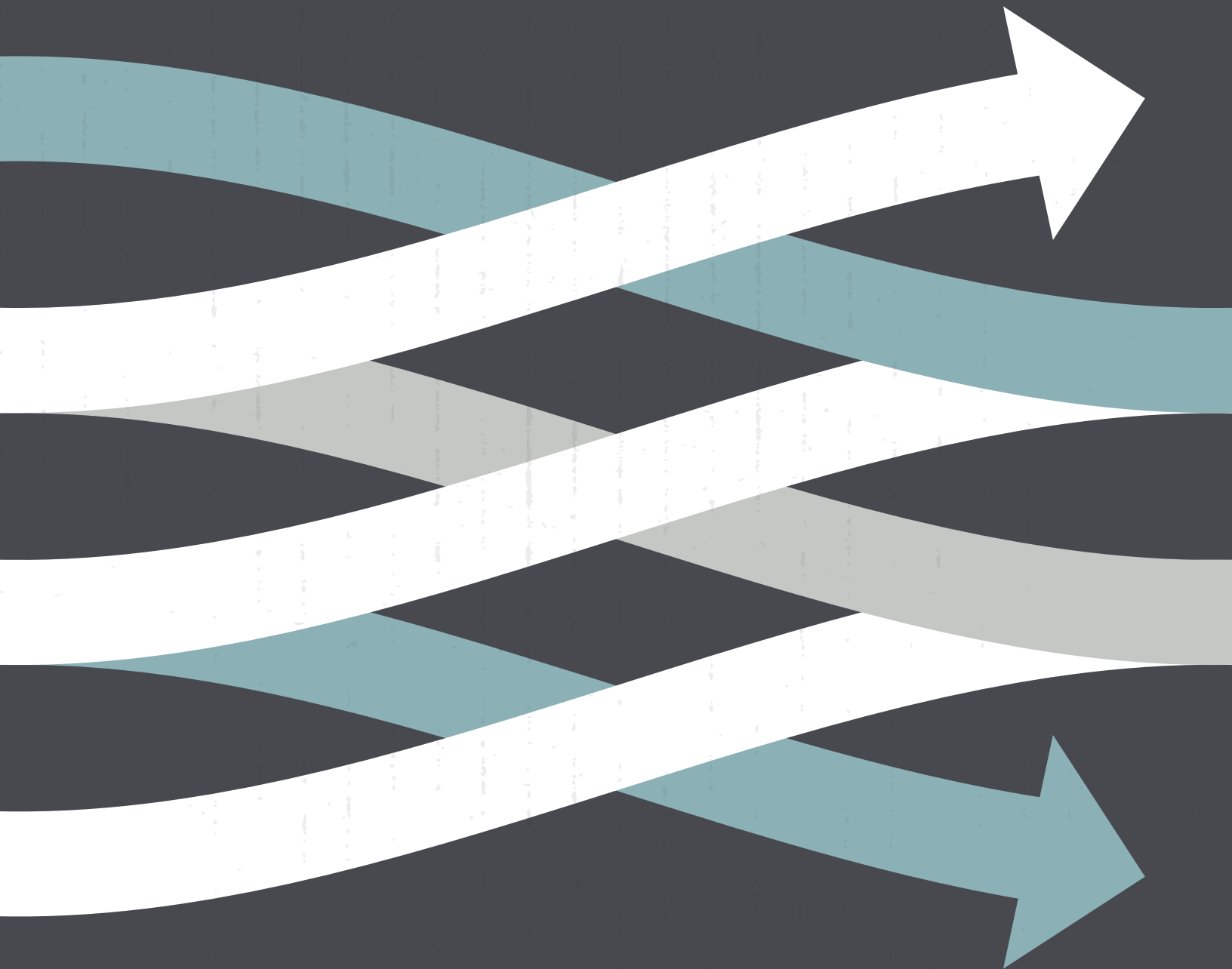SOUND MUSIC CITIES

The Pittsburgh Music Ecosystem Study:

ACTIVATING A COMMUNITY RESPONSE

SOUND MUSIC CITIES

Pittsburgh music people with over 42 different music industry skills

SPOKE UP!

1,800

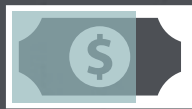online respondents

75%
are music creatives

58%
live within city limits

59%
of respondents have full-time jobs in another industry

69%
make less than $10k/year from music

57%
of venues present live music at least once a week

#1
concern for venue owners

Permitting, Regulations & Tax

DIY
(do it yourself)

is how Creatives get stuff done

89%
Social Media Marketing

84%
Booking

74%
Managing

40%
Record Label

Contents

Acknowledgements

The music community in Pittsburgh deserves special acknowledgement for their time and willingness to share this depth of inquiry into their business activities. As one respondent suggested, the only thing missing was "a DNA swab." Through the many interviews, focus groups, town hall gathering and the online survey, it was very important for participants to speak up and share.

We have many collaborators to thank from our "community of practice" that work on these issues tirelessly in cities far and wide. Over the years they have helped develop the concepts we customized for the unique considerations of Pittsburgh. We greatly appreciated the opportunity to convene the Music Cities Think Tank in March 2018, which brought over 16

music city leaders together to discuss the most pressing issues of this field and compare different strategies. The same passion that drives musicians in Pittsburgh drives us to find new ways to make sense of an incredible array of data, comments and opinions and somehow find ways to help these communities sustain themselves. More specifically we would like to recognize the hard work and diligence of a range of studies in this space, dating back to the 1990s by the National Endowment for the Arts, as well as more recent efforts in Denver, CO, Melbourne, Australia, the Live Music Exchange in UK, London (Ontario) Music Census, the Albuquerque Music Ecosystem Study, MusicCanada's The Mastering of a Music City, and the Austin Music Census, conducted by Titan Music Group, to name just a few. We appreciate your hard work, and we are doing our best to align our efforts so that the industry benchmarks and trends that you have helped define can be better understood and compared over time and space, globally and for the benefit of this economically deserving but historically marginalized community.

Executive Summary

Pittsburgh's music ecosystem spoke up for this study. This complex and interconnected system of creative and business professionals provided an overall picture of economic struggle and frustration. However, data from interviews, focus groups, and an online audit of 1,800 respondents also reveal a number of improvements already in motion. With a long-term focus on developing the following five areas (Leadership, Career, Industry, Policy and Audience), Pittsburgh's music people with the support of their community can adjust course, stabilize and grow their ecosystem.

Leadership Development

For a variety of reasons, leadership has not emerged from within Pittsburgh's music ecosystem in the way we might expect to see from other groups or industries. There is also a lack of civic involvement. 88% of Pittsburgh music people do not participate in government or business gatherings of any sort. Thus, in various domains of policy, economic development, nonprofit or philanthropic support, music-related issues just aren't getting addressed. Therefore, this study's primary recommendation is a two-part development of leadership skills for music ecosystems, to include:

Civic Engagement Training Program:

A bootcamp or series of workshops to develop skills in areas such as public policy-making, community development, cross sector collaborations, systems change, nonprofit administration, all with the goal of helping music community members elevate the ecosystem's capacity to become more accountable for its own needs and interests.

Music Industry Change Initiative:

A larger and more sophisticated structured change initiative bringing together representation of various music sub-sectors along with community leadership in government, philanthropy, nonprofits and private sector into a formal cross-sector collaborative body aligned on specific outcomes for Pittsburgh's music scene. This effort is not a new organization or "gate-keeper" but rather a 3-year initiative with dedicated administrative support that would sweep a path and develop working groups focused on finding longer term solutions to root-cause issues affecting Pittsburgh's music world.

"If you are trying to make this city more industry friendly you should start by building up from the foundation."

Career Development

Every sub-sector of economic activity in Pittsburgh's music industry is built around the output of its creative workforce. However, we also see that 50% of these creatives played 10 or fewer gigs last year. We can help musicians, most of whom are sole proprietors, find more time to be creative by improving and expanding their music business skills. Specific recommendations include development of a multi-institution music education pipeline, an intensive grant program for artists/bands creative development, and a wider range of music industry workforce training seminars rather than just entry-level education. In addition, small wins that could be pursued in the short term include a royalty registration drive and a series of musician revenue development workshops.

"Get bands to admit if they are here to work or if it's just a hobby. So many can't decide and don't want to commit but want the recognition and pay of a real working band."

"Pittsburgh needs to update its local laws, so music can be played at bars. The venues are dwindling as the scene is growing! We need more quality places to play!"

Regulatory Reform

Despite a complex regulatory landscape, and a history of punitive approaches to nightlife, the City of Pittsburgh is rethinking its legacy systems and can make significant strides in reducing regulatory compliance concerns for music venue operators. At the same time, if leadership within the music ecosystem can better develop and organize itself and provide clear feedback to help shape policy, especially those that impact community standards for public safety, economic conditions for the industry will improve.

Specific recommendations include waiving amusement tax for live music venues under 350 in capacity, centralization of sound complaints into a 311 process, a partnership strategy for music-friendly districts to develop new locally-controlled sound ordinance overlays, adoption of a best-practice sound management strategy, a pilot program to temporarily explore hybrid uses and a more diverse classification of nighttime venues in zoning and land use code, and finally, giving the Office of Nighttime Economy a clearer role in the city code, which would allow it to better manage a coordinated partnership approach with music industry operators.

"From my 3 years in Pittsburgh, I see a promising cultural scene and a busy entertainment industry, but very little 'music industry' that is concerned with the actual commercialization of music."

"Audience development ranks 1, 2 and 3 for me. Nothing else comes close to it. Good venues with good experiences and good bands, then everything else falls into place."

Industry Development

Pittsburgh's diversity of professionals providing services for the music industry (in 42 separate sub-sectors) is world-class, but they are underutilized by local creatives, who are more apt to struggle in "do it yourself" (DIY) strategies. There are gaps in expertise and many providers as generalists may not have the specialization of skills necessary to compete nationally. Recommendations include creation and maintenance of a central directory of service providers, development of a Pittsburgh Music Venue Alliance, increased networking opportunities both within and across sub-sectors, more mentoring opportunities for younger industry entrants, a regional alliance with neighboring cities to develop shared resources, and finally a live music venue best practice guide.

Audience Development

Changing interest in live music is a great concern especially for Pittsburgh's local music scene, despite data that indicates an optimistic outlook for growth of local music programming over the next three years. There are a range of strategies to help stimulate interest and shift perception of the value of local music, including launching a Love Pittsburgh Music Month, developing a master gig calendar, creating a basement music festival, curating patron-centered live music experiences often in non-traditional places (supported by a music fan survey), certifying skilled audio engineers, providing micro-loans for music venue audio installations, supporting radio that features local music, and coordinating new models of local music patronage.

This study provides a starting point and benchmark for change. Just by becoming aware of its own interconnectedness (the premise of the music ecosystem), Pittsburgh's music community can activate a response, especially with an initial focus on building its own leadership capacity. This enables music people to start working collaboratively across sectors on deeper systemic issues affecting development of careers, audience, industry and music-friendly government policy. By resisting the temptation of quick fixes, true population-level change for the thousands of participants in Pittsburgh's music ecosystem will become possible, and music can become more widely embraced for its powerful potential to help drive Pittsburgh's resurgence as an exceptional and vibrant place to live.

"I think it's important to define the real question you're seeking to answer." Comment from online respondent

Introduction

Pittsburgh's music ecosystem has significant challenges.

59% of the respondents we surveyed have full-time jobs in another industry. A similar percentage reported less than $10,000 in music income last year. 85% of creatives are relying on their own personal funds to finance their music careers. Several respondents express doubts that music is an actual industry in Pittsburgh, given the disconnect they have experienced with any commercial gain.

On the other hand, there were numerous indicators of current growth and sustainability. Focus group participants noted many strengths, such as diverse neighborhood music scenes, good mix of small, medium and large live music venues, Pittsburgh's geographical location as a regional hub, a good balance of local and national touring music offerings, lots of festivals that present local music, passionate audiences, multitude of musical genres represented, deep expertise of professional music industry service providers, to name just a few. Additionally, the data reveal that a population of creatives exist who are earning income at levels similar to the median income for Pittsburgh households in general. And, 72% of all respondents report that over the past several years their income has either stayed the same or increased. So, despite a high level of frustration, there is reason for optimism. In Pittsburgh's music scene, there are people making it work.

Members of the Pittsburgh music ecosystem provided a lot of input. It's been no small trick to bring it all together, organize it and make recommendations. But a guiding principal throughout was to reflect what actual music people reported, relate this information to music ecosystems elsewhere when it was useful to do so, and then to suggest ways to frame discussions over time regarding strategies for response.

This study chose five themes or section to present. Each starts with supporting data followed by a discussion of design considerations (organized by topic areas), and then concludes with numbered specific recommendations. Depending on each reader's frame of reference, priorities may differ from the order presented herein, and the overlap between the areas may feel disorganized as well. For example, live music venues considerations come up in every one of the five areas. But this is the point: ecosystems do not follow discrete organizational structures. The work that Pittsburgh's music people do is connected in all kinds of ways.

Music ecosystems are defined herein as **"a complex network or interconnected system of creative and business professionals providing music-related outputs within a city or region."**[1]

We have found this ecological terminology helpful to deepen understanding and appreciation of the unique challenges of stabilizing or improving the health of these interdependent populations. There is a passion for music that links a vast spectrum of social and economic activities together. It's not just an industry vertical, it isn't defined just by a collection of professional skills, it isn't exactly a pastime, it isn't just for economic gain but even in its purest artistic form it possesses enormous commercial potential. All we know with absolute certainty is that it is complex and interconnected.

This perspective comes from decades of music industry experience and training combined with music-specific public policy practice on the front lines. This was written by and for music people. At the same time, we hope additional audiences will gain insights including practitioners of this work in the trenches every day seeking more relevant and specific info to focus their efforts, philanthropic organizations, and nonprofits striving for ways to better serve unmet needs. Finally, Pittsburgh's civic leadership can better understand this community that in aggregate drives a number of desirable economic and social impacts that has been historically under-represented at the policy-making table.

Patience is greatly appreciated, and the big idea we hope this study helps introduce is what many Pittsburgh music professionals already understand, which is that the issues are many, they are complex, and they are intertwined, and they don't change quickly with a single program or idea or handout. Quick fixes and go-it alone strategies haven't worked elsewhere, leadership of these communities by well-intentioned outsiders haven't worked either. Solid progress can be made over time, especially if music people are allowed to lead, and given the additional skills they need to lead effectively.

They can build the trust and courage for teams of collaborators to get down into the messy details of root causes for issues, discover shared goals, build momentum with some small wins, and ultimately drive population-level change for Pittsburgh's music ecosystem. This is what "activating a community response" means. But again, it doesn't happen overnight.

2018 PGH Music Ecosystem

University Partner
City of PGH
Nonprofits
Foundational Support

Leader
Leader
Venues
Studio Engineers
Business Management
Creatives
Live
Songwriting
Arrangers
Event Production
Social Media Marketing
Promoters
Marketing/ Consulting
Booking
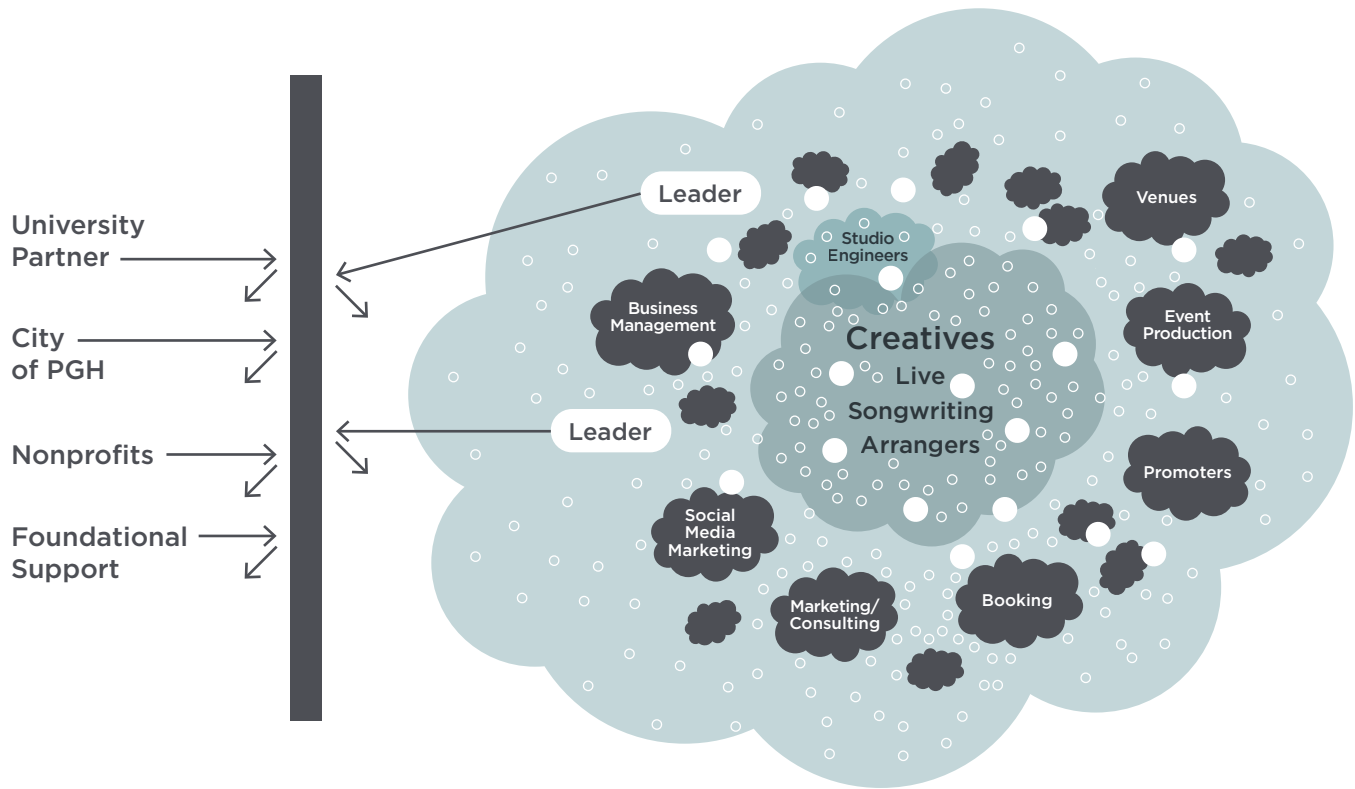
2018 Pittsburgh Music and Nightlife Industry Audit
Skills and Experience

Category	%	Total	Category	%	Total
Live Performance	72.91%	1,227	Tour Management and Production	7.84%	132
Songwriting/Composing	44.03%	741	Tour Travel/Logistics	7.78%	131
Event Promotion	31.13%	524	Studio Mastering	7.61%	128
Music Arranger	25.19%	424	Film/TV Composer	7.01%	118
Booking (Artist Rep)	24.48%	412	Radio DJ/Production	6.83%	115
Social Media Marketing	24.36%	410	Retail Sales	6.83%	115
Event Production (Incl. Festivals)	23.35%	393	Advocacy/Lobbying	6.71%	113
Business Management	18.72%	315	Record Label/Label Services	5.94%	100
Marketing/Consulting	18.12%	305	Manufacturing/Making	5.41%	91
Studio Engineering/Mixing	17.83%	300	Studio Management	5.35%	90
Artist Management	17.35%	292	Music Tech/Software Development	5.23%	88
Graphic/Web Design	15.63%	263	Talent Buying/Middle Agent	4.63%	78
Music Education/Teaching	13.90%	234	Ticketing Box Office and Technology	4.22%	71
PR/Publicity	13.55%	228	Radio Promotion	3.68%	62
Media/Journalism	12.83%	216	Music Publishing/Administration	3.51%	59
Record Producer	12.54%	211	Ecommerce/Fulfillment	3.51%	59
Venue, Service and Door Staff	10.93%	184	Finance/Investment	3.45%	58
Other (please specify)	9.63%	162	Physical Distribution	3.39%	57
Venue Management	9.33%	157	Music Licensing/Supervision	2.32%	39
Videography/Post Production	8.97%	151	Music Law	1.54%	26
Nonprofit or Public Sector	8.85%	149	Medical/Music Therapist	1.49%	25
Digital Music Sales/Distribution	8.50%	143			

Recommendation

Leadership Development

Pittsburgh's music community, especially its local musicians, expressed many frustrations, and with good reason when we contemplate the data. This sentiment that "nothing can be changed" is not uncommon. Community members feel stuck, especially those at the margin, even if there are aspects of the audit that are more optimistic.

88%

of Pittsburgh music people do not participate in municipal or business gatherings of any sort

25%

have 2 or more part-time jobs

and...

81%

of music industry service providers have 5 or fewer employees

83%

of music industry service providers gross less than $250,000 annually

75%

of small venue owners take home less than $25,000 a year in music income

"People are hell bent on being cutthroat as hell instead of building each other up, collaborating, and creating a stronger scene."

"I spent 2 years in Nashville and learned so much. They had leadership that knew the ins and outs of the actual music industry."

When thinking about steps to move forward, it is helpful to consider two opposing issues in terms of the context and structure of this ecosystem:

1

The inherent structure of the music ecosystem makes change difficult. Almost all of the individual participants are sole proprietors, stuck in a culture of scarcity year after year. There is no incentive to commit precious time and effort to provide leadership skills necessary for industry-wide, city-wide civic activism or advocacy. Nor are there programs to externally or internally validate such skills anyway. Thus, sub-sector networking, trust-building and commitment to leadership to advocate for these professional communities is just not emerging from within.

2

Industry development efforts, when they do exist, lack the depth of community trust to push real change. These approaches are more top-down, distributing resources to those who can demonstrate the quickest fix or the greatest direct impact from their efforts for a specific target number of beneficiaries that doesn't match the scale of the ecosystem, without a larger vision of the collaboration that is necessary across sectors to *really* create systemic population-level change.

So, this feeling of being stuck is justified. It is baked in over time and it is no one party's fault (or within any one organization's power to change it, despite how many fingers are pointed).

"This music scene issue isn't something that's primarily the fault of venues, artists, publications or fans. It's a little bit of everything, it's an issue with the current culture here."

Specific Recommendations

It is recommended that to truly think about building bridges to stabilize Pittsburgh's music ecosystem, we should start by thinking about something called "systems change." Social Innovation Generation[2] defines it as:

> ## "shifting the conditions that are holding the problem in place."

We believe that the best way to shift systems for the music scene is to "sweep a path" and find ways to stimulate and validate civic leadership skills from within the ranks of the music community. Music people are capable of owning and operating this change. They just haven't had the incentive, tools, or time to learn how to lead large organizational structures, process or capacity-building initiatives, especially civic bureaucracies. This is a problem that can be solved, as these are skills that can be taught.

Thus, efforts to activate community leadership suggest these two mutually dependent initiatives.

1

Launch a Music **Civic Engagement Training Program,** enrolling candidates based on a simple and transparent set of application criteria. A bootcamp or series of workshops could include topics such as public policy-making, nonprofit design, community development, leadership skill building, social change theory, meeting facilitation, grant-writing, etc. By formalizing these skills amongst those who participate every day in specific sub-sectors of the ecosystem we can groom and validate community members to build consensus amongst peers, and to advocate for their specific needs, all while they learn to collaborate with other sub-sectors. In addition to funding the cost of the programming, a separate fund could be developed to offset loss of income for those participants with demonstrated financial needs during this training.

2

The second phase of this leadership development process is the larger and more ambitious joint effort, which is to launch a **Music Industry Change Initiative** that community members can lead, bringing together a shared vision not only within music communities, but also across sectors that are necessary partners and collaborators for big changes. This is a highly structured collaboration, using best practices currently working in other big social worlds[3] (like education, health care, justice).

Additional design considerations for this initiative include:

+ Its mission is urgent. It expires in three years.

+ It is a cross-sector collaboration (in other words, music community members lead it, but important government, civic, nonprofit and philanthropic partners also participate).

+ It requires dedicated staffing and resources for backbone support (such as budget for two full-time professional organizers). However, it is not necessary, nor recommended, to form a new organization to provide this support.

+ It does not collect and disperse grants for programs or individuals, nor does it aim to compete against funded programs related to music. Its sole purpose is to maximize the focus and coordination of efforts (including those already in action).

+ Its steering committee (again made up primarily of music people) works together in a highly-structured process to set very focused goals, the progress against which can be measured.

+ Over time, work groups are assigned to specific tasks that address root-cause issues hampering the music community, and they begin to hammer out better ways for a whole range of already-existing resources to align their activities amongst each other.

+ Initiative leaders learn and participate in a global community of practice (such as the Music Cities Think Tank) to help the organization be as adaptive as possible to issues and challenges (of which there will be many).

+ Re-measurement forces accountability throughout the community. If there is failure to move the needle on shared measures at a population-level, it is because everyone failed (rather than a specific scapegoat, as in the past).

The remainder of this study presents themes that this newly envisioned initiative can start to work on, including a number of small wins that could be addressed in the short term. But it is important to understand that stimulating grass roots leadership and a structured process for decision-making has to come first, and this new initiative should be allowed to take ownership of the agenda. Its eventual priorities may differ from the suggestions herein. This approach takes a lot of discipline, and the early stages can feel chaotic and messy. But the best way to truly move the needle over time for a big diverse community such as Pittsburgh music is to first set up an effective grass-roots organizational structure. Once the community starts to build this mechanism to organize itself, then root causes for specific issues can be more effectively addressed.
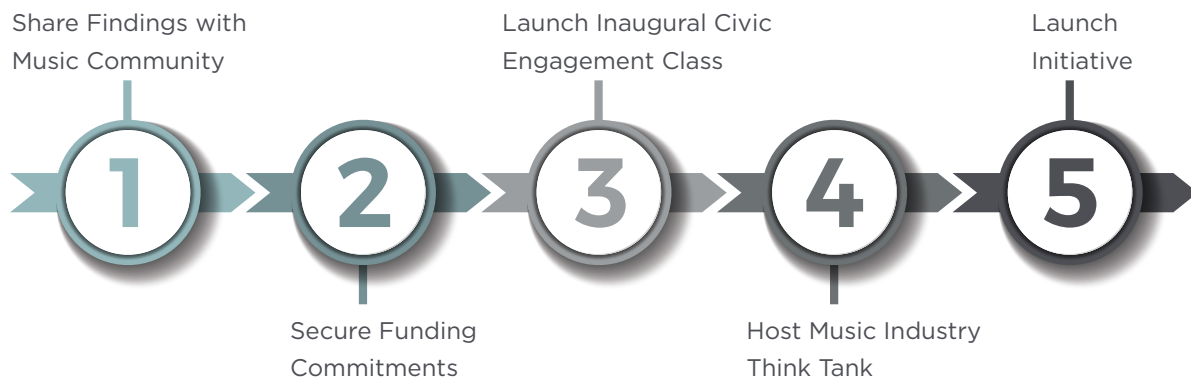
Important questions to consider in preparation for this launch:

+ What is the best way to harness the sense of urgency that this project has stirred up, and direct it toward deeper consideration of these ambitious goals?

+ How will funding for the backbone organization staff and overhead be secured for no fewer than three years, and where will it live (again, no new organizations need to be launched to administer this effort)?

+ How will membership in the steering committee (and later in the working groups) be defined? What is the optimal representation to increase the diversity of music community membership (in terms of genres, experience level, age, race, industry sub-sector, neighborhood)? How will seats from collaborating sectors be allocated (to include public sector, nonprofits, community supporters, philanthropic supporters, educational partners, civic champions)?

+ What are some short-term wins that can build confidence and patience while investing in a community-run collaboration like this?

To-Do List
(first 1-3 months)

+ Local sponsors of this study assign administrator of leadership training program

• Meet with potential providers of such programming (such as Leadership Pittsburgh)

• Interview programmers of similar efforts elsewhere (such as Music Leadership)

• Meet with philanthropic supporters to design funding of recommendation

• Host an initial bootcamp in Fall of 2018 to build interest amongst the music community

Roadmap for Leadership Recommendations

1 Share Findings with Music Community

2 Secure Funding Commitments

3 Launch Inaugural Civic Engagement Class

4 Host Music Industry Think Tank

5 Launch Initiative

Roadmap for a Pittsburgh Music Initiative

PHASE 1
Fall 2018
Initiate Action

PHASE 2
2019
Organize for Change

PHASE 3
2020-2021
Sustain Action and Impact

+ Ecosystem Study Released
+ Funding Strategy Initiated
+ Leadership Training Begins

+ Backbone Staffed
+ Steering Committee Launch
+ Goals Defined

+ Work Groups Fully Operating
+ Mutually Reinforcing Activities
+ Measurement and Communication

Inspired by Channeling Change: Making Collective Impact Work, ssir.org/articles/entry/channeling_change_making_collective_impact_work

Recommended Structure of PGH Music Leadership Initiative

University Partner

City of PGH

Nonprofits

Foundational Support

Steering Committee

Backbone Organizer (2-3 staff)

Music Ecosystem Working Groups

Workforce Development

Audience Development

PGH Policy Reform

Industry Development
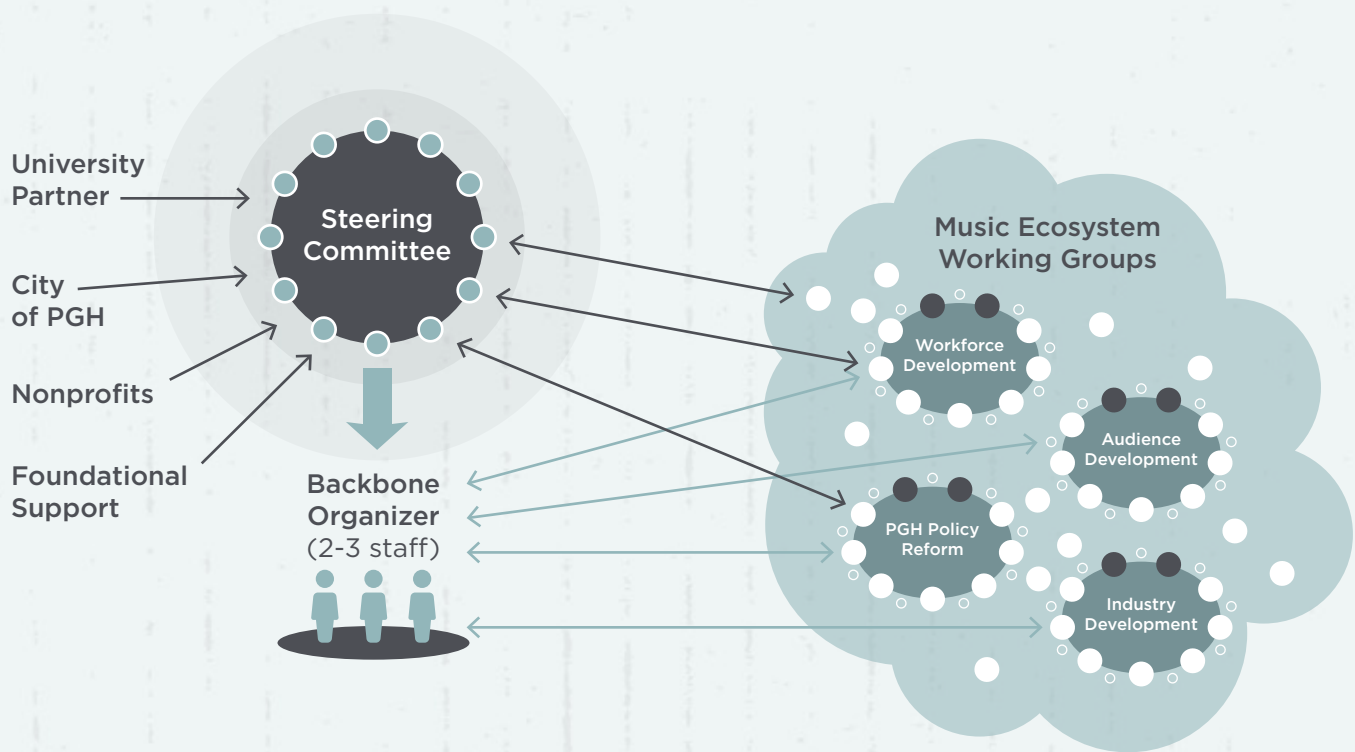
Inspired by "From Vision to Implementation" Collective Impact Convening 2018,
Collective Impact Forum and "Listening to the Stars: The Constellation Model of Collaborative Social Change"
by Mark Surman and Tonya Surman, 2008

CASE STUDIES

Leadership Pittsburgh, Inc.[4]

A leading resource for community leadership in southwest Pennsylvania, this independent nonprofit develops a pipeline for civic leadership skills from a pool of talented participants in a variety of private for-profit industry and public sectors. With over 2,000 alumni of its programs over the past 35 years, LP emphasizes the importance of civic roles for community enrichment, such as matching its graduates with board membership in local nonprofits. LP has designed and launched several programs, including Veterans in Community Leadership which helps post-9/11 veterans leverage skills and training over a six-month program that includes hands-on experience leading a community impact project, learning about the region, meeting with businesses, developing networking savvy, connecting across industry sectors, and much more.

Leadership Music (Nashville)[5]

Leadership Music is a nonprofit organization that assists communication between sub-sectors of the entertainment industry and helps leaders in various parts of the industry become more effective decision makers. At the time of its founding in the 1980s, local leaders recognized that the music industry had become too complex to effectively interact and strategize informally, and it needed a more rigorous structure to develop mutual respect and cooperation. Participants interact through an 8-month program that includes a range of off-site retreats and site visits so that a well-rounded understanding of vastly different activities within the music industry are better understood. Candidates are chosen from a range of creative and music business leadership backgrounds, as well as from the wider community of business, public sector and nonprofits. Similar to other leadership programs, alumni are expected to participate in civic activities, develop curricula for the class that follows, and continue to develop new relationships. Now in its 29th year, the program boasts over 1,100 graduates.

MusicColumbus[6]

The Columbus Music Commission is a nonprofit community movement rather than a government agency that has organized a diverse and eclectic group who have united around a single simple issue: a love of music. They believe that by supporting music, they are nurturing richer, happier, more vibrant experiences for the Columbus community. Not only singers, songwriters and musicians, the group includes city leaders, educators and business owners, amongst others who have developed core values around collaboration, transparency, inclusivity, inventiveness, nurturing and accountability.

Recommendation

Career Development

over 50%
of creatives indicated they played
10 or fewer gigs in Pittsburgh last year...

... the same percentage said that live music made up **less than 25%** of their music income.

10%
only 105 out of almost 1,000 musicians earn $35,000 or above

56%
of creatives have at least a bachelor's degree (vs. 41% for Pittsburgh CBSA in general)

42%
have received some sort of formal training or education in the music industry

63%
have 10 or more years' experience in the music industry

57%
of creatives have not registered for the most basic revenue distribution services, such as performing rights organizations or SoundExchange, who collect artist and songwriter royalties
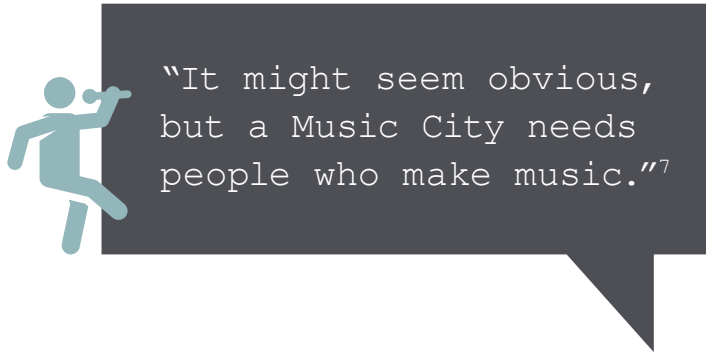
Creatives Need Time

The center of a healthy music ecosystem is without a doubt, the creatives (musicians, songwriters, DJs, recording engineers, producers, etc.).

> "It might seem obvious, but a Music City needs people who make music."[7]

Every sub-sector of economic activity in the industry is built around this creative workforce.

In order to develop creatively, write songs, make recordings, rehearse, establish and maintain technical musicianship, or perform on stage, creatives must be afforded time. Pittsburgh music creatives made clear some deep frustrations as part of this study, and we believe a major reason is because so few of them can afford the time to focus on their creativity. Their loss is Pittsburgh's loss. Low creative output limits the quality and health of the entire ecosystem.

This consideration is even more challenging when factoring in the range of business administration that today's music professionals are expected to handle, not just to grow their careers but even just to collect on monies their work has already earned. Thus, there is both a need for more creative time, and a need for skills that will help operate the business side smarter and faster.

The Impact of Education and Professional Skills on Creative Output

As challenging as all of this sounds, there are creatives who are finding a way (again with a focus on finding time to be both creative AND compensated). As we consider specific work and investments to assist music creatives, it is clear that better educated dedicated musicians are doing better economically. They have more time not just to be creative but also are more effective at capturing and maximizing compensation for their creative output.

This is an important point, as it is counter-intuitive that more time spent developing business skills and diversifying revenue would produce what creatives really want, which is more time to make music. This concern came up in audit feedback many times, such as *"you automatically expect everyone on Earth to be financially motivated, which screams 'I don't understand art or artists.'"* But the data suggests a shift in this thinking: as time spent as a creative professional within the industry goes up, so does income. When considering how to design recommendations it is not enough to simply say "musicians need to be paid more." A deeper consideration of root causes reveals that business education is essential for addressing the compensation issue.

Part-Time should not mean Amateur

It is important to recognize that part-time creatives can provide professional quality output to a music scene as well, especially if given access to music business training as part of their career development.

Pittsburgh creatives are more highly educated than the general population and their creative skills further differentiate them. These are skills that attract employers, and result in better paying jobs. Creatives with better paying jobs have greater financial stability. Harry may have a day-time job, but "he can play the honky-tonk like anything."[8]

PGH Creatives:
From Hobby to Career

89%

of PGH music industry creatives are either full-time in another industry, or doing a range of part-time jobs

+

Better Tools

+ Revenue development skills

+ Small business and entrepreneur skills

+ Do it yourself (DIY) training

=

More Full-time Creatives!

+ Business owners managing a team

+ Delegating service needs

+ Goal of 50% creative time is manageable

More Part-time Creatives!

+ Creative + other skills = better paying jobs

+ Financial stability = more time to create

+ Professional, not amateur

Increased Creative Output (Good for PGH!) →

Design Training for Range of Career Needs

Most creatives already have years of experience, so it is important to offer deeper professional level training in addition to "music industry 101" training.

Furthermore, focus training on adapting to the evolving issues of today's music industry. Trust and participation improves when these small business owners are afforded entrepreneurial tools and continuing education programs we see in other fields, in formats that eschew traditional instructor lectures and instead emphasize participation, group discussion and sharing of ideas.

Design Access for Musicians

Consult real industry creatives when setting up timing, location and access to education programs.

Schedules and patterns of work differ from other industries. 8:00 am classes may not be well attended for those getting offstage 7 hours earlier.

Teach DIY and Beyond

The effectiveness of DIY strategies can be optimized with skills workshops.

Teach and exchange ideas to help DIY become smarter and more effective. But don't stop there. Include entrepreneurial and small business training so creatives can better assemble and manage their team of professional services providers. As noted elsewhere, Pittsburgh has managers, booking agents, tour logistics, etc. who are good at what they do. Creatives, as small business owners, have to learn how to delegate work, and become quarterbacks for their team (which frees up creative time, even as businesses grow).

Specific Recommendations

1

Creative Development Grant Program
To help creatives (80% of which rely on personal cash to finance their music careers), work with existing philanthropic support resources in the community to launch a structured grant system for music creatives and bands to write, record, perform, tour, and market themselves. For recipients, establish milestones for unlocking grant dollars (such as songs written, video or audio recordings made, touring performances, local performances for nonprofits, etc.). This is not a small-scale proposal, it should be designed for the scale of the issue for Pittsburgh creatives, with a focus on time for creative output.

2

Pittsburgh Music Education Pipeline
Convene multiple organizations already developing music education services (including Point Park University's highly regarded Sports, Arts and Entertainment Management Program, but also tapping into small business resources, start-up incubators and entrepreneurial accelerators) to further align, mutually reinforce, and avoid duplication of offerings in this creative career development space. Fund an inaugural class of a select and diverse number of artists in a pilot program to validate this more comprehensive and intensive music career development process.

3

Registration-Athon
An early confidence-building small win would be to hold an event to specifically address the 57% in the audit who chose "none of these" for professional registrations. In one afternoon, a creative one-stop shop session (not unlike disaster relief initiatives that bring a full-range of services under one roof) could register hundreds of individuals for Soundexchange, initiate publishing/writer applications with PROs, and guide other protections for intellectual property. As a music industry executive recently advised "you should put the effort in because it is your creative work."[9]

4

Revenue Development Workshop Series
Host a series of events, bringing in experts in this space to present specific strategies on how to collect on the ever-growing income streams in music today (170+ and counting), how to balance active and passive revenue generating activities, how to grow a fanbase, how to segment customers to maximize income, etc.

CASE STUDY

Backline (Milwaukee)[10]

A newly launched grant and education initiative by Radio Milwaukee in partnership with business accelerator gener8tor, will recruit four area musicians or bands into an intensive 12-week program. Recognizing that funding and business education were the two greatest hurdles for area musicians, this program will grant $20,000 per recipient and provide workshops and guidance from local and national industry professionals, including specific entrepreneurial skills such as how to procure services and navigate the industry successfully. The initiative plans to grow to two sessions in 2019 and represents the initial steps that when aligned with a range of other efforts will begin to provide population-level impacts over time.

Recommendation

Regulatory Reform

> "Government policy has a direct impact on the ability of music businesses...to operate sustainably."

The Mastering of a Music City "

More venue operators chose **"Permitting, Regulatory Compliance, Amusement Tax"** as their greatest concern with presenting live music vs. other options ("venue physical space," "changing trends in audience interest," "extra show costs," or "extra work of booking").

Small Capacity Venues (under 350)

45% of these business owners make less than $10,000/year from their music industry activity

68% of their programming is local talent (vs 52% with larger venues)

43%

43% of venue operators have "met with City officials regarding permitting," however, it appears such conversations are mostly occurring AFTER or as a result of a raid or inspection

80%

of venue operators have not received any compliance training regarding amusement tax

1/3

nearly a third of venue operators report being audited by the City

Problem-solving in the public process requires extraordinary cooperation

While it is recommended throughout this study that leadership within the music ecosystem assume greater control of their industry, given that certain aspects of music, especially live music, have significant impacts upon the population and their safety, problem-solving with municipal government, and the larger population it must serve, is obviously of particular importance. This problem-solving can only happen if individuals and organizations that have been at considerable odds are able to focus on shared goals and begin to work together.

Balance public safety with economic opportunity

Experience shows that music-friendly reforms are most difficult to enact when issues of public safety are not fully addressed.

The more music venues are able to provide data about their customer base the better, as live music audience behaviors may be better understood as a unique segment within larger context of nighttime economy. The more communication and coordination there is from venues regarding when shows end, the types of programming planned, the more this helps those in charge of public space to design their strategies to keep everyone safe. This is an area where pragmatic innovations by music operators can really help reduce higher risk issues for safety officials. Such cooperation ultimately helps to reduce public safety's "veto" power over future music policy reforms.

The regulatory playing field is complex in Pittsburgh

"City and LCB make it very difficult for permitting and operation of business."

The City of Pittsburgh is just one of several levels of government (city, county, state, federal) that regulate and enforce compliance on issues that affect Pittsburgh's music industry activity.

"The problems with the Pittsburgh music scene are mostly due to the lack of all ages venues and shows."

It is helpful for music people to understand that even with the best of intentions, there is only so much city government can do on particular issues. That said, there are significant ways in which new thinking by the City could improve the landscape for commercial music activity.

Flipping the Sequence on Enforcement and Outreach

A general theme that characterizes better policy-making from the music community's perspective, centers around shifting from a culture of punitive measures and "catching bad operators in the act," to a culture where customer assistance, education and clarity of policies are emphasized at the beginning of all interactions with industry operators.

Music venue operators respond favorably to readily accessible customer assistance, general education during on-site visits (occurring outside normal operating hours), clear expectations of licensee obligations, and finally opportunities to converse, and jointly consider what is working and what is not. When this outreach is not enough to get compliance on nightlife and sound issues, enforcement actions are of course necessary. However, as this is the least cost-effective tool from the city's perspective, it should only be deployed when other options have been exhausted. This set of definitions is recommended to help contextualize enforcement within the wider range of city government's role:

Regulation: defined as government intervention through a set of rules identifying permissible and impermissible activity on the part of individuals and business.

Compliance: the state of conformity with regulatory requirements including but not limited to legislative provisions, regulations, rules, standards and orders.

Enforcement: actions taken to induce, encourage, or compel compliance with regulatory requirements. A sub activity of "enforcement" is described as "responding to non-compliance."[12]

Over the long term, the City and music industry can work together to change state law

A better articulated and organized advocacy position from the music community provides a platform for music people and city/township/county government to work together in leveraging change at the state level (such as PLCB's role in regulating sound ordinances, etc.).

"Pittsburgh needs to update its local laws, so music can be played at bars. The venues are dwindling as the scene is growing! We need more quality places to play!"

Improving infrastructure is a good start

The City's first steps that focus on issues with transportation, mass transit and parking are very helpful and provide a path for collaboration and improvements that will lead the way for additional music-friendly success. In addition, the 2015 Pittsburgh Sociable City Plan remains relevant on a number of issues, and a renewed effort to implement its recommendations would benefit the music community.

"Parking in the southside sucks, and the new policies and horrible signage have led to many people, friends and fans having their cars towed."

Specific Recommendations

1 Amusement Tax Reform

"I don't feel it [amusement tax] is a good thing for small venues and promoters. This may be a way to get the city to help make Pittsburgh more of a music city. Don't tax the little guy and kill creativity."

– *Comment from Online Respondent*

The City's amusement permit/tax feels like a penalty and a nuisance for music venues, so an earnest effort to make this as painless as possible signals the City's recognition of live music's contribution to Pittsburgh's quality of life.

The audit brings into focus the disproportionate impact this tax has on smaller sized venues (which we define as fewer than 350 in capacity) and the financial profile of the musicians who perform in such settings. These are businesses on the margin, and something as simple as a 5% Entertainment Tax, along with regular filing requirements, is more than just a nuisance. Contemplation of a surprise audit by the Finance Department, and a potential back-tax balance due along with penalties (which was alluded to in several interviews) is particularly chilling to both current operators and younger, less experienced first-time small businesses considering the opportunity (and what it would take to become fully compliant). And, as has been reported, of the approximately $18mil in Amusement Tax collected in the most recent year, 75% is sports related.

It is likely that small venue collections (as some subset of the remaining 25%) is minimal (and likely a financial loss for the City to administer given the disproportionate resources required to service so many venue accounts paying such relatively small amounts).

Small music venues play a crucial role as incubators of local music scenes.[13] Indeed, if the Pittsburgh community values local talent (providing a platform for artist to build their careers and develop their music and performance skills), we ought to consider ways to lessen this burden, especially on the small venues and musicians.

We are pleased that reforms and modernization within the City's Finance Department are already under way. Adding functionality such as online payment, updates to venue classifications, simplification of code language, email notifications, all with the goal of making the burden of paying taxes as painless as possible, would be warmly received by venue operators.

That said, we suggest that City planners and the industry community can use this reform initiative as a window of opportunity to work together in forming a more robust and workable policy update. On the one hand, the planning and design should not be developed in secret by the City, and on the other hand the venue community needs to be much more proactive about providing the input that City planners would welcome as they make these changes.

Together the following key issues could be addressed by both the City and Community, such as:

+ Reform should include clarification/ standardization of responsible (liable) party for collection and reporting of Amusement Tax. Confusion amongst building owners, venue owners, promoters and musicians result in wasteful collection process for the City. Once this is clarified, agreements and settlement processes can be re-adjusted between talent, promoters, venues and land owners. We are not recommending that the burden of this expense move to another party. This is simply to clear up the liability question in the interest of consistency and efficiency.

+ Relevant departments within the City (Finance Department, Permits, Licenses and Inspections, etc.) and venue operators should co-host an annual venue summit, where key training, updates and outreach can be exchanged to increase knowledge, understanding and trust between these groups. The City may also explore adding additional resources to provide venue service and compliance training year-round.

+ Small venues (under 350 in capacity) that provide crucial incubation of local live music should be exempted from the Amusement tax burden (much in the same way that various types of nonprofits currently qualify based on their civic value). Input from the venue industry during the formulation process of these standards is strongly encouraged.

+ For those venues that do not charge admission, the current system of applying tax formulas based on food and drink sales during the time of entertainment is cumbersome at best, and as this type of revenue has only recently been incorporated into the collection form, venues have been understandably confused. Efforts by the Finance Department to collect back taxes for this type of revenue should waive non-payment penalties in recognition of this discrepancy. Also, going forward, this grey area creates an incentive for venues to not charge at the door, which could further reduce income potential for performers on stage.

+ Both the City and the venue community would benefit from greater transparency regarding how the City conducts the audit process. The more that is known about progressive steps to address delinquent actors, the more the venue community can work together with the City to prevent occurrences of the most drastic punitive measures.

+ Finally, explore ways that portions of the revenues generated by the Amusement Tax might be re-invested back into the industry for any one of a number of worthwhile stimulation programs suggested herein.

Specific Recommendations

2

Centralize and measure sound complaints

Currently there are multiple choices for citizens to call in a sound complaint related to commercial live music presentation (such as 311, Mayor or Council office, Pittsburgh Police and PLCB). A centralized entry point for complaints would provide a range of improved insights which is invaluable for a sound management partnership.

Specific actions may include:

+ Create a *Commercial Music Service Request* category within existing 311 system

+ Update questions on reporting form so that more helpful data points can be collected at the time of the complaint

+ Work towards reduction in anonymous complaints, so that the source, the path, and the receiver of the sound can be included for deeper and more effective analysis and recommendation

+ Message wider community to encourage exclusive use of 311

+ Encourage current alternative systems to redirect incoming complaints to 311

+ Train for neutrality in call center scripts during complaint process (don't shame the folks who are calling in complaints)

+ Regularly share complaint data (such as a dashboard website that is publicly accessible)

3

Establish Music-Friendly Districts with Local Sound Ordinance Overlays

The Pennsylvania Liquor Control Board (PLCB) has jurisdiction over enforcement of sound emanating from licensed premises. During our interviews, focus groups and the online survey, current sound ordinance policy came up multiple times as an issue in presenting or performing live music in Pittsburgh. A potential solution is that the City as a municipality has the right (outlined in Section 5.36 of the PA Liquor Code) to petition for an exemption of Section 493 governing noise ordinances.[14] Through this process, music-friendly districts could be established in specific areas of the city according to the interests of various neighborhoods, and in such cases, they would operate under a City-run special sound ordinance. For improved outcomes, we recommend implementing Sound Music Cities' highly successful partnership-focused **Sound Management Strategy,** which is credited for reducing sound complaints in Austin by 70%. Details of this plan are included as Addendum D in this report.

"There is something wrong with zoning definitions when a bouncer is arrested for excessive force and this all supposedly happened in a restaurant."

4

Land Use/Zoning Recommendations

Possibly one of the most complex municipal policy areas affecting live music is land use planning and zoning. Pittsburgh is not alone when it comes to confusing and outdated classifications and permitted uses. Local Neighborhood Commercial (LNC) zones prohibits any type of public assembly while a Restaurant (Limited) Use specifically prohibits live entertainment and dancing. There is a process for business owners to seek a variance in order to move up to a different zoning category, but from the music industry perspective this is time-consuming and costly and it effectively becomes a barrier, especially for small venue owners operating on fragile profit margins.

As with land development policy in other cities, current zoning has not kept up with changing urban assembly behaviors and desire for multiple hybrid uses. Younger citizens especially in creative communities are increasingly "tripling up" on the same space amongst office, residential & entertainment. This is particularly problematic for regulatory bodies.[15] A complete rewrite to accommodate these changes would take years.

Instead we recommend that the City of Pittsburgh offer a wider range of temporary "hybrid" zoning classifications as specific pilot projects, in specific limited locations, such as:

1. Where live music venues are currently scarce despite proximity to music friendly populations (such as a venue "desert")

2. where there have been recurring public safety issues related to nighttime economy activities (such as being currently addressed by Disruptive Property Task Force)

3. where a temporary waiver of the Restaurant (Limited) live entertainment prohibition would provide favorable conditions for multiple small live music venues to launch. Such modifications could free up more spaces for singer/ songwriters or all-ages shows (which are currently perceived as highly risky and/or unprofitable).

Launching such pilots would provide a range of benefits, such as:

+   Partnerships and community outreach benefits as the City and community work together to develop, test, measure and modify hybrid use definitions

+   Reduced risk of harm as "off the grid" underground activities will be more likely to respond to outreach vs. enforcement

+   Interaction and education for venue operators, who admittedly learn mostly by "trial and error"

+   Help to more precisely segment and differentiate types of nighttime activities so that more appropriate regulations can be matched to actual uses (such as different security requirements for a small live music venue versus a liquor-oriented nightclub with recorded music only)

As it stands today, there are a multitude of nighttime commercial activities operating under the guise of restaurants, and the City is at a disadvantage in shaping regulatory policy because of this. Additional zoning categories would enhance public safety with more precise understanding, and potentially modified regulatory standards could be developed for these different uses. The result would be safer, more plentiful, more financially stable live music venues.

Specific Recommendations cont'd

5

Give the Office of Nighttime Economy a clearer role in the City Code

If the City is truly dedicated to shifting its approach from a punitive to a partnership philosophy, it needs a better positioned interface with the music industry. The current "arrangement" does not give the Office of Nighttime Economy (NTE) the tools it needs to build trust and communication with operators. As one example might help to illustrate, the Nuisance Bar Task Force could include a step codified into its process that requires operators who are out of compliance to complete an assessment with the Office of NTE (and other useful City resources such as the Bureau of Neighborhood Empowerment), and the earlier these education-oriented steps are included in each cycle of communication, the better. Formally including the Office of NTE's participation in City processes that affect music venue operators provides a greater toolkit of options

(besides enforcement for non-compliance) to resolve issues and it frees up Public Safety resources from having to manage these "nuisances." The Office of NTE already exists, and the more it is managing relationships and an ongoing channel of communication the less distrust and fear there will be amongst music community operators.

Given all of the proposals for City reforms included herein, it is crucial that the City's Office of NTE be granted more permanent codification of its role and the power that it needs to lead all this work internally, strategize timing of various initiatives, pull in resources and commitment from the range of City departments, and generally field the increasing feedback (and push back) that a more involved and activated music community would be potentially providing.

6

Small Wins to build trust

+ Musician unloading/loading signage (work with existing commercial zones)

+ Daily Venue & Public Safety updates (such as a Slack channel), where venues can post show end times, anticipated audience size, and other information that will help the Public Safety Department better allocate their resources.

CASE STUDY

Safe Occupancy Program & Safe Creative Spaces Fund (Denver)[16]

Passed by Denver City Council in 2017, the Safe Occupancy Program was developed through lengthy negotiations between the City of Denver and a local creative advocacy group called Amplify Arts Denver and is intended to address safety concerns in the wake of the Ghost Ship fire in Oakland, CA while at the same time avoiding displacing creative DIY spaces in this quickly growing city. It provides a pathway to receive conditional occupancy as long as venues remedy immediate life-threatening conditions, agree to inspections and work through a schedule together with the city for gradual implementation of code. It is the first program of its kind in the U.S. that provides legal occupancy to spaces that are still un-permitted.

In order to help work through trust issues with the creative community, the city has also made $300,000 available for a Safe Creative Spaces Fund which will be administered by a community nonprofit and which over the next two years will assist those organizations that cannot afford the costs of construction required to comply with the Safe Occupancy Program. "This program will make it safer, easier and less expensive for people to live and work in the neighborhoods they helped build," according to Brad Buchanan, executive director of Denver Community Planning and Development.

Recommendation

Industry Development

42 industry sub-sectors:

a significant numbers of respondents indicated expertise in 42 industry sub-sectors

60%

agree or strongly agree that their services are competitive with service providers in larger music industry cities

37%

claimed at least six areas of expertise – and when pressed to choose one core competency, this work only contributed 55% of their total revenues

30%

of music service providers work primarily for clients outside of Pittsburgh, and 20% have at least some international work

20%

only 20% of surveyed providers believe that local artists cannot afford their services

40%

of providers indicate they already mentor others in the industry

97%

of venues believe they draw only "some" or "few" patrons from "out of town"

45%

of providers typically attend industry networking events (whereas almost 60% follow local music industry interest groups online)

Diverse range of services available but perhaps too generalized?

"My ability to provide an outlet for bands is only good if it is used."

Audit data from the survey reveals a surprisingly active service provider sector within the Pittsburgh music ecosystem.

"While Pittsburgh has a ton of talented musicians, there is no industry to support them. A handful of decent recording studios, but no record labels, minimal booking agents, management opportunities, etc. All that being said, it seems like it's getting better."

There are clearly local resources available to help. And these providers are confident in the competitiveness of their skills. However, it is also apparent that this same workforce is not very specialized, which corroborates a general concern that music industry service providers, as small business operators, do "a bit of everything" to make ends meet, and thus have a hard time competing with more specialized service providers (e.g. full time music publicists) in major industry hubs.

There are gaps

"From my 3 years in Pittsburgh, I see a promising cultural scene and a busy entertainment industry, but very little 'music industry' that is concerned with the actual commercialization of music."

As "The Mastering of a Music City" states, "it is not uncommon to have gaps within this category and still succeed overall."[17] This is true for Pittsburgh as well.

For example, 26 respondents indicated experience in music law, but only 2 believed it to be their core competency. Similarly, 39 have experience in music licensing, but only 1 is seriously focused on this. Yet there are strengths. There is a surprising amount of work that this sector does for national and international clients. So, we should not necessarily connect the health of these service providers to local creative activity. Not just in Pittsburgh, but across the nation, various music industry sub-sectors are tightly siloed according to music genres.[18] These well-developed niche businesses miss out on cross-sector exchange and growth, especially at the local level, but they do build stable cottage industry activity that brings in revenue from other locations. Similar to the differing brand strategies of music-friendly cities around the world, Pittsburgh music industry services can emphasize what they do best and further develop in that manner.

Music Tourism can take many different forms

While it is generally believed that Pittsburgh does not benefit from music tourism, data for developing a deeper understanding is often hidden within cultural or recreation tourism or sports-based tourism numbers,[19] so further study is highly recommended.

It doesn't take a lot of new activity to make a case for how a vibrant nightlife, and live music, can augment a separate but primary reason for visiting. Thus, initiatives to develop audience interest in local music (such as Love Pittsburgh Music Month) can also be helpful as enhancements to non-music related tourism development efforts. Civic recognition plays an important role in helping music tourism initiatives get off the ground, so particular attention should be drawn to unique partnerships that can leverage unique music traditions and history, and jointly promote these activities.

"It'd be really cool if the city could set up music/nightlife networking events! A lot of local networking is clique-y and hard to break into."

"Networking is not done through industry themed events. The Pittsburgh music scene tends to be unwelcome to "outsiders" and is a very clique centered network"

"Youth nonprofits in music and arts need funding and support in order to build sustainability in the Pittsburgh music community. Women, people of color, people with disabilities, and people who identify as LGBTQ need support as well. Pittsburgh is lacking in spaces and support as a whole for these groups."

"Networking in Pittsburgh is difficult because this is a very clique-ish city."
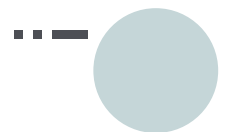
Specific Recommendations

1

Pittsburgh Music Venue Alliance

The Music Venue Trust is a U.K.-based organization founded in 2015 that advocates for small venues around London, and is helping to launch affiliated venue alliances elsewhere. Austin's Music Venue Alliance launched in 2017 and has quickly won the trust of venue operators and established itself as an effective voice to advocate for venue-specific interests, whether it is policy-making, business or residential community relationships. A Pittsburgh "chapter" could gain traction quickly and provide a powerful voice for venue operators in a range of ongoing regulatory efforts, and play a key role on the steering committee of the music leadership initiative outlined herein.

2

Pittsburgh Industry Directory

Build a PGH Music Industry Service Provider database to validate locally available resources and connect creatives with the services they could benefit from sourcing locally. Local providers want to help local artists.

3

Pittsburgh Music Mentors

Launch an industry mentoring program, so that the considerable experience and wisdom of veteran providers can be shared to help younger or less specialized practitioners gain deeper sub-sector skills. We can get more of these individuals, *who are specifically committed as music industry service providers*, together, in conversation, sharing notes and growing professionally.

4

Pittsburgh Music Sub-Sector Networking

Program, and work with already existing networks, to convene events specific to each of these 40+ sub-sectors.

5

Philanthropic Support Outreach

Granting organizations with a mission to provide community support need to hear more from the music industry. Allegheny RAD, Heinz and Hillman Foundations, and others are all potential partners that could be called upon to support Pittsburgh's music industry as a creative sector, especially if proposals are competitively presented and begin to reflect true community ownership.

6

Wide Spectrum of Business and Nonprofit Support Opportunities
Research of local music businesses reveal multiple interesting opportunities that are manageable and ripe for ambitious individuals to develop. Use the Private Sector Music Business Opportunities (see Addendum B) for ideas and inspiration.

7

Live Music Venue Best Practices
Over a third of venues have been in operation less than 5 years, and 15% of venue operators have less than 5 years' experience. "Personal Trial and Error" is how most learn the business. So, we have included an abridged guide that could be used as a starting point for developing Pittsburgh-specific best practices and training, especially with local permitting, tax compliance and zoning questions (see Addendum C).

8

Leaders in Pittsburgh Music
Not to be confused with the civic leadership programs elsewhere in this report, develop a six-month program that will provide participants with a wider understanding of the range of music community sub-sector opportunities (such as publishing, recording, songwriting, independent record labels, touring, programming, marketing). The inaugural class could be comprised of about 15 - 20 individuals, and the program should focus on exploring solution-oriented initiatives regarding the music industry's pressing issues and opportunities as well as increasing cross-industry collaboration opportunities with other creative industries in Pittsburgh.

9

Regional Music City Alliance
Launch an initiative to build sub-sector industry relationships with music ecosystems in cities such as Cleveland, Columbus and others. Booking agencies, promoters and venue operators can explore opportunities for pooling resources to build audience, exchanging best practices, providing artist residencies and encouraging other creative collaborations. In many cases they just haven't had an opportunity to network together and get discussions going on mutually beneficial opportunities.

CASE STUDIES

Gotta Groove Records (Cleveland)[20]

An early entrant in the recent renaissance of vinyl record manufacturing in the United States, Gotta Groove was the first to provide under one roof the entire process for musicians and record labels to get records pressed, printed and distributed. Since opening in 2009 the plant has produced almost 8,000 different album releases and prides itself on making the best looking and sounding records along with the best possible customer service. This employer of 30+ fulltime employees recently landed technical assistance support through a program that combines loans from the City of Cleveland and Cuyahoga County with 40 hours of technical assistance from NASA engineers. Through this program, Gotta Groove hopes to develop computerized controls of legacy pressing machinery, reduce scrap vinyl and find new areas of productivity.

The Mixer (Seattle Film & Music Office)[21]

The Mixer is a meet-up for leaders in film, music, and interactive industries to share, learn, and make meaningful business connections. This event is free and open to the public, and organizers strive to host it in all-ages spaces whenever possible. The Mixer averages an attendance of over 150 people each month. In addition to bringing like-minded and creative people together, these events feature a diverse array of guest speakers presenting TED-style talks on some of the creative and technological innovations affecting these industry sectors along with open networking events designed to provide opportunities to interact directly with peers and engage industry leaders.

Recommendation

Audience Development

"Where are the promotions companies for local bands? Where is the local music on the radio?"

2/3rds

of venues have experienced stable or increased revenues over the past 3 years, and the same percentage believe their audience interest in local music has increased or stayed the same

58%

have live music at least once a week, and almost a third present DJs or electronic artists at least once a week

800

800+

music fans attempted to participate in the survey, despite "music industry professional" messaging

48%

of venues list "changing trends in audience interest" as either their greatest or second greatest concern

89%

of creatives do their own social media marketing, and are relying overwhelmingly on social media to connect with their fans, with

f Facebook in the lead at 93%

5%

only 5% of creatives reported receiving civic recognition

50%

of creatives (541 for this specific question) reported they have secured an opening slot for a national act at least twice, which indicates a high level of cooperation between artists and venues to get local music in front of as many new music fans as possible

45

Getting people out for live local music is increasingly difficult

"People only go to shows of national acts. Absolutely no scene for local bands."

As we have seen in other cities, the issues are many and complex and intertwined when it comes to getting people out to shows. Passions run deep when a show fails to draw an audience.

"My band has opened for national acts, but those opportunities have diminished significantly over the past two years"

As a focus group respondent lamented, "there are a lot of open mic nights." Multiple comments make it clear that the local live music scene in Pittsburgh is struggling. So, recommendations for improvement must include how to better understand and stimulate local demand for live music. It should be noted that the audit data is not as pessimistic as the qualitative input. But clearly both venues and creatives are fighting an uphill battle when it comes to attracting a larger following for local music.

City-wide touring vs regional touring vs national touring scene

Focus group participants were quick to note the strong demand for national touring artists and that Pittsburgh "sells more tickets per capita than any other city in the country."

However, this distinction does not hold up when including the entire Pittsburgh metro area.[22] So, there isn't clear evidence that the national touring sector is pulling a greater percentage of Pittsburgh's total discretionary live music dollars than in other cities (although this would be a helpful area for continued study). There is certainly a thirst for more gig opportunities for local musicians, evidenced by half of the creative population performing 10 or fewer gigs per year. Additional local and regional opportunities could be developed. Pittsburgh has many distinct neighborhoods, and a majority of the population lives outside the city limits, so market saturation is less of a risk, especially

for artists who can build a gig circuit that balances local geographies. As seen elsewhere, "venue deserts" in particular neighborhoods and areas of concentrated population outside the central city are ripe for savvy venue operators and promoters who know how to program and work with local artists to build distinct new audiences (and who understand this unmet need for live music outside the usual concentrated entertainment districts). Also, as addressed elsewhere in this report, a regional circuit of promoters and booking agents is already collaborating effectively in particular niche music genres. Pittsburgh creatives, especially those gaining popularity locally, can be supported for regional touring and this is a better career investment over the long-term to build these new fanbases (versus the perceived shortcut of "big time" national exposure).

Shift perceptions about value of live local music

Audit data shows that the issue is not that local music is failing to get access to local audiences, rather that the entire music scene, including both the makers and the consumer side, could benefit from initiatives that shift perceptions of value of music created locally.

Pittsburgh embraces its local heroes in other forms of entertainment, such as sports. There are ways we can stimulate the same kind of widespread esteem for local musicians, especially with the help of other local heros.

"Local acts have very few venues to play at that actually pay the act directly."

"The folks that care about new bands the most are young kids or college students who either can't go to bars or don't have enough money to pay more than $5 to support their favorite band every week."

Weave live local music into a greater range of local experiences

A guiding principal for developing audiences for local music that works in many different cities, is to find ways to help shift value judgements beyond mainstream music marketing of global stars.[23] As one focus group participant complained, "there is low awareness here of any music that isn't huge."

There is nothing wrong with popular national touring artists selling out shows in Pittsburgh, but that still leaves a great many opportunities for local makers of live music to accompany and enhance a multitude of social, public and commercial retail activities around town.[24] Pittsburgh has a significant supply of live local music that would benefit from more opportunities to play in the community, and not just in music venues. Live music supports community development, reinforces neighborhood identity, ethnic traditions or smaller affinity groups (evidenced by a thriving underground DIY music scene for basement parties, house concerts, etc.). But we shouldn't expect these sorts of presentations to be effectively executed without assistance from knowledgeable live music designers. With help, interesting and valuable sharing of music can happen in grocery stores, at the farmers market, in a hardware store, at family-oriented events, in places of worship, and even on barges (as one respondent reminded us of the American Wind Symphony Orchestra). And pursuing such a strategy isn't an "either/or" career decision for our creatives. Building local success is an excellent strategy to gradually work toward regional and even national success.

Hometown music legends should be publicly honored

Additional suggestions regarding what the City can do are addressed in Regulatory Reform, but in terms of audience development, while it may seem trite or superficial, symbolic gestures of support from government help shift the community psychology about the value of local music.

It can start immediately with small wins such as proclamations and over a longer timeframe, with guidance from the Leadership Initiative, address more complex concepts such as a physical space that commemorates Pittsburgh's rich musical heritage (and begins to develop strategies for branding the Pittsburgh music scene for music tourism opportunities).

Local radio programming plays a pivotal role

In today's digital entertainment world where consumers are presented with infinite options, people often chose nothing. This is often referred to as the tyranny of choice.[25]

"Where are the promotions companies for local bands? Where is the local music on the radio?"

There is increasing momentum nationally that is helping local radio strategies, especially with the noncomMUSIC Alliance (a loose affiliation of 50+ stations around the country),[26] which supports and explores ways that radio can partner across sectors with local music advocates, nonprofits and the public sector to align goals specifically to support local music scenes. Local music journalism is a specific example of what drives appeal and support for community radio. And it's not just about a radio signal. Physical events and place-based activities (such as YEP's Summer Music Festival, and support for many other live music events) are increasingly understood for their social value. Regardless of format, any radio that provides exposure for local music is a vital community asset, not just in terms of developing audience interest, but also as a social hub, a civic leader, and an impartial convener for the commercial music industry.

Small live venues bear the brunt of changing tastes in music

With a majority of venues doing their own booking, there's very strong opinions about what works and what doesn't, with specific experience to guide such opinions. Live music presenters assume extraordinary risk in their role as curators of music taste.

"We typically lose money or make far less by the time the performers are compensated and we account for lost business because the regulars prefer a night without live entertainment."

We should do everything we can to help them provide excellent live music experiences for their patrons, whether it is parking, advertising shows, investing in high quality sound reinforcement, all in the effort to facilitate human connection with the creative expression presented. Designing a patron-centered live music experience requires cooperation amongst many different entities, most notably the creative talent. As an online respondent commented, venue customers "actually call the venue to make sure we don't have a band booked before they come." We can bemoan waning interest in live music, or we can look inward as an industry and use our creativity to find new ways to present music that enhances rather than inhibits social experience.

Patronage and Audience Development are Synonymous

Despite the frustrations expressed in this study, Pittsburgh does have a passionate local live music audience. The generosity of this core "superfan" segment is likely under-estimated.

Nonprofit services with a focus on basic needs for Pittsburgh's low-income working musicians could gain wider support than expected, especially if the message is crafted in terms of civic pride. A virtuous cycle or positive feedback loop can result as initial commitments to patronage open up greater interest and awareness amongst these donors which helps the emergence of new social networks of local music fans that in turn helps local creatives develop more compelling music, and so on. Patronage of local music and home-town pride can go hand-in-hand, and the result isn't just more cash to support programs, it is also people going out and becoming passionate connoisseurs of local music.

Specific Recommendations

1

Love Pittsburgh Music Month

With the support of the community, WYEP could lead the launch of a coordinated, city-wide month-long celebration of local live music. By incorporating all media outlets (including non-music media), venues, promoters and creatives can showcase and spotlight Pittsburgh music of all genres across its many different neighborhoods. An organic momentum should be encouraged to allow for venues, business, and media to program as they wish but at the same time participate in a combined promotional calendar. Note that this is not a showcase concept where artists or venues would be expected to provide live music for free. This celebration is a valuable test-bed for future audience development marketing and promotional efforts. Observations of what works and what doesn't will inform design of future campaigns and maximize the impact of such investments.

3

Master Gig Calendar

Especially in focus groups, it was suggested that communication of gig schedules could be improved. Only 63% of venues are listing their shows on online calendars currently. Only 22% of creatives are using DIY gig calendars that amongst other benefits, can be configured to disseminate listings over several services. A central online Pittsburgh gig calendar, with accompanying smart phone app, push notifications, weekly picks, and other features helps a local music scene compete with other entertainment offerings.

2

Music Fan Survey

Concurrent to Love Pittsburgh Music Month, it is recommended to launch a music fan survey (at the same level of sophistication as the ecosystem audit), to help the industry better understand what is working or not working from a patron-centered perspective in Pittsburgh's live music scene.

"I have always felt that Pittsburgh had just as much musical talent as any other city but have a hard time marketing that fact."

"The issue with Pittsburgh is the culture is sport-related not music supported. It's really sad."

4

Local Sports Heroes and Local Music Heroes

Develop a community outreach initiative with the help of Pittsburgh's professional sports franchises to build awareness of local musicians. Examples include NFL players sharing their Spotify playlist of Pittsburgh-exclusive music through their social media networks. Despite 84% of local creatives reporting never having been featured at a sporting event (such as National Anthem), Pittsburgh's pro teams should be commended for their local music programming efforts. Reinforcing the value of these opportunities, as well as new ideas to make local music programming more effective over the long term, is very important. Developing relationships with leaders of the marketing teams for these organizations is key for music ecosystem leadership (including future cross-sector collaborations).

5

Micro-Loan Program for Venues

Work with Small Business Administration and other potential partners to provide simple low-cost loans to venues and other presenters of live music to upgrade their production resources (or aging infrastructure that may be jeopardizing occupancy permitting). Only 72% of venues provide in-house audio, which means that a significant number still lack this essential tool. And even for venues that do have a system, numerous comments emphasized the importance of updated, professional quality sound reinforcement, especially for smaller venues with less flexible spaces who could really benefit from innovative, good sounding gear with a much smaller footprint.

6

Launch a FOH Certification Resource

One of the best-kept secrets of live music is that the "Front of House" sound engineer is the single most important job in the industry.[27] The quickest way to insure every live local show of amplified music in Pittsburgh is a pleasant experience for patrons is to hire professional FOH operators. Host an annual 1-day continuing education seminar with inspirational and informative FOH legends, require participation for certification and inclusion on an online database, and work up a community credit system that benefits those who use only certified engineers.

7

Help expand Iron City Rocks Pittsburgh Music Awards

Look for ways to help ICR and others to stimulate a higher profile and wider range of genres, and include more music industry categories, for this event. The good actors doing the hard work all year long deserve a night where they "own" the city and are recognized for not only their contributions to the music community but to the entire civic identity of Pittsburgh.

8

Pittsburgh Basement Music Festival

There were numerous comments referring to the underground DIY party scene and smaller festivals in specific neighborhoods, which is active in areas that lack established music venues and provide live music experiences for under-age audiences. The organizers of such events are the venue owners of tomorrow. By helping this scene coordinate and align into a city-wide shared event (such as a mid-winter, all-access wristband for basement party hopping), a unique Pittsburgh tradition could gain traction that will begin to draw new audiences, attract more regional interest and help differentiate and diversify Pittsburgh's music scene. Additionally, with mentorship and increased professionalization of these operators, public safety concerns and regulatory compliance concerns can be addressed in a less threatening way.

Specific Recommendations

9

**Develop an online guide
for non-traditional spaces to
host live music**
Using the attached Venue Best Practices
Guide as inspiration (see Addendum
C), pull together a short best practices
manual for Pittsburgh small businesses
and community groups to help them
budget and plan for ways to incorporate
live music effectively. Include an updated
listing of middle agent/event producers
who can provide referrals and who know
how to make these events successful.

CASE STUDIES

Black Fret (Austin)[28]

Founded with the premise that local music deserves the support of its community, Black Fret is an innovative nonprofit charity for music fans to become members, with annual dues funding artist grants and performance fees. Now in its fifth year, Black Fret has distributed nearly $1mil in grants and performance fees, enjoying a growing membership each paying $1,500 annually, in exchange for access to over 20 concerts per year and voting rights to nominate bands and finalists. What originated as a patronage model has transformed into a highly social community of local music enthusiasts. Additional benefits include a structured process for artists to unlock grant dollars and access to networking and skills development from an advisory board of industry experts. In addition to building greater long-term stability of funding through an endowment, Black Fret will soon be expanding its model to additional cities.

The Festival of Small Halls (Ontario)[29]

This nonprofit in operation since 2014 presents performances in small venues in nearly 35 communities across eastern Ontario. Based on an idea that originated in Prince Edward Island and spread to Australia, Small Halls celebrates the unique qualities of small performance spaces by presenting unforgettable evenings of entertainment by exceptional musical talent. Their focus on venues "off the beaten track" is supported not only by curious local populations that embrace high quality music in their community, but also provides an interesting music tourism vehicle for individuals from outside the community to visit and enjoy.

VuHaus[30]

This nonprofit formed three years ago as a live performance video aggregation platform for public media. It works with 22 partner radio stations around the country, including KCRW in Los Angeles, WXPN in Philadelphia, and others, who are deeply committed to supporting their local music scenes and facilitating music discovery, providing a website and an app where it curates national and local market playlists and streams live concert video content. VuHaus believes that public radio music stations are the heart of local and national music discovery.

Conclusion

"…how do you bring the parts of a system together to sense themselves as one system; how do you encourage the people in a system to share a diagnosis of what's wrong; to design improvements; to rewire the connections between the parts of a system; and then to make the leap to a new way of doing things?"

Geoff Mulgan, Nesta [31]

This study is just the starting point. Simply by calling it an "ecosystem" and measuring its range of activities, the Pittsburgh music community can start to "sense" a common thread that holds all of these different music efforts together as a single entity.

Then individual leaders within this world can start constructive conversations and develop shared accountability for "a diagnosis of what is wrong." This is where the most impactful progress will be made. Decision-making may echo the recommendations provided in this report. They may not. The important thing is that the community has developed the "ecosystem" metaphor as a path to renewed ownership and traction to lead and advocate for itself.

It was tempting to integrate all the specific suggestions from the mass of data collected during this study. There were hundreds of excellent points, based on actual experience and understanding. This is a good sign and it bodes well for the future. But right now, Pittsburgh music people must keep an unwavering and disciplined focus on process. Or to put it another way, while it is interesting to consider the journey and what paths to take to reach a particular destination, first the engine must be assembled. This audit has validated that all the necessary parts exist in Pittsburgh and are available and ready to get to work. It starts with a renewed investment of time and resources to get tools and training in the hands of music leadership. And during this time, as we have recognized, there are baby steps that various participants are already pursuing that will help build on this trust.

Ultimately, in partnership with a wider community, the big issues of career, audience and industry development, and a friendlier approach from the municipal sector, can begin to be deeply considered. Through time measurable results can be evaluated to deepen the long-term commitment necessary to truly "rewire" these complex legacy systems that hold old problems in place. These problems were not created quickly, and we can't simply bend them to our will,[32] but over time the creative output of the many music scenes of Pittsburgh can and will flourish because of this gradual alignment. This grand shared goal can drive the ambition of the music community to make Pittsburgh the best possible version of itself – a place that embraces its own music as an attractive and enriching benefit to life here.

As we shared at the beginning, Pittsburgh's music ecosystem has its challenges, but it also has a lot to be proud of. Music makers and their supporters can and will play a vital role in this community's resurgence. Let's find some ways to help them make a decent living in the process.

Audit Details and Methodology

This audit was designed and deployed by Sound Music Cities to help to guide the Pittsburgh Music Ecosystem Project.

Respondents could access the online survey through desktop computers, tablets or mobile phones. The link to the survey was disseminated through the community by a variety of sources at www.pghmusicproject.org. The survey was open from February 27 to April 2, 2018. The introductory page stated that no personal identifying information would be gathered or requested.

Access to the survey was limited to respondents who entered a zip code between 15001 – 16373 (the December 2017 CBSA for Pittsburgh).[33]

Top 21 home zip codes of respondents in the audit

Zip Code	# of Respondents
15201	89
15212	73
15206	70
15216	68
15224	67
15237	52
15217	48
15221	48
15203	45
15218	40
15210	39
15213	37
15106	34
15211	34
15226	33
15209	30
15235	28
15202	27
15214	27
15228	27
15236	27

Once qualified geographically, we segmented respondents initially with 5 options for their role, and received the following responses:

2,666 Total Responses

(2,814 – 148 who failed to complete this required question)

1,343	Creative Talent
817	Music Fan or Supporter
365	Service Provider/Worker
88	Venue Owner/Manager
53	None of the Above

The survey had a 70% completion rate, and the typical time spent by respondents was 5 minutes. The design of the questionnaire communicated progress by numbering each section and providing encouraging messages as each section was completed. However, a progress bar was not provided.

Input from all respondents who satisfied the initial screening based on zip code and role are included in the analysis herein.

The Creative Talent, Venue Owner/Manager and Service Provider/Worker segments were given a number of common questions about their role and demographics, as well as a section of unique questions (3 branches). Music Fan or Supporter and None of the Above were not able to access any of the survey questions.

We imagine it was disappointing for the great number of respondents who chose "Music Fan or Supporter" (or "Other") to not have the opportunity to participate. There are several encouraging points to be made regarding this result. First, the survey solicitation messaging clearly stated the eligible participants should be "music and nightlife economy professionals" who are pursuing "economic gain." Second, we provided a message on the survey exit page with instructions for how to re-take the survey if they had chosen the Fan option by mistake (fresh access could be attained by employing a different device). Third, this exclusion of non-professionals should enhance our trust in the reliability of the industry-specific data collected. Finally, and most importantly, the large number of fan responses indicate there is a large and passionate community of supporters who are eager to engage regarding this issue. This bodes well for future audience data collection initiatives in this community.

The question formats varied. Most were multiple choice, using Likert scale options, in the interest of developing a data set that was as quantifiable as possible. They were rarely provided text boxes as answer choices, such as "Other." With some exceptions there has not been additional analysis or recategorization of "Other" responses to questions in the data presentations herein.

There is variation in the number of respondents for each question, as many questions did not require an answer in order to proceed, and also there was logic applied, so that in several instances different questions were included or omitted based on prior responses.

We strongly recommend additional analysis of this data set (which is available through the PGH Music Ecosystem Project), such as by a university group. There are many different areas of analysis outside the scope of this report that could provide helpful insights, especially if set up using an online portal system, as have many prior music surveys.[34]

Sample Comments from Respondents

"What did we miss?"

Leadership Development

"From my experience, if you exist outside of the 'important group that everyone knows,' then the gate is closed. It is a lot more like high school than I would like it to be."

"This music scene issue isn't something that's primarily the fault of venues, artists, publications or fans. It's a little bit of everything, it's an issue with the current culture here."

"If you are trying to make this city more industry friendly you should start by building up from the foundation."

"I think the artists and city is offended by this project and don't think the city will change."

"Fix the scene."

"I would like to take a more active role in Pittsburgh's music community but frankly, the infighting is a bit of a turnoff."

"I spent 2 years in Nashville, joined their local and learned so much. They had leadership that knew the ins and outs of the actual music industry, maintained communications with all members regarding how to find work, how to file union contracts, know the scale rates, etc. I get none of that here."

"You have a fundamental lack of understanding of how independent music operates. No one wants your involvement in this. Leave us alone. That's all we want."

Career Development

"Get bands to admit if they are here to work or if it's just a hobby. So many can't decide and don't want to commit but want the recognition and pay of a real working band."

"Grants for local band/grants for spaces like Roboto that can help develop talent would be great. Gotta help out the small & mid-sized venues."

"Everyone expects your band to play for free 'for exposure.' We had to start doing it because there is basically no money available for playing out. Venues don't pay and collecting at the door requires paying someone to do that. You can't live splitting a $50 gig with 4 people and committing 6 hours to setup/gig/breakdown for a 30-minute set. We basically gave up and went back to our day jobs."

"Playing music isn't about money."

"I'm a little disappointed. I thought you would ask how to improve the scene, not my net worth."

"This didn't feel very relevant to me. It was 100% business."

"I am a recent graduate looking for jobs within the music industry. Because of student loans, I can only accept jobs that provide benefits and a salary. Pittsburgh does not offer those types of jobs."

"I've always been a DIY musician. It's a lot of work alone. A whole lot."

"This survey seems to assume musicians are making money from music in Pittsburgh. That is not the case for a single musician I know personally."

"I'm a software developer by day. Music is not my full-time job. Anything I make from music is just icing on the cake. I've seen that increase over the last few years. I love my day job, but I would love to find myself in a position to do music full-time and software in my spare time. Maybe someday that opportunity will present itself. I'm currently working on recording an album and funding it from my own pocket."

"I am a professional musician born and raised in Pittsburgh but currently living in NYC. I would love to work with members of the Pittsburgh community to help further the development of a strong music community. I would love to see it prosper. And prosper to the point where I could move back and feel like I could make a living as a musician in the city."

"HOW ABOUT SOME EASY TO FIND FINANCIAL ASSISTANCE?"

"This survey is so completely aimed at music 'industry' that it completely ignores the huge majority of musicians who never make any real reliable amount of 'income' from music."

"Pittsburgh music scene is a race to the bottom. Workers are paid little with no benefits. Work is subcontracted out to vendors that have little regard to employ personnel with a standard of living wage. Production companies seek the lowest pay with no health care. If a worker asks for improvements, one is terminated and replaced by another."

"It sux working this hard for crumbs."

Audience Development

"One of the main reasons I perform more out of town is that pay from venues in other cities is substantially higher than locally."

"I virtually never come into the city to play, not worth the aggravation."

"The local radio and tv stations and newspapers and online music information sites need to provide a lot more time to local artists. i.e more local bands on radio, more local tv shows with local talent, and more media-wide space for event promotion listings and information."

"Where are the promotions companies for local bands? Where is the local music on the radio?"

"Pittsburgh promoters seem hell-bent on booking and rebooking the same acts over and over again. It may provide income at the time, but there is no investment in the future."

"Pittsburgh has a great diy scene that takes place in basements and some bars like Howlers and Spirit. Even the most popular bands in that diy scene have a tough time getting recognized by established organizations and making a jump into a position where they're actually financially profiting. The folks that care about new bands the most are young kids or college students who either can't go to bars or don't have enough money to pay more than $5 to support their favorite band every week."

"The problems with the Pittsburgh music scene are mostly due to the lack of all ages venues and shows."

"My band has opened for national acts, but those opportunities have diminished significantly over the past two years"

"People only go to shows of national acts. Absolutely no scene for local bands."

"Local acts have very few venues to play at that actually pay the act directly."

"Get some new people and it'll draw more interest and the industry will grow and prosper. It's marketing 101, really not that freaking hard dude."

"We typically lose money or make far less by the time the performers are compensated and we account for lost business because the regulars prefer a night without live entertainment."

"The issue with Pittsburgh is the culture is sport-related not music supported. It's really sad."

"We'd love to have the opportunity to open a big show for a national act, but it honestly feels impossible and is disheartening. Living in other cities, there was an excitement around other local acts because it felt like everyone had an opportunity to progress, but here it unfortunately feels like you're just running on a treadmill."

"The local scene from a musician point of view is very stuck in the mud."

"I have always felt that Pittsburgh had just as much musical talent as any other city but have a hard time marketing that fact."

"Promoters need us to turn a profit. Their practices are predatory and abusive. The venues are currently few and far between."

Regulatory Reform

"Pittsburgh needs to update its local laws, so music can be played at bars. The venues are dwindling as the scene is growing! We need more quality places to play!"

"I'd like to see more opportunities for musicians to play in the Downtown subway stations in the same way musicians play at Pittsburgh International Airport but with a much bigger and more diverse audience."

"While we have a vibrant community, it is only because we support each other. I see very little help coming from outside sources or the city itself, which is frustrating. We need to invest more in the arts here in Pittsburgh – not the Cultural Trust, due respect – but to the hard-working musicians in this city whose only resources are other struggling musicians."

"Parking in the southside sucks, and the new policies and horrible signage have led to many people, friends and fans having their cars towed. That turns a $50 night of music, drinks, and fun into a $300 night of towing and parking tickets."

"Our City does not help our union secure outside work in the Cultural District even though that's what we are trained to do."

"City and LCB make it very difficult for permitting and operation of business."

"Our venues are forced to move just because someone wants to put an apartment above and then complain."

Industry Development

"My ability to provide an outlet for bands however, is only good if it is used."

"From my 3 years in Pittsburgh, I see a promising cultural scene and a busy entertainment industry, but very little "music industry" that is concerned with the actual commercialization of music."

"While Pittsburgh has a ton of talented musicians, there is no industry to support them. A handful of decent recording studios, but no record labels, minimal booking agents, management opportunities, etc. All that being said, it seems like it's getting better."

"It'd be really cool if the city could set up music/nightlife networking events! A lot of local networking is clique-y and hard to break into."

"Youth nonprofits in music and arts need funding and support in order to build sustainability in the Pittsburgh music community. Women, people of color, people with disabilities, and people who identify as LGBTQ need support as well. Pittsburgh is lacking in spaces and support as a whole for these groups."

"Networking is not done through industry themed events. The Pittsburgh music scene tends to be unwelcome to "outsiders" and is a very clique centered network"

"Networking in Pittsburgh is difficult because this is a very clique-ish city."

Supporting Documents

About the Partners and Writers

About the City of Pittsburgh Office of Nighttime Economy

The Office of the Nighttime Economy Manager is charged with coordinating efforts to support the Sociable City vision and mission. Vision: Safe and vibrant places to socialize for visitors and Pittsburghers of all ages, cultures and lifestyles. Mission: Retain and grow the economic value of Pittsburgh's social and nighttime economy, while effectively preventing and addressing nuisance activities, managing public safety risks and alleviating quality of life impacts.

About WYEP

On the air, online and in the community, 91.3 WYEP champions musical discovery by supporting new and emerging artists, showcasing the region's music community and celebrating the creative process. WYEP's music mix is curated by passionate and dedicated music lovers who deliver a hand-crafted listening experience spanning a broad range of genres and styles. Weekly specialty programs offer a deep dive into Blues, Soul, R&B, Folk, Bluegrass, Electronica and more. A service of Pittsburgh Community Broadcasting Corporation, WYEP produces free concerts with local and national artists, provides teens with the opportunity to perform their own original music and plays a visible role in Pittsburgh's cultural scene. WYEP enriches the community through musical discovery, expression, and education.

About the Pittsburgh Downtown Partnership

Pittsburgh Downtown Partnership is a dynamic, nonprofit organization comprised of business and community leaders, property owners, civic organizations, foundations and residents who provide energy, vision and advocacy for Downtown Pittsburgh. Working collaboratively with its partners, the PDP strives to create a positive Downtown experience for residents, workers and visitors alike. The PDP's strategic initiatives include clean and safe services, transportation, and economic development and advocacy.

For more information, visit DowntownPittsburgh.com, follow us on Twitter at twitter.com/downtownpitt and "like" us on Facebook.

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. Founded by Don Pitts and Peter Schwarz in 2017, the team has extensive experience in sound management initiatives and philosophies that encourage both live music industry growth and residential compatibility.

For more information, visit soundmusiccities.com.

When it comes to the music industry, Don has done it all over the past three decades, including managing bands and venues, handling entertainment relations for Gibson Guitar and co-founding the North American Music Cities Summit. This unique background has given him the ability to communicate effectively with various partners to find common ground.

As the first and long-time manager of the City of Austin's Music Office (2010 – 2017), Don pioneered a number of innovative programs to address the needs of a local music ecosystem, including commissioning the 2015 Austin Music Census. Also, he developed a community sound management initiative, which reduced sound complaints by 70% during his tenure.

Peter brings almost four decades of experience as a musician and a business leader to Sound Music Cities. He recently completed a long-term commercial music industry development plan for the City of Austin's Economic Development Department. He was previously for 14 years the executive–in-charge of all of Ray Benson's holdings, including Asleep at the Wheel and Bismeaux Records. He oversaw album releases and artist management for Carolyn Wonderland, Willie and the Wheel, Raul Malo, A Ride With Bob, Texas Tornados, Wheeler Brothers, Aaron Behrens, and 2015 Grammy winner Still the King. Earlier experience includes festival coordination, arts programing, album producing, and touring musician and composer (as a member and manager of Steve Riley and the Mamou Playboys), protégé of master Cajun fiddler Dewey Balfa, and longtime musical collaborator with his father, Tracy Schwarz, of The New Lost City Ramblers. Schwarz is a graduate of Harvard College (BA) and the University of Texas at Austin's McCombs School of Business (MBA), and specifically for this report notes that he's a York County, PA native, performed at the Calliope House in the late 1970s and the Alter Bar in the 1990s, and was a production coordinator with the National Council for the Traditional Arts when the National Folk Festival was presented in Johnstown, PA.

Business and Nonprofit Support Opportunities

The following is an augmented laundry list of potential program ideas for the music space in Pittsburgh, many of which have already been validated, planned or launched in other cities. Almost none of them require municipal government action or involvement to launch.

Local Artist Support and Development

+ Paymaster Service (umbrella employer, using the model created by SAG/AFTRA compliance payroll services such as Talent Partners. Path for regular working local musicians to gain full-time employment status and thus gain eligibility for benefits, such as employer provided health insurance, 401k, short term disability, etc.)

+ Temporary Employment or Placement Agency for PGH Touring Musicians (structured as a worker cooperative, offering more flexible mid-level skilled part-time work for musicians to augment their income)

+ "The PGH Card", local designation (or certification) for PGH Musicians, PGH Bands or PGH Music Venues. Once developed, this designation could leverage any number of discounted services or products, such as "reduced parking fee for PGH Card holders" (in exchange for use of logo and "Loyal Supporter of PGH music!")

+ Health care services, mental health care, dental services for low-income working musicians. 12% of respondents do not have health insurance, and 35% of those covered are relying on a family member or the government. In addition, it is likely that many musicians are not able to "bridge the gap" and commit more fully to music without risking loss of coverage. Thus, options for coverage and preventative care are very helpful for music ecosystem growth (and also compelling models for local music patronage).

Non-Resident Touring Artists Services

+ Touring artist local services (providing a secure place to safely park tour vehicles overnight, recommendations for reduced rate lodging, negotiate referrals through venues for inclusion on venue production riders)

+ Request for voluntary contribution to local music charity (in lieu of municipal non-resident entertainer tax)

+ Personal Concierge Services (laundry, shopping, appointments, etc.)

Audience Development

+ Local Music Focus in Top Tier Festival Programming (e.g. Thursday– local only)

+ Concert Subscription Series for New Residents (e.g. "Local Music Hour")

+ Top 10 List for PGH (monthly local artist/band business activity, an PGH "Pollstar")

+ Neighborhood Concert Series ALL around town (such as with Parks Dept)

+ Yelp for PGH bands... helping people decide what to see

+ Vinyl Listening Lounge (offering large vinyl libraries + hi-end audio)

Career Development

+ Professional Services Mentoring (Artist Management, Booking, Label, Producer, etc.)

+ Entry level paid internships for music industry jobs (accessible for economically disadvantaged only, to gain access and thus improve racial/ethnic/gender diversity in the industry)

+ PGH Music Production online community (tech, roadies, managers, drivers, etc.)

Technology (Music Adjacent Opportunities)

+ Music and Technology Venture Fund

+ Music Subscription Streaming Service – User-based revenue model

+ Music Industry Professional Community (ideas, debate, job search, events, etc.)

+ Digital Music Metadata Initiative (blockchain technology to enhance information access)

Various

+ Record Label Services Coop (worker coop or profit share, back office for artist-owned labels)

+ Survey to compile data about impact of non-ticketed music events

+ Vinyl Manufacturer + Live Music Venue + Food (music tourism attraction)

+ Email List of PGH voters who want to stay informed about music industry (advocacy)

+ Venue and Music Nonprofits Annual Awards in Excellence Show

+ Music Event Designers Marketplace Website (for middle agents, market makers)

ADDENDUM C

musicsa

Best Practice Guide for Live Music Venues

The following are excerpts from an industry-leading guide that helps develop best practices for venue operators. The language has been edited in various places to align with USA-based terminology regularly used in the live music venue industry. The full guide is available here:

musicsa.com.au/best-practice-guidelines

Thank you to Lisa Bishop and Anne Wiberg for their assistance. The following is included with the permission of Music SA.

Attracting and Booking Live Music Gigs

FINDING MUSICIANS

Firstly, think about how you want to operate as a live music venue. Do you want to specialize in a particular genre, host different genre-based nights, have resident bands, run all-ages events, add low risk acoustic music or perhaps stage touring acts?

There are a number of ways to find artists to suit your venue.

+ Get the word out to the music community via your social media

+ Go to shows at other venues

+ Talk to artists that perform in your area

+ Organize meetings with booking agents

+ Speak to people at Music SA

+ Check out online gig guides to see what musicians are playing and visit their Facebook pages for contact details

+ Read through local free music press and blogs

+ Show companies that hire out production and backline around your venue, explain your plan and discuss how you can work together

+ Contact local genre-based music associations

BOOKING MUSICIANS

Do you want to book the music yourself or contract someone else to do it? Most venues do one or a combination of the following:

Booking Yourself

✓ **Pros:** Direct communication with artists, can grow your network and relationships, can negotiate performance terms directly.

✕ **Cons:** Additional administration and time spent coordinating shows, and you'll need to grow your network yourself. It's up to you to make sure all bases are covered.

Booking Through Agents

✓ **Pros:** Access to a broad range of acts and industry knowledge, less administration, generally more professional and easier to talk business with than directly speaking with artists.

✕ **Cons:** Will cost a regular fee. Can be negotiated as part of an artist's payment, or they may request a retainer. Less direct contact with artists and no development of personal networks.

Booking As A Venue For Hire (Working With Promoters)

✓ **Pros:** Promotion of shows and administration is not your direct responsibility.

✕ **Cons:** You're open to take on a lot more risks. The promoter may select some acts that may not attract an audience to your venue. You'll need to ride out the highs and lows with them and you're giving a lot more trust over to another business. The goal is mutual gain, but there are always fluctuations in consistency.

WORKING WITH BOOKING AGENTS

As a live music venue, it's essential you build a good relationship with booking agents and agencies. They represent a roster of reputable artists and can be a great way to find music. They also manage the business and fee negotiations on behalf of the artists they represent.

1. Contact them through resources such as Pollstar, and artists' provided contact info

2. Invite them to visit and check out your venue (if they happen to be local)

3. Offer guarantees to artists to start getting more confidence in a new venue

PERFORMANCE AGREEMENTS

Once you've decided on the music act you should put the booking in writing. This is called a performance agreement. It's important to spell out the form of payment upfront. The three most common forms of payment are:

1. **A guarantee:** the venue agrees to pay an agreed fee for the show in advance. This is the most common type of payment deal in live music.

2. **A door deal:** the venue pays the artist a percentage of ticket sales for the show.

3. **A versus deal:** the venue pays a guaranteed fee to the artist plus a percentage of the door takings once a certain amount has been reached.

Go to Music SA's website for a template for a Performance Agreement.

musicsa.com.au/resources

MAKE IT PUBLIC!

Update your website or Facebook page with details of how you book artists that perform at your venue. Outline the process of how artists can get a gig. Whether it's sending in demos, links to music online or a phone call, it's much easier for the artists if they know how you like to work in advance.

Live Music Regulation

The following areas must all be addressed according to local law in order to present live music to the public.

Do your research of each of these topic areas:

+ Liquor Licensing and Live Music
+ Zoning/Use/Land Code
+ Permitting
+ Tax

SOUND MANAGEMENT TIPS

+ Use a sound level meter to take regular measurements from reference points both inside and outside during live shows and keep written records of these.

+ Educate staff on sound management principles, such as monitoring on-stage sound levels, managing patron noise and disposing of trash or recycling quietly.

+ There are a variety of construction materials you can install to better contain crowd noise in outside areas.

+ Use a PA system that is appropriate for the size of the venue. Devices such as limiters, warning lights, compressors and cut-out switches can help sound levels. Try to keep speakers facing away and as far as possible away from outside doors.

+ Install high-density acoustic insulation in the walls, ceiling and floor surrounding live music areas, particularly external walls that are close to neighbors.

+ Install sound absorbing materials such as heavy drapes and carpet in live music areas to reduce reverberation and minimize the build-up of sound.

+ Install acoustic or double doors at the entry points to your live music area, venue or other outdoor areas to limit the leakage of sound.

+ Regularly contact police and any other sound regulatory body, as well as residents and neighborhood groups in your area. Include newsletters or meetings and advise when you plan to host live events.

Setting Up and Staging Live Music

GET THE BASICS RIGHT/SIMPLE STAGE SET UP

1. A suitable set of PA speakers to amplify the music coming from the stage. A basic set up includes two speakers facing the audience and at least one speaker facing the musician as a "monitor" so they can hear their performance.

2. A basic mixing unit with at least 4 input channels, which helps manage your sound. Performers need to be able to separate the volume levels of (for example) their instruments and their vocals, to make sure that each aspect of their performance is being amplified in an appropriate and balanced way.

3. A couple of microphones, a set of microphone stands, the appropriate cords and multiple power adapters.

4. A basic lighting set up to illuminate the performance space (use LED lights to save on power bills).

5. A space, stage or riser that is big enough to comfortably fit a full band including room for a drum kit.

6. Digital mixing consoles simplify the mixing/installation process (such as with iPads etc.)

BACKLINE

If you are programming a lot of shows, consider purchasing/leasing "backline" i.e. a standard drum kit, bass speaker/amplifier, guitar amp, keyboard stands, microphone stands, cords and microphones. This will attract artists to your venue.

PARKING, LOADING AND STORING

You'll also need to ensure there are suitable parking options, or temporary options for the band to load in their equipment to your venue. Allow plenty of time for a sound check to be completed before patrons arrive. Suitable storage space for storing cases and additional equipment is also a practical necessity. Contact your local authorities if there is no loading zone.

PA SYSTEMS AND MIXING

Regardless of how good your PA system is, or how good the act is, a good show hinges on how well the sound is mixed. While a simple acoustic set up can be quick to sound check, a skilled engineer should always sound check a band. Always request a stage plot and inputs list from the artist. Consider employing a sound engineer to operate your equipment and ensure all performances at the venue sound the best. Usually the in-house operator mixes sound and lighting for artists for a small fee. Larger acts often bring their own mixer.

ARTIST RIDER

It is a strong expectation in the entertainment industry that musicians are provided with refreshments. This can be either supplied over the bar upon request or ticket tokens can be issued. At the very least water and soft drink should be available free of charge. If the performance is scheduled for early to late in the evening then it is typical to provide a meal, particularly at a private gig when others are being served as well.

INSURANCE

Check whether your business insurance policy covers you for operating live music performances before proceeding with booking shows. It's also best to check whether the musicians you book have their own general liability insurance and you may ask for a copy of their Certificate of Insurance. It should be noted that it is the responsibility of musicians to have their own musical equipment insured. If the gear belongs to your venue, then insure it through your business policy.

ALL AGES EVENTS WHERE MINORS ARE PRESENT

Expect additional legal requirements when admitting minors. Research local laws to learn more.

CROWD SAFETY, SEXUAL HARASSMENT & INCIDENTS DURING EVENTS

+ As the venue owner, make sure you understand your rights to deny service or eject patrons.

+ Consider hiring trained security providers if you are going to stage live music with large numbers of patrons. Drink spillage, sexual assault or injuries can occur. On top of preparations you've made to ensure the stage set up is neat and secure, have a security person watch things in the front, ensure that drink spillage is cleaned and that first aid is administered in a safe area.

+ Complaints may occur and it's crucial to have a system to capture this information. Take the time to record any incidents on a form when they occur. Repeat offenders should be asked for ID and blacklisted from your venue. Take complaints by female patrons seriously and train your staff in complaint handling. Consider installing security cameras at entries and waiting areas to assist in surveillance, deter antisocial behavior and to obtain evidence of complaints. If an incident is reported to a staff member, or they become aware of an incident or believe there is a likelihood of an incident occurring, all necessary steps must be taken to eject the perpetrator (and if necessary, their friends) from the venue. The perpetrator's identity must be sought and recorded in the incident log.

+ Clearly inform patrons through written policies and signs that your venue discourages sexual harassment and irresponsible drinking behavior. Develop a patron code of conduct and display it at all entry points. Create posters for bathrooms that indicate zero tolerance for sexual harassment.

COPYRIGHT LICENSING

No matter if you're hosting live music or playing music through your house speakers/television, you must obtain a license for your business from various Performance Rights Organizations (PROs). PROs are responsible for collecting and paying royalties to songwriters. Musicians will love you for being licensed so they can claim their public performance rights (it is their responsibility to submit their set lists to enable this).

AND DON'T FORGET ...

+ Have all of your administration in order; know the stage set up, playing order, set times, rider and any requests communicated from the band.

+ If the show is ticketed, have door staff and a float prepared in advance.

+ If the band wish to sell merchandise, have a table prepared.

+ Use your communication channels to share what time the show will start and when each band will perform, as well as any additional promotions.

Working with Musicians

LOCAL MUSICIANS

There is an incredible variety of musical acts available for booking. Smaller venues can host acoustic solo acts or have "Open Mic" nights to attract unsigned and emerging original artists (who will remember your venue later in their careers!). Larger venues can offer an opportunity for local emerging bands to support more accomplished bands or supplement the headline touring acts playing at larger capacity venues.

The venue will work directly with the musician if the musician is self-managed or will negotiate the booking through an Artist Manager if the local act is more established.

Covers bands are typically booked through a Booking Agent (Entertainment Agency). Booking Agents maintain a roster of acts that can be booked for functions at venues. Booking Agents act as a liaison between the Artist Manager and the venue, often negotiating performance fees for the act.

Promoters are entrepreneurs who take on the responsibility and risk of providing musical acts for venues. This will involve arranging and routing touring in suitable venues in regional locations. The Promoter often engages a Tour Manager to do all the production communication(in "advance" and day of show) with the venue regarding times and logistics.

PERFORMANCE AGREEMENTS

A performance agreement is an initial basic contact for services outlining when and what performance the artist will perform at your venue, including what the band will provide and what the venue will provide for the performance. It should be followed up with an Advancing Worksheet containing more details. A basic template is available at musicsa.com.au/resources

WORK FOR HIRE

Regardless of the deal, it's important to understand that artists are not employees of a venue. They are contracted to provide a service.

ADVANCING WORKSHEETS

An Advancing worksheet is a document that venues can provide to musicians/tour manager, the Booking Agent or the Artist Manager in the weeks leading up to a live music show. It provides more details about the upcoming event and is based upon what was agreed to in the initial performance agreement. A worksheet can include details such as:

+ The location of the venue and the contact details of the venue manager

+ What time the musician should load their equipment into the venue and details about parking (if available)

+ What meals and drinks are provided to the musician (commonly called the 'rider')

+ What production is supplied by the venue (i.e. lighting, sound, stage)

+ Times for sound check and set times, including breaks in the performance

+ Details for where the artists can store personal belongings

MUSICIAN FEES

There is no regulated remuneration structure for contemporary musicians. There is an industry standard that Booking Agents take 10% of the musician's gross fee and Artist Managers take 10-30% of the musician's net fee (may vary for different income streams).

A venue will need to negotiate the musician fee for touring bands with Booking Agents, who will often tell the venue what the market driven fee is – the better the act with the bigger the fan base then the larger the fee will be.

These fees may vary according to a variety of factors including: night of the week, quality/reputation of the artist, capacity of the venue, how long and how many sets, whether or not production is supplied, how many tickets the band can sell, touring/travel costs that need to be recouped, the number of players in the act and the number of bands that are playing.

The venue will need to add the technical production costs of any additional equipment not provided in-house. Costs can be controlled by purchasing or leasing a backline and mixing console so that sound equipment is not needed to be brought in every time an act plays live music in your venue.

ARTIST RIDER

In addition to the hospitality mentioned previously, touring musicians will often stipulate a number of production, logistical, meal, other preferences, and even legally binding requirements in a rider attached and incorporated into their performance agreement. The more these details can be arranged ahead of the agreement signing, the better.

SELLING MERCHANDISE

One of the ways in which musicians earn additional income while playing live is by selling band merchandise – CDs, hats, t-shirts, hoodies etc. It is very helpful to have a table set-up near the mixing desk or front entry, where a band support person can sell merchandise, or the band can sign autographs for fans. This is a good opportunity for the venue to also place a "Venue Mailing List Sign-Up" on the merchandise table and collect emails of people interested in knowing what future shows are on at your venue.

EQUIPMENT STORAGE

Musical equipment and personal items belonging to musicians must be insured by the musicians. These items can be both fragile and expensive, so musicians will love the venue if it provides a lockable space to store gear while on stage.

Marketing and Promoting Live Music

GETTING INTO THE MARKET

Without beating around the bush, the live music market is highly competitive so to be a cut above the rest, you should consider at minimum getting the following things correct. Look at marketing as an investment rather than an expense and if well planned and executed, should get more music patrons through your doors.

Free Opportunities (Earned Media)

This takes time and effort to develop, but there are an increasing number of tools to help streamline your efforts.

+ **Gig guides:** Target any local services that will list your events for free. It's a start. Make a schedule so your listed information is up to date and accurate.

+ **Social media:** Choose one or two platforms (Facebook, Instagram) and be very good at it. Post regularly with interesting articles, song and video links of bands playing in your venue and give-aways. Consider small $ for advertising to boost Facebook posts.

+ **Your website:** If you've got a website, include your entertainment listings in a prominent position. Ensure they're always up to date.

+ **Ask bands to help promote their shows:** Obviously it's a good idea to have the artist tell their fans they're playing at your venue (creating a Facebook event should be a minimum requirement).

  But a word of warning – by no means make this your only strategy and put it all on the band to bring a crowd. Work together.

+ **Start a mailing list:** Collecting emails of people who are interested in knowing what's on at your venue might take you a bit of time to administer, but there is a host of online tools that can help you manage a mailing list. That way you can keep them informed of what is coming up and when their favorite act is coming through. Ensure you maintain a regular consistency of mailing (once a month is fine). Templates can be downloaded for free for most mailing list programs.

+ **Band bios and photos:** Be sure to ask your artist to send you a digital version of their brief bio and a decent band photo (colour, high res 800W pixels x 800H pixels, .eps and .jpeg formats, or whatever specs you require).

Low Cost Marketing Options

+ **Posters and flyers:** Whether they're put up in-house or distributed around the eighborhood, posters remain a relatively low cost means of promotion. Don't use Microsoft Word to design a poster ever! Get a designer to help you set up a professional template that looks good, catches the eye, is easy to edit that will reflect well on your brand.

+ **Paid social media posts:** Social media advertising, when done right, can reach a very specific audience and present a point of sale directly in front of them. Again, it's not the only strategy you should employ but it can be helpful as part of an overall marketing strategy and allows you to target your audience.

+ **Competitions and loyalty programs:** It doesn't take much to add a "Competitions" button to your website to give-away free tickets to shows. You can link the competitions to social media posts but be sure to keep abreast of rules and conditions. There's a reason why age-old strategies like promotional giveaways and loyalty programs are still included in marketing strategies to this day. Well-executed promotions linked to your venue can add value to the show experience for your customers, increase their positive association with your brand and help keeps things lively and exciting.

Higher Cost Marketing Options

+ **Regularly advertise in relevant publications or on radio:** Again, this is about knowing how to reach people who will come to your show. Media often has a broad reach that can help you grow the brand of your business. Be savvy about how frequently you invest and which media you invest in.

+ **Arrange broader distribution of your promotional material:** Poster and promotional distribution companies can help promote your shows to people sitting in coffeeshops and bars, for example, and place your brand in places where people are looking for information on things to do. Research local street team providers.

+ **Engage a graphic designer:** If you're serious about standing out from other shows, you should look to find a designer to work with to create all of the artwork you use to promote your music.

+ **Live music photography:** A picture speaks a thousand words. Spend a few hundreds dollars and engage a professional photographer to shoot a couple of your live music gigs. You will be rewarded with a good number of key images to use in all your printed and online marketing for years.

+ **Work with a ticketing company:** If you run ticketed events regularly, working with a ticketing company is a good idea. They will often add booking fees to ticket prices to pay for providing their service, but they can save you a huge amount of time in administration and also assist with data collection, growing your contact lists, and general promotion for shows.

+ **Partnering with large events:**
There are always large events that your
business can partner with to increase
awareness, reach new audiences and
generally get seen. Just because you
are a venue doesn't mean you can't
be part of a larger event somewhere else.
Public funding may be available to support
live music events in your neighborhood.

+ **Engage a publicist or marketing
specialist:** Professionals who know how
to attract customer's attention may cost
you, but if you're really looking to succeed
they can make a big difference in spreading
the word to the media, reviewers and
music bloggers about your venue and the
acts you have performing. If you have the
money engage a Social Media Influencer
to spread the word on their social
media channels.

Visit the Music SA website
resources page for a cheat sheet
on How to Write a Media Release
and a list of media contacts!

SOUND MUSIC CITIES

Sound Management Strategy based on Community Partnerships

| **Stakeholder** _A person with an interest or concern in something_ | **Partner** _A person who takes part in an undertaking with another or others_ |

Most cities use a stakeholder approach for a broad range of policy proposals, from zoning to transportation, new libraries to new public art. These usually incorporate a series of public meetings where feedback is freely welcomed from individuals. The degree to which different types of stakeholder input can hold power over municipal governance is of increasing concern.[35] This is especially well understood in the context of managing the impact of sound upon communities.

A partnership approach is recommended for managing sound. Instead of reinforcing traditional types of exchanges in public forums with members the community, the City can be proactive in identifying neighbors, neighborhood associations, business owners and venue owners who are directly impacted, and through a variety of methods, incorporate these individuals and organizations into a collaborative and jointly accountable process, where each live music venue is evaluated through a "Sound Management Plan" process.

It is also helpful to consider a shift in understanding. "Noise" requires regulation, whereas "sound" requires management. As various cities with sound issues have learned, effective sound policy clearly separates good actors from bad and allows operators to be stable and successful with the entertainment services they provide as long as they are complying with guidelines. A successful sound ordinance becomes the bedrock for additional music-friendly policies because it builds trust with the commercial music industry and at the same time addresses quality of life for the rest of the city.

Experience tells us that sound issues arise from two basic factors; **Behavior,** where in its most extreme examples a live music venue operator may chose not to respond to regulations. Such behavior choices, although rare, require enforcement as a primary tool. So called "Bad Actor" clauses must be included in sound ordinances and they should clearly communicate not only the penalties for violations, but also the escalation of hardships that will result from repeat violations. The second most basic factor with sound issues is **Environmental.** The venue operator may be a good actor, yet there is still work to be done on mitigating the amplified sound properly to compensate for environmental impacts (and/or the topography or building materials play a major role in the impact).

Finally, it is important to understand the importance of balancing regulatory framework and music friendly infrastructure (i.e. managing expectations of those _affected_ by sound versus managing the expectations of those trying to make a living _generating_ sound). Venue operators can be out of compliance just as much as neighbors can be out of touch, and vice versa. The City has special leverage in bringing individuals and organizations to the table in a partnership format, addressing concerns in language that this population understands (rather than policy speak), and getting all parties over the hump in terms of accepting and acknowledging co-existence. Music cannot be legislated out of existence in the ambient environment of today's cities. That desire is unrealistic. At the same time, there are a host of way it can be more effectively managed, so that tolerance by the larger community is reasonably accommodated.

Specific recommendations for launching a Sound Management Strategy include:

Provide Dedicated City Staff

Having professional staff that is responsible for providing a detailed analysis of a live music permit request, which in this case is focused on sound and noise, allows for formulation and analysis of a Sound Impact Plan, as well as site visits to more fully consider impact to residential neighbors. This analysis should include specific production-related information like site layout, stage configuration, sound equipment and potential for sound bleed. From this analysis, City staff can make potential recommendations on sound attenuation and potentially limiting the hours of operation of sound equipment and limitation of decibel levels if necessary. Experience has shown that venue owners and promoters respond to the depth of this analysis (and the potential consequences) with a range of proactive and helpful solutions. This becomes the basis for discussions with impacted partners who are then empowered to be part of the dialogue. Also, this greater focus on technical and demonstrable impacts helps avoid hot button issues such as personal preferences in music or a venue's right to exist and/or present live music in a particular location.

Process

Establish a consistent process that includes project management, regular meetings, timely reporting and measurable outcomes, with an emphasis on City's role in ensuring that each interested partner is both heard and feels like success is the ultimate goal.

Sound Management Plans

A goal should be established for every permitted venue that impacts its surroundings to have a plan submitted that includes at minimum sound mitigating design features, prescribed decibel levels, hours of permitted operation, availability of decibel meters on site, contact information and office hours for the venue staff person responsible for sound. Additionally, there should be a stated process for modifying submitted plans. Finally, there should be a clear process for neighborhood input for each plan, and a requirement for a "Good Neighbor Policy" (set of good business practices) for each venue.

Land Use Analysis

Ensure a firm understanding of the land use planning that was intended for a particular area, including zoning categories (more about this below). Specifically evaluate how a new sound permit contributes or hinders an overall plan for a particular geographic location, and whether this type of use is permitted under the current code.

Physical Distance

Measure how far any proposed sound permit locations might be from various residential locations, as well as other businesses that might be impacted.

Development Standards

Assess how surrounding buildings are built. Do they have appropriate protection from environmental sound as well as amplified sound? How is a venue built/situated? What is the stage placement? Are there windows or roll doors? Will the front door be permitted to remain open during the normal business hours? What is the stage construction? Is there a band shell?

Equipment Standards

Assess what type of speakers are being utilized. What is the PA system? Is this size of PA/Speakers/Amps, etc. appropriate for the size and capacity of a venue? What is the system equalization? Is it modified to ensure that low-end frequencies are not carrying into low-lying areas?

Sound Measurement

The City should be equipped with reliable and accepted tools for the measurement of sound (professional quality dB meters rather than a phone app, etc.). Encourage venues to invest in this same equipment, so they can do their own monitoring. Develop a process to create a sound profile during a test evening that measures the impact both at the property line and at the nearest impacted residence or business. How are we talking about sound pressure (dBs vs. loudness)? How is the sound bleed impacted from the built environment around?

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SOUND MUSIC CITIES

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