BALTIMORE MUSIC CENSUS

Photo Courtesy of Peabody Institute

SUMMARY REPORT
September 2024

SOUND MUSIC CITIES

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Executive Summary

The 2024 Baltimore Music Census was an anonymous, voluntary survey designed to capture key information about the local music scene. The goal of the initiative is to support local musicians, educators, venues, promoters, industry personnel, and non-profits by giving them important, up-to-date data about the city's music ecosystem. The music census launched on March 4, 2024 and ran through June 26, 2024 and collected 576 responses from people working in music in any capacity who are 18 years or older and living in the Greater Baltimore area.

The Baltimore music ecosystem is predominantly composed of individuals in the Music Creative sector, representing 88% of survey respondents. This is followed by 7% who are Venue/Presenters and 6% who are associated with the Industry. While the gender of respondents overall find a majority in those who identify as male (60%), both the Industry and Venue/Presenter segments find a majority in those who identify as female at 56% and 48% respectively, which is notable because music ecosystems nationally tend to be male dominant.

Baltimore Creative respondents are highly experienced, with 91% having over 10 years in their field. Their top concerns include the lack of music work, rising living costs, and stagnant pay rates. Local live performances and teaching are key income sources. Annually, Creatives respondents spend an average of $6,329 on career-related expenses, contributing $3 million to the local economy, with 40% of that spent locally. Baltimore Industry respondents are highly experienced, with 72% having over 10 years in their field, reflecting a seasoned workforce. The industry is diverse, with significant roles in music development, marketing, and recording.

The Venue/Presenter landscape in Baltimore is diverse, with live music venues making up 28% of the respondents. There is a significant presence of community spaces, house/DIY/private venues, and independent promoters, each contributing 10%. Venue capacity varies widely, with the majority accommodating 101-200 people, and 55% of venues offer outdoor capabilities. On average, venues host 53 live events annually, totaling 1,472 per year, reflecting Baltimore's active, though smaller-scale, music scene. Regulatory challenges for Venue/Presenters include music performance licenses, accessibility compliance, and street/parking issues. Venues/Presenters seek support through micro-grants, tax breaks, and streamlined tools like one-stop permitting.

Music significantly contributes to the income of Baltimore music professionals, generating a total of $20 million annually across all respondents, with 36% of their annual income coming from music. On average, respondents earn $35,000 annually from music, while their average household income is $96,000. Local performances pay an average of $309 per gig, whereas touring gigs pay $372. In terms of ecosystem development, respondents show a strong preference for connecting with Music Industry services, with 41% seeking connections to agencies, record labels, artist management, and similar entities. Venue and Presenter respondents prioritize audience development tools (88%) and forming coalitions like a local NIVA chapter (54%). Key interests for professional development include marketing, audio/video recording, and event production.

In terms of livability, Rising costs of living and stagnant pay rates are top concerns for 37% and 30% of respondents, respectively. Venue/Presenters also report challenges with fan behavior post-COVID and talent costs, with 27% and 23% rating these as significant challenges. Respondents find that the Baltimore music ecosystem offers predominantly positive experiences. The Baltimore music ecosystem's greatest strengths are that it is non-homophobic (82%), safe (82%), and inclusive (73%). The Baltimore music ecosystem challenges are elitism (50%) and ageism (49%)

This report and the online dashboard at **Baltimore Music Census** offer more in-depth data, insights, and opportunities to understand, support, and grow Baltimore's active and emerging music ecosystem and all the benefits it offers culturally and economically.

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Introduction

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The music census launched on March 4, 2024 and ran through June 26, 2024 and collected 576 responses from people working in music in any capacity who are 18 years or older and living in the Greater Baltimore area (Baltimore City & Baltimore, Anne Arundel, Howard, Harford, and Carroll Counties). The 576 responses offers a statistically significant response rate, but this is a bit lower than desired for a city of Baltimore's size so the margin of error is closer to +/-5%. The census was administered by Sound Music Cities, a leading Austin-based provider of music ecosystem studies and music census work, in conjunction with Professor Anna Celenza and the 21st Century Cities Initiative at Johns Hopkins University. Baltimore joined a multi-city cohort program administered by Sound Music Cities which met monthly to discuss best practices on improving music industries on a city level, allowing Baltimore to gain insight from other cities conducting similar research.

This summary report has been prepared by Sound Music Cities and includes an overview of the Music Ecosystem Health Assessment based on 10 key indicator areas. The report includes key findings and recommendations. Alongside this report, Sound Music Cities has provided access to an online dashboard where you can find more data at **Baltimore Music Census**.

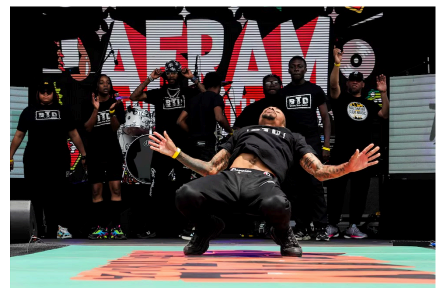
INTRODUCTION TO A MUSIC CENSUS

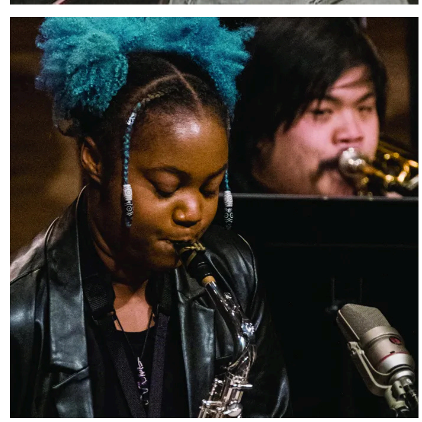
Any strategy to support and grow a music ecosystem begins with a basic understanding of its population. Professional music communities are not easily discoverable using traditional methods (such as through labor statistics or economic data). A music census collects key data points to better understand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

The value of a music census goes well beyond the data itself. Such initiatives ignite a range of activities that are conducive to more strategic and sustainable support for local music scenes over the long term, beginning with validating this economically marginalized group, sharing new learning, activating civic and community resources, and ultimately empowering music people to take ownership of change initiatives.

576 responses
March 4-June 26, 2024

7% venue/presenter
6% industry
88% music creatives





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A Community Effort

The 2024 study was led by Professor Anna Celenza and the 21st Century Cities Initiative at Johns Hopkins University. This study took a grassroots approach that engaged local partners who hold the relationships with music people. Lead and Community Engagement Partners served as an essential means of outreach to music people and these organizations were instrumental in shaping the Music Census itself.

Special thanks to these organizations and individuals for their support and promotion of the Baltimore Music Census:

ORGANIZATIONS

21st Century Cities Initiative at Johns Hopkins
American Federation of Musicians, Local 40-543
The Baltimore Banner
Baltimore Folk Music Society
Baltimore Jazz Alliance
Baltimore Symphony Orchestra
Krieger School of Arts and Sciences at JHU
Peabody Institute at JHU
Sound Music Cities
WYPR

INDIVIDUALS

Michael Bader
Tonika Berkley
Sam Bermas-Dawes
Beth Blauer
Kat Jones
Sean Jones
Mac McComas
Wendel Patrick
Don Pitts
Brian Prechtl
Peter Schwarz
Simoné Skkye

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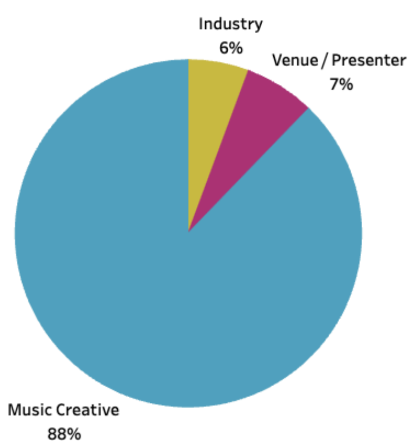
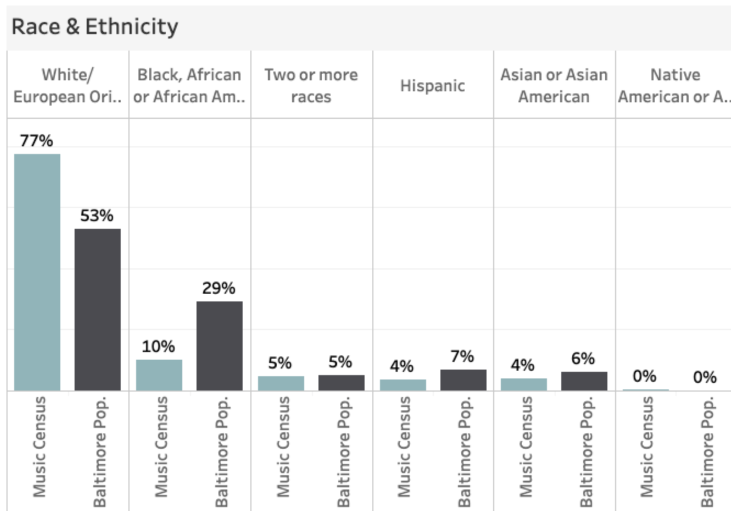
Music Ecosystem Health Assessment

Ecosystem Composition

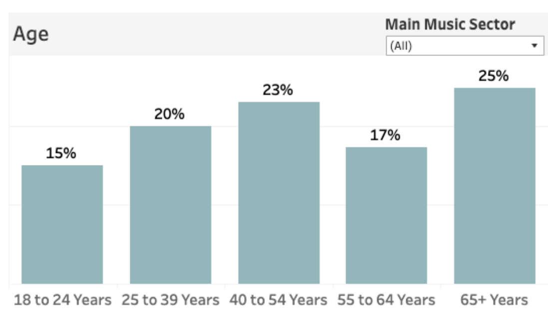
The Baltimore music ecosystem is predominantly composed of individuals in the Music Creative sector, representing 88% of survey respondents. This is followed by 7% who are Venue/Presenters and 6% who are associated with the Industry. While the gender of respondents overall find a majority in those who identify as male (60%), both the Industry and Venue/Presenter segments find a majority in those who identify as female at 56% and 48% respectively, which is notable because music ecosystems nationally tend to be male dominant.



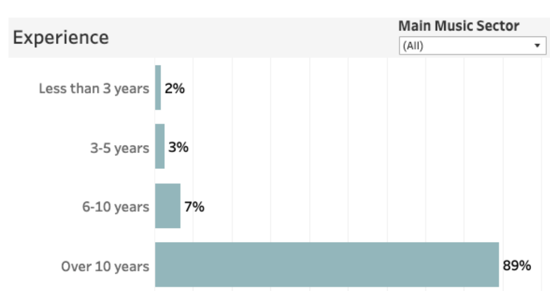


- **Race & Ethnicity** - The racial and ethnic composition of respondents shows a significant overrepresentation of White/European origin individuals (77%) compared to Baltimore's general population (53%). Conversely, Black/African American individuals make up 10% of the respondents, significantly underrepresented relative to their 29% share of the city's population. Other groups, such as Hispanic (4% respondents, 7% population), Asian or Asian American (4% respondents, 6% population), and Native American or Alaska Native (0%), are also represented, albeit in smaller proportions.

- **Age** - The age distribution of respondents in Baltimore reveals a concentration of older participants. The largest group is aged 65 years and older (29%), followed by those aged 40 to 54 years (23%) and 25 to 39 years (20%). The youngest group, aged 18 to 24 years, constitutes 15% of respondents.



- **Experience** – A significant majority of respondents (89%) have over 10 years of experience in the music sector. Those with 6 to 10 years of experience account for 7%, while those with 3 to 5 years and less than 3 years of experience make up 3% and 2%, respectively.



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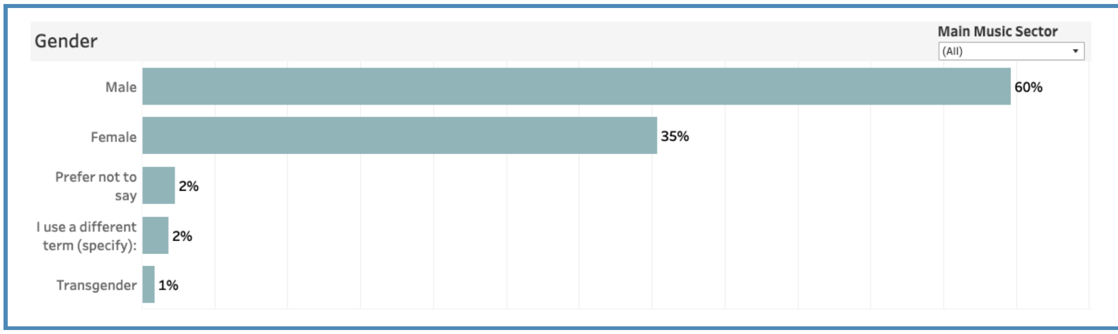
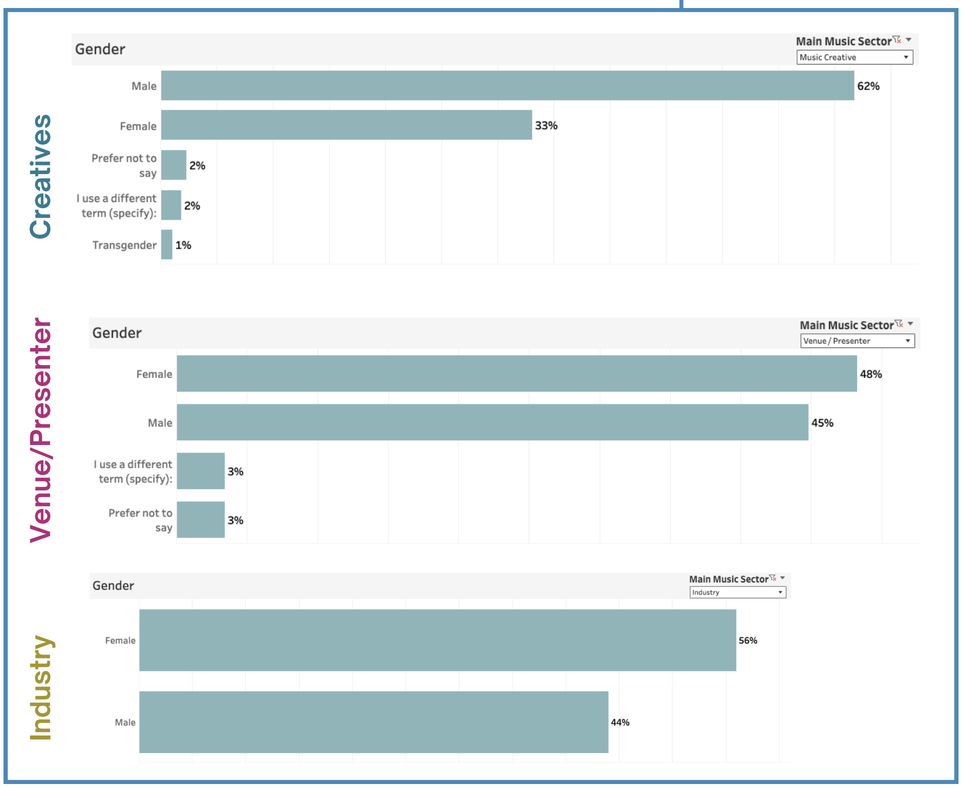
Music Ecosystem Health Assessment

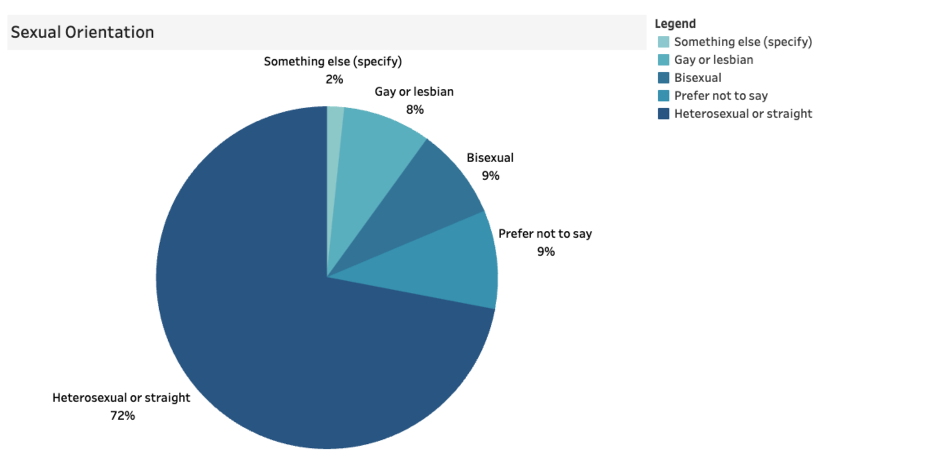
Ecosystem Composition (continued 2/3)



- **Gender** - The gender distribution of respondents shows a predominance of males, with 60% identifying as male, 35% as female, and smaller percentages identifying as other genders (2% use a different term, 2% prefer not to say, and 1% as transgender). This indicates a somewhat more gender-balanced representation compared to some other cities but still reflects a male majority. Notably, in both the Venue/Presenter and Industry categories, respondents predominantly identify as female which is significant because most music ecosystems are male dominant.



- **Sexual Orientation** - The Baltimore music ecosystem displays a range of sexual orientations among its respondents. The majority, 72%, identify as heterosexual or straight. Bisexual individuals make up 9%, those who identify as gay or lesbian represent 8%, and those identifying as something else or preferring not to say constitute 2% and 9%, respectively.



"I love the Baltimore music scene! It is so diverse and quirky and open to anything; all genres are loved!"

"There is a sense of Community and Support."

"The scene is very community-minded."

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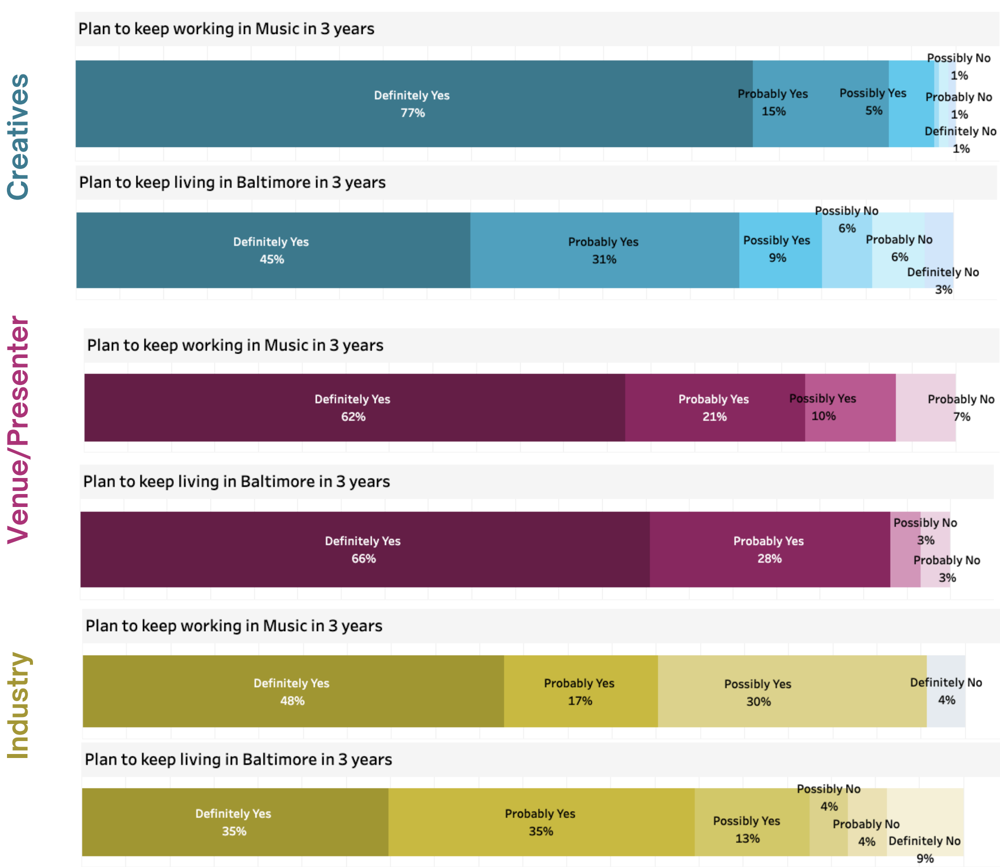
Ecosystem Composition (continued 3/3)

Plans to Stay in Music and Baltimore

- **Creatives** - A significant majority of Creative respondents in Baltimore (77%) definitely plan to continue working in the music industry over the next three years, with an additional 15% either probably or possibly continuing. However, their commitment to staying in Baltimore is lower, with 45% definitely planning to remain in the city and 31% either probably or possibly staying. A notable 21% are uncertain or considering leaving Baltimore.

- **Venue/Presenter** - The majority of Venue/Presenter respondents in Baltimore (62%) definitely plan to continue working in the music industry over the next three years, with an additional 21% either probably or possibly continuing. Their commitment to staying in Baltimore is slightly higher, with 66% definitely planning to remain in the city and 28% either probably or possibly staying. A smaller 6% are uncertain or considering leaving Baltimore.

- **Industry** - The Industry respondents show a more cautious outlook, with 48% definitely planning to continue working in the music industry over the next three years, and an additional 47% either probably or possibly continuing. Their commitment to staying in Baltimore is relatively lower, with 35% definitely planning to remain in the city and 35% either probably or possibly staying. A notable 30% are uncertain or considering leaving Baltimore.



> "The most frustrating parts as a music person in the local ecosystem is the 'clickish' type attitude and lack of venue spaces."

> "There is a lot of talent here and pockets of exciting collaboration and musical innovation happening."

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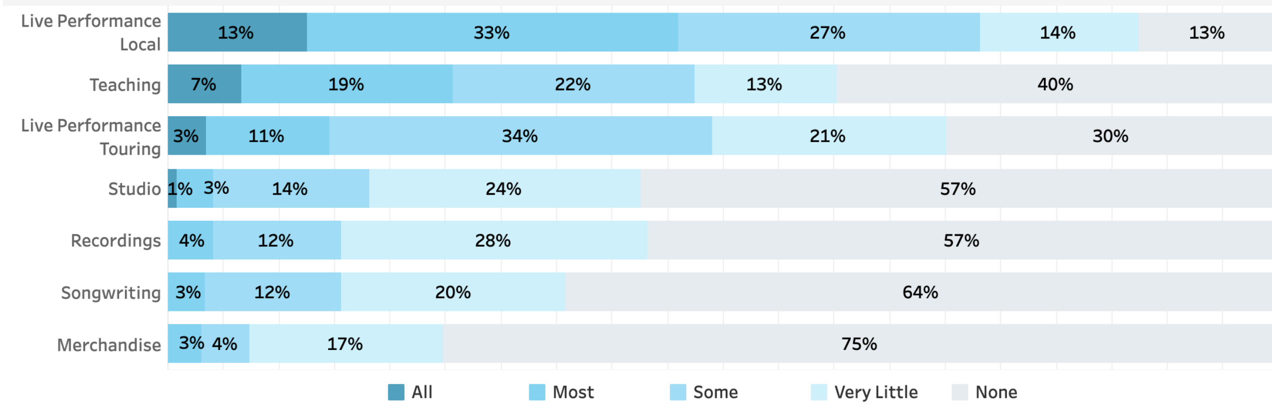
Music Ecosystem Health Assessment

Creative Profile

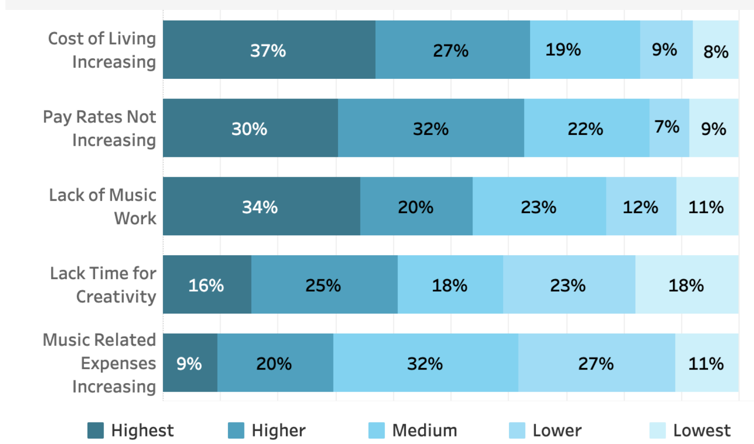
Baltimore Creative respondents are highly experienced, with 91% having over 10 years in their field. Their top concerns include the lack of music work, rising living costs, and stagnant pay rates. Many utilize their homes for music-related activities such as home studios and equipment storage. Income sources are diverse, with local live performances and teaching being key sources. Annually, Creatives spend an average of $6,329 on career-related expenses, contributing $3 million to the local economy, with 40% of that spent locally.

Creative: Sources of Income



- **Sources of Income** - Creative respondents in Baltimore derive their income from various sources, with local live performances being the most significant (13% all, 33% most). Teaching also plays a key role (7% all, 19% most). Other notable income sources include touring live performances (3% all, 11% most), recordings (4% all, 12% most), and studio work (1% all, 3% most). Songwriting and merchandise sales represent smaller portions of income (3% and 3% all, respectively), with the majority relying on "some" or "very little" income from these activities.
- **Career Concerns** - The primary career concerns for Creative respondents in Baltimore include increasing costs of living (37% highest concern), the lack of music work (34% highest concern), and stagnant pay rates (30% highest concern). Other concerns are the lack of time for creativity (16% highest concern) and increasing music-related expenses (9% highest concern). These concerns highlight the financial pressures and challenges faced by Creatives in Baltimore.

Creative Career Concerns



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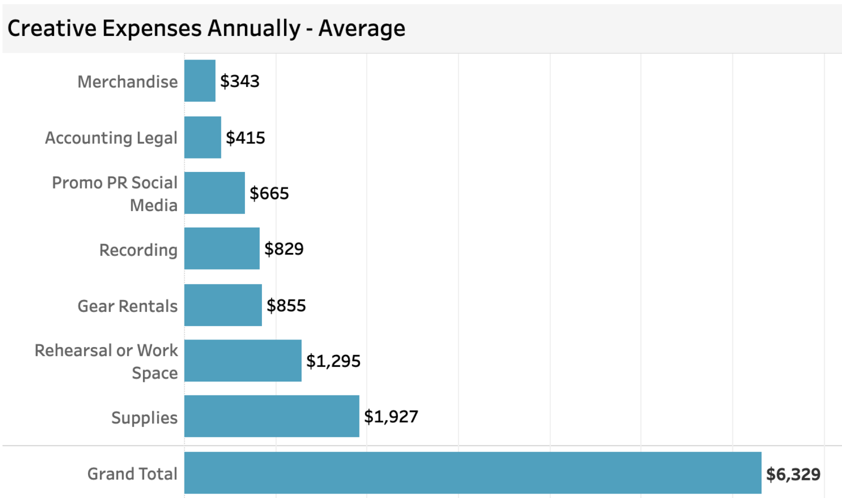
Music Ecosystem Health Assessment

Creative Profile (continued 2/3)

- **Spend** - On average, Creatives in Baltimore incur annual expenses totaling $6,329. Major expense categories include supplies ($1,927), rehearsal or workspace ($1,295), and gear rentals ($855). Promotional PR/social media, recording, accounting/legal services, and merchandise expenses are also significant but at lower levels, reflecting a more modest spending pattern compared to New Orleans. Collectively, Baltimore Creatives spend $3 million annually, with 40% of this expenditure occurring locally.



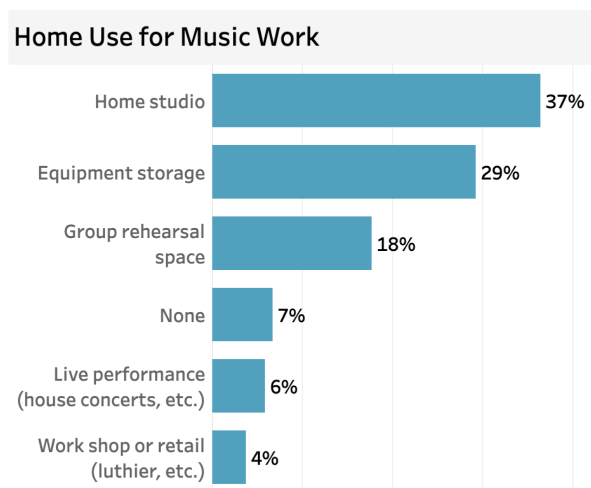
$6,329
Average Annual Creative Spend

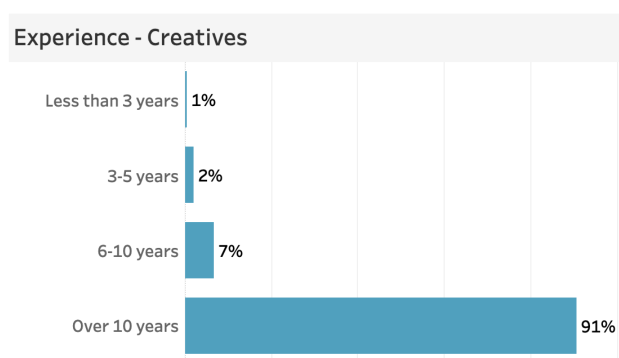
$3M
Total Creative Respondents Spend Annually

40%
Spent Locally

- **Home Use for Music Work** - Creatives in Baltimore frequently use their homes for various music-related activities. The most common uses are for home studios (37%) and equipment storage (29%). Group rehearsal space (18%) and live performances such as house concerts (6%) are less common, while 7% report not using their home for any music-related work.

- **Experience** - The vast majority of Creative respondents in Baltimore are highly experienced, with 91% having over 10 years of experience in their field. Those with 6 to 10 years of experience account for 7%, while respondents with 3 to 5 years and less than 3 years of experience make up 2% and 1%, respectively. This indicates a seasoned creative community, with a strong base of long-term professionals.





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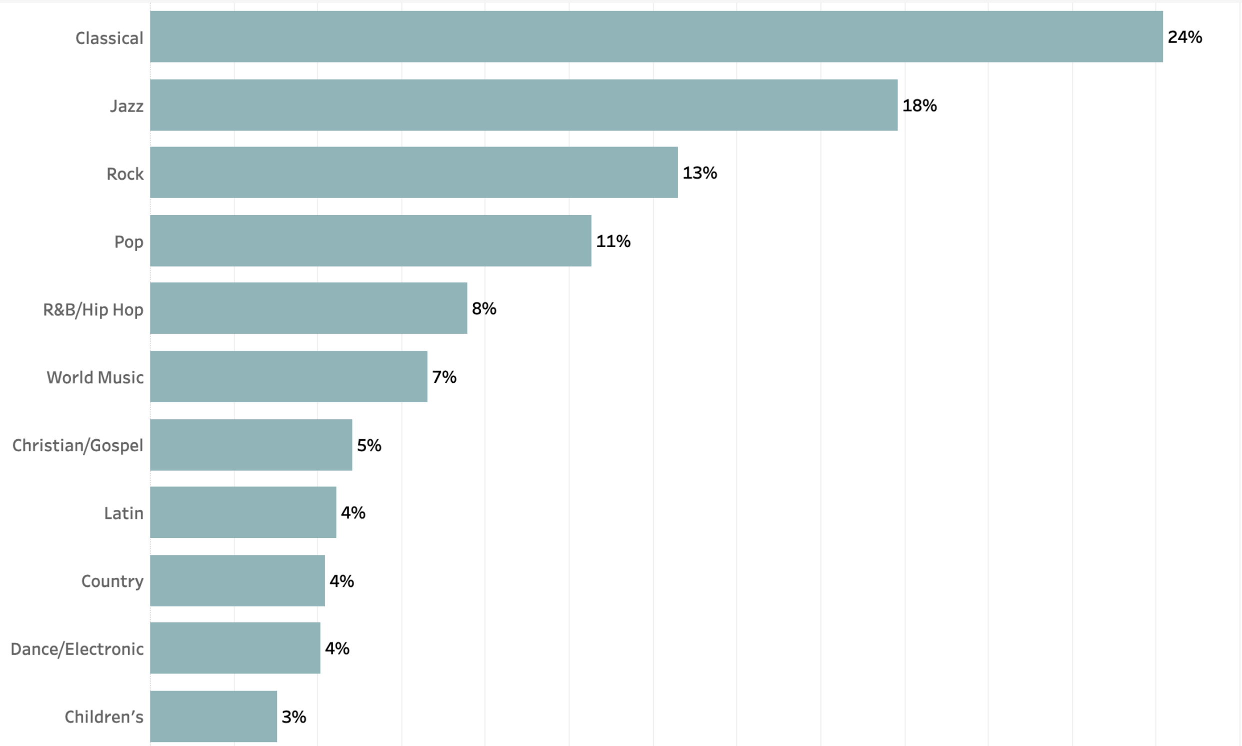
Music Ecosystem Health Assessment

Creative Profile (continued 3/3)

- **Genre Participation:** Baltimore Creatives participate in or support a wide range of musical genres. The most popular genres include Classical (24%), Jazz (18%), Rock (13%), and Pop (11%). Other genres such as R&B/Hip-Hop (8%), World Music (7%), and Christian/Gospel (5%) are also represented, with genres like Latin, Country, Dance/Electronic, and Children's music attracting smaller participation.

Which of the following options best describe the music genres you participate in or support? Select all that apply



> I enjoy the collaborative nature of Baltimore artists.

> There is a lack of diversity. Classic rock covers, or neo-R&B.

> There are too many divisions. Artists need to be supportive of each other.

> The wide variety of musicians in Baltimore trying new things is great.

> We as a community need to show up for one another more often, whether that's reposting IG stories, going to each other's gigs, or just spreading the word.

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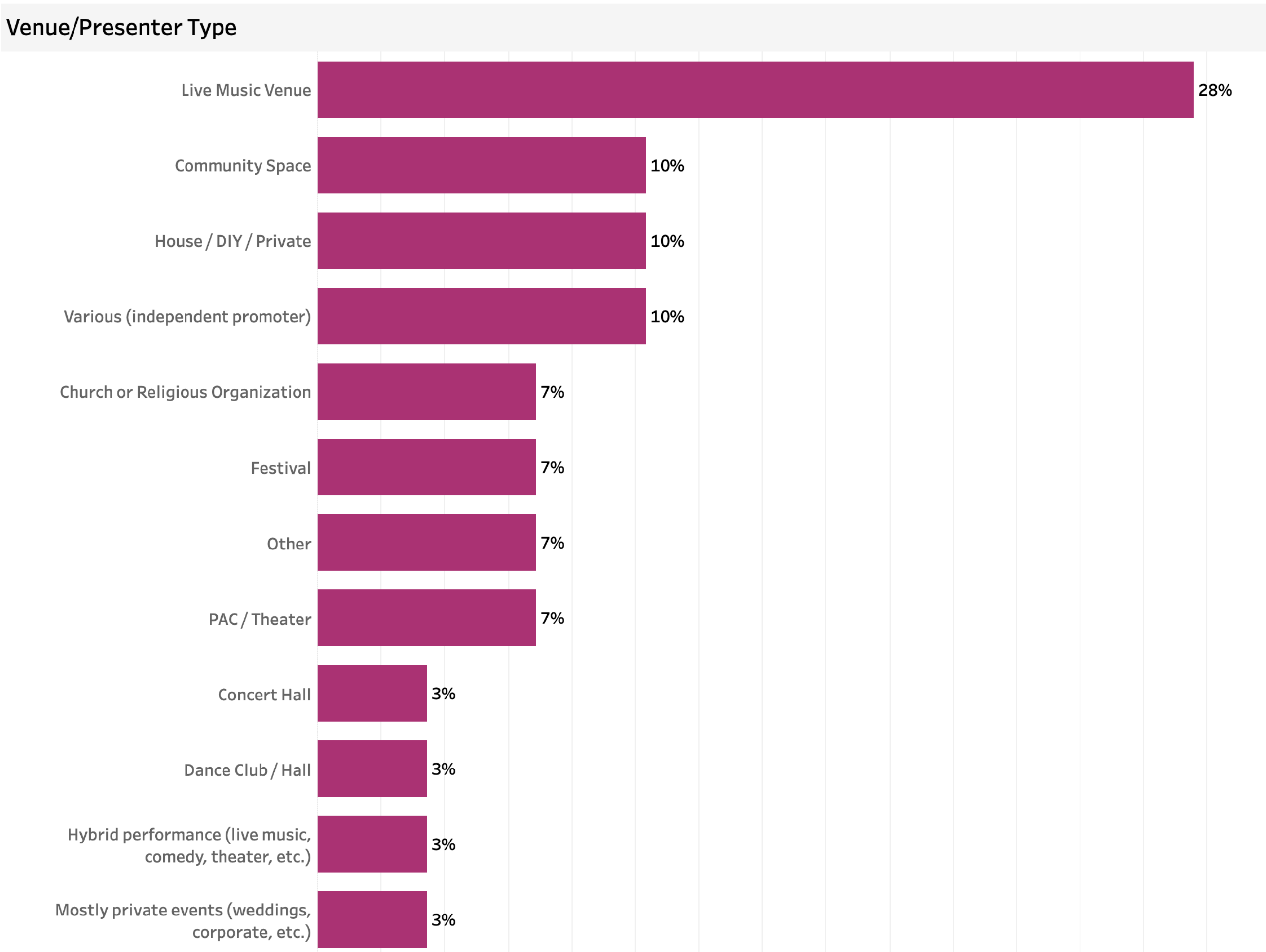
Music Ecosystem Health Assessment

Venue/Presenter Profile

The Venue/Presenter landscape in Baltimore is diverse, with live music venues making up 28% of the respondents. There is a significant presence of community spaces, house/DIY/private venues, and independent promoters, each contributing 10%. Venue capacity varies widely, with the majority accommodating 101-200 people, and 55% of venues offer outdoor capabilities. Most Venues (42%) are nonprofit, while 32% are locally owned for-profit entities. On average, Venues host 53 live events annually, totaling 1,472 per year, reflecting Baltimore's active, though smaller-scale, music scene.



- **Venue/Presenter Type** - Live music venues dominate the Baltimore landscape, making up 28% of the respondents. Community spaces, house/DIY/private venues, and independent promoters each account for 10%. Other venue types, such as churches/religious organizations, festivals, and PAC/theater venues, represent 7% each. Smaller percentages are seen in concert halls, dance clubs, hybrid performance spaces, and venues hosting private events (3% each).

> "More venues and rehearsal spaces are needed."

> "Lack of interest by community leaders to bring music venues into specific communities. Lack of promotion by venues. Lack of respect for the value of live music."

> "Very few house concerts after the pandemic."

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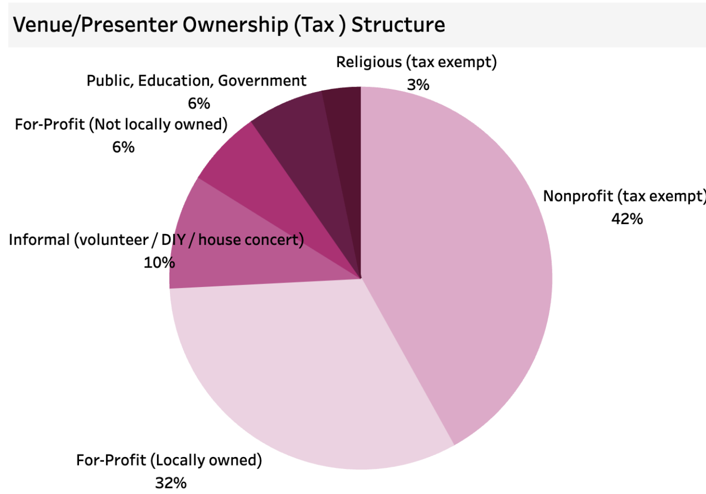
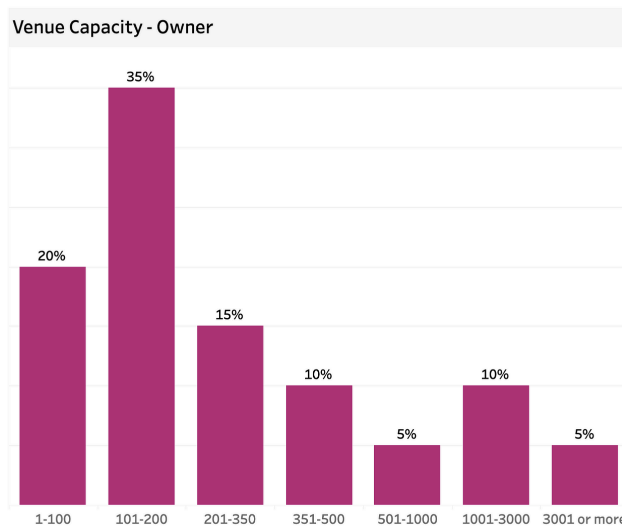
Venue/Presenter Profile (continued)

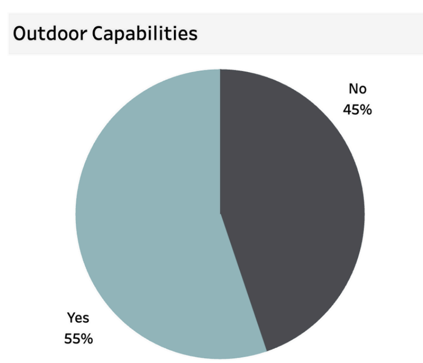
- **Venue Ownership/Tax Structure** - The majority of Venues and Presenters in Baltimore are nonprofit, tax-exempt entities, which make up 42% of the respondents. Locally owned for-profit venues account for 32%, while 10% of venues are informal, including volunteer-run, DIY spaces, and house concerts. Other ownership types include public/education/government venues and for-profit, non-locally owned venues (6% each), with religious venues making up 3%.



- **Venue Capacity & Outdoor Capabilities** - Baltimore venues show a diverse range of capacities, with 35% accommodating 101-200 people and 20% hosting 1-100 people. Mid-sized venues (201-350 people) account for 15%, and larger venues (1001-3000 people) make up 10% of the respondents. Outdoor capabilities are present in 55% of the venues, allowing for flexible event hosting.



- **Venue Live Events Each Year** - On average, venues in Baltimore host 53 live events annually, with a total of 1,472 live events per year across all respondents. This indicates a relatively active but smaller-scale event scene compared to cities like New Orleans where Venues average 163 live events/year yielding over 17,000+ total. This highlights the unique dynamics of Baltimore's music ecosystem.



Venues average
53
live events/year

1,472
total live events/year

> Not enough venues, sometimes shows happening on the same dates.

> There aren't as many venues as in the past. The general promotion is low.

> We could use more mid-size venues to grow the audience and provide more well-paying local gigs that aren't always DIY.

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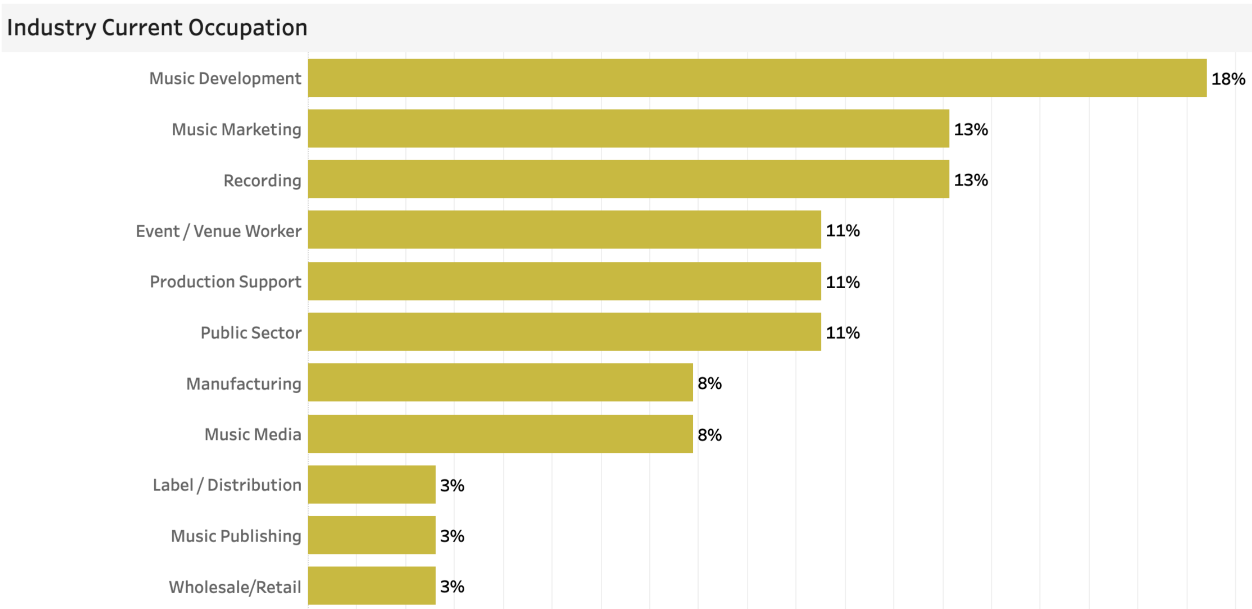
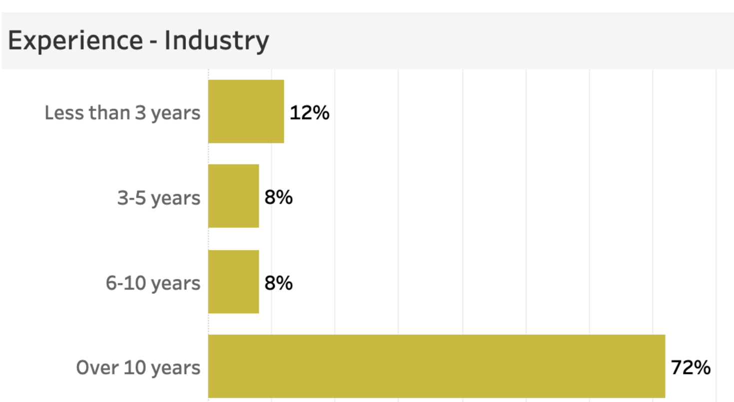
Industry Profile

Baltimore Industry respondents are highly experienced, with 72% having over 10 years in their field, reflecting a seasoned workforce. The Industry is diverse, with significant roles in music development, marketing, and recording. Local Industry services are often accessed for legal/accounting and equipment needs, but many Creatives prefer to manage tasks themselves. Baltimore Music Industry is serving primarily local clients.



- **Industry Occupation** - In Baltimore, the largest group of industry respondents work in music development (18%), followed by music marketing and recording, each at 13%. Other significant roles include event/venue work, production support, and public sector positions, all at 11%. Manufacturing and music media each account for 8%, while label/distribution, music publishing, and wholesale/retail make up 3% each.

- **Experience** - The industry in Baltimore is highly experienced, with 72% of respondents having over 10 years in their field. Those with less experience include 8% with 6 to 10 years, another 8% with 3 to 5 years, and 12% with less than 3 years. This indicates a mature industry workforce with a wealth of experience.



> "We lack booking agents, publishers, promoters, and label representation."

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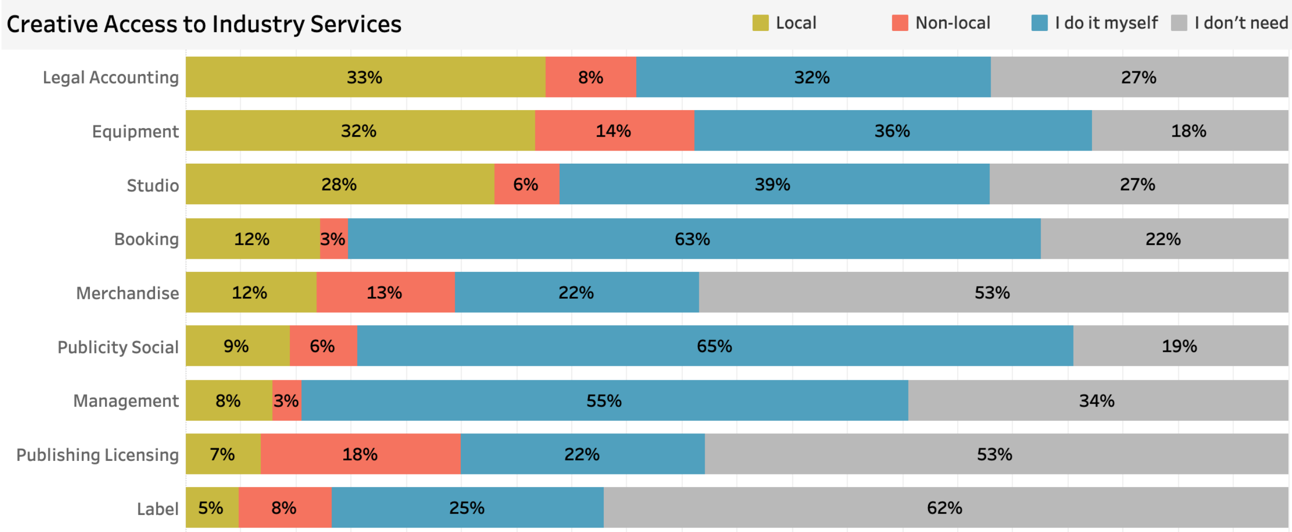
Music Ecosystem Health Assessment

Industry Profile (continued)

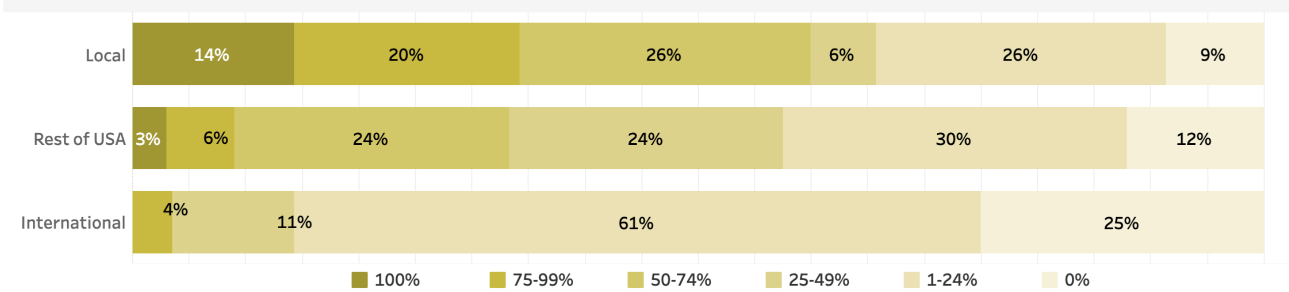
- **Creative Access to Industry** - Baltimore creatives often access local industry services for legal/accounting (33%) and equipment needs (32%). Studios are also frequently local (28%). However, a significant number of creatives prefer to handle many services themselves, particularly in management (55%), publicity/social media (65%), and merchandise (53%). Non-local services are less commonly accessed, with the exception of publishing/licensing and label services.

Creative Access to Industry Services



- **Location of Clients** - Baltimore Industry is serving primarily local clients. Across the majority (>50%) of the Industry client base, 60% are local, 33% are national, and 4% are international.

Location of Clients Served by Music Industry



> Booking gigs in Baltimore is a nightmare.

> Responses from booking contacts at venues need to improve.

> Accessing industry services like recording and management is difficult here. The services are limited and navigating them is frustrating.

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Music Ecosystem Health Assessment

Economic Activity

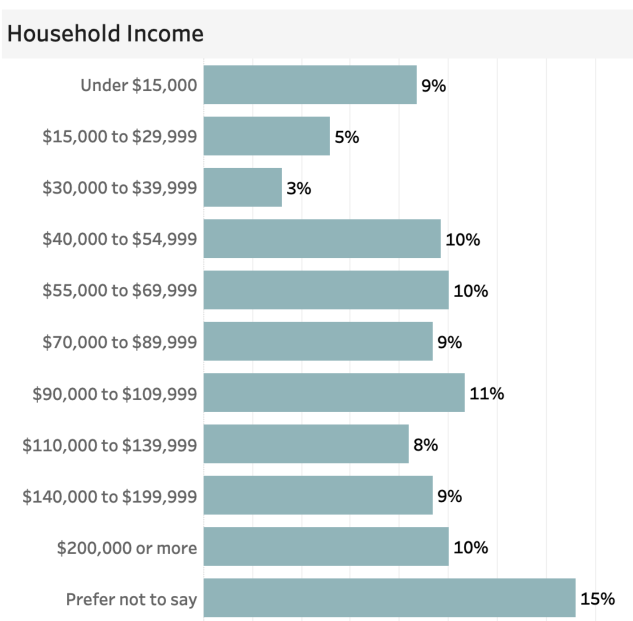
Music significantly contributes to the income of Baltimore music professionals, generating a total of $20 million annually across all respondents, with 36% of their annual income coming from music. The majority of professionals are freelancers (67%), primarily earning money independently. Despite this, 47% work outside the music industry, with 81% of those relying on these jobs as their primary source of income. On average, respondents earn $35,000 annually from music, while their average household income is $96,000. Performance frequency varies, with 28% of respondents performing no local paid shows per month, while 23% perform only one show. Local performances pay an average of $309 per gig, whereas touring gigs pay $372. Venues in Baltimore host an average of 53 live events per year, totaling 1,472 across all venues. Regarding local talent, 36% of headliner slots and 32% of supporting act slots feature local talent at all events. Publishing and licensing are underutilized, with 55% of respondents not engaging in licensing, and 53% not collecting royalties. For those who do engage in royalty collection, BMI is the most used method, followed by ASCAP and other collection agencies.

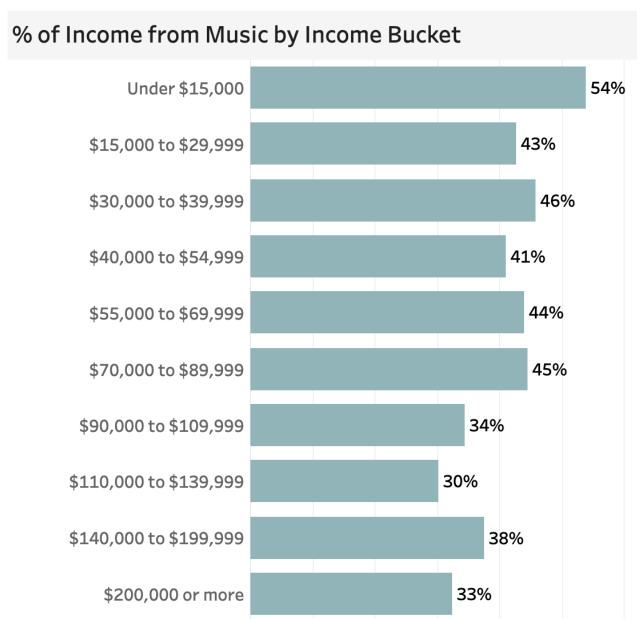
Music generates a total of **$20M** in income annually across all respondents

36% of respondent annual income comes from music

Average household income for respondents is **$96K**

Average annual income from music is **$35K**/respondent





- **Household Income & Income from Music** - Household income for Baltimore music professionals varies, with 9% earning under $15,000 and 10% earning $200,000 or more. On average, 36% of respondents' income comes from music. Lower income brackets, such as those earning under $15,000 annually, report a higher percentage (54%) of their income coming from music compared to higher earners, who see a smaller proportion (33%) of their income from music activities. The average annual income from music is $35,000, while the overall average household income is $96,000.

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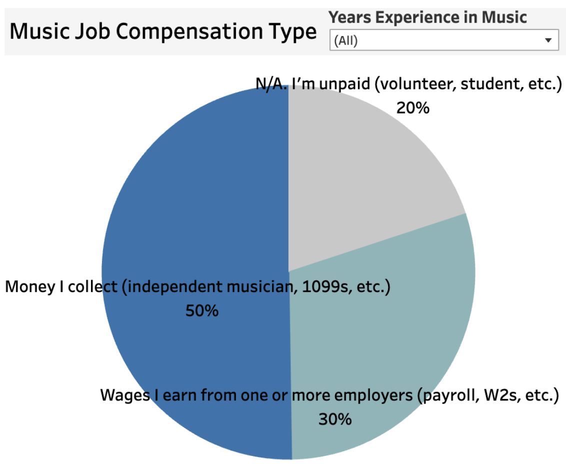
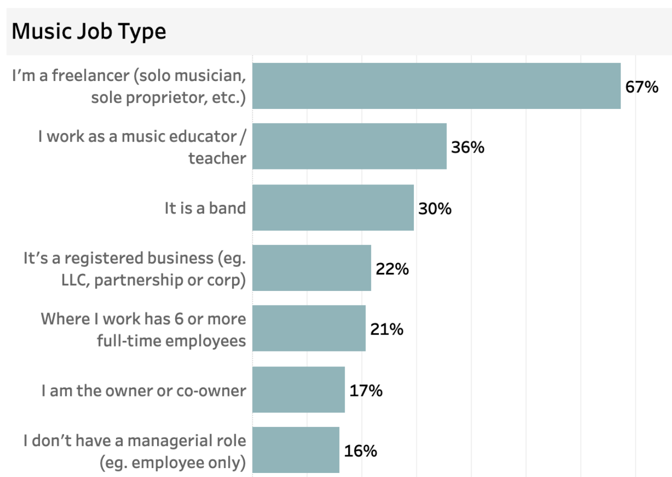
Music Ecosystem Health Assessment

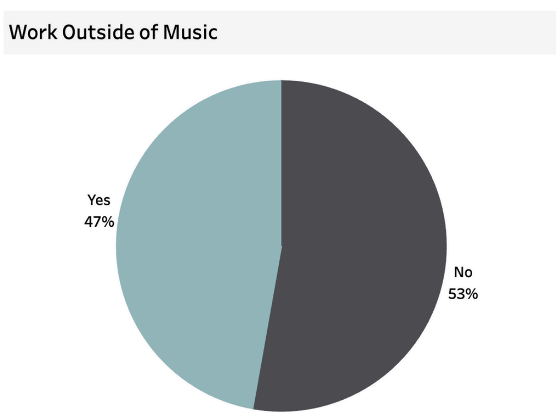
Economic Activity (continued 2/4)

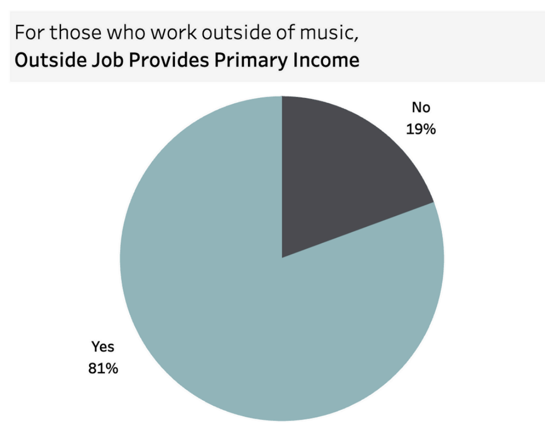
- **Music Job Type/Compensation** - The majority of Baltimore respondents are freelancers, with 67% working independently. Half of the professionals (50%) collect income as independent musicians through 1099 forms, while 30% earn wages from one or more employers (payroll, W2s, etc.). A notable 20% of respondents work unpaid, either as volunteers or students. The music job roles are diverse, with 36% working as music educators/teachers, 30% as part of bands, 22% within registered businesses (LLCs or corporations), and 17% identifying as owners or co-owners of a business.

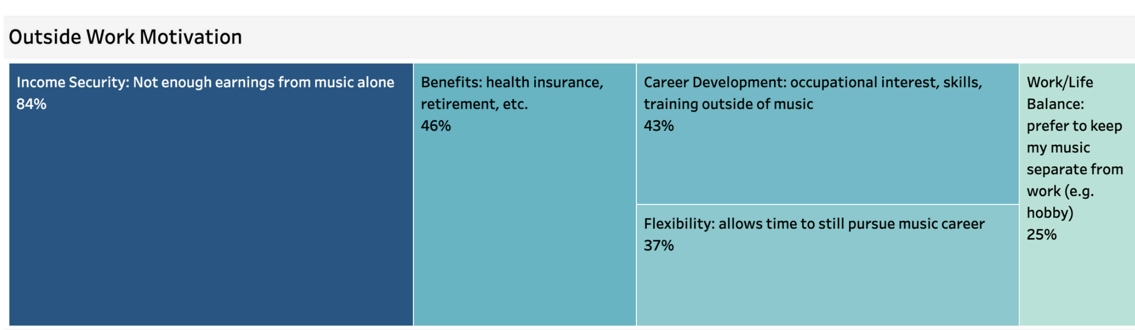




- **Work Outside Music** - A large portion of respondents (47%) work outside the music industry to supplement their income, with 81% of these individuals relying on their outside job as their primary source of income. This highlights the financial challenges faced by Baltimore music professionals, where external employment is often necessary to achieve financial stability.







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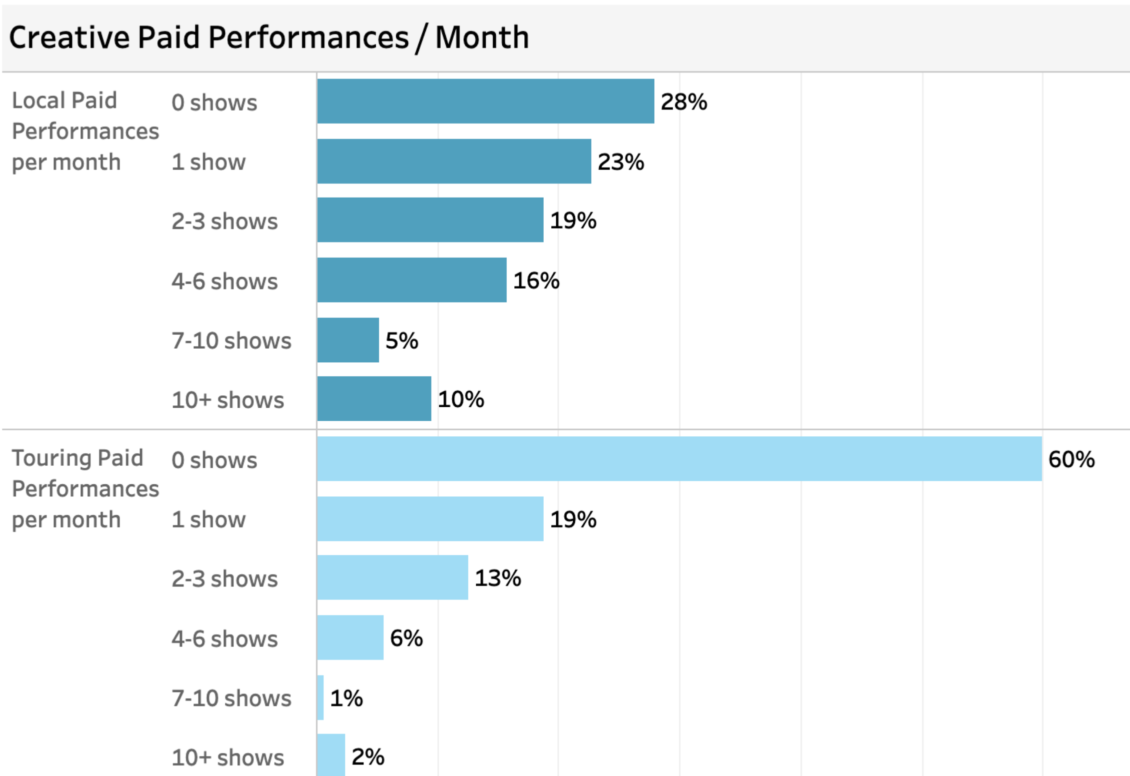
Music Ecosystem Health Assessment

Economic Activity (continued 3/4)

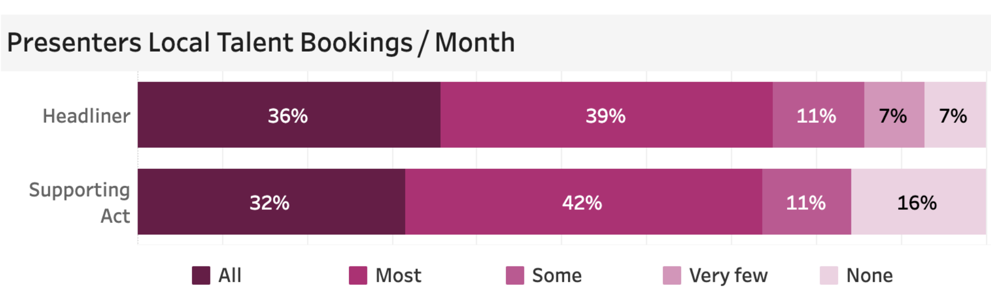
- **Creative Performance Frequency & Pay** - Performance frequency among Baltimore respondents varies widely. A significant 28% do not perform any local paid shows per month, while 23% perform one show per month. The average pay per local performance is $309, whereas touring performances yield a slightly higher average of $372 per gig. For touring, 60% of respondents do not perform any shows per month, with only 2% performing 10 or more shows. This data underscores the limited performance opportunities and income potential from local and touring shows.

$309
average pay/local gig

$372
average pay/touring gig



- **Venue Live Events and Local Talent Bookings** - Venues in Baltimore host an average of 53 live events per year, with a total of 1,472 events across all respondents. Local talent is featured prominently in these events, with 36% of headliner slots and 32% of supporting act slots featuring local talent at all events. This data reflects a strong commitment to local talent within the Baltimore music scene, although there remains room for improvement in the frequency and diversity of local talent showcases.



Venues average
53
live events/year

1,472
total live events/year

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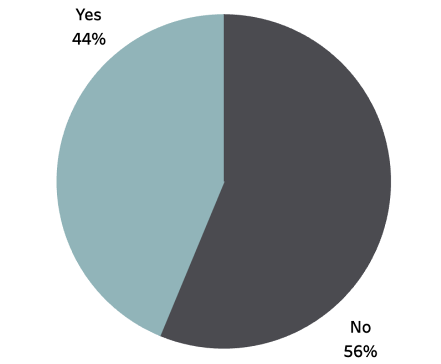
Music Ecosystem Health Assessment

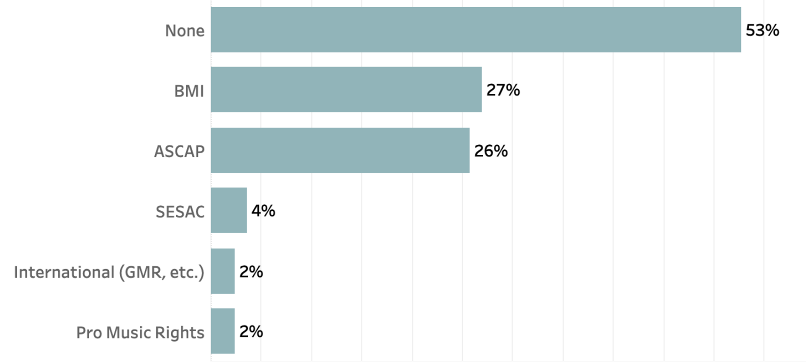
Economic Activity (continued 4/4)

- **Publishing/Licensing** - Publishing and licensing are underutilized among Baltimore respondents. More than half (55%) do not engage in any licensing activities, and 53% do not collect royalties. Among those who do collect royalties, BMI is the most popular collection method (27%), followed by ASCAP (26%), while other methods like SESAC and international organizations have minimal usage. This highlights a significant area for potential growth in income generation for Baltimore music professionals.

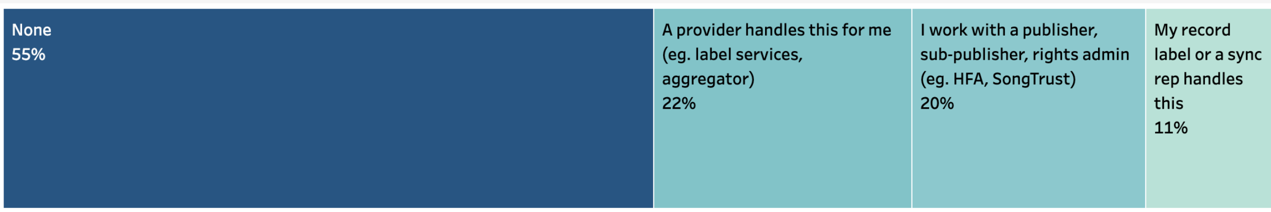
IP Rightsholder



Royalty Collection Methods



Licensing



> Overall, money per show is still lacking in comparison to the cost-of-living. It doesn't make it for music to be a viable Primary income source.

> I hoped this would be my primary income and a good one at that, but it's not.

> It is increasingly difficult to receive a decent income from the studio business. The income for studio work is no more now than it was in 2014. Actually, less for commercial studios.

> Universal basic income would allow me to actually be a thriving musician, not just a musician that crams in as much creative work as possible between jobs when tired.

> Low pay for musicians, colleagues need more support for healthcare, retirement, emergencies.

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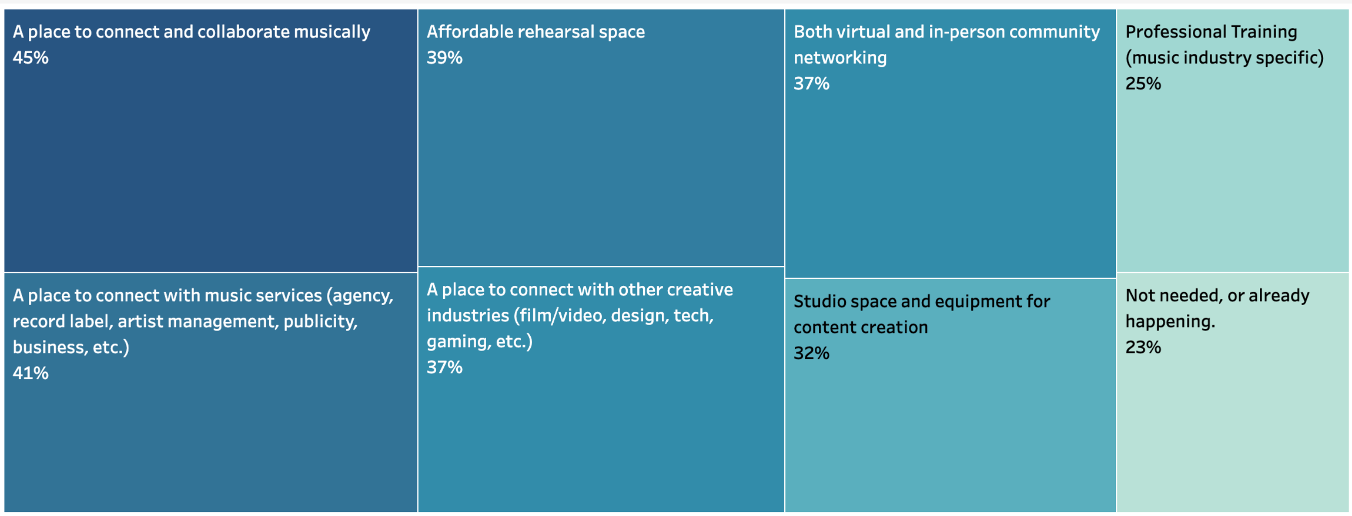
Music Ecosystem Health Assessment

Ecosystem Development

In Baltimore's music ecosystem, respondents show a strong preference for connecting with Music Industry services, with 41% seeking connections to agencies, record labels, artist management, and similar entities. Additionally, 37% express a desire to connect with other creative industries such as film, video, design, and gaming. Venue and Presenter respondents prioritize audience development tools (88%) and forming coalitions like a local NIVA chapter (54%). Financial assistance for music work has been received by 40% of respondents, with scholarships (65%) and support from friends and family (53%) being the most common sources. A majority of respondents rent their commercial workspace, with 78% renting both temporary and permanent live performance spaces, and a significant need exists for rehearsal (70%) and studio spaces (75%).

Local Music Resource Preference



- **Local Music Resource Preference** - Respondents in Baltimore indicate a strong preference for connecting with music industry services, with 41% needing a place to connect with agencies, record labels, artist management, publicity, and business services. Additionally, 37% expressed a desire to connect with other creative industries like film, video, design, and tech. Affordable rehearsal space is sought by 39% of respondents, while 32% need studio space and equipment for content creation. A notable portion, 23%, feel these resources are either not needed or already available.

"The city administration and BOPA do not consult the health of the local music ecosystem when making decisions that impact the entire community."

"Many of my performing opportunities occur outside of Baltimore. It would be nice if Baltimore had more opportunities rather than having to drive to DC etc."

"The scenes need to be more integrated... There shouldn't be such division between scenes. This is a small city and all of us should be working together."

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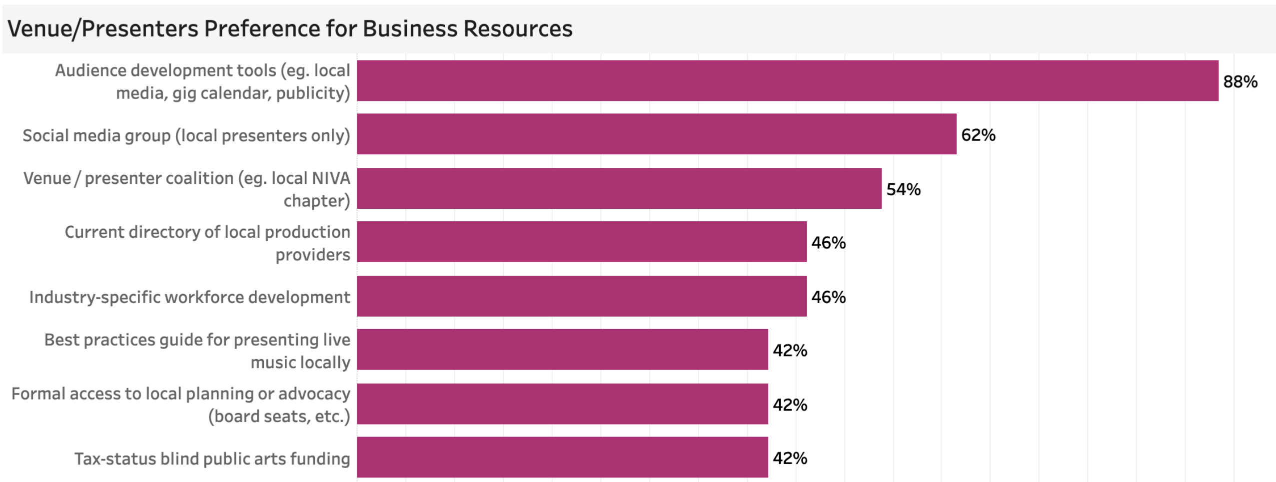
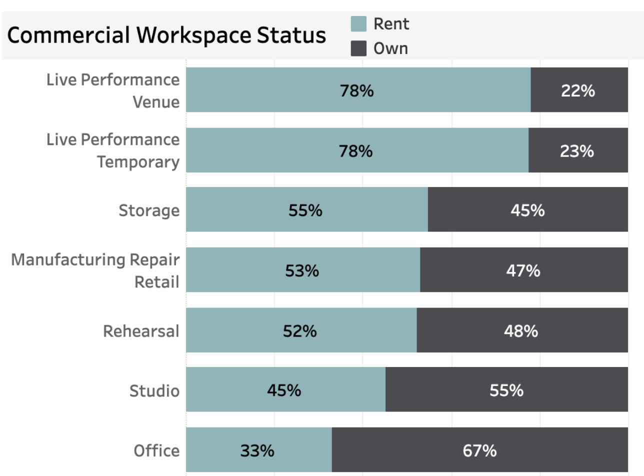
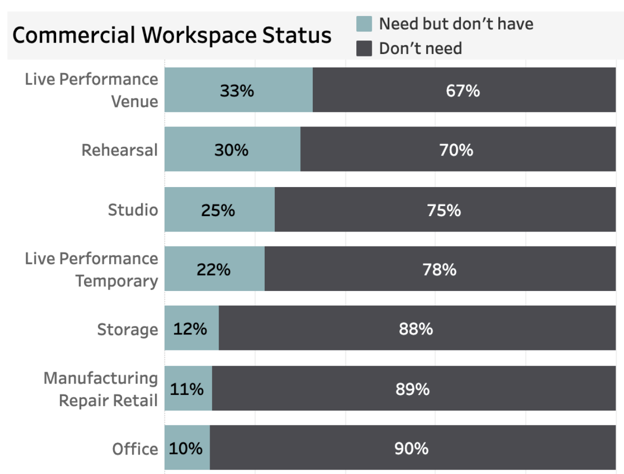
Ecosystem Development (continued 2/3)

- **Venue/Presenter Business Resources** - Audience development tools, such as local media, gig calendars, and publicity, are prioritized by 88% of Baltimore Venue and Presenter respondents. A social media group exclusively for local presenters is sought by 62%, while 54% prefer a venue/presenter coalition, like a local NIVA chapter. Other significant preferences include a directory of local production providers (46%) and industry-specific workforce development resources (46%).



- **Commercial Workspace Status** - A majority of respondents rent their commercial workspace, with 78% renting both live performance venues and temporary spaces. Storage space is rented by 55% of respondents, while 45% own it. In terms of needs, 75% need studio space, 70% need rehearsal space, and 67% require live performance venues. The need for manufacturing, repair, and retail space is lower, with 11% indicating a need.





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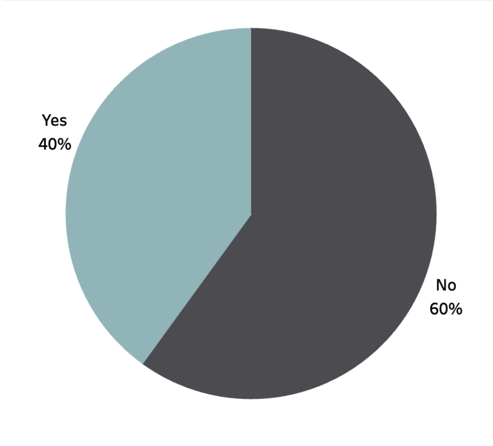
Music Ecosystem Health Assessment

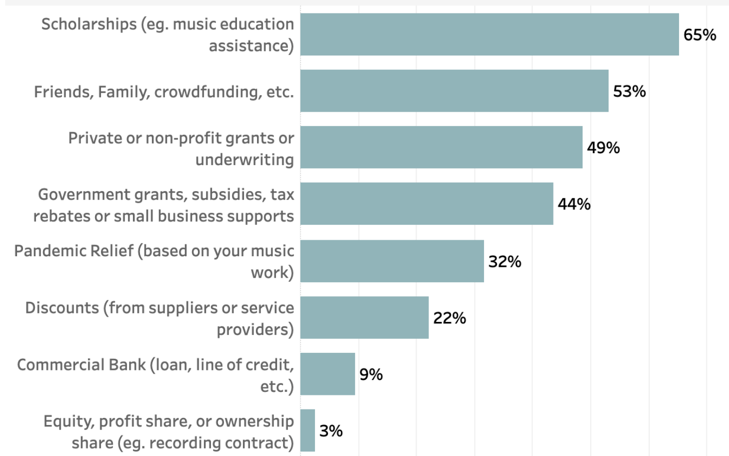
Ecosystem Development (continued 3/3)

- **Financial Support** - Of the respondents, 40% have a history of receiving financial assistance for their music work, while 60% have not. Scholarships are the most common form of financial assistance, received by 65% of those who sought support. Friends, family, and crowdfunding are also significant sources, accessed by 53%. Government grants and tax rebates account for 44%, while 32% received pandemic relief. The primary barrier to financial assistance is a lack of awareness, cited by 46% of respondents, followed by a lack of grant-writing skills (29%). Micro-grants are the most preferred form of assistance, with 55% favoring them, followed by tax breaks at 53%.

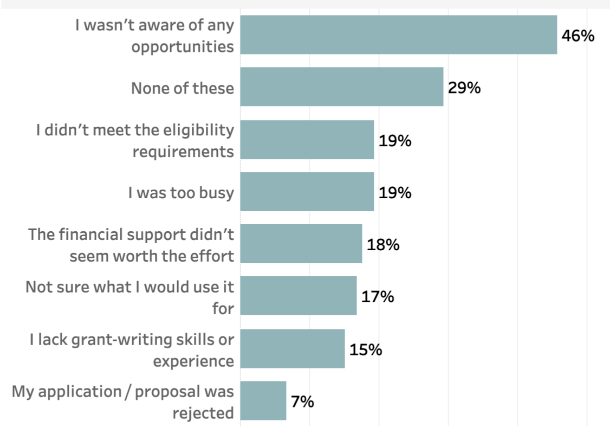
History of Financial Assistance for Music Work



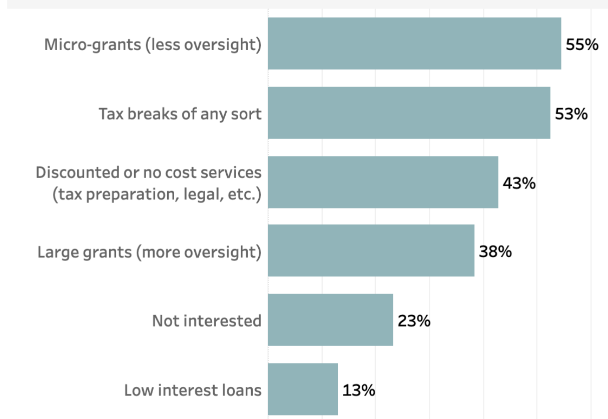
Type of Financial Assistance for Music Work



Financial Assistance Barrier



Financial Assistance Preference



> "It feels like a subgroup of people that run things through mutual relationships. It's hard to get in as an outsider."

> "Boards need to get younger, more aware, and willing to think collaboratively more than territorially."

> "Grant education is key - as well as free resources such as lawyers, copyright etc."

> "Grant opportunities are dwindling while also becoming more difficult and time-consuming to apply for."

> "It's the age-old thing, venues vs musicians and artists... It becomes a toxic situation for most bands. I realize that it is a free market, but there are no advocates looking out for the interests of professional musicians at a local level."

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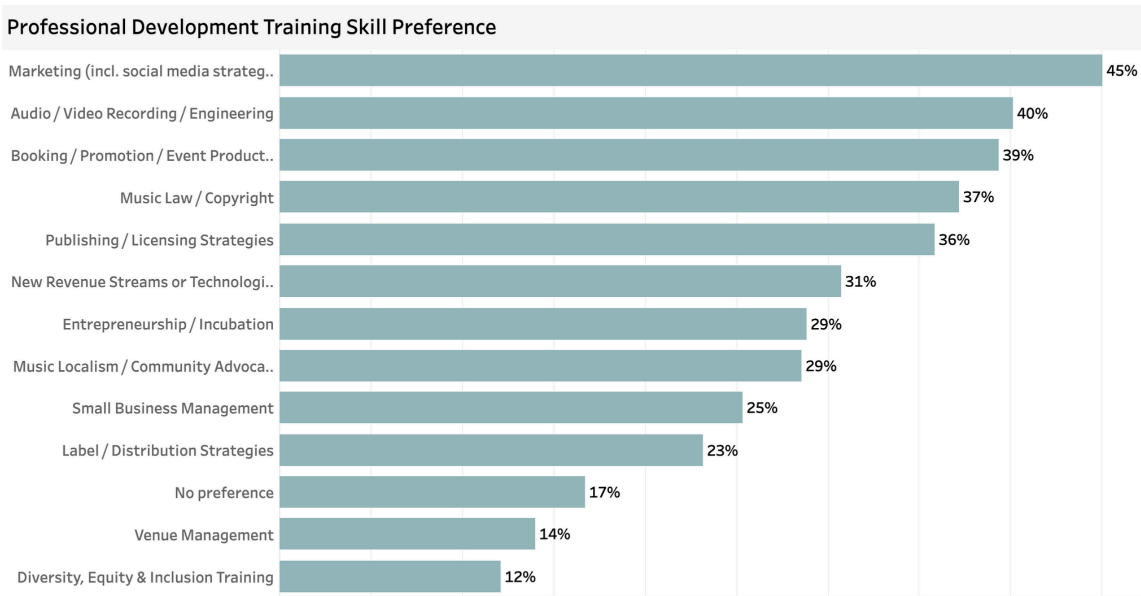
Music Ecosystem Health Assessment

Workforce Development

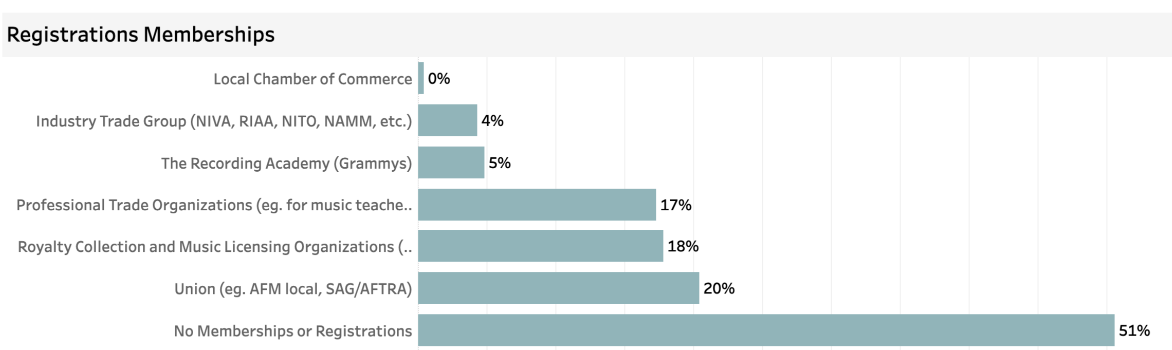
A significant majority of Baltimore respondents, 89%, have over 10 years of experience in the music industry. Key interests for professional development include marketing, audio/video recording, and event production. Many respondents are not affiliated with music-related organizations, with unions and royalty collection groups being the most common memberships.

> We need more educational programs and workshops to help musicians improve their skills and navigate the industry effectively.

> The path to career growth is unclear. I would like to play more venues and performance halls, but I don't know how to get there. More programming to help developing professionals would be useful.



- **Professional Development** - Respondents showed a strong interest in professional development training in areas like marketing (45%), audio/video recording and engineering (40%), and booking, promotion, and event production (39%). Other significant areas of interest include music law and copyright (37%), publishing and licensing strategies (36%), and new revenue streams or technologies (31%).



- **Professional Industry Associations** - Over half of the respondents (51%) do not belong to any industry-related organizations. Of those who are members, 20% are part of a union (e.g., AFM or SAG/AFTRA), 18% belong to royalty collection and music licensing organizations, and 5% are members of The Recording Academy (Grammys). Only 4% participate in industry trade groups, and none are affiliated with local chambers of commerce.

> Establishing meetings between players and teachers in the school system to discover common ground and how to be available to each other when needed.

> More artist communities, workspaces, grants, and support.

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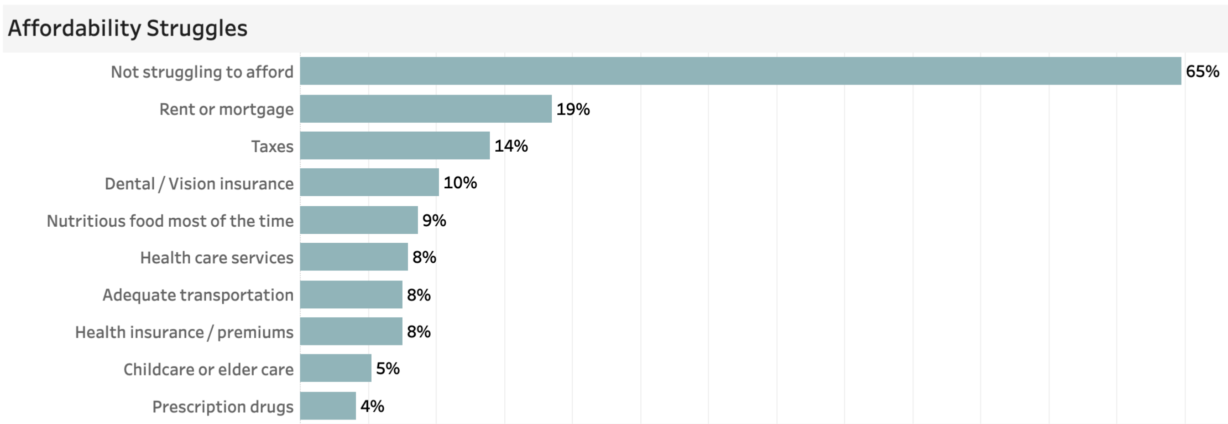
Music Ecosystem Health Assessment

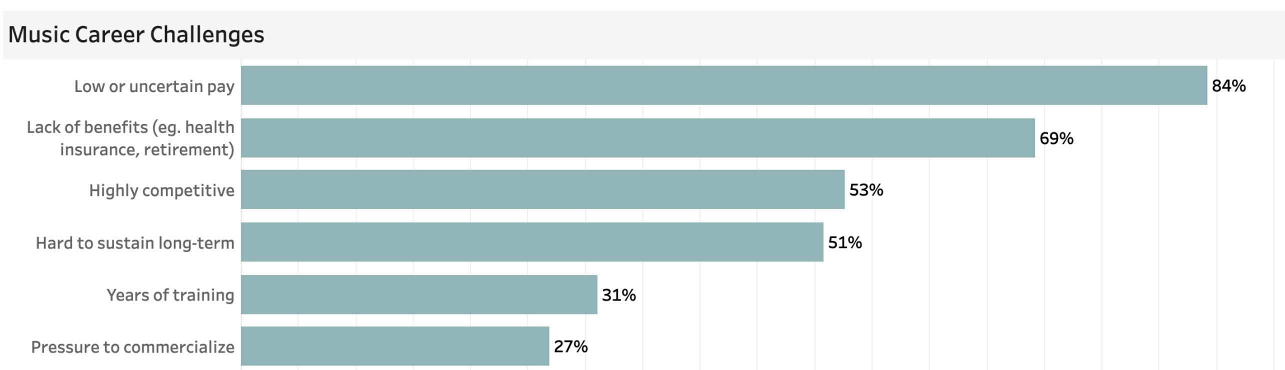
Livability

Baltimore respondents face significant challenges in their music careers, with 19% struggling with rent or mortgage payments and 84% citing low or uncertain pay as a major issue. Rising costs of living and stagnant pay rates are top concerns for 37% and 30% of respondents, respectively. Venue/Presenters also report challenges with fan behavior post-COVID and talent costs, with 27% and 23% rating these as significant challenges. While 65% of respondents do not face affordability issues, a notable portion of the music community still grapples with financial insecurity.



- **Affordability** - Affordability struggles affect 19% of respondents, with rent or mortgage payments being a top concern. Other challenges include taxes (14%), dental/vision insurance (10%), and access to nutritious food (9%). Interestingly, 65% of respondents report no significant affordability issues, indicating a mixed landscape when it comes to financial stability in the Baltimore music community.

- **Music Career Challenges** - Low or uncertain pay is a pervasive issue for 84% of respondents, making it the most significant music career challenge. Lack of benefits, such as health insurance and retirement plans, impacts 69% of the community. Other obstacles include the highly competitive nature of the industry, which 53% of respondents find challenging, and the difficulty of sustaining a long-term career, noted by 51%.



"I am convinced that going into Baltimore City is unsafe. I have been attacked multiple times in Baltimore City."

"My biggest frustration living here has been Baltimore's limited public transit system. I have done very little gigging while here, in part because the travel time and hassle of getting to locations often makes it impossible or not worth it."

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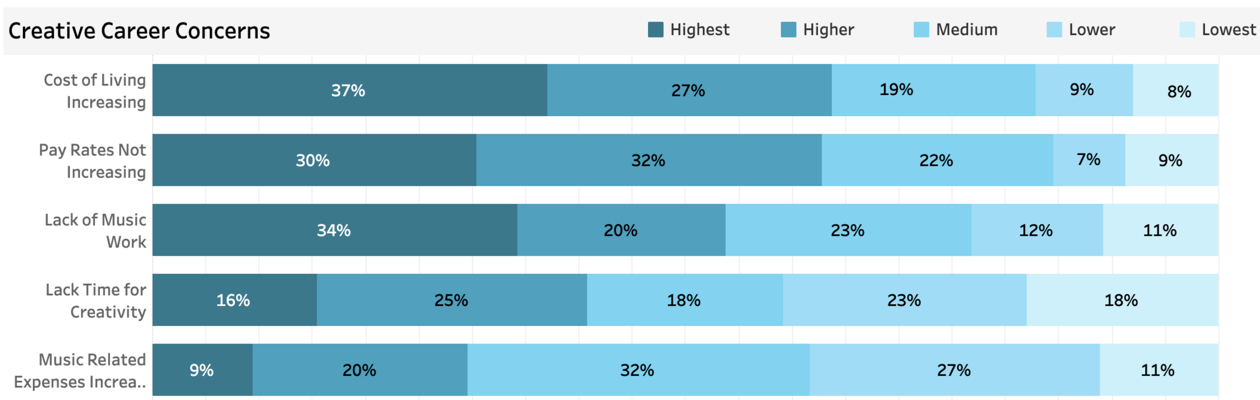
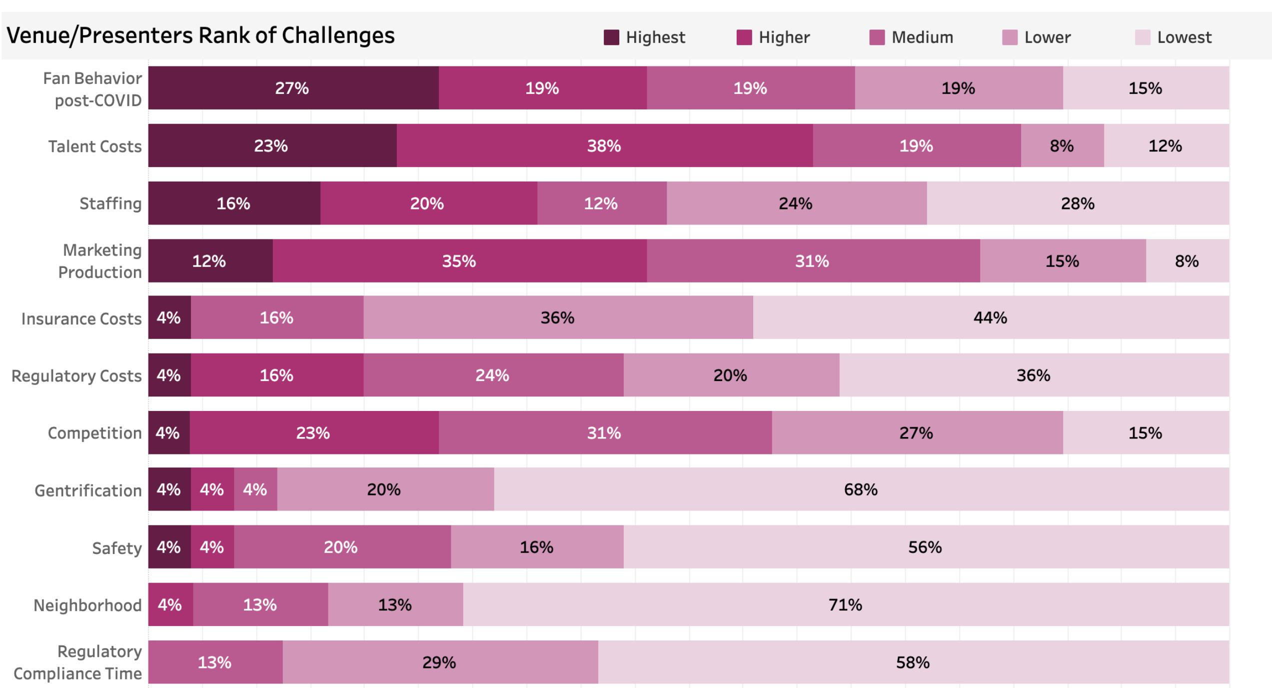
Music Ecosystem Health Assessment

Livability (continued)

- **Creative Career Concerns** - Creatives in Baltimore are particularly concerned about the increasing cost of living, with 37% rating it as their top issue. Pay rates not increasing is a concern for 30%, and 34% worry about the lack of music work. Some respondents (16%) express concerns over finding enough time for creativity, while 9% are troubled by rising music-related expenses.

- **Venue/Presenters Rank of Challenges** - Fan behavior post-COVID is the highest-ranked challenge for 27% of Venue/Presenter respondents, followed by talent costs (23%). Staffing (16%) and marketing production (12%) also pose challenges. Insurance costs are a significant concern for 36%, while regulatory costs, competition, and neighborhood issues rank lower in the list of challenges, highlighting the varied obstacles faced by this sector in Baltimore.





> "It is difficult to predict audience turnout since the pandemic."

> "They [students] are not able to travel for kids who struggle to get transportation to music events to grow the ecosystem."

> "I feel unsafe at night in parts of Baltimore, and it makes it harder to gig as a woman."

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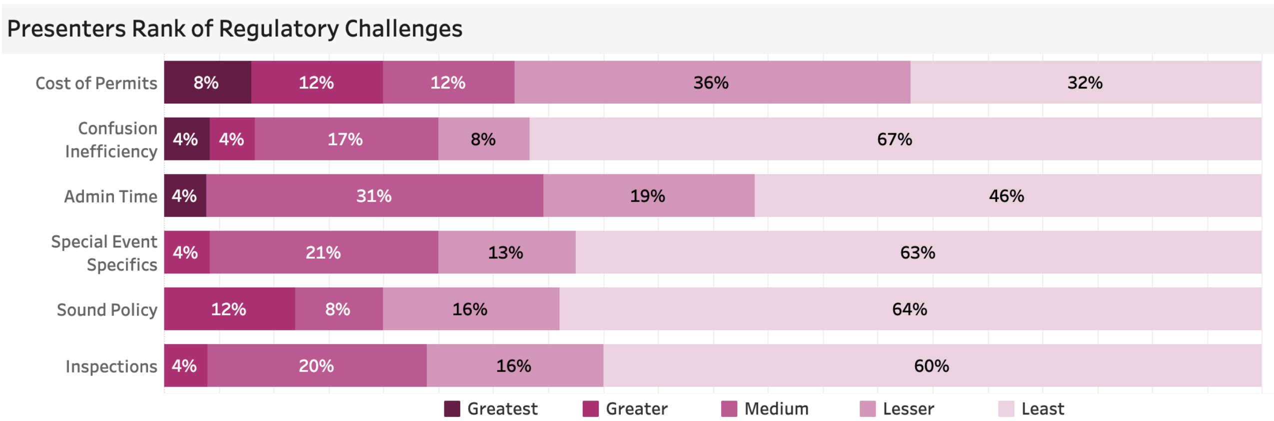
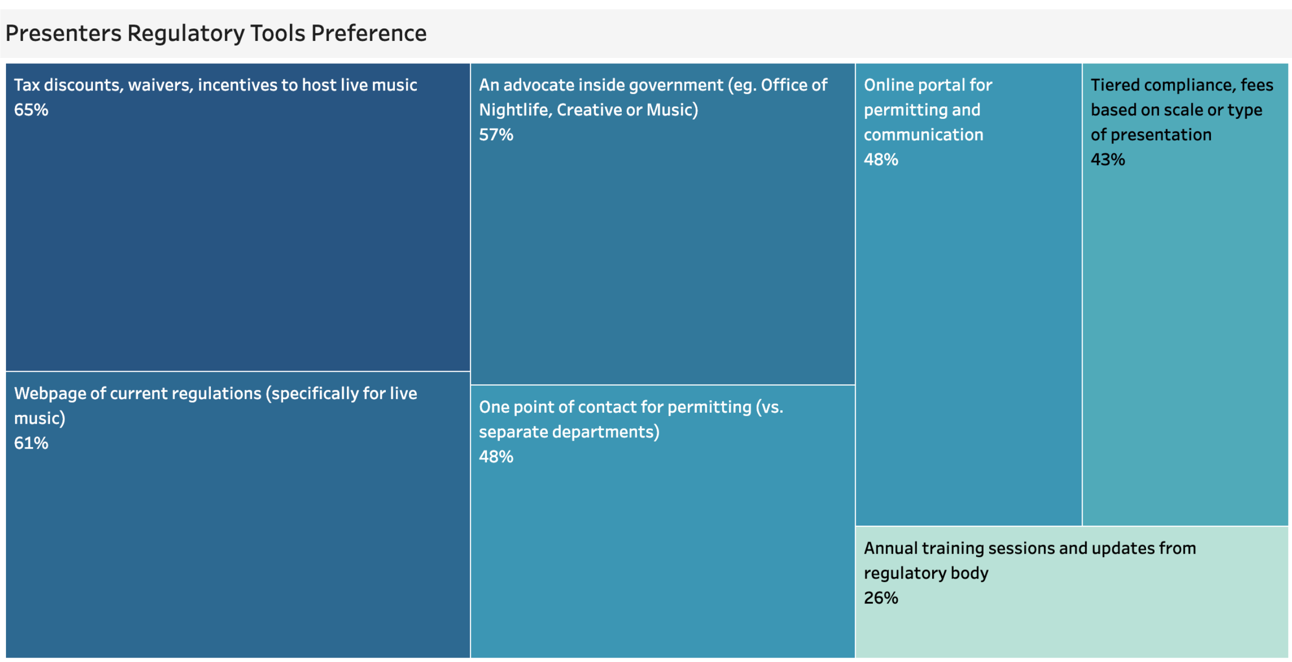
Music-Friendly Policies

Baltimore's Venue and Presenter community faces a range of regulatory challenges, with music performance licenses, accessibility compliance, and street/parking issues being the most common. Venues/Presenters seek support through micro-grants, tax breaks, and streamlined tools like one-stop permitting. However, a lack of regulatory fluency remains a barrier, impacting event planning and execution.



- **Regulatory Challenges** - Venue/Presenters in Baltimore face several regulatory challenges. Admin time (35%) stands out as the most significant difficulty, followed by confusion and inefficiency (8%) and special event specifics (25%). Other notable challenges include the cost of permits, sound policy, and inspections.



- **Venue/Presenter Tool Preference** - Presenters are eager for tools that simplify regulatory processes. The most desired tools are tax discounts, waivers, and incentives to host live music (65%), along with a webpage of current regulations for live music (61%). An advocate inside government (e.g., Office of Nightlife, Creative, or Music) was supported by 57%, while one point of contact for permitting is preferred by 48% of presenters.

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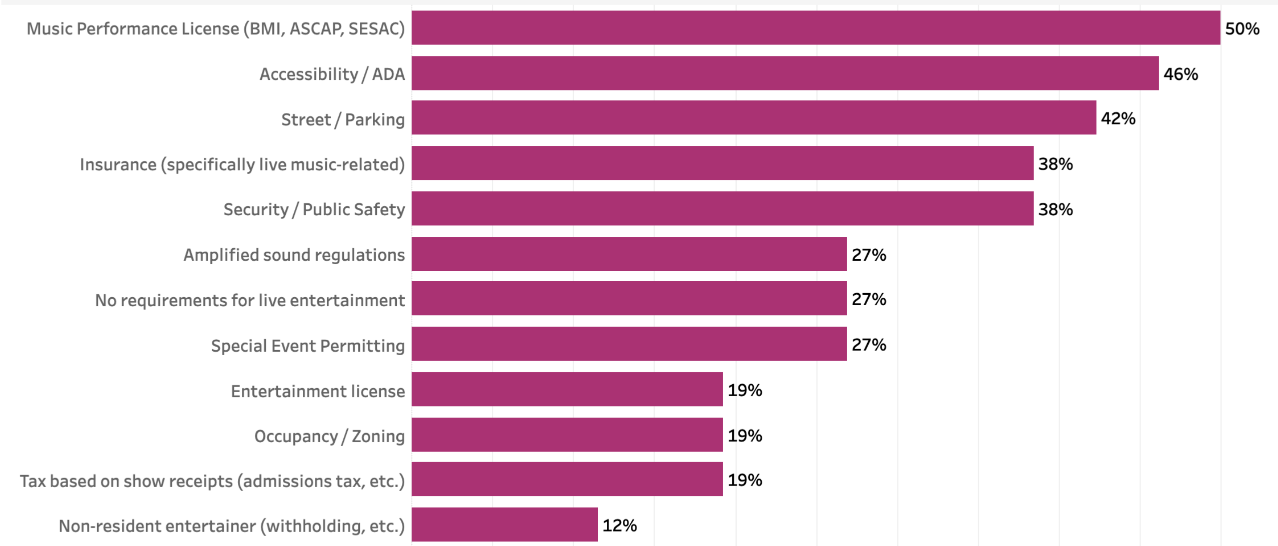
Music Ecosystem Health Assessment

Music-Friendly Policies (continued)

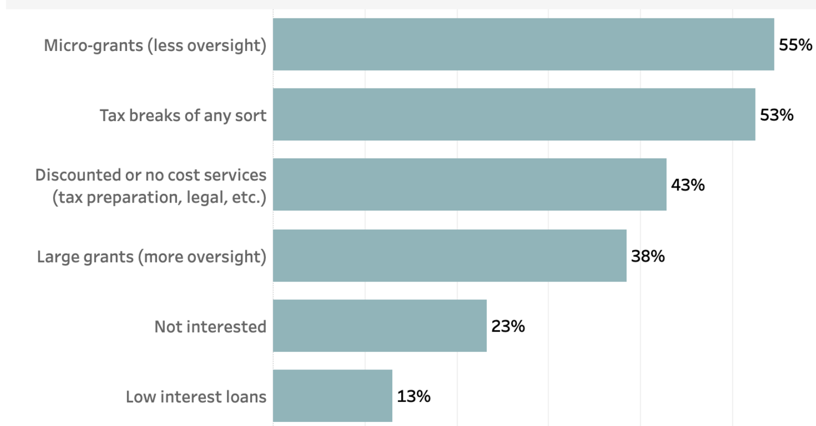
- **Regulatory Fluency** - Music performance licenses are encountered by 50% of respondents, followed by accessibility and ADA requirements (46%) and street/parking regulations (42%). Insurance related to live music and security/public safety requirements were also significant, each reported by 38% of respondents. Amplified sound regulations, occupancy/zoning, and special event permitting were encountered by 27% of venues, while entertainment licenses and admissions taxes were noted by 19%. The withholding tax for non-resident entertainers was encountered by 12%.

Regulatory Processes Encountered to Present Live Entertainment



- **Financial Assistance Preference** - Baltimore presenters show a strong preference for micro-grants with less oversight (55%) and tax breaks (53%) as the top forms of financial assistance. Discounted or no-cost services for tax preparation or legal assistance were also favored by 43% of respondents, though larger grants, which come with more oversight, were preferred by 38%. Presenters showed the least interest in low-interest loans (13%).

Financial Assistance Preference



> “Admission and Amusement tax should be repealed for small venues.”

> “The restrictive liquor license in Baltimore prevents live music in many places.”

> “We need payment timeline guarantees, a streamlined process for contracting and submitting invoices.”

> “The Baltimore City government does not know what they are doing in the arts. I wish more questions had been asked about public support of the arts in schools.”

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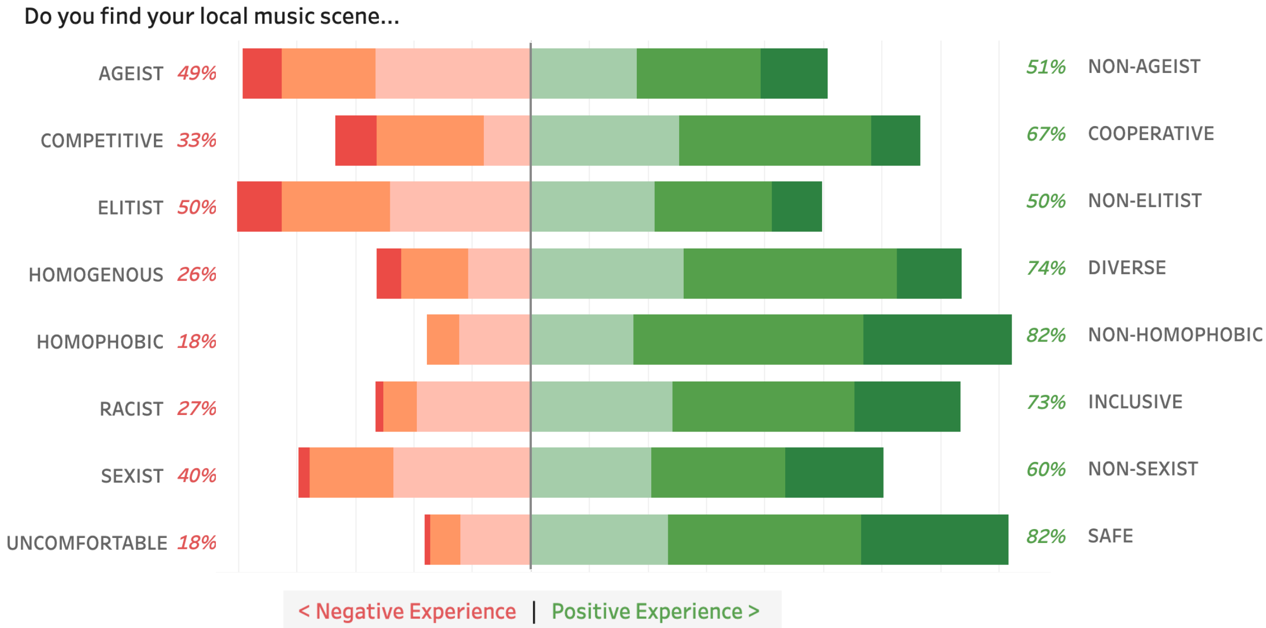
Music Ecosystem Health Assessment

Culture & Belonging

Respondents find that the Baltimore music ecosystem offers predominantly positive experiences. The Baltimore music ecosystem's greatest strengths are that it is non-homophobic (82%), safe (82%), and inclusive (73%). The Baltimore music ecosystem challenges are elitism (50%) and ageism (49%).



Subgroup Insights

Please see the online dashboard at Baltimore Music Census for full data on each indicator by subgroup. Some overarching themes to the subgroups are:

- **Negative experiences** - Respondents who experience the most negative (red) side of the Baltimore ecosystem are people who identify as Female/Woman, people who identify as Hispanic, and people who identify as two or more races.

> There is little to no support for music that is not commercial. For people reliant upon grants and other similar forms of support (instead of ticket/record sales), grant opportunities are dwindling while also becoming more difficult and time-consuming to apply for.

> Treatment of women and non-binary music industry professionals has been frustrating; we are often not taken as seriously and overpowered by the male-dominated opinion.

> Many profit and non-profit orgs rarely reply to emails or calls from strangers asking for info on how to get booked for a performance. This is rude and detrimental to themselves.

> The continuing gentrification and real estate takeovers of this city are pushing out creativity, making it more difficult for creators to present their work, and destroying what makes this city special.

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Key Insights

Racial Disparity: There is significant underrepresentation of Black/African American respondents (10%) compared to their 29% share of Baltimore's population, while White/European-origin individuals are overrepresented.

Aging Music Workforce: A large portion of respondents (29%) are aged 65 years and older, with younger respondents (18-24 years) making up only 13%, indicating a skew toward an older music workforce.

High Experience Levels: Most respondents (89%) have over 10 years of experience in the music sector, reflecting a seasoned music community.

Limited Performance Opportunities: A significant 28% of respondents do not perform any local paid shows per month, and 23% perform only one, reflecting the scarcity of local gig opportunities. Touring opportunities are even more limited, with 60% of respondents not performing any paid touring shows per month, highlighting the overall lack of performance opportunities in both local and touring contexts.

Underutilization of Licensing: More than half of respondents who are IP rights-holders do not engage in licensing activities or royalty collection, highlighting a missed opportunity for revenue generation.

Venue Shortages: Many respondents noted a shortage of venues, especially mid-sized and DIY spaces, which limits performance and audience-building opportunities.

Regulatory Barriers: Venues face various regulatory challenges, including music performance licenses, sound regulations, and special event permits, complicating the process of hosting live music.

Strong Demand for Workspace: Many Creatives (75%) need studio space, 70% need rehearsal space, and 67% require performance venues. This reflects a high demand for affordable and accessible workspaces.

Community Support and Collaboration: Respondents frequently highlight a strong sense of community and collaboration in Baltimore's music scene, despite noting frustrations over "cliquish" attitudes and divisions within the ecosystem.

Post-COVID Behavioral Changes: Fan behavior post-COVID remains a challenge for 27% of venues and presenters, suggesting that the live music scene has not yet fully recovered to pre-pandemic levels.

Nonprofit Dominance in Venues: A large proportion of music venues in Baltimore (42%) are nonprofit entities, indicating a more community-based music landscape compared to other cities where for-profit venues are more common.

Photos Courtesy of Camerata Baltimore, Casey Ryan Vock

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Opportunities

Youth Engagement Programs: Initiatives that target younger musicians and professionals could help address the aging workforce and encourage youth participation in Baltimore's music scene.

Expand Venue and Performance Spaces: Addressing the shortage of mid-sized and community-run venues could improve performance opportunities and audience growth.

Simplify Regulatory Processes: Streamlining the regulatory framework for live music venues could reduce barriers and make it easier for more events to take place.

Increase Financial Assistance and Awareness: Providing greater access to micro-grants, tax breaks, and financial education could help musicians better navigate the economic challenges they face.

Improve Professional Development: Offering more workshops and programs focused on booking, promotion, and event production could help musicians navigate their careers more effectively.

Foster Cross-Industry Collaborations: Connecting the music industry with other creative sectors like film, design, and gaming could open new opportunities for creative collaborations and income generation.

Post-Pandemic Audience Recovery: Venues and Presenters could benefit from support to develop strategies for rebuilding audiences post-COVID, including targeted marketing campaigns, supplement local music journalism and incentives to attract audiences back to live music events.

Leverage Nonprofit Venue Model: With a significant portion of venues operating as nonprofits, there is an opportunity to secure grants and funding aimed at community-driven music spaces, which could support the development of more inclusive and diverse programming.

Promote Cross-Genre Collaborations: Addressing the divisions within the local music scene by promoting more cross-genre collaborations could lead to greater unity and a more inclusive ecosystem, as artists often cite the need for mutual support.

Broaden Talent Development Programs: Expanding talent development programs that focus on younger and emerging artists, while also addressing barriers like transportation, could help ensure the long-term sustainability of Baltimore's music ecosystem.

Photos Courtesy of Efrain Ribiero, Wendel Patrick

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