrive and succeed in Sacramento's music industry. Achieving a balance between the number of musicians and the availability of venues and resources is important for a healthy and vibrant music ecosystem in any city or region.



With creatives (78%) dominating Sacramento's ecosystem, the venues (7%) and music industry (15%) are underdeveloped. Notably, only 26% of that 7% of venues are for-profit businesses, so the commercial and economic opportunity is lacking. The venue capacity ladder is not balanced and specifically lacking venues with capacity between 101 and 500. With such a small venue/presenter portion of the ecosystem, it's not surprising that creatives need more opportunity. Similarly, creatives can't find industry services and end up doing a lot of it themselves, and spending less annually on local services. For comparison, the music industry in Austin is 24% and creatives spend \$10,500 annually (60% locally = \$6300); Chattanooga's music industry is 19% and creatives spend \$15,180 annually (45% locally = \$6831), while Sacramento's music industry is 15% and creatives spend \$9,251 annually (50% locally = \$4625).

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

Demographically, there are also imbalances across communities within Sacramento whose voices and needs could be amplified and addressed to bring more diversity, equity, and inclusion. Queer, Hispanic, Female, and 18-24 year old respondents noted more issues with elitism, ageism, and sexism which are the three categories where Sacramento needs the most attention. Please see the DEI Deep Dive Appendix for more detail.

OPPORTUNITY:

- Balance the sector composition by creating incentives to bolster for-profit venues and music industry.
- Deeper analysis of the venue ladder/pipeline and available performance spaces for local live music.
- Balance and develop the ecosystem with more connections across music sub-sectors (directories, events, etc.)
- Diversity is an essential component of creative industries; tap into the expertise of community organizations and DEI/social sector research to facilitate community conversations, workshops, etc. to specifically address concerns of Queer, Hispanic, Female and 18-24 year old audiences.

Design The Regulatory Environment To Bolster Local Live Music

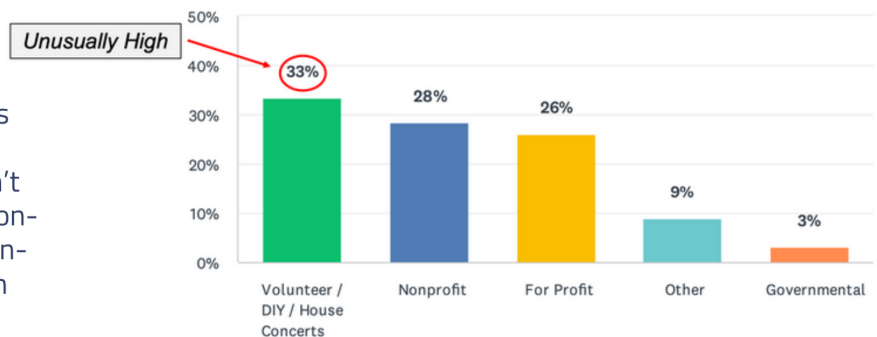
Sacramento's local live music ecosystem is stifled by an outsized regulatory landscape that prevents the venues from presenting live music, which in turn narrows the opportunity for creatives. Live music is lumped in with bar and nightclub restrictions, so the regulations are limiting the local live music and venue business. There is a trend of offering a variety of tiered options as evidenced by California's 2022 new music venue license and license exchange options.

In the same way that Sacramento has created a regulatory environment and special events permitting that has fostered a vibrant music culture with larger music festivals (regional and national touring acts), Sacramento could also create regulations that are supportive, inviting, and friendly to local live music and community events through a more collaborative approach that redesigns the business entertainment licensing regulations for businesses and smaller community events featuring live music. Small venues and small stages that incubate local artists are missing from the ecosystem because regulation creates so many barriers.

“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.”
-survey respondent

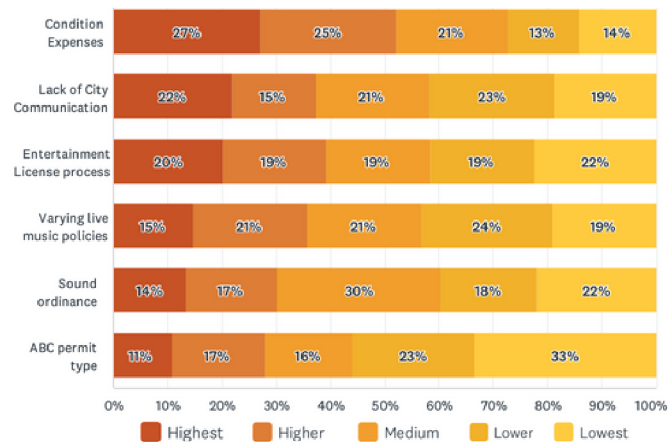
Venue Ownership Structure

offers evidence of the regulatory landscape's impact on venues. For profit usually is dominant, and house concerts is usually 3rd or 4th and more in the 15% range. Independent live music venues can't make it in this regulatory environment. Non-profit status is a work around because non-profit entities are somewhat exempt from the regulatory process.



Current policies and regulations for venues and businesses presenting live music create **challenges and concerns**.

“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.”
-survey respondent



OPPORTUNITY:

- **Address regulatory barriers preventing businesses from featuring local live music:**
 - Evaluate the entertainment and special event permit process
 - Regulatory resource guide
 - A partnership approach for outreach and education about regulations - between City and venues, presenters, etc.
 - Adopt a more centralized and user-friendly process.
 - Partnership approach in regulatory redesign process
- **Audience development programs** (i.e.: investing in journalism helps establish an emotional connection to artists, etc.)
- **Incentives/tax rebate/grants to qualified businesses that host local live performances** (reference model: Performing Arts Promotion Amendment Act in Washington D.C. (offers property tax rebates to businesses who satisfy the requirements of number of performances and performer pay)
- **Better integration of local arts and music into Sacramento's large festivals**

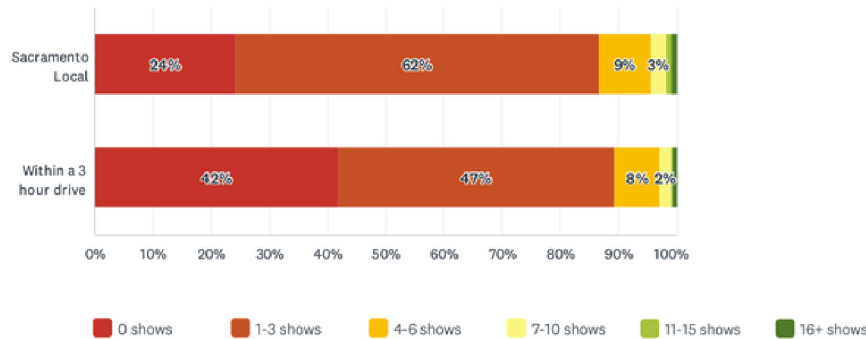
Creatives are committed to Sacramento and need more opportunity

There is very little opportunity or diversity for revenue streams for creatives from their music.

- 86% have less than 4 local gigs per month.
- And yet, 87% plan to stay in music and 78% plan to stay in Sacramento!

Reduce barriers for younger, new entrants to join the music ecosystem and find success. Work on diversity, equity and inclusion for women and BIPOC people in the music ecosystem.

Very Few Paid Gigs per Month



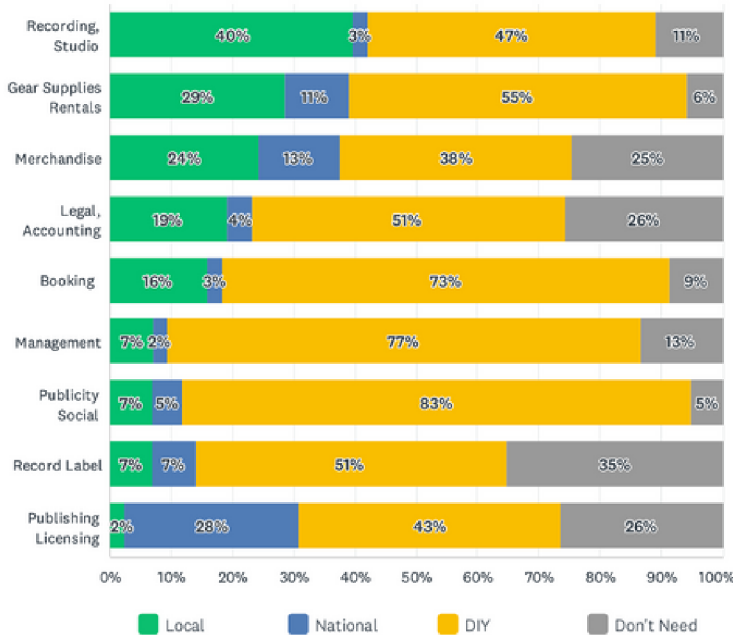
“Interested primarily with city government becoming more accessible to the creative community to assist in building culture and an industry.”

-survey respondent

“Our community is loaded with talent who just need a stage and some way to get paid.”

-survey respondent

Where Creatives Go For Music Industry Services



Creatives need more industry services and connections to them.

- 52% can't find local providers
- Large DIY segment for industry services (too much yellow)
- Creatives need to go pro – industry services need to be easy to find, affordable
- Music Creatives spend \$9,251 per year and 50% of that is spent locally. If they didn't do it themselves, this could grow the industry services business in Sacramento.

OPPORTUNITY:

- Revenue development (diversify creatives' income sources)
- Grants (to support more creative time)
- Audience development around local live music artists (demand generation will help artists and venues)
- Industry training (publishing, licensing, etc.)
- Improve awareness of and ease of finding local industry services to reduce DIY
- Mentorship programs to get industry experience for younger participants
- Centralized music/creative industries hub that functions as a sector connector
- Incentives for businesses or organizations who provide more music industry services

Going Forward

This Summary Report and appendices are the beginning. Going forward, we hope the community will embrace and work with this new dataset to develop ways forward that will continue to strengthen and build the Sacramento music ecosystem.

There are many potential uses of this data set including:

- Foster greater understanding /empathy (within and externally)
- Sharpen and clarify the focus of public and private initiatives
- Identify needs and gaps (training, regulations, health needs, etc.)
- Bring to light differing perspectives from different communities and sub-groups
- Provide market research to organizations for new service opportunities
- Provide reference point for future research, trends, performance

We are grateful for the opportunity to work with Sacramento music stakeholders on developing this census and data set and look forward to seeing good things emerging from this community effort and data collected and shared. In addition, we will continue our collaboration with Sacramento through ongoing regulatory review work that will build on this census.

About Sound Music Cities

Based in Austin, Texas, Sound Music Cities was born out of a diversity of direct experience in music-related policy, music development program implementations, and leadership of sound management initiatives. Led by Don Pitts and Bobby Garza, the team has extensive experience in sound management initiatives and philosophies that encourage both live music industry growth and residential compatibility.

The Sound Music Cities team has a special combination of political know-how, street-smarts, and active listening skills—three things that help when beginning to connect the dots in creating sustainable music policy in any community. Their fresh, unbiased perspective listens for patterns and themes unique to your city. Above all else, they work alongside clients as a partner, digging deep into the foundational issues that make or break a sound music economy providing a clear, actionable path forward.

Prior to Sound Music Cities, our team spent years working as both City Staff and City Council Staff to produce a “one stop shop” permitting model in Austin, Texas specifically related to music and event permitting. This included generating the ideas surrounding the creation of the Austin Center for Events and being part of its implementation and success. In addition, the SMC team, in their previous municipal positions, drafted the city policy and legislation that was the most comprehensive rewrite of music permitting and sound enforcement policy in decades.

Sound Music Cities also curates and hosts the Music Cities Think Tank, an annual two-day convening of music policy experts and practitioners from over 16 cities around the globe. This invitation-only gathering is structured to facilitate intimate and intensive discussions of latest issues and strategies for this select group of participants.

www.soundmusiccities.com