



Prepared for:

COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE

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REMIX CLEVELAND

THE CLEVELAND MUSIC SECTOR AND ITS ECONOMIC IMPACT

CENTER FOR
ECONOMIC
DEVELOPMENT

Foreword and Acknowledgements

Cleveland, like so many other cities, finds itself at a crossroads. It is caught between nostalgia for an illustrious era of industrial success and national prominence, and the uncertainty of how to respond to the realities of its current environment. Throughout history, societies have grappled with similar challenges – some adapted and thrived while others stagnated and further declined. Despite the different outcomes, all societies have found an outlet for expression, comfort, and definition through arts and culture. Beyond such intrinsic value, arts and culture is exceedingly being recognized for its potential to contribute to economic and community development. Arts and culture is a distinct asset that can be engaged by cities to celebrate their pasts and redefine their futures. Community Partnership for Arts and Culture (CPAC) believes that one of Cleveland’s natural industry clusters and major competitive advantages is its arts and culture sector.

The breadth of Cleveland’s arts and culture sector would be daunting as the focus of one research study and such a study would not adequately depict the sheer diversity and scope of Cleveland’s dance, film, literary, music, theatre, and visual art sectors. For this reason, CPAC decided to focus on these sectors individually by conducting a number of in-depth research studies. The music sector was chosen as the starting point.

Remix Cleveland will spark new conversations of how the Cleveland Music Sector can be engaged as a partner for shaping the city’s future. *Remix Cleveland* contains numerous analyses that can be used to synthesize efforts among musicians and the music workforce, public officials, and business community leaders in a profound way. This work is critical especially in an era when arts and culture amenities are significant forces for attracting and retaining new classes of creative workers to cities.

Just as a city’s fabric is unshakably tied to its past, Cleveland’s music scene is the culmination of a music legacy that contains groundbreaking performances, local talent, and music innovation. Balancing this legacy with today’s technological advancements and audience expectations poses many challenges and opportunities. However, finding this balance is necessary for Cleveland and its music scene to evolve for the future.

Remix Cleveland is the result of the dedicated efforts of numerous arts and culture practitioners, academic researchers, and music industry professionals.

CPAC wishes to thank the *Remix Cleveland* advisory committee for its dedicated support and valuable guidance as the research unfolded. *Remix Cleveland* advisory committee members included Cindy Barber, Co-Owner, Beachland Ballroom and Tavern; Angelin Chang, Professor - Applied Piano, Coordinator - Keyboard Studies and Chamber Music, Cleveland State University; Matt Charboneau, Arts Network Leader, Council of Smaller Enterprises (COSE); Charles Lawrence, President/CEO, The Music Settlement; Santina Protopapa, Executive Director, Progressive Arts Alliance; Gregory Reese, Trustee, The Cleveland Jazz Orchestra; and Beth Rutkowski, Managing Director, Tri-C JazzFest Cleveland.

CPAC also extends its sincere gratitude to all of those who participated in interviews, surveys, or focus groups for *Remix Cleveland*. Your vital insights into the strengths and challenges facing the Cleveland Music Sector helped inform and validate this research immeasurably.

We would also like to thank the subjects of the six case studies who graciously took time out of their busy schedules to share their experiences and expertise as members of the Cleveland Music Sector.

They include Cindy Barber, Co-Owner, Beachland Ballroom and Tavern; Paul Jarrett, Managing Director, Apollo's Fire; Lalene Kay, Director, Cleveland Music Therapy Consortium, Baldwin-Wallace College; Jae Kristoff, Co-Founder, Cleveland Lottery League; Dr. Deforia Lane, Director of Music Therapy, University Hospitals of Cleveland; Bill Ransom, Applied Faculty - Percussion, Cleveland State University; Vince Slusarz, Owner, Gotta Groove Records; Jeannette Sorrell, Music Director, Apollo's Fire; Ed Sotelo, Co-Founder, Cleveland Lottery League; and Dr. Eric Ziolek, Chairman, Department of Music, Cleveland State University.

CPAC would also like to thank the entire research team at the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University for their tireless work and enthusiasm in completing this project. Their expertise and innovative approaches in studying the music sector went above and beyond our expectations.

Remix Cleveland would not have been possible without the generous support of CPAC's funders. *Remix Cleveland* was supported through dedicated research funding from The John P. Murphy Foundation, the Rock and Roll Hall of Fame and Museum, and The Thomas H. White Foundation.

CPAC is also grateful for the continuing general operating support for its programs and services from The Cleveland Foundation, Cuyahoga Arts and Culture, The George Gund Foundation, The Kulas Foundation, The John P. Murphy Foundation, and the Ohio Arts Council.

And finally, CPAC wishes to extend its gratitude to all of those who are members of the Cleveland Music Sector. Their work makes our city, county, and region more vibrant for residents and a destination of first choice for tourists.

About the Community Partnership for Arts and Culture

Vision

The powerful competitive advantage generated by our distinctive arts and culture sector is widely recognized and supported both publicly and privately.

Mission

To strengthen and unify greater Cleveland's arts and culture sector.

Guiding Principles

In pursuing its vision and mission and acknowledging its beliefs, CPAC will:

- ◆ **LEAD:** Set direction with the arts and culture sector based on shared interests and potential impact on arts and culture organizations and individual artists.
- ◆ **ADVOCATE:** Position arts and culture as a driving force in building a vibrant community, particularly where community priorities and funding decisions are determined.
- ◆ **EDUCATE:** Inform community decision-making through credible research that identifies solutions for evolving needs and demonstrates the contribution arts and culture makes to the economy, education and quality of life.
- ◆ **CONVENE:** Provide opportunities for the community's diverse arts and culture constituencies to join together to learn about and take collective action on shared interests and objectives.

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History

Community Partnership for Arts and Culture (CPAC) was formed by The Cleveland Foundation and The George Gund Foundation in 1997 to develop a regional, community-wide, strategic cultural plan. Northeast Ohio's Arts & Culture Plan (the Plan), released in May 2000, was the culmination of 9 major analytical studies and 42 regional public forums representing 30 months of quantitative and qualitative research. Upon delivery and implementation of the seven-county plan CPAC evolved into a service provider focused on filling functional gaps identified through the planning process: capacity building, public policy and research.

In 2003, CPAC launched its first capacity building program designed for individual artists, The Artist as an Entrepreneur Institute, which has served 345 artists locally and has subsequently been licensed by organizations in Florida, North Carolina, and South Carolina. In 2004, through an innovative partnership with the Council of Smaller Enterprises (COSE), CPAC helped to launch the Arts Network, a program of

COSE offering professional development resources, education and networking events, benefits programs and business savings to those in the creative industries.

CPAC's research and public policy initiatives led to the formation of Cuyahoga County's first regional arts and cultural district, Cuyahoga Arts and Culture, in 2005. In 2006, CPAC's public policy work led to the successful passage of Issue 18, a dedicated revenue stream of public sector support for Cuyahoga County's arts and culture sector, which generates \$19.5 million annually. In 2006, CPAC also designed and implemented a joint marketing group of twelve arts and cultural organizations in an effort to increase the profitability of direct marketing efforts. CPAC's continued efforts on behalf of individual artists led to the development of the first nationwide conference on artist-based community development in 2008 entitled, *From Rust Belt to Artist Belt*, and the first individual artist fellowship program in Cuyahoga County, the Creative Workforce Fellowship, in 2009.



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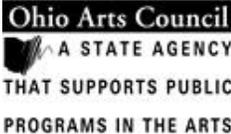
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About the Study Team

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Iryna Lendel is Assistant Director of the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. Dr. Lendel was the principal investigator for this project and developed the overall framework and methodologies for research components of the project. Lendel managed the team of researchers and participated in each phase of the project. Dr. Lendel is an economist with 16 years of experience conducting applied economic research and analyzing regional and urban economic development. Her research portfolio includes projects on industry analyses; state and regional science and innovation policies; university products; and high-tech, emerging, and creative industries and their role in economic development. Dr. Lendel has also conducted multiple economic impact analyses. Lendel is an associate editor of *Economic Development Quarterly* and was named a Fulbright New Century Scholar for 2009-2010.

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Renee Constantino was a researcher in the CSU team throughout the duration of this project. She contributed to organizing and conducting the interviews, focus groups, survey, and an advisory committee meeting. She worked on providing background material for the case studies, collecting data for the economic impact study, and wrote portions of the final report. Constantino earned her Master of Public Administration degree in 2011 from the Maxine Goodman Levin College of Urban Affairs at Cleveland State University.

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Matthew Hrubey participated in the industry analysis, preparation of data for the economic impact study, and assisted in writing the supply and demand chapter and the final report.

Sunjoon Park conducted the industry trend analysis.

Joan Chase participated in writing the final report.

Mary Grodek designed the case studies and executive summary.

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EXECUTIVE SUMMARY

“Where words fail, music speaks”

- Hans Christian Andersen

This introductory quote speaks of the utility of music, but misses its pervasiveness in the various aspects of our lives. The art of music has contributed significantly to society. Music inspires us to move according to rhythms and express our emotions in keeping to the optimism of Mozart, the energy of Elvis Presley, the creativity of Miles Davis, and the innovativeness of Lady Gaga. Throughout history, music has helped people to worship, win wars, create communities, enhance dialogues, and prompt social change.

From an economic perspective, music is not usually recognized as being influential. In the 1990s and the beginning of the 21st century, the new paradigm of economic growth has emphasized the significance of technological change and validated the importance of creativity to social change and economic

development. However, because many people tend to think of music only as an amenity, the usefulness of music as an economic and community development engine is often overlooked.

There is a growing awareness of the economic impact that a creative and entrepreneurial workforce can have on economic outcomes. Art, in all its forms, can provide a region with a “sticky,” or long-lasting, regional competitive advantage that is attractive to creative people. Regions can become commodities sold to people in packages relating the city’s history, arts, and cultural amenities. Despite this newly recognized awareness, the arts generally remain disassociated from the main economic development strategies of regions striving to improve and grow their economies.

ABOUT THIS REPORT

This study was commissioned by the Community Partnership for Arts and Culture (CPAC) as a starting point for gaining a deeper understanding of the different sectors of the Cleveland arts scene in Cuyahoga County. Its objective is to understand the Cleveland Music Sector, delineate its components, learn its dynamics, and assess the economic impact of music events and venues in Cuyahoga County.

This study was conducted by the Center for Economic Development (“Center”) of the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. The Center sought answers to a set of core research questions regarding the typology and economic impact of the Cleveland Music Sector on the regional economy: What constitutes the music sector in Cuyahoga County? What character-

istics help to describe it? What industries and types of products are significant to the vitality of the Cleveland Music Sector? Which unique properties of the Cleveland Music Sector make it thrive and diminish? What are prominent examples of success in the local music scene? What economic impact does the Cleveland Music Sector create on the local economy? Finally, the project was designed to stimulate an interest in the music sector as a unique resource for inclusion into public policy capable of leading to economic prosperity.

The project started in July of 2010 and was completed in June of 2011 with this report. The products of the study include this executive summary, which highlights major findings. A main contribution of this study is a comprehensive framework capturing analyses of the Cleveland Music Sector based on quantitative and qualitative data, and illustrating the music sector across several major dimensions: industrial and occupational structures of the music sector, functional groups of the music sector, for-profit and non-profit entities, inclusion of the amateur sector of the music scene, and capturing the economic impact of all these components, including major music events in the region. The findings presented in this executive summary synthesize information provided by all of the detailed analyses, including individual interviews and six case studies. An in-depth analysis of the Cleveland Music Sector is presented in the nine chapters following the executive summary. Each chapter reflects a stage of the research.

Chapter 1 describes the structure of the Cleveland Music Sector, defines its typology in terms of eight industrial subsectors, analyzes overall employment and wage trends of the music sector as a cluster and the dynamics of its

subsectors, analyzes the for-profit and non-profit portfolio of companies in the music sector, and compares the Cleveland Music Sector to music sectors in other regions. These findings are followed by the outcomes of two focus groups conducted in conjunction with this study (Chapter 2), which vetted and enriched the findings of the Cleveland Music Sector's dynamics with qualitative characteristics of change. Chapter 3 presents the results of the Cleveland Amateur Musician Survey. The major findings of the survey describe the quality of the amateur music scene, compare it to the trends associated with professional musicians, reveal data analyzing the supply and demand of musicians, and provide the costs and incomes associated with music events.

Chapter 4 demonstrates the results of the data-driven analysis on the supply of musicians in the Cleveland Music Sector in comparison to other regions and compares it with the demand for music locally and in other cities. Chapter 5 discusses the music performances that are brought (imported) into the region and music products that are sent out (exported) in Cleveland and comparable metropolitan areas. The quantitative analysis concludes in Chapter 6 with the assessment of the Cleveland Music Sector's economic impact on the local economy. The impact is assessed using the estimates of employment and expenditures of major Cleveland music venues in Cuyahoga County and visitor spending on major music events in 2010.

Chapter 7 includes six case studies featuring accomplishments in the Cleveland Music Sector, exemplified by stories of individual musicians and ensembles, music venues, new types of music performances, and undertakings emerging at the cross sections of Cleveland's

strongest sectors, i.e., music and medicine and music and manufacturing. The case studies investigate musicians and venues that capitalized on some regional competitive advantage and became successful in Cleveland. The stories discuss favorable factors that exist in the Cleveland Music Sector, as well as changes to and challenges within the music industry.

Chapter 8 presents the Directories of Musicians and Music Organizations for the Cleveland Music Sector. The directories, although not inclusive of all musicians and music, serve as a snapshot of current performers and venues operating throughout the region in the period from 2009 to 2010. Chapter 9 includes detailed methodologies that emphasize replication of this study across other geographies and other

types of art.

In this study, we defined musicians as those who self-identified themselves as belonging to one of two groups: professional musicians or amateur musicians. Professional musicians are defined as those who receive more than 50% of their income from music-related activities; amateur musicians are defined as those who receive less than 50% of their income from music-related activities and are employed in other, non-music sectors. We also analyzed musicians by the major music occupations specified in Chapter 4. Music venues were identified by their association with major music industries and by advertisements on major music websites. Other specific conditions used to identify musicians and music venues and events are detailed in Chapter 9.

MUSIC IN CLEVELAND

Music Legacy

Cleveland has a long history as one of the nation's most thriving music scenes. It is known nationwide for its outstanding classical music venues and as the birthplace of rock and roll, as well as a source of the blues and jazz. Today, Cleveland's music scene has evolved into an eclectic mix of genres due to its musical heritage and historic development as a city. However, the region's richness of musical diversity and distinguished talent is in need of reinforcement in order to put Cleveland back on the map of the national music landscape. Highlights of Cleveland's music legacy emphasize its past renown and the need for today's

music sector to develop strategies that can restore Cleveland's importance as a name in music.

Cleveland's storied musical history dates back to the 1840s when Lowell Mason, the most influential musician of the 19th century, led a series of music workshops in the city. However in the mid-20th century, Cleveland was probably best known for its history as the epicenter of rock and roll's beginnings. It was home to four legendary rock and roll AM radio stations during the 1960s: WIXY, WHK, WERE, and WJW. When WHK moved to FM and converted to free form

radio it became WMMS, which was a major player in the rock scene well into the 1990s.ⁱ The phrase “rock and roll” was coined by Cleveland natives Leo Mintz, owner of Record Rendezvous, and Alan Freed, a deejay for WJW-AM. Freed was also responsible for organizing the Moondog Coronation Ball, the first-ever rock and roll concert, on March 21, 1952. Sixteen thousand tickets were sold for the event at the old Cleveland Arena, a venue that held only 10,000 people.

Cleveland’s prominence in the blues music industry is due in large part to renowned venues like the Brothers Lounge, known in its heyday as the “Bastion of Blues in the Cleveland area.” The lounge was a mandatory stop on the blues circuit and featured performers including Buddy Guy, B.B. King, Robert Lockwood, Jr., and Bonnie Riatt. The Brothers Lounge underwent a million dollar renovation in 2008 to restore the space.ⁱⁱ

Another historic music venue in the Greater Cleveland region is the Agora. The Agora opened in 1966 and over time became a series of clubs that booked national and local musical acts. The club held events known as “Sundays at the Agora,” which helped launch a number of national acts including The Grand Funk Railroad, The Outlaws, ZZ Top, Rainbow Canyon, James Gang, Glass Harp, Foghat, and the Raspberries. In pre-MTV days, the Agora also showed rock concerts on a local television station. In the late 1970s, Billboard Magazine rated the Agora as

the number one rock club in America.ⁱⁱⁱ The Tri-C Jazz Festival was founded in 1980 to bring jazz music to a wider audience and continues in this tradition today.^{iv}

While Cleveland is legendary for its blues and rock and roll past, classical music in the city has perhaps even a greater history. The Cleveland Orchestra is one of the most highly regarded symphony orchestras in the world. It was founded in 1918 by local residents, including Adella Prentiss Hughes, the first woman to manage a symphony orchestra. In 1946, the Cleveland Orchestra developed the distinctive sound for which it is known because George Szell, who had recently been instituted as director of the orchestra, wanted the orchestra to function and sound like a chamber group. Don Rosenberg, in *The Cleveland Orchestra Story: Second to None*, described the transformed ensemble as a place where “every musician would be an important part of the texture and they would listen to each other closely and every one would be heard very clearly.”^v The Cleveland Orchestra’s legacy of sound has lasted 65 years, and it continues today.

The growth of Cleveland’s manufacturing industry in the 19th and 20th centuries attracted diverse groups of immigrants who wove numerous cultural traditions into the city’s fabric. Notably, a wealth of world music added to the diversity and eclectic nature of the Cleveland Music Sector and continues to

ⁱ Wolff, C. (n.d.). Hello Cleveland: The city’s rock and roll legacy. *The Rock and Roll Hall of Fame & Museum*. Retrieved from http://rockhall.com/story-of-ock/features/all-featured/3326_hello-cleveland/

ⁱⁱ Norman, M. (2008, March 7). After a million-dollar renovation, the landmark Brothers Lounge will reopen. *Cleveland Plain Dealer*.

ⁱⁱⁱ Agora History, <http://www.clevelandagora.com/history.htm>

^{iv} For more details, see <http://www.tricpresents.com/wp-content/uploads/Updated-JazzFest-History-for-09.pdf>

^v DeOreo, D. (Producer) and Rosenberger, M. (Executive Producer). (2000, September 29). Around Noon: History of a World Class Orchestra. Narrator, D. Perry. ideastream.

influence the city’s musical offerings today. The world music scene in Cleveland spans from polka and salsa to reggae and gospel. Cleveland has been dubbed the “Polka Capital of the World”, and was the home of Frankie Yankovic, the “Polka King” who popularized the Slovenian-style of polka. Cleveland’s rich gospel history includes the Wings Over Jordan Choir that was founded in 1935 and was the first full-time professional African-American choir in America.^{vi}

Mirroring Cleveland’s decline from its industrial heyday, the Cleveland Music Sector has also experienced a drop in prominence from the national music scene. However, pinpointing when Cleveland faded from being considered a top American music city is difficult. Today, Cleveland musicians express that outsiders are surprised by their superb skills and depth of performances. Local musicians believe strongly that the overall sense in the Cleveland Music Sector is that “talented artists are from Cleveland, but don’t come to Cleveland.” This was reflected in comments such as: “Cleveland is a birthplace,” and “[you] may be from Cleveland, but work and success is outside of Cleveland.” While talent and opportunities do abound in Cleveland, the sector lacks unification on the messaging and organizing fronts, which

makes it challenging to dispel negative perceptions of the sector’s richness and depth.

Participants of this study noted that outsiders are often surprised when they visit Cleveland and learn firsthand about the rich music scene and culture that exists here. “People are very energetic and passionate about the arts [in Cleveland],” one of the musicians who participated in the study commented. “Cleveland has an unusually sophisticated audience for classical music—larger and more educated than other cities of this size,” echoed another. “If people [musicians] would come together, their audiences would expand, opportunities for funding would grow, and [the] world would see Cleveland as a major artistic contributor,” noted another participant.

“Pride and musicianship,” “abundance of talent,” with an “education component [that] is phenomenal across all genres: Jazz, Classical, Rock, R&B, all covered in our universities” – are just a few assertions from the description of the Cleveland Music Sector by local musicians and community leaders. They were not hesitant to add that the Cleveland Music Sector is passionate, under-appreciated, diverse, engaged, and has “incredible potential for entrepreneurship.”^{vii}

^{vi} For more information, please refer to the Encyclopedia of Cleveland History, <http://ech.cwru.edu/index.html>

^{vii} Read more on the characteristics of the Cleveland Music Sector cited by local musicians in Chapters 2 and 7.

The Cleveland Music Sector Today

THE CLEVELAND MUSIC SECTOR BY OCCUPATIONS

The Cleveland Music Sector was defined and studied using occupational data from the U.S. Bureau of Labor Statistics' Occupational Employment Survey (OES) (Chapters 4 and 9).^{viii} The music sector was defined in terms of core music occupations and support music occupations. *Core music occupations* were identified as music industry workers involved in jobs that result in the creation or performance of music. *Support music occupations* were identified as music industry workers involved in jobs that do not result in the creation or performance of music.

For the occupational analysis, the music sector was identified as people who work in two core music occupations, *Music Directors and Composers* and *Musicians and Singers*. Based on these two occupations, it was determined that the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA)^{ix} has more *Musicians and Singers* than comparable MSAs, namely Cincinnati-Middletown, OH-KY-IN; Columbus, OH; Indianapolis-Carmel, IN; and Pittsburgh, PA. The Cleveland Music Sector had the largest

number of *Musicians and Singers* (500) in 2009 as well as the largest occupational share of music employment to total regional employment (0.05%) compared to the aforementioned MSAs. For every 1,000 people in the Greater Cleveland region, at least five are musicians.

Despite having the largest number of *Musicians and Singers*, the Cleveland-Elyria-Mentor MSA had the smallest number of *Music Directors and Composers* (40) in 2009 when compared to the other four MSAs. While the Indianapolis-Carmel MSA only had ten more *Music Directors and Composers* (50), the Pittsburgh MSA had more than four times the number of *Music Directors and Composers* (170). The Cleveland-Elyria-Mentor MSA also had the smallest share of music employment to total regional employment (0.004%) when compared to the other MSAs.

Support music occupations include ten unique occupational categories including *Agents and Business Managers of Artists, Performers, and Athletes; Art, Drama, and Music Teachers Postsecondary; and Musical Instrument Repairers and Tuners*. The Cleveland-Elyria-Mentor MSA employs 8,320 individuals in music support occupations. Compared to the other four MSAs, the Cleveland-Elyria-Mentor MSA has the second smallest number of music support employees, exceeding only the Columbus MSA (7,380). The largest music support employment is found in the Pittsburgh MSA (10,440), followed by the Indianapolis-Carmel MSA (10,270).

^{viii} Previous research studies analyzing music sectors have addressed the scope of the sector by identifying musicians and music venues based on industrial and occupational definitions. The Center critically reviewed these methodologies, selected appropriate industries and occupations, and enhanced them by utilizing the Quarterly Census of Employment and Wages database (QCEW, also called the ES202) and the U.S. Bureau of Labor Statistics' Occupational Employment Statistics (OES).

^{ix} Due to the fact that the Occupational Employment Statistics data are unavailable at the county level, the geographic boundaries of the Cleveland Music Sector were extended for this portion of the study to include the entirety of the Cleveland-Elyria-Mentor MSA, including Cuyahoga, Geauga, Lake, Lorain, and Medina counties. Read more on the occupational analysis in Chapter 4.

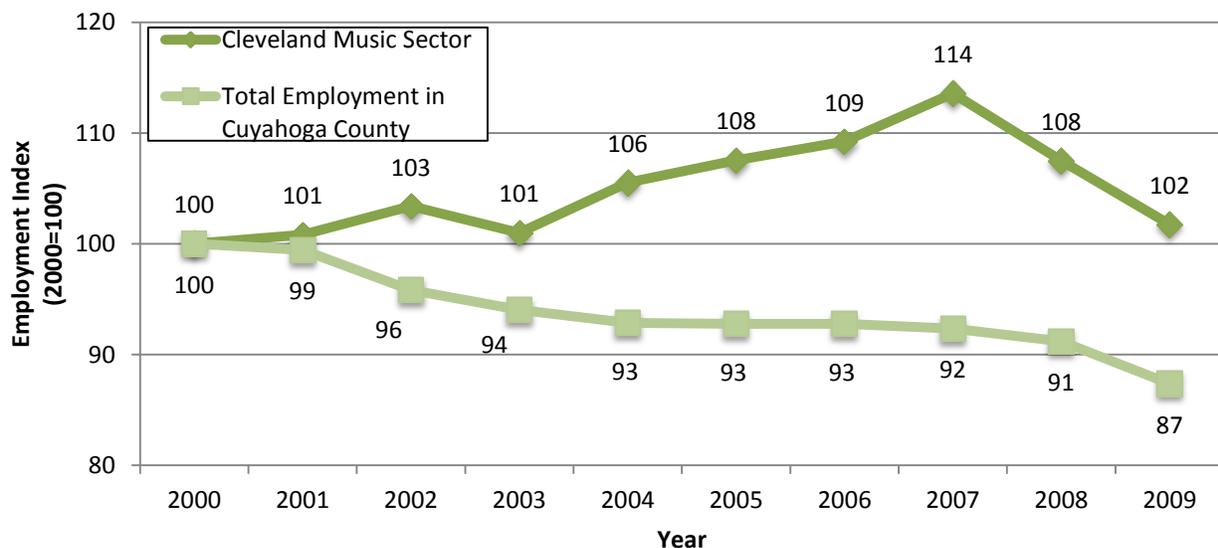
THE CLEVELAND MUSIC SECTOR BY INDUSTRIES

The Cleveland Music Sector was also defined and studied by the industries it encompasses. This industry-based definition allowed the Center to identify 2,718 employees^x in the Cleveland Music Sector^{xi} in 2009. The size of the music sector remained stable between 2000 and 2009, despite two recent recessions; in fact, employment in the Cleveland Music Sector increased slightly between 2000 and 2009 (Figure 1). For Cleveland, which was hit harder by recent economic downturns than other similar-sized economies, the stability illustrates

the success of music as an economic sector.

The vitality of the Cleveland Music Sector was confirmed by the dynamic of the music sector's payroll, which increased by a total of \$29.3 million (34.3%) from 2000 to 2009, yielding a total payroll of \$114.8 million in 2009. In addition, the music sector's average wages increased by \$10,224 (31.9%) between 2000 and 2009, producing total average wages of \$42,228 in 2009.^{xii}

Figure E-1: Employment Index of the Cleveland Music Sector and All Industries in Cuyahoga County, 2000-2009



^x The Center for Economic Development designed a methodology describing an industry-based Cleveland Music Sector by using a computer program capable of identifying music-related industries through keyword searches (Chapters 1 and 9). Using this program, the Center defined the Cleveland Music Sector as encompassing musicians and music venues from 45 unique industry codes in the North American Industry Classification System (NAICS). See Appendix 1-1 for brief descriptions of the 45 NAICS codes included as part of the Cleveland Music Sector's industry-based definition.

^{xi} This study is geographically limited to Cuyahoga County. Some sections' analyses are based on metropolitan areas due to data availability.

Source: Quarterly Census of Employment and Wages (QCEW)

^{xii} All data are inflated to 2009 dollars.

Although the average wages of people working in the Cleveland Music Sector in 2009 were lower than the average wages of people working in all other industries in Cuyahoga County (\$46,408), anecdotal evidence suggests that part of musicians' income might be unaccounted for in the data. Only 20% of all performing musicians surveyed in this study^{xiii} indicated they draw all their income from a single job in the music industry. The overwhelming majority of survey respondents across all categories indicated that part of their income comes from private music lessons and performances outside of their primary job. This activity is not captured by the ES202^{xiv} data, which is based on the records of businesses that have paid employees.

Musicians as well as other art industries are classified in the academic literature as a part of the creative workforce. The creative workforce cluster contributes to their regional economies more than any other industry cluster including high-technology industries. One of the seminal economic development studies includes arts and culture industries in so-called *alpha* clusters. John Schoales's research identifies the alpha clusters which include art, culture, fashion, and financial investment industries across Canada and the United States. The alpha

cluster is distinguished from other industries by its very short product life-cycle that requires industries to develop and introduce new products continuously.^{xv} Therefore, success in alpha clusters requires perpetual innovation. Alpha cluster's industries are comprised of highly skilled, creative individuals, who consistently produce new ideas, products and concepts. As mentioned by Ann Galigan, who studies arts and culture workforce dynamics, "quality of the imagination and the creative vision in a search for truth, beauty, and meaning" is at the core of "creativity [that] became an individual gift, not a collective trait" after the Industrial Revolution.^{xvi} The high skills of workers in this cluster are required for continued innovation, and the skills of workers in this sector are derived from their wealth of creativity, which drives the industry forward at a rapid speed. With wages being a proxy for skills and productivity, the increased level of contribution of the alpha clusters is confirmed by their higher levels of pay as compared to other clusters.^{xvii} The alpha clusters are deeply embedded in their respective regions and impact the speed of innovation within their geography.

The Center created eight subsectors, or groups of industries, within the Cleveland Music Sector that identify major functions of the music cluster. These subsectors are *Education & Museums, Manufacturing, Musicians, Promoters, Recording & Publishing, Retail, Service*

^{xiii} See the comprehensive analysis of the Cleveland Amateur Musician Survey in Chapter 3.

^{xiv} The Ohio Economic Development Information Network (OEDIN), also known as The Ohio ES202 Network, is a statewide network of university centers and researchers. The ES202 database is derived from company level data obtained by each state for unemployment compensation tax collection purposes. Nearly all employers with paid employees are required to file unemployment insurance reports (technically called ES202) to their respective states on a quarterly basis. Cleveland State University, on behalf of the Ohio ES202 Network, receives the data on a quarterly basis from the Bureau of Labor Market Information of the Ohio Department of Jobs and Family services.

^{xv} Schoales, J. (2006). Alpha clusters: Creative innovation in local economies. *Economic Development Quarterly*, 20(2), 162-177.

^{xvi} Galligan, A. (2008). The evolution of art and culture as it relates to workforce dynamics. *The Journal of Arts Management, Law, and Society*, 37(4), 345-349.

^{xvii} Schoales, J. (2006). Alpha clusters: Creative innovation in local economies. *Economic Development Quarterly*, 20(2), 162-177.

Providers, and Wholesale (Figure 2).^{xviii}

The *Musicians* subsector is the staple group in a music sector. Its existence justifies the development of all support and supplementary functions performed by other industries. In 2009, this subsector accounted for 378 employees in Cuyahoga County. It declined from 474 employees in 2000 and from 643 workers at its highest point in 2001. The data source used for this analysis undercounted all artists in music industries as it captures only individuals that are officially employed in the industry as full-time or part-time employees. It does not include any musicians that work on a contractual basis with music establishments, or any self-employed freelance, or amateur musicians.

The *Retail* subsector was the largest subsector in 2000 and accounted for more than 27% of the Cleveland Music Sector's employment. Along with *Promoters* and *Musicians*, *Retail* constituted the core of the Cleveland Music Sector at the beginning of the millennium; these three subsectors together represented approximately 68% of total music sector employment. *Promoters* and *Musicians* included 24% and 18% of music employment in 2000, respectively.

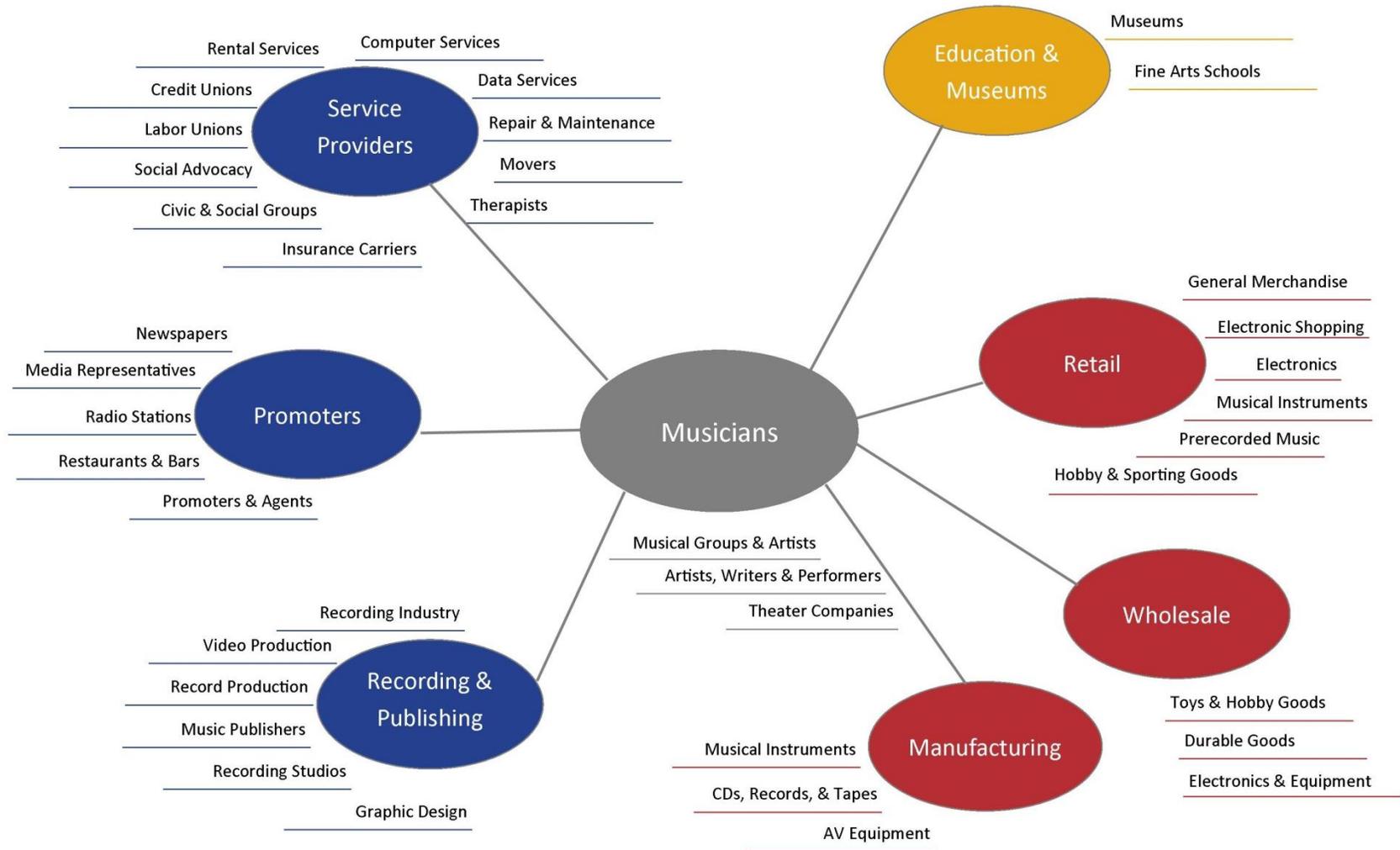
Although the level of employment within the Cleveland Music Sector was nearly the same in 2000 and 2009, the breakdown by subsector differs between years due to changes in both the music industry and the regional economy.

Changes include increased access to the Internet and digitally-formatted music that significantly altered the way people buy music. Consumers no longer need to travel to local music stores to buy records or instruments, which hinders the growth of the *Retail* subsector. However, music stores were known not only as music retail outlets, but also as community anchor spaces for music lessons, kids' hangouts, and concerts of amateur and professional musicians. The consolidation and disappearance of music retail creates vacancies for filling in the niche to educate neighborhood children and create public spaces for live music. Compared to 2000, the *Retail* subsector in 2009 captured only 15% of the Cleveland Music Sector's employment, following the decline of *Musicians* to 14%. At the same time, the subsector *Promoters* grew substantially to represent 42% of music employment in 2009.

The subsector *Education & Museums* is very special in Cleveland. It was strongly emphasized as the Cleveland Music Sector's signature industry in the interviews and focus groups conducted in conjunction with this study. This subsector includes the employment of the Rock and Roll Hall of Fame and Museum, one of the nation's most recognized music institutions and a world-class museum that collects, preserves, exhibits, and interprets the art form through its library and archives as well as its educational programs. The subsector grew from capturing 17% of the Cleveland Music Sector's total employment in 2000 to representing 21% of employment in 2009.

^{xviii} The *Education* and *Museums* subsectors were analyzed together due to a restriction in the ES202 database about disclosing data concerning individual companies.

Figure E-2: Ecology of the Cleveland Music Sector



The educational component of this subsector captures a core specialty of the Cleveland Music Sector.^{xix} Cleveland has exceptional formal music education opportunities, outstanding, easily available private lessons, and access to many high-quality music ensembles and orchestras that can serve as places of employment for graduates. The Cleveland Institute of Music, The Oberlin Conservatory of Music, Baldwin-Wallace College's Conservatory of Music, Case Western Reserve University's Department of Music, Cleveland State University's Department of Music, and Cuyahoga Community College's Music Department are the core of the formal music education system in Cleveland and its surrounding region.

In addition to the region's formal music programs, its high quality of private lessons was repeatedly emphasized during the study's interviews. Private teachers are a key part of any music education system, but the private teachers in Cleveland are especially accomplished; several have published books on methods and are accomplished musicians and composers in their own right. Another unique

attribute of Cleveland attractive to many students is the close proximity of an agglomeration of very prominent musicians playing at local venues. Students have unprecedented access to accomplished musicians and are sometimes given the opportunity to play with them in low-key sessions.

The interviews and focus groups conducted for this study revealed a shortfall in the Cleveland Music Sector that is reflected in the data. The lack of sufficient employment in the *Service Providers* subsector was indicated by interview and focus group participants as a limitation on the successful growth of the Cleveland Music Sector. This subsector lost 101 employees between 2000 and 2009 and decreased its share in the cluster from 6.4% in 2000 to 2.6% in 2009. There was a strong consensus among artists concerning the need for resources for promoting the music business model, financing, and infrastructure organizations. This consensus was voiced alongside an emphasis on the importance of leveraging public funding for the arts, information infrastructure, and non-profit network providers, both with physical and virtual performance spaces.

^{xix} Although *Education & Museums* became the second largest subsector in 2009 in terms of employment, the reality is that the subsector is larger than what is shown in this study's trend analysis. This variation is due to limitations associated with the study. For instance, defining the Cleveland Music Sector geographically as only Cuyahoga County limited the Center from including in the study educational institutions like Oberlin College that are strongly related to music. In addition, the *Education & Museums* subsector does not contain data for 326 employees, including music teachers working for both local school districts and the music departments at Case Western Reserve University, Cleveland State University, Baldwin-Wallace College, and Cuyahoga Community College. The data on the music departments were obtained from various sources and cannot be added to the ES202 data.

MUSIC AS AN ECONOMIC ENGINE

The Cleveland Music Sector as a whole is linked to other industries through buy-sell relationships that contribute to the sector's impact on the local economy. The activities of the Cleveland Music Sector accounted for 6,210 total jobs created in Cuyahoga County in 2010. Fifty-five percent (3,384) of these jobs were the *direct* impact^{xx} representing existing jobs in the Cleveland Music Sector (including.g jobs that are not listed in the ES202 database). An additional 25% of the jobs (1,550) were the result of the *indirect* impact on industries that buy or sell goods or services to the music sector. Finally, 21% (1,275) of the impact was from the *induced* effect, which represents the household spending of people who work in the music sector and its associated suppliers.

In addition to its economic impact on job creation, the Cleveland Music Sector generated \$274.4 million in labor income,^{xxi} \$474.1 million in total value added,^{xxii} and an output of \$839.8 million^{xxiii} in 2010. A total of \$91.6 million in tax

revenue was also associated with the Cleveland Music Sector in 2010. Of that amount, \$51.9 million was federal tax revenue and \$39.7 million was state and local tax revenue.^{xxiv}

The *Musicians* subsector alone created an economic impact on Cuyahoga County's economy, accounting for 681 jobs (including the musicians employed in this subsector), \$37.3 million in labor income, \$45.9 million in value added, \$46.3 million in output, and almost \$9.3 million in tax revenue in 2010.

The *Promoters* subsector created the largest economic impact of all the subsectors in the Cleveland Music Sector in 2010. Forty-seven percent of the total jobs created in the Cuyahoga County economy (2,901) resulted solely from the activities of the *Promoters* subsector. The *Promoters subsector* was also responsible for generating 50% (\$138.1 million) of the music sector's total labor income received, 55% (\$258.5 million) of the total value added, 62% (\$519.9 million) of the total output, and 52% (\$47.9 million) of the total tax impact.

The *Education & Museums* subsector created the second-largest economic impact of any subsector on the local economy in 2010. Between the employment in this subsector, museum visitors, and student spending, this subsector generated 1,676 jobs, \$65.6 million in labor income, \$105.8 million in value added, \$151 million in output, and over \$20.1 million in tax revenue.

The Cleveland Music Sector's for-profit versus

^{xx} *Direct impact* refers to the initial value of goods and services, including labor, purchased by the Cleveland Music Sector within a defined economic region. These purchases are sometimes referred to as the "first-round effect." *Indirect impact* measures the value of labor, capital, and other inputs of production needed to produce the goods and services required by the music industry (second-round and additional-round effects). *Induced impact* measures the change in spending by local households due to increased earnings by employees working in local industries that produce goods and services for the Cleveland Music Sector and its suppliers.

^{xxi} Labor Income represents wages paid to employees plus proprietors' income. All monetary impact assessments are presented in 2011 dollars.

^{xxii} Value added measures the value of goods and services less the intermediary goods and represents a portion of output.

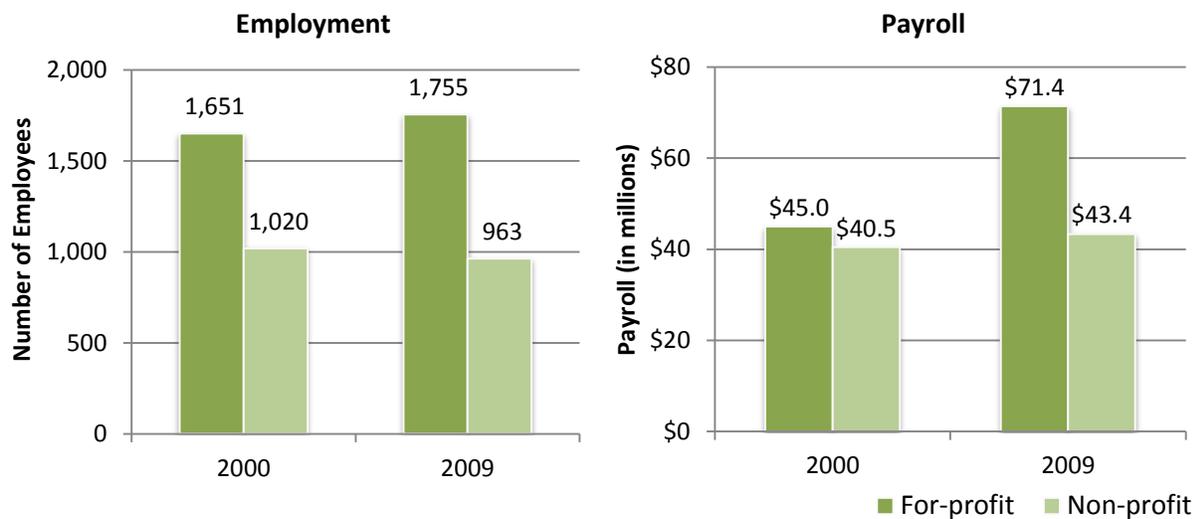
^{xxiii} Output measures the total value of goods and services produced as a result of the activities of the Cleveland Music Sector.

^{xxiv} The IMPLAN model does not separate the tax generated from local governments and the state.

non-profit business models surfaced several times in this study. Interesting to note, the for-profit portion of the Cleveland Music Sector employed more individuals than the non-profit portion in both 2000 and 2009 (Figure 3). In addition, whereas for-profit music employment grew by 104 jobs from 2000 to 2009, non-profit music employment decreased by 57 jobs, widening the overall employment gap between the groups.

The gap in employment between the for-profit and non-profit music sectors is mirrored by a substantial gap in each group’s total number of music establishments. In 2009, the for-profit sector (130 establishments) included 105 more music establishments than the non-profit sector (25 establishments). The gap in for-profit and non-profit music employment can also account for the gap in payroll between sectors.

Figure E-3: For-Profit vs. Non-Profit Sectors in the Cleveland Music Sector, 2000 and 2009



Source: Quarterly Census of Employment and Wages (QCEW)

In 2000, non-profit groups in Cuyahoga County employed only 1,020 versus 1,651 employed by for-profit groups. In addition, while for-profit music employment grew by 104 jobs from 2000 to 2009, non-profit music employment decreased by 57 jobs, widening the overall employment gap between groups. In 2009, for-profit groups employed 1,755 people compared to 963 people employed by non-profit groups. There is also a vast difference in the number of establishments of for-profit and non-profit groups. In 2000, the for-profit group (148 establishments) included 132 more music

establishments than the non-profit group (16 establishments). The establishment gap decreased to 105 establishments by 2009 (for-profit, 130 establishments; non-profit, 25 establishments), but the for-profit group still accounts for several hundred more employees than the non-profit group.

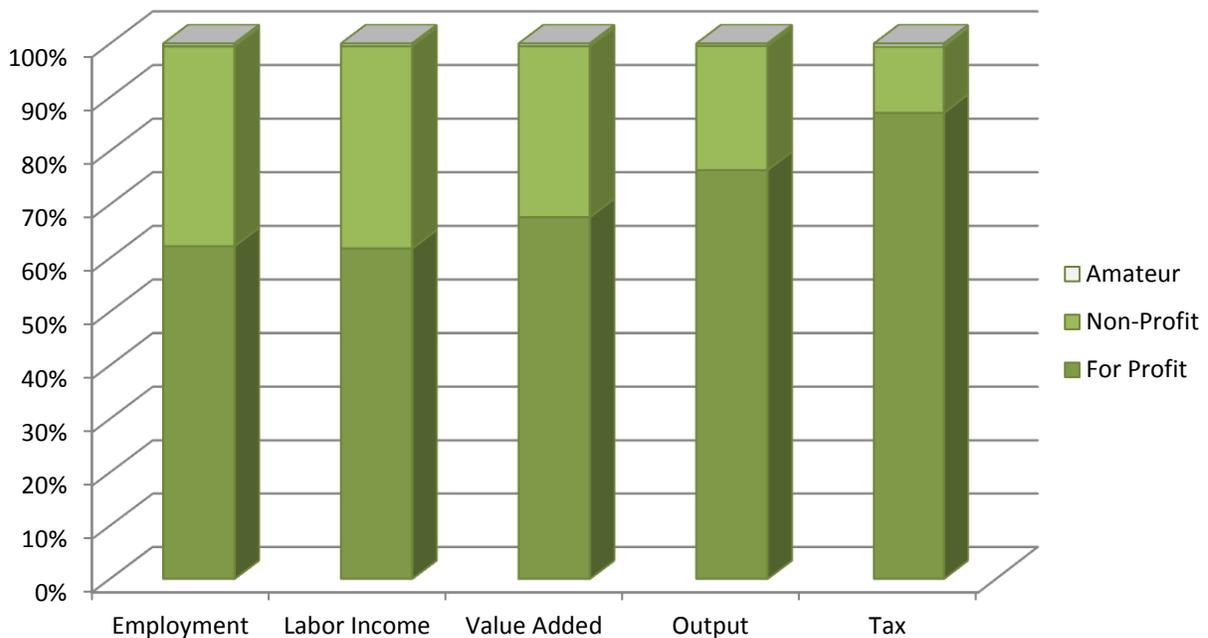
In 2000, the payroll for the for-profit portion of the Cleveland Music Sector (\$45.0 million) exceeded the non-profit portion (\$40.5 million) by approximately \$4.5 million. The payroll gap grew increasingly larger by 2009 with the

payroll of the for-profit music sector (\$71.4 million) having grown to exceed the non-profit sector (\$43.4 million) by approximately \$28 million. The average wages of the non-profit and for-profit music groups in 2009 were \$45,037 and \$40,687, respectively, which resulted in a gap of \$4,350.

Not only did the for-profit business portion of the Cleveland Music Sector grow faster than its non-profit counterpart, it also generated a

greater economic impact on the local economy (Figure 4). The for-profit sector of the Cleveland Music Sector accounted for 62% of the total employment impact (3,863 jobs), 62% of the total labor income impact (\$169.5 million), 68% of the total value added (\$320.5 million), 76% of the total output (\$641.6 million), and 87% of the total tax impact (\$79.8 million). For-profit, non-profit, and amateur sectors' impacts together constitute the total economic impact of the music sector on the regional economy.

Figure E-4: Percentage of Economic Impact of Music by For Profit, Non-Profit, and Amateur Status, 2010



The Cleveland Music Sector creates an economic impact on the local economy not only from the local presence of music industry, but from tourist spending at local music events and performances by local musicians outside Cuyahoga County. In fact, the music sector is a unique sector of the economy in that it actively attracts visitors who spend their money in the

region, thereby boosting the local economy. For example, although this study captured only a fraction of the music events organized in Cuyahoga County in 2010,^{xxv} tourist spending alone at these events generated 12-13% of the

^{xxv} A list of the music venues that provided data on 2010 music events in Cuyahoga County for this economic impact study is included in Chapter 6.

Cleveland Music Sector’s total economic impact on the local economy.

Cleveland musicians perform not only locally but also outside of the region. Although none of Cleveland’s local performers were on Billboard’s 2010 list of top performers who traveled across the country, 73% of local professional and amateur musicians performed regularly outside of Cuyahoga County.^{xxvi}

The employment of the Cleveland Music Sector represented 86% of the sector’s total employment impact (5,352 jobs), 87% of the total labor income and value-added impacts (\$239.2 million and \$412.4 million, respectively), 88% of the output impact (\$736.6 million), and 86% of the tax impact (\$78.8 million) (Table 1). Spending at music events represented between 12% and 13% of the total impact and amateur musicians represented 0.5%-0.6% of the total impact.^{xxvii}

Table E-1: Economic Impact of Music by Employment, Events, & Amateurs, 2010

Subsector	Employment	Labor Income	Value Added	Output	Tax
Employment	5,352	239,199,297	412,366,218	736,563,938	78,779,564
Events	825	33,831,986	59,250,932	99,272,449	12,319,914
Amateur	33	\$1,366,070	\$2,440,624	\$3,935,828	\$541,581
Total	6,210	\$274,397,353	\$474,057,774	\$839,772,215	\$91,641,059

Note: Data inflated to 2011 dollars.

The products of the music industry include not only live performances, but also music records and albums. In 2010, 3.6 million albums were sold in the Cleveland Designated Market Area.^{xxviii} These sales were greater than the album sales in Indianapolis, Pittsburgh, Columbus, and Cincinnati, the four cities used for purposes of comparison in this section of the study.

In addition to its high number of album sales, Cuyahoga County also has an ample supply of musicians. The Cleveland Music Sector’s supply of musicians is commonly characterized as rich

and diverse, due in large part to the region’s low cost of living (especially as compared to other similar-sized metropolitan areas) and the excellent quality of the region’s local artists, events, and music education programs. Strong support is needed to maintain and increase the Cleveland Music Sector’s supply of musicians. However, the interviewees and focus group participants did provide several examples of existing factors detrimental to Cleveland’s supply of musicians, including a lack of funding and weak advertising. The music sector needs to engage its leadership across its sectors and also work with public officials. This can create relationships that will better support and strengthen the current music scene. This could

^{xxvi} A detailed analysis of the import and export of music industry products in the Cleveland Music Sector is located in Chapter 5.

^{xxviii} Data from Nielsen SoundScan, 2010 Overall Album Sales. A Designated Market Area (DMA) is defined as the 50-mile radius around a central city.

^{xxvii} Detailed information on the direct, indirect, and induced impacts of events, employment, and amateurs is located in Appendix 6-3.

mean implementing programs that facilitate collaboration between local artists, promote performances and music-based events to raise public awareness, and seek out additional sources of funding. Unfortunately, a well-rounded supply alone, though advantageous, cannot create an economically dynamic music sector; attention must be paid to cultivating the demand for music as well.

The Cleveland Music Sector has experienced a decrease in the demand for music perform-

CLEVELAND MUSIC INNOVATION

The Cleveland Music Sector is a source of innovation, especially among the younger generations of local musicians. For example, the Cleveland Lottery League, a competition for local bands, was developed and executed by a group of musicians in Cleveland and is now being replicated at the national level. Some bands formed as a result of this competition are continuing to produce and perform new music locally. Policies and programs that encourage the exploration of the boundaries of music and collaboration with other fields may lead to even greater innovation.

There are opportunities in Cleveland for the music sector to innovate in collaboration with other sectors. For instance, there is a growing partnership between the music sector and the medical industry. Cleveland is well-known for the large medical industry that exists within its borders, including prominent and highly-ranked medical institutions like the Cleveland Clinic and University Hospitals. One aspect of the medical

ances due to a variety of factors such as a shrinking population, a decline in disposable income due to the most recent recession, and a smaller number of establishments for music-related events, especially in relation to comparable MSAs.^{xxix} Increased opportunities to perform can be satisfied by a growth in local festivals, home concerts or private parties, and other music-based events. Only when the demand for music and music-related activities grows to meet the supply of musicians can the Cleveland Music Sector truly prosper.

industry, music therapy^{xxx}, has become an established strength of the Greater Cleveland area. Of the 70 accredited education programs in music therapy nationwide, five are located in Ohio.^{xxxi}

Cleveland has a specialization in music therapy education through the Cleveland Music Therapy Consortium, a partnership of the Baldwin-Wallace College Conservatory of Music, Cleveland State University, and The College of Wooster. Students attend classes at these institutions and then complete a six-month

^{xxix} Cuyahoga County and the Cleveland-Elyria-Mentor MSA were compared to the Cincinnati-Middletown, OH-KY-IN MSA; Columbus, OH MSA; Indianapolis-Carmel, IN MSA; and Pittsburgh, PA MSA.

^{xxx} "Music Therapy is an established health profession in which music is used within a therapeutic relationship to address physical, emotional, cognitive, and social needs of individuals. After assessing the strengths and needs of each client, the qualified music therapist provides the indicated treatment including creating, singing, moving to, and/or listening to music." Quote retrieved from <http://www.musictherapy.org/quotes.html>

^{xxxi} The schools are: Baldwin-Wallace College, Cleveland State University, Ohio University, The College of Wooster and the University of Dayton, as reported by the American Music Therapy Association, <http://www.musictherapy.org>

internship and pass a certified exam. This program was the first to require an outside internship and has been so successful that it has been replicated across the country.

With the growing demand for music therapists across the country, this specialization is becoming a successful educational export sector in the local economy. Due to Cleveland's excellent music therapy education programs, students from outside Northeast Ohio come to Cleveland to study. Once educated, therapists are exported from Cleveland and are placed outside the region. Additionally, all of the large health institutions, such as the Cleveland Clinic and University Hospitals, in Cleveland's medical sector use music therapy to treat patients.

Music and manufacturing represent another potential crossover area. Cleveland has a well-established manufacturing sector, including a skilled labor force and considerable industry knowledge, making it an ideal partner in collaboration with Cleveland's strong music sector. One point of collaboration is applying manufacturing skills to produce music instruments and music-related equipment. A good example of this crossover is American Bass, located in Maple Heights. American Bass manufactures premium, high-tech speakers, subwoofers, and amplifiers. American Bass has been actively involved in the sponsoring of

many events over the years where world-class competitors use their products.^{xxxii}

A new addition to the music manufacturers in Cleveland is Gotta Groove Records. Gotta Groove Records is one of the few vinyl pressing facilities in operation today. Its 6,000 square foot facility is located on Superior Avenue in downtown Cleveland. Vinyl records are one of the fastest growing industries of the music sector in recent years. The technicians who produce Gotta Groove vinyl, in addition, are all involved in the music industry outside of their manufacturing work, often as performing musicians.^{xxxiii} There is great potential for additional music manufacturing in the region.

A discussion of music and innovation in relation to Cleveland's music scene must include Ingenuity Fest, a festival that merges art and technology. Visual arts, performance pieces, and multiple musical acts are featured alongside presentations by high tech firms, research universities, and local colleges. One exhibit, *Temple of Tesla*, includes live, original music, theater, and dance all sharing the stage with an enormous Tesla coil. With its strong industries, diverse musicians, and creative denizens, it is only logical that Ingenuity Fest thrives in Cleveland. As Ingenuity Fest redefines cultural festivals, it is a presentation of Cleveland's innovation potential.

^{xxxii} American Bass, <http://www.americanbassusa.com/front/index.aspx>

^{xxxiii} Niesel, J. (2010, October 28). Hot wax: How Cleveland's Gotta Groove Records is riding the vinyl wave. *Fresh Water Cleveland Online*. Retrieved from <http://www.freshwatercleveland.com/features/gottagroove102810.aspx>

CLEVELAND MUSIC SECTOR'S CHALLENGES AND OPPORTUNITIES

Geography

The purpose of this study is to describe the Cleveland Music Sector strictly within the boundaries of Cuyahoga County. Input collected from the interviews and focus groups, however, revealed a consensus among study participants regarding the true size and geography of the music sector. Specifically, Cleveland is seen by many as the driver and signature name for the music sector that extends far beyond Cuyahoga County.

The general term “Northeast Ohio” is used to describe Cleveland and its music sector. In addition to Cleveland, the Akron-Canton area was most frequently included as part of the region making up the local music sector. Reaching beyond Cuyahoga County, the borders of the Cleveland Music Sector were described as extending as far south as Akron-Canton, Lorain-Oberlin to the west, and Lake County to the east. As stated in an interview, “Working musicians will go to other areas like Mentor, Lorain, and Elyria for gigs. It is at least a five-county area.”

As part of the Cleveland Amateur Musician Survey, respondents were asked to identify the locations where they normally perform; specifically, they were asked whether the locations were within Cuyahoga County, outside Cuyahoga County but within the Northeast Ohio (NEO) region,^{xxxiv} outside of the NEO region but in the state of Ohio, in states other than Ohio, or internationally. Participants most often

responded that they play within Cuyahoga County (32%) and outside Cuyahoga County but within the NEO region (26%). This reiterates the fact that the Cleveland Music Sector expands beyond Cuyahoga County into surrounding regions.

The Cleveland Music Sector was also defined by the location of music schools including Oberlin College, University of Akron, Kent State University, Youngstown State University, and all the Cleveland music schools. One focus group participant said, “Akron, Kent, and Canton are connected to Cleveland.” To reinforce this argument, another interviewee mentioned that one of the attractions of the Cleveland music education scene is the possibility of music students and graduates playing with prominent musicians not only from the Cleveland Orchestra, but from many classical ensembles located in the region. The Greater Cleveland region has more orchestras regionally located than comparable economic areas. Moreover, some of our music graduates find their first jobs in one of the regional orchestras, including CityMusic, The Ohio Philharmonic Orchestra, The Cleveland Chamber Symphony, Apollo’s Fire, Akron Symphony, The Canton Symphony *Orchestra* & Chorus, and the Warren Philharmonic Orchestra. Graduates also find employment in orchestras located in neighboring metropolitan areas, including Ohio’s Dayton Philharmonic Orchestra, The Clermont Philharmonic Orchestra, Columbus Symphony, Toledo Symphony, Erie Philharmonic, Central Ohio Symphony, Southern Ohio Symphony Orchestra, and the Springfield

^{xxxiv} Northeast Ohio was identified in the Cleveland Amateur Musician Survey as three metropolitan areas with the central cities of Cleveland, Youngstown, and Akron.

Symphony Orchestra.

Many artists are frequently associated with Cleveland even though they are from surrounding counties. The Black Keys were a repeated example illustrating the Cleveland Music Sector. They have become somewhat synonymous with the Cleveland music scene despite coming from Akron. In fact, their first *gig* was at Cleveland's Beachland Ballroom.

Therefore, Cleveland is the base for the music sector due to its size and volume of philanthropy. In addition, large institutions such as The Cleveland Orchestra, Playhouse Square, and the Rock and Roll Hall of Fame and Museum, all of which are located in the city, have grounded Cleveland as the center of a broader regional music network.

Fragmentation

A common theme in the interviews and focus groups was the fragmentation of the Cleveland Music Sector. Many of those interviewed described the Cleveland Music Sector as disjointed and scattered. They believed that while the region is filled with talented individuals, they are not organized or united in a meaningful way and face challenges in connecting with others.

Several opportunities emerged during the interviews and focus groups to address this challenge. Artists frequently spoke of the need for the music sector to form a dedicated support organization for musicians where they could find relevant information and resources for musicians in Cleveland. There is also a demand for the sector to develop more structured networking opportunities for

A key opportunity that this challenge presents is how the Cleveland Music Sector can more fully embrace its role as the anchor of the Northeast Ohio music scene and promote a sense of regional collaboration versus competition for musical acts and tourists. Local Cleveland artists regularly commute to surrounding counties for steady work and musicians from suburban counties routinely include the city of Cleveland in their work travel. Although this study focused on Cuyahoga County, no sector is insulated against regional forces. For this reason, the Cleveland Music Sector should consider regional voices when thinking about strategies for repositioning itself nationally. Without a regional focus, the sector would alienate a great deal of talent and business that is clearly associated with Cleveland's music scene.

musicians, such as a "music house" could be created as a physical space where musicians could rehearse and collaborate together. Within this space, musicians and other industry professionals could be invited to offer guidance and professional development assistance for local musicians. Additional support musicians desired was related to developing business skills to bring their art to market as well as marketing and exposure assistance; specifically, musicians asked for help developing electronic press kits. Focus group participants also identified some key infrastructure that the sector should focus on developing including booking agencies, investment capital firms, and entertainment lawyers.

Interviewees also called for more collaboration between existing music organizations. One

option is for the sector to identify a “Music Czar” who could guide the vision of the Cleveland Music Sector, which would allow all organizations to work toward a common goal. Another is for the music sector to develop a comprehensive website to promote the full scope of the Cleveland music scene.

Finally, many people feel Cleveland needs to be (re)branded as a “music city” to be counted with the likes of Austin, Memphis, Nashville, and Portland. However, merely launching an expensive branding campaign that has little impact on the way people experience a place will fail quickly. Instead, the Cleveland Music Sector should unite around a common goal or cause and strategic vision for its future. Using this as a guide, the sector could actively work to elevate its causes on the public agenda. A strategic approach would also permit the sector to define and delineate what is distinct about Cleveland music and capitalize on its strengths.

Cities in the 21st century need to be relevant, engaging, and interesting to attract and retain people. More than ever, places are commodities in which people choose to live, work, or visit.^{xxxv} There is a need for a story about the city (such as how Cleveland became the birthplace of rock and roll) that is backed up by

Public Policy

Research completed by economist Joseph Cortright suggests that a region’s preferences and behaviors influence a region’s economic

^{xxxv} Holcomb, B. (1993). Revisioning place: De- and reconstructing the image of the industrial city. In G. Kearns & C. Philo (Eds), *Selling places: The city as cultural capital, past, and present* (pp. 133-143). Oxford, England: Pergamon Press.

a built environment (events and venues like Ingenuity Fest and The Parkview). Cities have to have a positive street culture and offer something “cool” to visitors.^{xxxvi}

One way to ensure that music stays a vital part of the fabric of Cleveland is by supporting local musicians. As one participant put it, “Going to see live music should be part of the culture in Cleveland.” If Cleveland cannot support its musicians, the musicians will not support Cleveland. Staying in Cleveland and keeping talent here should be a true sign of success in the Cleveland Music Sector.

While there are great success stories in Cleveland, creating more innovative events and venues will serve to improve the image of the city from the bottom up. Events, places and businesses like the Lottery League, the Beachland Ballroom and Tavern and Gotta Groove Records create a buzz that travels quickly on today’s information highway to an untapped group of potential visitors and residents. By celebrating what is distinctly Cleveland in its music offerings, a reputation is created which can lead to music being a driving force in the image, and ultimately the brand, of Cleveland.

activity.^{xxxvii} His research has helped validate the concept that making a place distinctive is critical for both tourism and residents’ quality of life.

^{xxxvi} Jensen, O. B. (2007). Culture stories: Understanding cultural urban branding. *Planning Theory*, 6(3), 211-236.

^{xxxvii} Cortright, J. (2002). The economic importance of being different: Regional variations in tastes, increasing returns, and the dynamics of development. *Economic Development Quarterly*, 16(1), 3-16.

Fortunately for Cleveland, the vibrant music sector gives the city a sense of place. Unique, independent venues and local musicians differentiate Cleveland from other metropolitan areas.

Scholarly literature has detected strong relationships between regional economies and artistic activity, and has argued for increased support of the arts and culture sector. Ann Markusen and David King's *The Artistic Dividend: The Arts' Hidden Contributions to Regional Development* documents how attracting and retaining artists can contribute to broader regional economic outcomes. Beyond economics, a vibrant arts and culture scene is a locational amenity that can attract the coveted group of young, educated professionals. This group frequently decides where to live based on a city's amenities, and then searches for jobs. The following examples of public support for music and other arts in different cities could serve as guidance to help the Cleveland Music Sector address its needs and develop more support for local musicians and music venues.

Portland, Oregon's music scene was an important factor in its ability to attract educated young people, even as its unemployment rate climbed above the national average.^{xxxviii} Talented workers want to live in cities and neighborhoods where they feel engaged. Live music is one thing that connects people to their communities. Portland's Regional Arts and Culture Council delivers a range of support to local artists with several sources of public funding. A variety of grants are available including general support grants to

organizations, project grants for organizations and individual artists, and professional development grants for artists and arts administrators. In addition to funding, the Regional Arts and Culture Council provides comprehensive resources to artists including Art Spark - a regular event for artists and art supporters to meet, mingle, and network. The Council's website provides information about hundreds of arts organizations, groups, and services for artists as well as information about current auditions, calls for artists, job postings, educational opportunities, and artists' residencies. The Council also oversees a leadership development program in the arts community.^{xxxix}

Austin, Texas, which is renowned for its live music scene, incorporates arts and culture policy directly into its economic development office at city hall. Austin's Economic Growth and Redevelopment Services Office includes: Cultural Arts Division; Cultural Funding Programs; Art in Public Places; Emerging Technology Program; and the Austin Community Cultural Plan. Under Cultural Funding programs, the city of Austin has a Creative Industries Loan Guarantee Program to help individuals, non-profits, and companies involved in music, film, art, and technology secure conventional funding. Another program, Art in Public Places, requires 2% of all capital budgets to be spent on art for any construction project. Through this project, art has been incorporated throughout the city of Austin. Maps and guides to Austin's public art displays are available on the city website. It should be noted that even in Austin there is concern about the survival of the live music industry, its artists, and venues. Growing cost of living, a booming population, decreasing audiences at many music venues, traffic and parking

^{xxxviii} Dougherty, Conor. (2009, May 16). 'Youth magnet' cities hit midlife crisis. *Wall Street Journal Online*. Retrieved from <http://online.wsj.com/article/SB124242099361525009.html>

concerns, and lower pay for Austin musicians add to the problematic vitality of music industry there. Several grassroots organizations have convened to advocate for stronger support of the industry.^{xl}

Philadelphia is another city that has come to understand that “a strong for-profit creative economy is vital to the economic growth of the Greater Philadelphia region.”^{xli} Through Innovation Philadelphia, an economic development organization that services greater Philadelphia, the skills and creativity of the region’s youth have been successfully nurtured as economic development resources. Innovation Philadelphia has established several initiatives to achieve its goal of growing for-profit, creative industries like music production and digital media. These initiatives include the Young Professionals, New Idea Generation, and the Creative Economy Investment Fund. A second example of Philadelphia using its local arts and culture to promote economic growth is the Philadelphia Cultural Fund. The mission of this non-profit, city-funded corporation is “to support and enhance the cultural life and vitality of the city of Philadelphia and its residents.”^{xlii} The fund awards grant money to provide support for existing, Philadelphia-based arts and culture institutions while also encouraging the involvement of residents in the Philadelphia arts scene by generating new opportunities.

Minneapolis also strongly supports its arts and culture communities as part of its economic development strategy. In the city of Minne-

apolis, the Department of Community Planning and Economic Development Planning houses Cultural Affairs and works closely with the Arts Commission. Together, these departments created the Minneapolis Plan for Arts and Culture, a 10-year strategic plan that defines the role of the city in supporting arts and culture. Additionally, in the Twin Cities, the McKnight Foundation, in collaboration with the Walker Arts Center, developed the website mnartists.org. This website is a database of Minnesota artists and arts organizations of all genres. The website serves as a meeting place for all Minnesota artists and a marketplace for their art. The site provides opportunities for the public to discover new artists and potentially patronize them.

The city of Indianapolis has several programs to support local artists. The Arts Council of Indianapolis runs two artist fellowship programs. The Creative Renewal Arts Fellowship Program supports established artists in the community and the Robert D. Beckman Jr. Emerging Artist Fellowship helps to launch “up and comers” in the creative community. The Emerging Artist fellowship has two components.^{xliii} First, artists are given financial support to develop their work. Second, the program provides participants with a unique professional experience typically reserved for artists further into their careers. Fellows are introduced to experiences, connections, and relationships with arts institutions and other professional artists in central Indiana. In addition to the fellowships, Indianapolis has an extensive artist database of 600 local artists that can be used by consumers or artists.

Some Ohio cities have strong support for the

^{xl} Save Austin Music, <http://www.saveaustinmusic.com/>

^{xli} Innovation Philadelphia, <http://www.innovationphiladelphia.com/initiatives/creative-economy-fund.aspx>

^{xlii} The Philadelphia Cultural Fund, <http://www.philaculturalfund.org/about/mission/>

^{xliii} Arts Council of Indianapolis, <http://www.indyarts.org/>

arts. In the past, the city of Cincinnati had direct grants for artists, but that program was halted as a result of the economic downturn. The Fine Arts Fund provided crucial support for large, established arts organizations and, more recently, for smaller, emerging arts organizations. In 2010, however, the Fine Arts Fund underwent a transformation to become more responsive to the community's needs. The organization has re-launched as ArtsWave^{xliv} with a mission to create community through the arts by connecting people and creating vibrant neighborhoods. The organization's new goal is "to be a leader and a regional catalyst that works to advance the vitality and vibrancy of Greater Cincinnati by mobilizing the creative energy of the entire community."

The city of Columbus uses a portion of its hotel/motel tax to fund arts and culture grants administered by the Greater Columbus Arts Council, which has two distinctive programs to support local artists. The first program, the Opportunities for Artists (OPPArt), is a monthly series of networking that includes professional development workshops, roundtable discussions, and social events to connect individual artists and further their careers. The second program for artists is the Individual Artist Fellowships. This program provides unrestricted funding to artists for one year in the form of direct grants. Fellowships have been available in a range of disciplines including: visual arts, crafts, media arts, literature, music composition, choreography, film/video, and playwriting.^{xlv} There are also a variety of funding opportunities available to artists and arts and culture organizations through the Ohio Arts

^{xliv} ArtsWave, <http://www.theartswave.org/>

^{xlv} Greater Columbus Arts Council, <http://www.gcac.org/grants-services-for-artists/>

Council.^{xlvi}

Locally, financial support for arts and culture is one of the nation's top five sources of local government support for the arts. In 2006, Issue 18 passed in Cuyahoga County as a ballot initiative. This groundbreaking legislation levied a 1.5 cent per cigarette tax for 10 years to create a "significant and sustainable stream of local public support for the county's widely celebrated arts and cultural assets."^{xlvii} Cuyahoga Arts and Culture (CAC), which administers this public funding, has awarded more than \$65 million to 150 arts organizations since 2006. CAC has a fruitful partnership with the Community Partnership for Arts and Culture (CPAC), which has resulted, among other things, in the creation of the Creative Workforce Fellowship. The fellowship, funded by CAC and administered by CPAC, provides \$20,000 to 20 outstanding artists in a variety of disciplines each year. CPAC views the fellowship as "a targeted investment in the careers of individual artists."^{xlviii} Beyond financial support, local musicians can attend CPAC's Artist as an Entrepreneurship Institute (AEI), which is an artist-focused course designed to provide the tools artists need to hone their business skills. The course covers all aspects of developing an artistic business, from marketing to book-keeping and accounting. Another local resource for musicians is the COSE Arts Network, which is a network of professional artists and arts-based business owners offering professional development resources, education and net-

^{xlvi} The Ohio Arts Council, <http://www.oac.state.oh.us/>

^{xlvii} Cuyahoga Arts and Culture, 2009 Report to the Community. Retrieved from http://www.cacgrants.org/downloads/CAC_annual_report_2009.pdf

^{xlviii} Community Partnership for Arts and Culture, 2009-2010 Annual Report. Retrieved from http://www.cpacbiz.org/ftp_file/10-11/AnnualReport09-10.pdf

working events, health benefits programs and business savings to those in the creative industries.

These local initiatives are available to serve the broad needs of artists from a wide variety of disciplines. However, the participants in this study expressed that an opportunity existed for the music sector to develop greater leadership

among its ranks. Mobilized representatives from the music sector would be well-positioned to collaborate and work together to develop and advocate for more music-specific support services. Additionally, this group would be a proactive public voice for the sector that would be able to catalyze and unite its distinct segments.

CELEBRATING HISTORY, EVOLVING FOR THE FUTURE

Cleveland was known as one of the most prominent music cities in the 1960s, and people still want to compare it to what it once was. This argument was repeatedly made during the interviews, focus groups, and the Cleveland Amateur Musician Survey. Cleveland's music scene has changed since the 1960s, prompted by several factors outside of local control.

The music industry, like other industries, has changed and adapted over time. Once reliant on the production of vinyl records, cassettes, and CDs, today's music industry is based on digital technology. The advent of iTunes and YouTube have made it increasingly simple to be a self-promoting musician. For this reason, few cities have the resources available to continue record production. Musicians find themselves heading to major cities like New York, Los Angeles, Chicago, and Nashville when the time comes to produce a record. Cleveland musicians are not an exception to this new way of life.

The music industry is shifting to an Internet-based business. It has become much more difficult to compete for an audience when thousands of musicians are at the consumer's disposal online. Artists can post their music

online, free of charge, and, as one interview participant suggested, it merely takes the right person to hear your music online in order to get a record deal. Some nationally famous acts found fame through the video website YouTube. In order for Cleveland to compete, the Music Sector must work with local public leaders to advocate for support to increase the number of record labels and representation available in the city. If this were to happen, a musician would not feel the need to resort to online distribution or relocation to another city. This sentiment was best echoed by an interviewee: "It is natural for an artist to be where the distribution is. New York City is a popular destination for this reason; it has an abundance of record companies." It is important to note that Cleveland has the capability to change and compete in a new music industry. Enough vision, infrastructure and, drive exists in Cleveland to once more achieve a thriving music sector.

The current economic climate has also affected the music industry. The recession has significantly diminished the amount of money people can budget for entertainment, which has decreased ticket sales, attendance, and

performance opportunities for artists. During difficult economic times, it is becoming increasingly rare to make a living as a musician; however, this is not strictly a Cleveland issue. The Tri-C Jazz Fest can serve as an example of the impact of economic downturn. In 2010, the Jazz Fest celebrated its 30th anniversary. Even with this special event, the fest experienced a decrease in ticket sales from 2009. People are becoming more conscious of their spending habits, resulting in reduced ticket sales.

The recession has particularly affected small to mid-sized venues, causing many of them to close. In addition, venues are not booking a sufficient number of local acts. National names are needed to draw audiences to events and venues. Consumers may now be more willing to attend a single showing of a national act rather than several concerts of local musicians.

Attendance has also fallen because of a dwindling population and urban sprawl. Fewer people live in the city of Cleveland and people from suburbia are increasingly less likely to travel downtown for events. For this reason, musicians and audiences are beginning to turn to unconventional performance spaces such as converted warehouses, libraries, and sacred spaces. Increasing the diversity of physical venues for music shows not only illustrates the effect of the recession, but also speaks to the versatility of the Cleveland Music Sector. For example, the East Cleveland Public Library and the Lakewood Public Library are known as alternative performance spaces that host free concerts. Conventional performance venues

are suffering through the recession, but these alternative spaces are providing opportunities for audiences to continue to enjoy music.

Apollo's Fire Cleveland Baroque Orchestra is a classical ensemble whose strong innovative components have drawn audiences to its performances for over 20 years. An Apollo's Fire performance is much quieter than a full orchestra, making for a more intimate affair. They also eliminate the "invisible barrier" between musicians and its audiences, performing in alternative spaces with close proximity to listeners, often with no elevated stage. The music can resonate with people in an emotional and spiritual way, which is the artistic philosophy of Apollo's Fire.

As the music industry continues to change, the level of difficulty to maintain a music career is similar in most places, especially throughout the Midwest. Artists must work several jobs to afford their living expenses. Many musicians in Cleveland work as performing artists, teachers, and in music sales. Fortunately, the cost of living in Cleveland is more affordable than in other cities of its size, which attracts many musicians who use Cleveland as a home base and commute to performances outside of the region. Based on its strengths, Cleveland is positioned to reinvent itself within the changing music industry, and has an opportunity to surpass traditional music cities and once more become a music innovator, whether it is in music and medicine, music and manufacturing, or any other music endeavor.

TYOLOGY AND TREND ANALYSIS OF THE CLEVELAND MUSIC SECTOR

INTRODUCTION

This chapter of *Remix Cleveland* is designed to achieve two objectives. The first objective is to create a definition and initial typology of the Cleveland Music Sector based on classification of music industry products by industry affiliation. This will be achieved by using the U.S. Census Bureau's North American Industry Classification System (NAICS) and its industry codes. The second objective is to describe the economic trends of the Cleveland Music Sector during the period from 2000 to 2009. To achieve a comprehensive overview of the

Cleveland Music Sector, the sector will be analyzed from a number of different perspectives.

Please note for the purposes of this report that the term "Cleveland Music Sector" refers geographically to the entirety of Cuyahoga County, Ohio, not just the city of Cleveland. A more specific, industry-based definition of the Cleveland Music Sector will be provided in the following section.

DEFINING THE CLEVELAND MUSIC SECTOR

The first step in defining the Cleveland Music Sector was to identify and collect the NAICS codes of industries that are involved both with music and music-related activities. This identification and collection process was done in two steps. First, a literature review was completed of studies analyzing music sectors in other metropolitan regions. From these reports, a set of music-related NAICS codes was obtained. Second, a list of music-related keywords was assembled, which was used to search both the Quarterly Census of Employment and Wages (QCEW) database (also called the ES202 database) and the U.S. Census

Bureau's NAICS website¹ to further identify music-related NAICS codes.

The preceding steps yielded a total of 45 unique music and music-related NAICS codes. Of those 45, all the establishments (companies) in 10 NAICS codes were determined to be completely related to music. These 10 NAICS codes are listed in Table 1-1. The additional 35 NAICS codes were identified as encompassing both music-related and non-music-related establishments. As a result, the establishments in these 35 NAICS industries were examined individually to determine whether or not each

¹ United States Census Bureau, North American Industry Classification System (NAICS), <http://www.census.gov/eos/www/naics/>

belonged to the music sector. The importance of distinguishing between the two types of NAICS codes will be addressed later when

analyzing the Cleveland Music Sector as shares of other regions.

Table 1-1: Industry Sectors Encompassing All Music-Related Establishments

NAICS Code	Definition
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Producing
339992	Musical Instrument Manufacturing
451140	Musical Instrument and Supplies Stores
451220	Prerecorded Tape, Compact Disc, and Record Stores
512210	Record Production
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
711130	Musical Groups and Artists

In order to simplify the trend analysis of the Cleveland Music Sector and minimize the need for data suppression,² the 45 music NAICS codes were categorized into eight subsectors of industries: *Education & Museums, Manufacturing, Musicians, Promoters, Recording & Publishing, Retail, Service Providers,* and

Wholesale. Table 1-2 below defines the eight subsectors by the NAICS codes included in each group.

For a brief description of the industries included in each of the 45 music and music-related NAICS code, see Appendix 1-1.

² The ES202 database suppresses information in cases where the data of individual companies could be revealed.

Table 1-2: Music Subsectors by NAICS Code

NAICS Code	Definition
Education & Museums	
611610	Fine Arts Schools
712110	Museums
Manufacturing	
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
339992	Musical Instrument Manufacturing
Musicians	
711110	Theater Companies and Dinner Theaters
711130	Musical Groups and Artists
711510	Independent Artists, Writers, and Performers
Promoters	
425120	Wholesale Trade Agents and Brokers
511110	Newspaper Publishers
515111	Radio Networks
515112	Radio Stations
541840	Media Representatives
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
722110	Full-Service Restaurants
722211	Limited-Service Restaurants
722410	Drinking Places (Alcoholic Beverages)
Recording & Publishing	
512110	Motion Picture and Video Production
512210	Record Production
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
541430	Graphic Design Services

NAICS Code	Definition
Retail	
443112	Radio, Television, and Other Electronics Stores
451110	Sporting Goods Stores
451120	Hobby, Toy, and Game Stores
451140	Musical Instrument and Supplies Stores
451220	Prerecorded Tape, Compact Disc, and Record Stores
452990	All Other General Merchandise Stores
454111	Electronic Shopping
Service Providers	
484210	Used Household and Office Goods Moving
518210	Data Processing, Hosting, and Related Services
522130	Credit Unions
524126	Direct Property and Casualty Insurance Carriers
532299	All Other Consumer Goods Rental
541519	Other Computer Related Services
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists
811490	Other Personal and Household Goods Repair and Maintenance
813319	Other Social Advocacy Organizations
813410	Civic and Social Organizations
813930	Labor Unions and Similar Labor Organizations
Wholesale	
423690	Other Electronic Parts and Equipment Merchant Wholesalers
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers
423990	Other Miscellaneous Durable Goods Merchant Wholesalers

TRENDS IN THE CLEVELAND MUSIC SECTOR

This section of the chapter analyzes the economic trends of the Cleveland Music Sector from 2000 to 2009. Four measures of economic activity were used in the analysis: employment, number of establishments, payroll, and average wages. Analysis of *employment* trends provides information on local jobs in the music sector.³ The *number of establishments* counts the individual locations of businesses and captures their different functions. Analysis of *payroll* trends describes the scale of the Cleveland Music Sector in different regional economies and can be viewed as a proxy for value-added output or for the total size of an industry or group of industries. Finally, *average wages* are calculated as payroll divided by employment and estimate the average annual wages of each

industry within the music sector.

The trends of the Cleveland Music Sector are measured and discussed in four different ways. First, the Cleveland Music Sector is measured as a single cluster and the trends of the music sector as a whole are described. Second, the Cleveland Music Sector is analyzed by subsectors (Table 1-2). Third, the Cleveland Music Sector is classified according to the for-profit/non-profit status of the establishments that populate the sector and the trends within both groups will be discussed. Finally, the Cleveland Music Sector is analyzed as shares of other regional economies including Cuyahoga County, the state of Ohio, and the United States.

The Cleveland Music Sector as a Cluster

EMPLOYMENT

Total employment in the Cleveland Music Sector grew from 2,670 in 2000 to 2,718 in 2009 with significant fluctuations during these 10 years. Despite a slight decrease of 64 jobs from 2002 to 2003, the Cleveland Music Sector yielded a total net increase of 363 jobs (13.6%) from 2000 to 2007 (Figure 1-1). A substantial decrease in music employment began at the onset of the recession in 2007. From 2007 to 2009, the Cleveland Music Sector lost 315 jobs, or 10.4% of its total employment. As a result, the Cleveland Music Sector gained a net total of 48 jobs (1.8%) from 2000 to 2009.

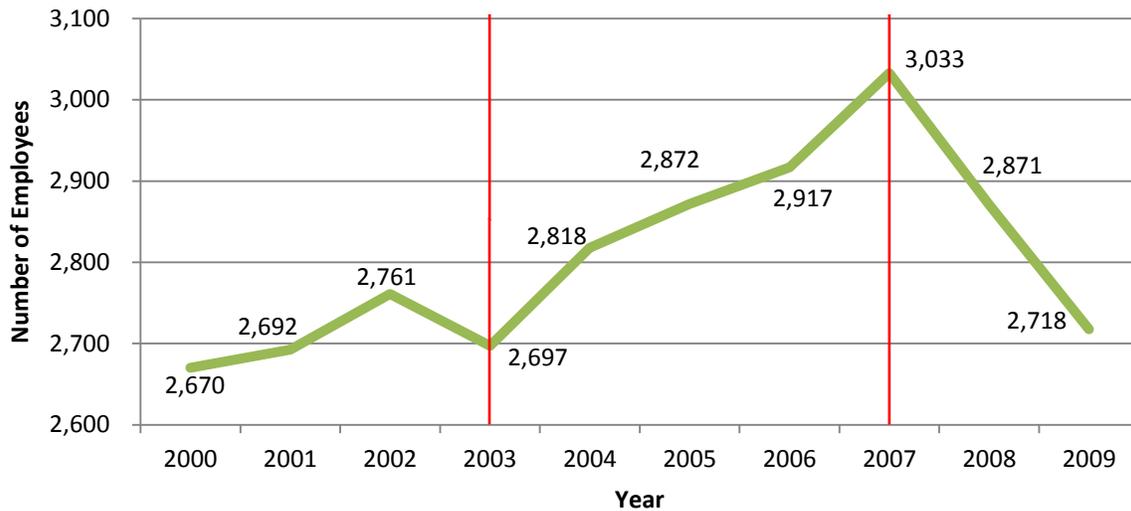
The employment trends of the Cleveland Music Sector can be seen best by dividing the 10-year study period (2000 to 2009) into three distinct periods of time, as represented by the red lines intersecting Figure 1-1. The first period of time, 2000 to 2003, includes the 2001 recession. During this period, music employment remained relatively stable; a small increase in employment took place from 2000 to 2002, but employment declined from 2002 to 2003. During the second period of time, 2003 to 2007, employment grew substantially in the Cleveland Music Sector. Finally, during the third period of

³ The database does not differentiate between full-time and part-time employment or among low-skill, low-paying jobs and high-skill, high-paying jobs within each industry.

time, 2007 to 2009, which corresponds with the most recent recession, music employment

largely declined, returning total music employment to a near-2000 level.

Figure 1-1: Music Employment in the Cleveland Music Sector, 2000-2009

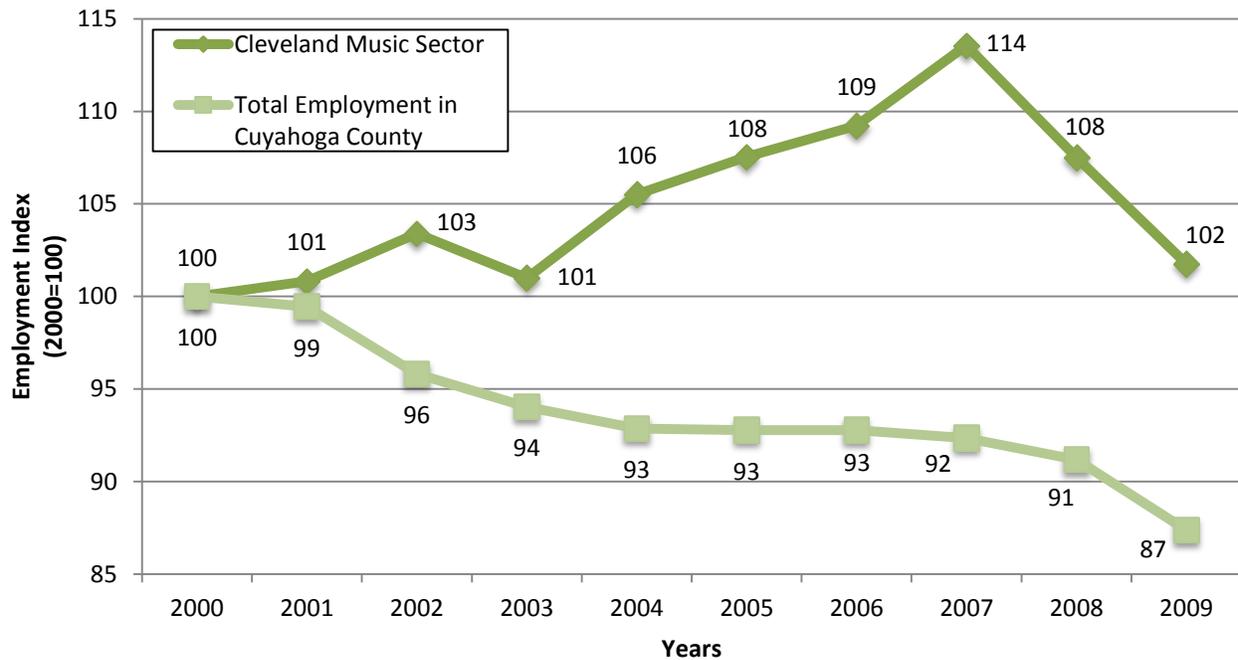


Source: Quarterly Census of Employment and Wages (QCEW)

The outlook on employment in the Cleveland Music Sector is painted very differently when compared to overall employment in Cuyahoga County. The Cleveland Music Sector finished the 10-year study period with a level of employment greater than it had in 2000, despite dynamic growth and decline throughout the 2000 to 2009 time period. By contrast, total

employment in Cuyahoga County steadily and continuously declined from 2000 to 2009 (Figure 1-2). Total employment in Cuyahoga County declined by 100,737 jobs (-12.6%) from 2000 to 2009 while the Cleveland Music Sector gained a net total of 48 (1.8%) jobs over the same time period.

Figure 1-2: Employment Index of the Cleveland Music Sector and All Industries in Cuyahoga County, 2000-2009



Source: Quarterly Census of Employment and Wages (QCEW)

ESTABLISHMENTS

The general trend of growth and decline in the Cleveland Music Sector’s total number of music establishments was sporadic from 2000 to 2009. The Cleveland Music Sector included 164 music establishments in 2000, peaked at 170 establishments in 2004, and ended with 155 establishments in 2009, sustaining a net loss of nine establishments (-5.5%) over the entire 10-year study period.

The fact that the peak in the number of music establishments occurred in 2004, but the peak

in music employment did not occur until 2007, shows that the Cleveland Music Sector’s changes in employment are not similar to the music sector’s changes in number of establishments. The growth in the number of establishments until 2004 reflected the expectations of growth in the music sector during economic upturns and the consolidation or closure of businesses during recessionary years. See Appendix 1-2 for annual establishment data from 2000 to 2009.

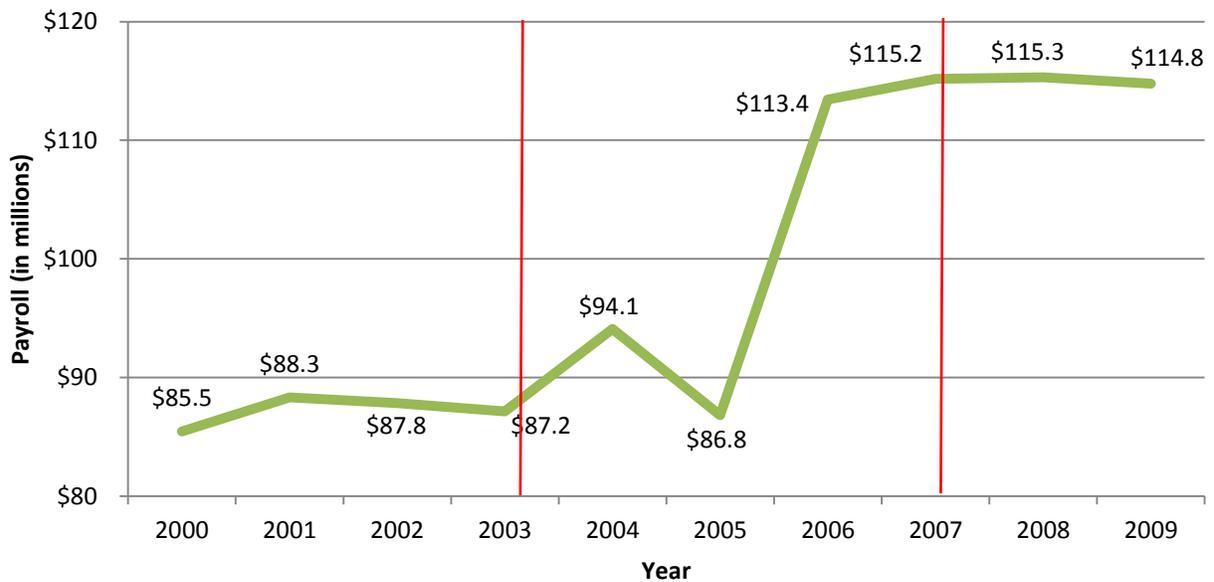
PAYROLL

The Cleveland Music Sector had a total payroll of \$85.5 million in 2000 (Figure 1-3). Measured in 2009 dollars, the music sector's payroll increased by a total of \$29.3 million (34.3%) from 2000 to 2009, yielding a total payroll of \$114.8 million in 2009.⁴

As with music employment, analyzing the Cleveland Music Sector's payroll by three different time periods provides an in-depth view of interesting payroll trends from 2000 to

2009. During the first time period, 2000 to 2003, music payroll remained relatively stable (Figure 1-3). The second time period, 2003 to 2007, featured a substantial growth in payroll. The total increase in music payroll over the study period, 90.8% or \$26.6 million, took place from 2005 to 2006. Finally, payroll during the third time period, 2007 to 2009, remained stable, despite the Cleveland Music Sector's decline in employment during the same time period.

Figure 1-3: Cleveland Music Sector Payroll, 2000-2009



Note: All payroll data have been inflated to 2009 dollars.

Source: Quarterly Census of Employment and Wages (QCEW)

⁴ The ES202 database suppresses information in cases where the data of an individual company could be revealed.

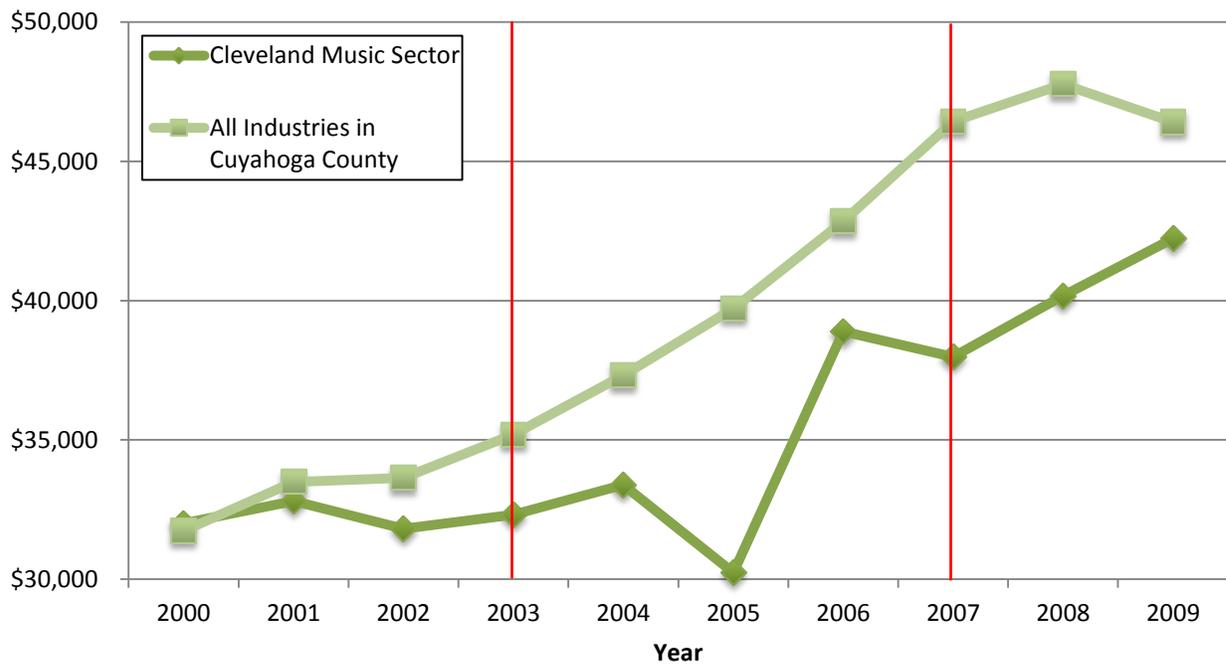
AVERAGE WAGES

The average wages of the Cleveland Music Sector, measured in 2009 dollars, were \$32,004 in 2000 (Figure 1-4). The music sector's average wages increased a total of \$10,224 (31.9%) between 2000 and 2009, though the majority of the growth took place between 2005 and 2009. The Cleveland Music Sector's average wages in 2009 were \$42,228.

Analyzing the Cleveland Music Sector's average wages by the three time periods mentioned above yields trends consistent with those of the music sector's trends in employment and

number of establishments. During the first time period, from 2000 to 2003, average wages remained stable with little or no variation (Figure 1-4). Average wages were much more sporadic during the second time period, 2003 to 2007, with a decrease from 2004 to 2005 followed by an \$8.6 million dollar increase between 2005 and 2006. The main deviation from preexisting trends took place during the third time period, 2007 to 2009. Unlike music employment and establishments, the Cleveland Music Sector sustained continuous growth in its average wages from 2007 to 2009.

Figure 1-4: Average Wages for the Cleveland Music Sector and All Industries in Cuyahoga County, 2000-2009



Source: Quarterly Census of Employment and Wages (QCEW)

In addition to showing the trend of the Cleveland Music Sector’s average wages, Figure 1-3 also includes for comparison purposes the average wages for all industries in Cuyahoga County. As shown, although the Cleveland Music Sector and all the industries in Cuyahoga County had approximately the same average

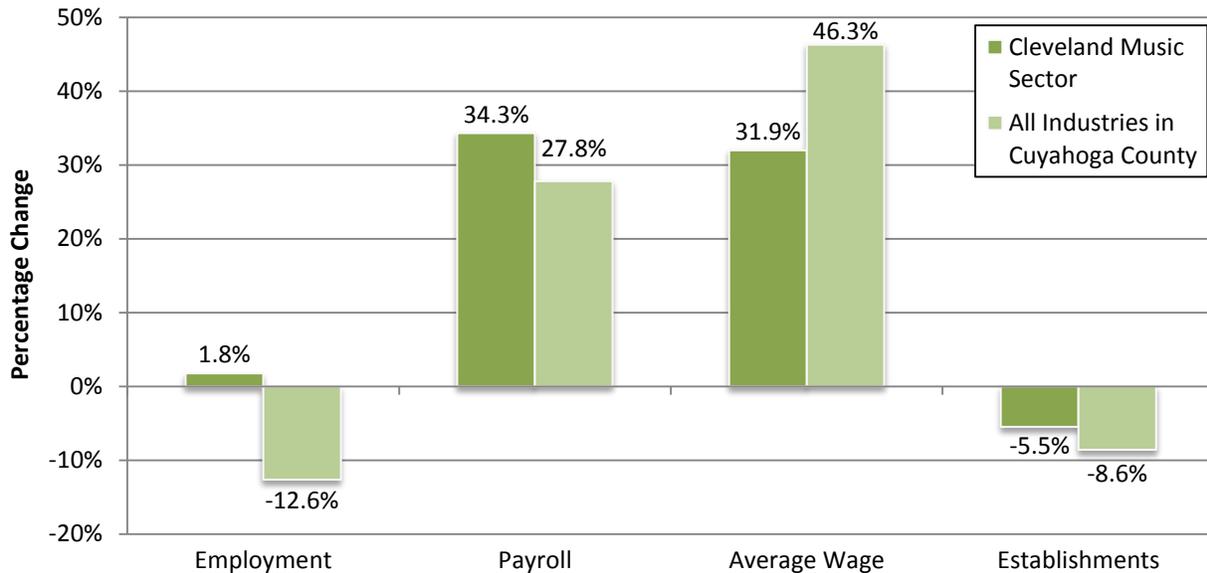
wages in 2000 (\$32,004 and \$31,727, respectively), the average wages for all industries in Cuyahoga County grew continuously between 2000 and 2009 and yielded larger average wages (\$46,408) in 2009. The average wages of all industries in Cuyahoga County grew by 46.3% from 2000 to 2009.

THE CLEVELAND MUSIC SECTOR AND CUYAHOGA COUNTY: A COMPARATIVE OVERVIEW

Figure 1-5 provides a snapshot of the Cleveland Music Sector by showing the composite percentage changes in its employment, payroll, average wages, and number of establishments from 2000 to 2009. Additionally, Figure 1-5

provides the same data for all industries in Cuyahoga County to show how the music sector’s performance compares to the total economy of the county.

Figure 1-5: Percentage Change in Employment, Payroll, Average Wages, and Establishments for the Cleveland Music Sector and All Industries in Cuyahoga County, 2000-2009



Source: Quarterly Census of Employment and Wages (QCEW)

The Cleveland Music Sector showed a higher percentage growth in its payroll (34.3%) than all the industries in Cuyahoga County (27.8%) from

2000 to 2009. In addition, the Cleveland Music Sector showed a higher percentage growth in total employment than all of Cuyahoga County

(1.8% and -12.6%, respectively) from 2000 to 2009, and a smaller percentage loss of establishments than all of Cuyahoga County (-5.5% and -8.6%, respectively) during the same time period. Finally, despite the Cleveland Music Sector's comparatively better performance over the 10-year study period, the average wages for Cuyahoga County as a whole increased more than those of the Cleveland Music Sector (46.3% and 31.9%, respectively).

It is important to comment at this point regarding the music sector's payroll and wages. Interviews conducted for this study with

musicians, educators, community leaders, and other stakeholders within the music industry⁵ suggested that a part of musicians' income might be unaccounted for in the data. Only 20% of all performing musicians surveyed for this study indicated that their entire income is drawn from a single job in the music industry. The overwhelming majority of respondents across genres and business models of their art indicated that part of their income comes from private music lessons outside of their main job. This activity is not captured by ES202, the data of which is based on the records of businesses that have paid employees.

Analysis of the Cleveland Music Sector by Subsectors

EMPLOYMENT

The music subsector with the largest employment in 2000 was *Retail (Music Instruments and Supplies Stores; Prerecorded Tape, Compact Disc, and Record Stores; Electronic Shopping; etc.)* with 728 employees, followed by *Promoters (Wholesale Trade Agents and Brokers; Radio Stations; Media Representatives; Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures; etc.)* with 634, and *Musicians (Theater Companies and Dinner Theaters; Musical Groups and Artists; and Independent Artists, Writers, and Performers)* with 474 employees (Table 1-3). By contrast, the *Wholesale* subsector (*Other Electronic Parts and Equipment Merchant Wholesalers; Toy and Hobby Goods and Supplies Merchant Wholesalers; and Other Miscellaneous Durable Goods Merchant Wholesalers*) had only 43

employees, the fewest of all subsectors. The second- and third-smallest subsectors in terms of employment were *Manufacturing (Audio and Video Equipment Manufacturing; Musical Instrument Manufacturing; and Prerecorded Compact Disc (except Software), Tape, and Record Reproducing)* with 84 employees and *Recording & Publishing (Music Publishers; Sound Recording Studios; Graphic Design Services; etc.)* with 87 employees.

From 2000 to 2009, the *Promoters* subsector grew 80.3% to become the subsector with the largest employment in 2009 (1,143 employees). The *Education & Museums* subsector (*Fine Arts Schools and Museums*) went from having the fourth-largest employment in 2000 (450) to the second-largest in 2009 (571) by growing 26.9%

⁵ Chapter 9 provides a detailed methodology of the initial interviews.

from 2000 to 2009. The *Retail* subsector, which had the largest employment in 2000, fell to the third-largest employment in 2009. This sub-

sector lost 332 employees or 45.7% of its workforce between 2000 and 2009.

Table 1-3: Cleveland Music Sector Employment by Subsector, 2000-2009

Subsector	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2000-2009	% Change 00-09
Education & Museums	450	396	392	507	506	559	492	505	533	571	121	26.9%
Manufacturing	84	88	76	52	54	49	51	54	58	49	-35	-41.9%
Musicians	474	643	635	552	517	516	486	461	399	378	-96	-20.2%
Promoters	634	600	753	735	826	962	1,122	1,309	1,238	1,143	509	80.3%
Recording & Publishing	87	91	88	84	96	90	82	75	84	76	-11	-12.6%
Retail	728	739	697	666	685	546	522	484	418	395	-332	-45.7%
Service Providers	171	NA	NA	63	99	109	127	110	106	70	-101	-59.1%
Wholesale	43	NA	NA	37	35	42	35	34	34	36	-7	-16.4%
Total	2,670	2,692	2,761	2,697	2,818	2,872	2,917	3,033	2,871	2,718	47	1.8%

Note: NA means that data has been suppressed due to confidentiality restrictions associated with the ES202 data.

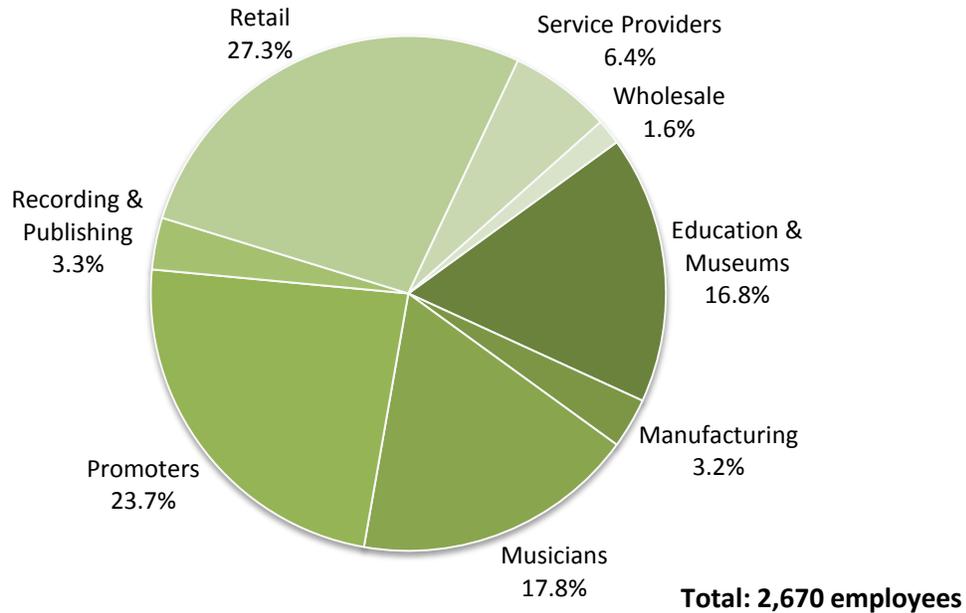
Source: Quarterly Census of Employment and Wages (QCEW)

The *Wholesale* subsector remained the smallest subsector in terms of music employment throughout the 10-year period from 2000 to 2009. This subsector lost seven employees between 2000 and 2009, representing 16.4% of its total workforce. The second-smallest subsector in 2009 was *Manufacturing*, which lost 35 employees or 41.9% of its workforce. Finally, the third-smallest subsector, *Service Providers* (*Data Processing, Hosting, and Related Services; Credit Unions; Direct Property and Casualty Insurance Carriers; Other Computer Related Services; etc.*), represented

the largest percentage loss in employment of any subsector between 2000 and 2009. The *Service Providers* subsector lost 101 employees (-59.1%) during the 10-year study period.

Another way to analyze music employment is by comparing the percentage of total music employment represented by each subsector. Figures 1-6 and 1-7 demonstrate graphically the percentage breakdown of total music employment by subsector for 2000 and 2009, respectively.

Figure 1-6: Percentage of Music Employment by Subsector, 2000



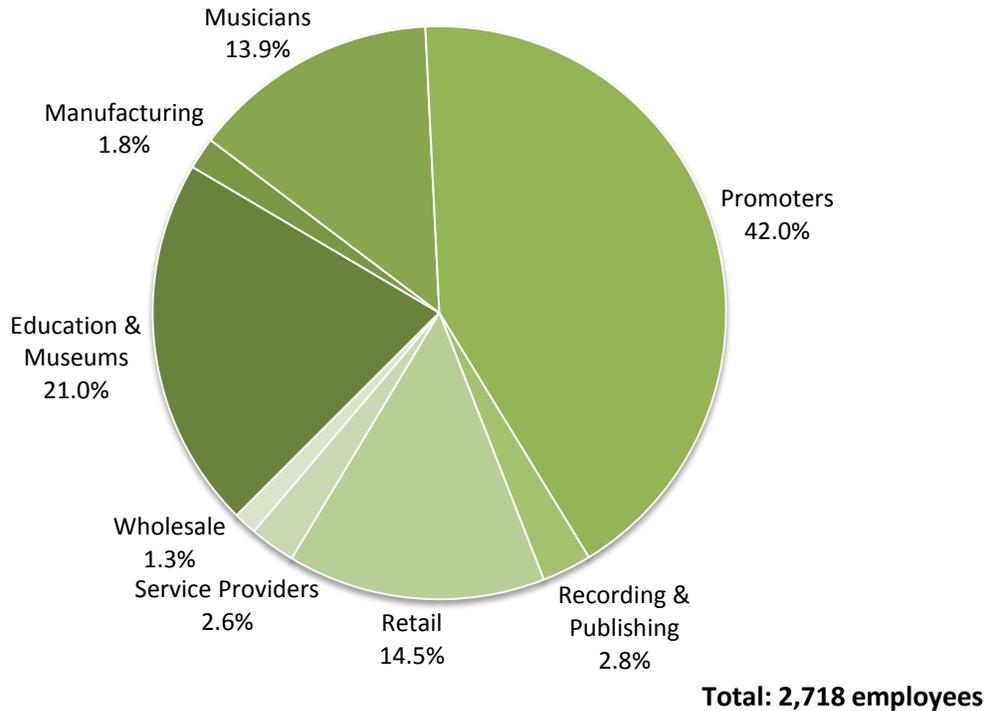
Source: Quarterly Census of Employment and Wages (QCEW)

In 2000, the *Retail* subsector represented the largest percentage of music employment (27.3%) (Figure 1-6). Subsequently, the *Promoters* subsector had the second-largest percentage of music employment (23.7%), *Musicians* had the third-largest percentage (17.8%), and *Education & Museums* had the fourth-largest percentage (16.8%). Conversely, *Wholesale* had the smallest percentage of employment (1.6%), followed by *Manufacturing* and *Recording & Publishing* (each with approximately 3%).

The largest subsector in 2009 was *Promoters*,

which grew from 23.7% of music employment in 2000 to 42.0% in 2009 (Figure 1-7). *Education & Museums* had the second-largest percentage of employment (21.0%), up from 16.8%. All other subsectors declined from 2000 to 2009 in terms of the percentage of total music employment they represented. Both *Musicians* and *Retail* had approximately 14% of total music employment in 2009, the third-largest percentage. *Retail* experienced the largest change in share of employment, decreasing from 27.3% in 2000 to 14.5% in 2009. Conversely, the three smallest subsectors remained consistent from 2000 to 2009.

Figure 1-7: Percentage of Music Employment by Subsector, 2009



Source: Quarterly Census of Employment and Wages (QCEW)

PAYROLL

The *Promoters* subsector, in addition to having the largest music employment, had the largest payroll in 2009 (\$55.5 million) and the largest overall increase in music payroll from 2000 to 2009 (\$34.9 million). *Musicians* and *Education & Museums* had the second- and third-largest payrolls in 2009 (\$26.2 million and \$16.5 million, respectively), and each had a modest overall increase in payroll from 2000 to 2009 (\$1.6 million and \$2.2 million, respectively).

All other music subsectors saw a decline in payroll from 2000 to 2009. *Service Providers* had the smallest payroll in 2009 (\$1.3 million), and the second-largest percentage decrease in payroll from 2000 to 2009 (-47.1%). *Manufacturing* lost the largest percentage of payroll from 2000 to 2009 (-48.1%). Finally, *Retail* had the largest dollar decrease in payroll (-\$5.1 million), which is consistent with its employment loss from 2000 to 2009.

AVERAGE WAGES

The music subsector with the largest average wages in 2009 was *Musicians* (\$69,355), followed by *Recording & Publishing* and

Promoters group (\$50,941 and \$48,573, respectively). Alternatively, *Service Providers*, which experienced the largest employment

percentage loss and second-largest payroll loss from 2000 to 2009, had the smallest average wages in 2009 (\$19,166). *Retail* and *Education & Museums* had the second- and third-smallest average wages with \$20,330 and \$28,845, respectively.

Over the period from 2000 to 2009, the *Musicians* subsector had the largest net dollar increase in average wages (\$17,469), followed by *Promoters* (\$16,133) and *Wholesale* (\$4,702). The *Musicians* and *Promoters* subsectors also had the largest percentage increases in average

ESTABLISHMENTS

The music subsector with the largest number of establishments in 2009 was *Retail* with 45 establishments. *Retail* represented 29.0% of the Cleveland Music Sector's total music establishments in 2009, the largest percentage of all the subsectors. Conversely, *Retail* also had the largest decrease in establishments from 2000 to 2009 with a loss of 39 establishments (-46.4%). This trend is consistent with retail losses sustained by the economy during the two most recent economic recessions.

The *Promoters* subsector had the second-largest number (43) of establishments in 2009. Unlike *Retail*, however, *Promoters* experienced an overall increase in the number of establishments between 2000 and 2009. *Promoters* gained 17 music establishments,

wages from 2000 to 2009 (33.7% and 49.7%, respectively).

By contrast, three subsectors had net dollar decreases in average wages from 2000 to 2009: *Recording & Publishing* (-\$9,967), *Manufacturing* (-\$4,111), and *Education & Museums* (-\$2,936). The *Recording & Publishing* subsector's average wages decreased by 16.4% from 2000 to 2009, the *Manufacturing* subsector's average wages decreased 10.6%, and the *Education & Museum* subsector's average wages decreased 9.2%.

increasing its number by 65.4% from 2000.

The music subsectors with the smallest number of establishments in 2009 were *Wholesale* and *Manufacturing* (4 and 5, respectively). From 2000 to 2009, *Manufacturing* lost four establishments and *Wholesale* stayed relatively consistent, netting an increase of only one establishment.

The employment, payroll, average wages, and number of music establishments for the Cleveland Music Sector in 2009 are summarized in Table 1-4. A more detailed, year-to-year breakdown of the Cleveland Music Sector's employment, payroll, average wages, and number of music establishments can be found in Appendix 1-2.

Table 1-4: Music Employment, Establishments, Payroll, and Average Wages by Subsector, 2009

Subsector	Employment	Establishments	Payroll	Avg. Wage
Education & Museums	571	15	\$16,461,068	\$28,845
Manufacturing	49	5	\$1,706,404	\$34,825
Musicians	378	22	\$26,239,356	\$69,355
Promoters	1,143	43	\$55,502,952	\$48,573
Recording & Publishing	76	11	\$3,871,496	\$50,941
Retail	395	45	\$8,037,072	\$20,330
Service Providers	70	10	\$1,341,652	\$19,166
Wholesale	36	4	\$1,601,880	\$44,912
Total	2,718	155	\$114,761,880	\$42,228

Source: Quarterly Census of Employment and Wages (QCEW)

For-Profit vs. Non-Profit Groups in the Cleveland Music Sector

Each establishment identified as music-related and included as part of the Cleveland Music Sector was defined as either for-profit or non-profit based on its legal status according to GuideStar⁶ and, if applicable, its website. Figure 1-8 compares the for-profit music group to the non-profit music group and shows both groups' employment, number of establishments, payroll, and average wages for 2000 and 2009.

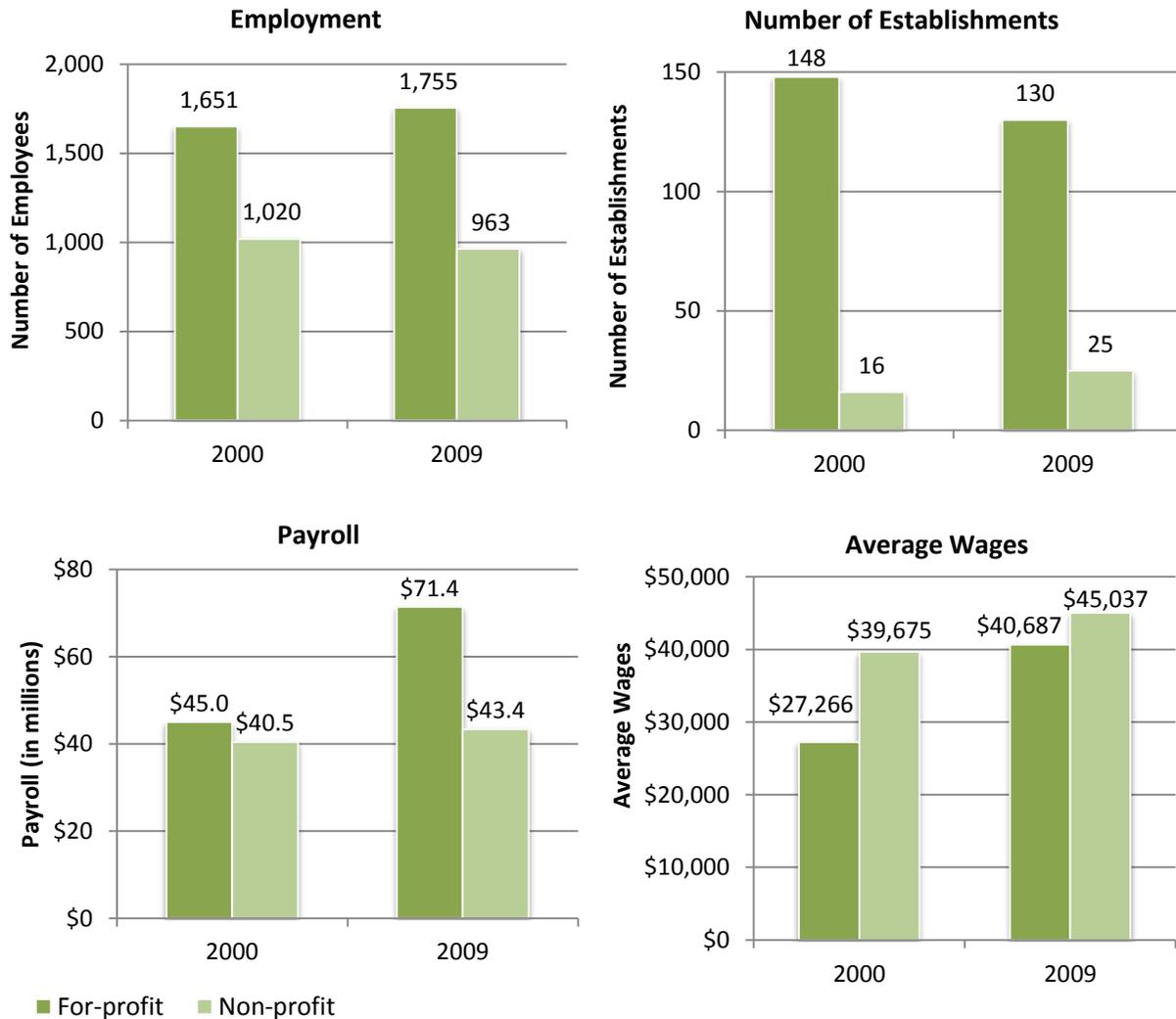
In terms of employment, the for-profit music sector employed more individuals than the non-profit music sector in both 2000 and 2009. In addition, while for-profit music employment grew by 104 jobs from 2000 to 2009, non-profit music employment decreased by 57 jobs,

widening the overall employment gap between groups.

The gap in employment between the for-profit and non-profit music groups is mirrored by a substantial gap in each group's total number of music establishments. In 2000, the for-profit group (148 establishments) included 132 more music establishments than the non-profit group (16 establishments). The establishment gap decreased to 105 establishments by 2009 (for-profit, 130 establishments; non-profit, 25 establishments), but the for-profit group still accounts for several hundred more employees than the non-profit group.

⁶ GuideStar is a 501(c)(3) non-profit organization that gathers and publicizes information about non-profit organizations. GuideStar's website can be accessed at <http://www2.guidestar.org/>.

Figure 1-8: For-Profit vs. Non-Profit Groups in the Cleveland Music Sector, 2000 & 2009



Source: Quarterly Census of Employment and Wages (QCEW)

The gap between for-profit and non-profit music employment can also account for the gap in payroll between sectors. In 2000, the payroll for the for-profit group (\$45.0 million) exceeded the non-profit group (\$40.5 million) by approximately \$4.5 million. The payroll gap grew increasingly larger by 2009 with the payroll for the for-profit music group (\$71.4 million) growing to exceed the non-profit group (\$43.4 million) by approximately \$28 million.

Finally, despite the for-profit group having a larger number of employees, establishments, and payroll than the non-profit group, the non-profit group had larger average wages than its counterpart in both 2000 and 2009. The average wages of the non-profit and for-profit music groups in 2000 were \$39,675 and \$27,266, respectively, which created a gap of \$12,409. The gap closed to \$4,350 in 2009.

The Cleveland Music Sector as Shares of Other Regions

Aspects of the Cleveland Music Sector can be measured against specific industries in Cuyahoga County, the state of Ohio, and the United States. However, the definition of the Cleveland Music Sector must first be adjusted in order to ensure the music sector can be compared properly with the respective industries of other regions.

Previously, when we defined the Cleveland Music Sector by industry, we noted that it

contained 45 unique NAICS codes. Of those 45, all the establishments in 10 NAICS codes were determined to be related to music (Table 1-1). The remaining 35 NAICS codes contained both music and non-music establishments, and each NAICS code underwent an in-depth examination to isolate the portion of establishments that were explicitly related to music. The following analysis uses both the 45- and 10-NAICS code definitions of the Cleveland Music Sector.

SHARES OF THE CLEVELAND MUSIC SECTOR IN CUYAHOGA COUNTY

Table 1-5 below shows the share of the Cleveland Music Sector, defined by all 45 NAICS codes, in the total economy of Cuyahoga County. Overall, the Cleveland Music Sector represented a small portion of Cuyahoga County's total economy in 2009. Specifically, the music sector accounted for 0.39% of the

total employment, 0.47% of the total establishments, and 0.35% of the total payroll of all industries in Cuyahoga County. Although it represents only a small portion of Cuyahoga County's total economy, the Cleveland Music Sector generates a significant economic impact and contributes to local distinctiveness.⁷

Table 1-5: Share of the Cleveland Music Sector in the Cuyahoga County Economy, 2009

	Cleveland Music Sector	All Industries in Cuyahoga County	Share of Cleveland Music Sector
Employment	2,718	697,255	0.39%
Establishment	155	32,776	0.47%
Payroll	\$114,761,880	\$32,358,326,672	0.35%

Source: Quarterly Census of Employment and Wages (QCEW)

⁷ See Chapter 6 for detailed information on the economic impact of the Cleveland Music Sector. See Chapter 7 for case studies that show the music sector's local distinctiveness.

SHARES OF THE 10 INDUSTRIES IN THE CLEVELAND MUSIC SECTOR IN CUYAHOGA COUNTY, OHIO, AND THE UNITED STATES

Table 1-6 presents the Cleveland Music Sector, defined as the industries in the 10 solely music NAICS codes, as a share of the total economies

of Cuyahoga County, the state of Ohio, and the United States in 2009.

Table 1-6: Share of the 10 Industries in the Cleveland Music Sector in the Cuyahoga County, Ohio, and United States Economies, 2009

	Cuyahoga County	Ohio	United States
Employment	0.12%	0.10%	0.12%
Payroll	0.12%	0.08%	0.11%
Establishment	0.23%	0.17%	0.21%

Source: Quarterly Census of Employment and Wages (QCEW)

The 10 industries of the Cleveland Music Sector identified as having only music-related establishments represented a relatively consistent share of employment, payroll, and establishments in the total economies of Cuyahoga County, the state of Ohio, and the United States. The 10 industries’ employment represented a 0.12% share of both Cuyahoga County’s and the United States’ total economies, which is a 0.02% greater share than that of Ohio’s economy.

Likewise, the 10 industries’ payroll represented 0.12% of Cuyahoga County’s economy, 0.08%

of Ohio’s economy (0.04% less than the Cuyahoga County share), and 0.11% of the United States’ economy (0.01% less than the Cuyahoga County share). Finally, the share of the 10 industries’ number of establishments was 0.23% in Cuyahoga County, 0.17% in Ohio, and 0.21% in the United States, a deviation of up to 0.06%.

Overall, the shares of 10 music industries in the compared geographies were generally consistent, although they were the largest in the Cuyahoga County economy.

SHARES OF THE CLEVELAND MUSIC SECTOR IN THE OHIO MUSIC SECTOR

The shares of the Cleveland Music Sector in the Ohio Music Sector are presented in Table 1-7. Data are provided for several years during the 2000 to 2009 study period, and they give a broad picture about the sizable music activities

that take place in the Greater Cleveland area relative to the state of Ohio as a whole.

Note that to ensure a proper comparison of music sectors, the Cleveland Music Sector and

the Ohio Music Sector presented in Table 1-7 are defined using the same 10 NAICS codes

(those identified as being solely related to music).

Table 1-7: Shares of the Cleveland Music Sector in the Ohio Music Sector: 2000, 2003, 2007 & 2009

	2000	2003	2007	2009
Employment	15.8%	18.3%	20.6%	17.3%
Payroll	20.5%	21.1%	24.1%	25.2%
Establishment	17.5%	17.3%	17.2%	17.1%

Source: Quarterly Census of Employment and Wages (QCEW)

In 2000, the number of music employees in the Cleveland Music Sector accounted for 15.8% of total employment in the Ohio Music Sector. This percentage share grew through 2007 when it peaked; the Cleveland Music Sector (only Cuyahoga County) represented 20.6% of the employment in the Ohio Music Sector in 2007. At the onset of the recession, the Cleveland Music Sector’s employment share fell to 17.3% in the Ohio Music Sector in 2009. This trend in percentage share can be associated with the overall growth pattern in the Cleveland Music Sector’s employment previously discussed in this chapter.

the Ohio Music Sector grew consistently from 2000 to 2009, increasing from 20.5% in 2000 to 25.2% in 2009 (or one fourth of all music payroll in the state). The largest percentage increase (3.0%) occurred between 2003 and 2007, which included the 2005 to 2006 time period during which the Cleveland Music Sector experienced a 34.3% increase in payroll.

Finally, the Cleveland Music Sector’s share of establishments in the Ohio Music Sector remained relatively stable from 2000 to 2009. The share was 17.5% in 2000 and although the share decreased each year, it decreased a total of only 0.4% in 10 years (see Table 1-7).

The Cleveland Music Sector’s share of payroll in

ECONOMIC-BASE INDUSTRIES AND THEIR DYNAMICS

The share of the Cleveland Music Sector in Cuyahoga County’s economy in comparison to the share of the U.S. Music Sector in the national economy can be used to identify the economic-base music industries in the regional economy. Figure 1-9 shows the music employment location quotient (LQ) of the Cleveland Music Sector as benchmarked against

the United States music sector. In this instance, the music sectors are defined as the industries included in the 10 NAICS codes identified as containing only establishments that are totally music-related. The location quotient is designed to show the comparative concentration of music employment in Cuyahoga County to the concentration of the music employment in the

United States.

Due to QCEW confidentiality restrictions, the data from only three of the 10 music NAICS codes can be reported. Consequently, six of the NAICS codes were categorized into two common-themed industry groups, *Music Production and Publishing* and *Music-Related*

Manufacturing. Table 1-8 lists the industries and groups of industries by NAICS code.

Note that *Musical Groups and Artists* (NAICS code 711130), which could not be categorized because of its unique content, remained alone as a single category and had to be omitted from Figure 1-9.

Table 1-8: Industry Groups by NAICS Code

NAICS Code	Definition
Music-Related Manufacturing	
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
339992	Musical Instrument Manufacturing
Musical Instrument and Supplies Stores	
451140	Musical Instrument and Supplies Stores
Prerecorded Tape, Compact Disc, and Record Stores	
451220	Prerecorded Tape, Compact Disc, and Record Stores
Music Production and Publishing	
512210	Record Production
512230	Music Publishers
512290	Other Sound Recording Industries
Sound Recording Studios	
512240	Sound Recording Studios
Musical Groups and Artists (Omitted)	
711130	Musical Groups and Artists

The location quotients for *Prerecorded Tape, Compact Disc, and Record Stores* (1.31), *Musical Instrument and Supplies Stores* (1.21), and *Music Production and Publishing* (1.08) are all greater than one, meaning the share of each industry or a group of industries is greater in

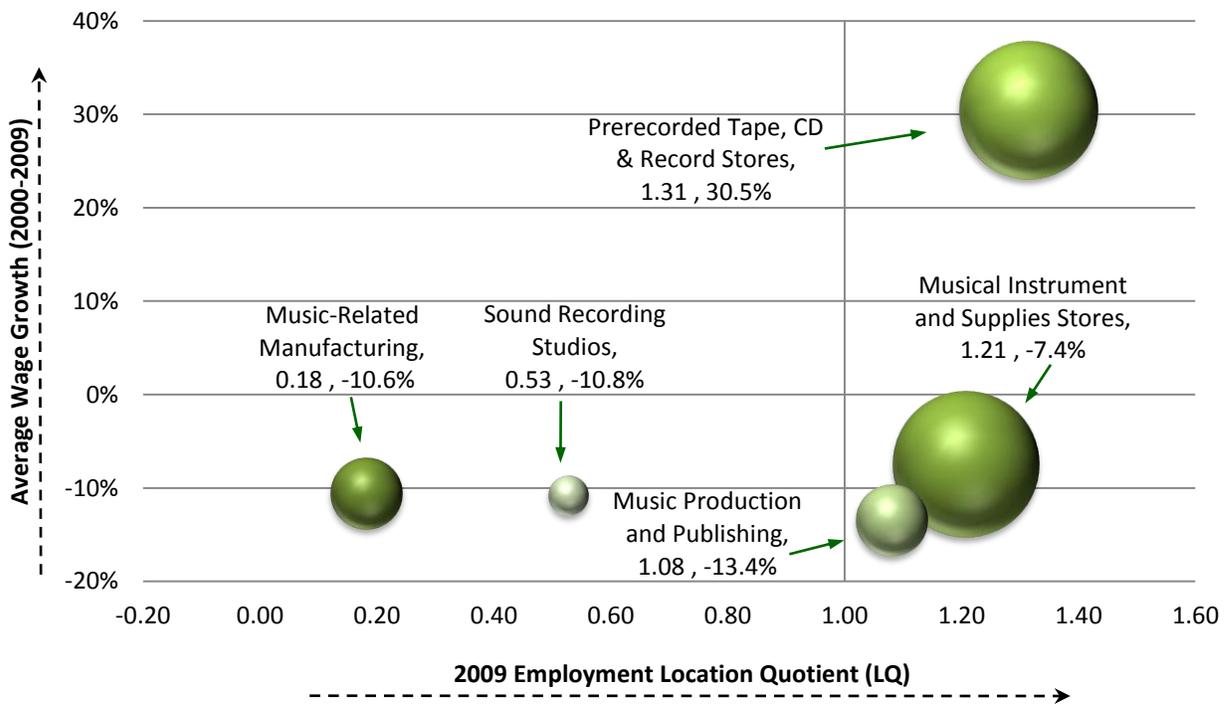
Cuyahoga County than that in the United States (Figure 1-9). A larger representation of these industries in Cuyahoga County compared to the

United States indicates that these industries are part of the economic base of Cuyahoga County (or what is also called “export industries”). Therefore, these industries are more likely to export their products to economies outside of Cuyahoga County.

Sound Recording Studios industry (0.53) are less than one; therefore, the shares of these industries or group of industries are greater nationally than in Cuyahoga County. As a result, these industries are less likely to export their products to other economies.

Conversely, the location quotients for the *Music-Related Manufacturing* group (0.18) and

Figure 1-9: Employment Location Quotient and Average Wage Growth of Cleveland Music Industries



Note: Each label includes the 2009 employment location quotient (LQ) and the percentage change in average wage from 2000 to 2009.

Source: Quarterly Census of Employment and Wages (QCEW)

Figure 1-9 also shows the growth rate of the average wage of each industry or group of industries from 2000 to 2009. In this instance, the change in average wage can be used as a proxy for productivity. Only one industry,

Prerecorded Tape, Compact Disc, and Record Stores, had a positive growth rate (30.5%). This means that only this industry experienced a growth in average wages and productivity from 2000 to 2009.

ANALYSIS OF THE FOCUS GROUPS

INTRODUCTION

This chapter seeks to analyze and provide a summary of the focus groups conducted in conjunction with this study. The members of the focus groups included local musicians, representatives of music venues, music manufacturing, and other industries comprising the Cleveland Music Sector. Two focus groups were conducted by members of the research team, one at the Cleveland State University western campus in Westlake, Ohio, and one at the Cleveland Heights Public Library. These sites, located geographically at opposite sides of Cleveland, were chosen specifically for the convenience of focus group participants.

The focus groups accomplished a number of objectives. First, the research team was able to establish lines of communication with major players and experts in the music industry. This communication allowed each group to share and verify information and confirm findings, all of which contributed to the research team's qualitative research for this project. Second, the information, input, and personal insights provided by focus group participants allowed the research team to finalize the typology of the Cleveland Music Sector. Finally, the focus groups provided the research team with recommendations for case studies.

IDENTIFYING THE CLEVELAND MUSIC SECTOR

When describing the Cleveland Music Sector, diversity was the most commonly used word by participants of the focus groups. Participants in both focus groups were in overall agreement

that the Cleveland Music Sector has a strong pool of local talent. They described the wealth of musicians, as well as many good local bands, that make up the music sector.

“There is an amazing abundance of talent here”

Other words used to describe the diversity and quality of talent included vibrant, plentiful, varied, passionate, and rich. Participants described incredible potential in the Cleveland

Music Sector. A complete list of the words used by participants to describe the Cleveland Music Sector can be found in Table 2-1.

Table 2-1: Words Used to Describe the Cleveland Music Sector

Changing	Incredible potential for entrepreneurship
Cheap (pay scale)	Innovative
Cleveland Jazz Orchestra and Jazz Fest	Not enough jazz education opportunities or jazz venues to play
Competitive	Limited (club scene)
Coordination with other performing arts areas	Lost
Creative	Medically-progressive
Culturally astute	Missing education of people on music
Disarray	More festivals/venues/exposure to music
Disconnected	Passionate
Diverse	Plentiful
Diverse local talent, different genres	Rich
Dominated (by large institutions)	Saturated
Drag	Scattered
Doing it for yourself	Shrinking
Dynamic	Slow (economy)
Education to make people more aware	Struggling
Engaged	Talent in amazing abundance
Excellent	Unbalanced
Full	Under-appreciated
Good local bands	Un-encouraged
History of music in Cleveland is deep, significant	Un-established
Hungry for work	Varied
Hyper-active	Very fragmented
Ill-served in PR and coordination	Vibrant (talent)
	Wealth of musicians

Participants also provided numerous descriptions of the challenges that exist in the music community as they see and experience them. These observations included a very fragmented community where there is too much competition among members and not enough collaboration. Participants also used the words “disconnected” and “disarray” to describe this sentiment. As a solution, one participant suggested strategic coordination not only within the music community but also between the music community and other performing arts

areas such as theater.

In both sessions participants indicated that they believed the large institutions in the area dominate the Cleveland Music Sector. They described the music scene as under-appreciated and lacking encouragement from the community (e.g., Cleveland compared to Austin) on a broad scale for individual artists and local bands.

While not necessarily a theme or descriptor of

the music scene, participants in the first focus group pointed out that there is a serious lack of education among the general public as to what

music is, how original music is created, and the large variety of music genres available, especially in the Cleveland Music Sector.

STORIES OF SUCCESS

Focus group participants were asked to share one Cleveland Music Sector success story that inspires them.

gathered from the interviews with musicians, educators, community leaders, and other stakeholders within the music industry.

These stories ranged from local record labels and businesses to bands, venues, and music education programs. A complete list of success stories can be found in Table 2-2. The focus group responses were similar to the responses

One example of a business was *Gotta Groove Records*, a full-service vinyl record manufacturer based in Cleveland with clients from around the country (see case study in Chapter 7).

Table 2-2: Suggested Success Story Topics of the Cleveland Music Sector

Alternative Press	Family Concert Series	POPS Orchestra
Ante Up Audio	First Waltz at House of Blues	RED (an orchestra)
Apollo's Fire	Fred Zurich	Root Café
Barking Spider	Gotta Groove Records	Roots of American Music
Beachland Ballroom	Heads Up	Savannah Bar & Grill
Black Keys	Hells Headbangers	School of Rock
Brother's Lounge	Kristine Jackson	Shaw High School Marching Band
Cavani String Quartet	Lakewood Alive	The Cleveland Orchestra
City Music	Lakewood Library	The Launch Artist Residencies
Cleveland Jazz Orchestra	Local music competitions	Program of PlayhouseSquare
Closer Look	Luca Mundaca	Tri-C Creative Center for the Arts
Convivium 33	Nighttown	Vance Studio
David Thomas	Nonesuch Records	Viva Concert Series (at CMA)
East Cleveland Library	Pere Ubu	Wade Oval Wednesdays
Exit Stencil	PlayhouseSquare	

While some of these successes may receive little attention locally, they are attracting attention from outside the Cleveland Music Sector. *Alternative Press*, *Ante Up Audio*, *Closer*

Look, and *Hells Headbangers* (a Medina-based group) are all examples of local talent that are supported by people all over the world.

In the second session, participants pointed out that locally there are a number of music competitions that provide young high school students with exposure and experience. One such competition is the Tri-C High School Rock Off at the House of Blues.

While participants provided a list of examples, stories, companies, and places they thought represented success, they also provided some suggestions to spur success. There was widespread agreement that there is a need in Cleveland for a one-stop arts and culture website that will provide information on what is happening locally for anyone who is interested in all genres of music and other artistic disciplines.

Another suggestion was to create a common

space, preferably in a central location to the region (city of Cleveland), where musicians can meet to talk, play, and jam together. This suggestion was echoed by a need for an efficient network.

A third suggestion was to learn from Great Lakes Theater and properly promote the Cleveland Music Sector. This suggestion was supplemented by a proposal to identify Cleveland as a welcoming city for artists, a place for musicians, and the place where musicians would want to move because of its community of musicians. All these suggestions were supported by a strong belief that “Cleveland could be a leader of music in the Midwest. Cleveland should be a leader in arts. It’s a mentality of wanting to support the arts and for them [the arts] to be important.”

EXTERNAL PERCEPTIONS OF THE CLEVELAND MUSIC SECTOR

Participants were asked: What would people outside of Cleveland say about today’s Cleveland Music Sector? What is the perception? What would surprise people about the Cleveland Music Sector?

Participants in both sessions strongly indicated that the overall sense was that talented artists are from Cleveland, but do not come to

Cleveland. This was reflected in comments such as: “Cleveland is a birthplace,” and “[you] may be from Cleveland, but work and success is outside of Cleveland.” They said that, most often, artists have to leave Cleveland to get noticed and to secure regular gigs where they can perform. If they want to live in Cleveland, they have to be willing to travel.

“Cleveland is a place you come from, but not a place you go to”

Cleveland is not viewed as a primary destination for musicians. Although Cleveland still attracts national music performances, the perception of the focus group participants was that the region

is just a stop on the way to somewhere else.

Participants also indicated that Cleveland has opportunities due especially to its low cost of

living. However, the participants thought the disorganization of the Cleveland Music Sector is frustrating and does not foster a thriving music community.

Participants also believed Cleveland has an abundance of talent and opportunity, but lacks

a cohesive message and unifying organization for the music sector. Finally, participants said that people are surprised once they come here and get a first-hand opportunity to learn about the rich music scene and culture that exists in the Greater Cleveland area.

THE MUSIC GENRES EXISTING IN THE CLEVELAND MUSIC SECTOR

Participants were provided a list of genres identified through both the interviews and the amateur musician survey and were asked to comment on the comprehensiveness and accuracy of the list. The focus group participants thought that the list was too generic and that the same list would apply anywhere.

While they believed that the list reflected the overall availability of music in Cleveland, they indicated that many of the genres cross over – where an artist performs in more than one genre of music and often times the music itself is a fusion of two or more genres. More importantly, participants said there were sub-categories within many of the genres that would provide more description and meaning. Such was the case with jazz. One participant indicated that jazz could be broken down into

many different subgenres including Jazz fusion, Latin Jazz, Modal Jazz, Acid Jazz, Calypso Jazz, Continental Jazz, and more.

When focus group participants were asked if there was anything missing from the list of genres, they identified five specific areas:

- Electronic
- Noise
- Heavy metal
- Contemporary
- Old Time (predates Bluegrass)

When asked if the diversity in this list was an advantage for the local music scene, participants indicated that yes, diversity is an advantage, but people need to know about it. In other words, if they don't know that they can hear all of this great music in Cleveland, what does it matter?

THE MUSIC INDUSTRY

Participants were asked: What industries do you think are needed for a thriving music city? Which are most important?

Participants in both sessions strongly indicated

that Cleveland has a strong competence in music education. This strong educational component is reflected in the increasingly good reputation of the Cleveland Institute of Music and in the availability of places where young

people can learn music.

Interestingly, participants in the second session made special note of private teaching. In their view, musicians teaching private lessons far outnumber musicians teaching through institutes and formal education centers. They expressed hope that a way might be found to account for this private teaching in order to more accurately estimate its economic impact. Participants also believed that musicians were probably undercounted in the industry analysis.

The need for greater coordination and collaboration continued as a theme for participants when discussing the music industry. They expressed a need for the music sector to focus on creating more infrastructure, networking opportunities, and efficient coordination. One participant made the suggestion that the music sector should advocate for the creation of a formal, government-supported “Music Czar” for Cleveland.

Although participants indicated the list of industry components accurately represented the Cleveland Music Sector, they stressed that it was not so much about having all of these components, but rather understanding how

well they interact and who oversees them. One participant suggested that yes, there are options for management and booking, but are these services being provided with the level of expertise and skills that are widely needed in the Cleveland Music Sector?

Participants also expressed the idea of the community providing more support for musicians. They want to see: (1) More public-private partnerships supporting musicians in promotion and informing music patrons about activities in the music sector; (2) More support from publicly-funded entities, such as libraries’ support in the form of free publicity; (3) More support from private organizations, such as free promotion through local hotels; (4) More formal organizations that support musicians and promoting a message that arts are important for the community; (5) More individual grants oriented specifically towards musicians; and finally (6) An organization that would “Find a way to make it about the arts and turn it into economic development, not the other way around.” One of the participants said, “If we [city, local patrons, private businesses, and community of musicians] help musicians more, they will stay here and bring other musicians in.”

WHAT’S MISSING

Participants were asked: As musicians and people who work in the music industry, what types of support do you get from the industries,

venues, events, and other components of the Cleveland Music Sector? What’s missing? What else is needed?

“We have talent, the people, just not organizations.”

Though the sentiment was expressed differently by varying participants, the major theme was support. Those in the music scene need a greater amount of financial and professional support.

There was a sense among participants that those who are active in the Cleveland Music Sector are already working to support one another. Specific examples included libraries or arts centers that sponsor concerts. Although they may not have the resources to pay musicians very much, sponsored concerts give musicians exposure, which is free publicity. Participants also described having the support of fans. One participant said there are local

artists who have decided to press records with *Gotta Groove Records* as a way to support the local industry.

Overwhelmingly, however, they indicated that musicians need a place where musicians are supported. This may be in the form of the music sector advocating for the creation of a “Music Czar,” as previously mentioned, or a single entity to coordinate events, activities, media, and public relations for the sector. Another suggestion was to look at an example from Texas where they have a Commission on the Arts formally organized as a government entity.

“Critical mass needed on a community level”

Nashville also was cited as having a community of artists reflected in the atmosphere of the city. One participant said, “It’s a mentality of wanting to have arts be important in the community.”

Another participant echoed that sentiment by

saying that “going to see live music should be part of the culture in Cleveland.” In addition to further bringing music into the city’s culture, another participant suggested the music sector also develop a community-based, community-supported music house where all music-related services could be accessed.

“We don’t celebrate our city”

Finally, participants thought that the Cleveland Music Sector needs to do a lot more self-promotion. A vibrant music scene needs to strategize so people will write about and publicize it in newspapers, magazines, blogs, etc. Participants believe there is very little of

that going on currently. Moreover, they suggest that this self-promotion should be a concerted effort among venues, artists, and the media to coordinate their message about what goes on in Cleveland.

CLEVELAND AMATEUR MUSICIAN SURVEY ANALYSIS

INTRODUCTION

The goal of the Cleveland Amateur Musician Survey was to discover amateur musicians' perceptions of the Greater Cleveland area in regard to typology, revenue, competition, supply of venues, and location of venues.

This chapter is constructed so that, in most cases, a graphic or table is displayed followed by a short paragraph that highlights the observations and analysis of the survey responses.

METHODOLOGY

The Center for Economic Development ("Center") collected over 900 email addresses of individuals, organizations, and musical groups from various sources. The Cleveland Amateur Musician Survey was disseminated via email and responses were collected online. The Center publicized the survey via Facebook, local and college radio stations, and the Internet in order to garner support and participation. The goal was to collect names and emails of musicians from all genres in the Greater Cleveland region.

Using the Internet-based survey software Qualtrics, the Cleveland Amateur Musician Survey was conducted online over a three-week period starting on January 4, 2011. Potential respondents were emailed on three consecutive Tuesdays: January 4, 2011; January 11, 2011; and January 18, 2011. When respondents completed the survey, they were removed from the email list and did not receive future email reminders. The Center continued to collect new email addresses of individuals and groups throughout the survey process in order to maximize survey response numbers. In addition,

an incentive was offered to respondents who completed the survey; specifically, their name was entered into a drawing to win one of two \$50 gift cards.

Although the goal of this survey was to gain information from amateur musicians in the Greater Cleveland region, it was determined, based on responses to certain questions, that both amateur and professional musicians responded to the survey. Professional/amateur status was determined by the answers to the question: *Is playing music/composing your primary means of income?* If a respondent replied *Yes*, it was determined they self-identified their primary occupation as being a musician and they were categorized as a professional musician. Conversely, if a respondent replied *No*, it meant their primary occupation was not self-identified as being a musician and they were categorized as an amateur musician.

At this time, the Center is not able to measure the bias that occurred in this survey; however, it is important to address the types of bias that

can be detected based upon survey responses. Survey participant selection bias may have occurred because the individuals and groups solicited by the Center to participate in the survey were selected from a variety of Internet sources where email addresses and contact information were able to be obtained.⁸ This selection was not random.

In addition, selection bias has occurred because of the method of dissemination and collection of this survey. If a potential respondent did not have an email address or a computer, they were

unable to participate in the survey and were therefore not represented in the survey respondents. In regard to response and non-response bias, the Center cannot determine if one particular group was over- or under-represented in this survey because of non-response bias. Based upon information the Center gathered from initial stakeholder interviews and from a literature review, selection bias in the survey instrument may have occurred in the genres which the Center selected for the questionnaire.⁹

SURVEY ANALYSIS

A total of 174 respondents participated in the survey and were tabulated as a part of this report. These responses illustrated an overall response rate of 19.3%, which is above the average for similar studies. Out of 174 overall responses, 116 respondents provided an

address, which allowed for the identification of 83 respondents as residing within Cuyahoga County and 33 respondents residing outside of Cuyahoga County. Respondent counts vary by table because not all respondents answered each question.

Table 3-1: Geographic Location of Respondent by Amateur/Professional Status

Residential Location of Respondent	Amateur		Professional		Total	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Live in Cuyahoga County	49	72%	34	71%	83	72%
Do not Live in Cuyahoga County	19	28%	14	29%	33	28%
Total	68	100%	48	100%	116	100%

Examining the two subgroups of survey respondents' geographic location by amateur/professional status shows that there is not a significant difference between the groups. A

vast majority of respondents live in Cuyahoga County, whether they self-identify as an amateur or professional musician (Table 3-1).

⁸ A listing of electronic sources can be found in Appendix 3-1.

⁹ See Chapter 9 for the survey instrument used; Question 2 asked respondents to choose their "primary music genre."

Table 3-2: Number of Individuals in Primary Music Ensemble

Individuals in Primary Music Ensemble/Composing Business	Respondent Count	% of Respondents
Self Only	56	33%
2	13	8%
3	16	9%
4	25	14%
5	20	12%
Greater than 5	42	24%
Total	172	100%

Note: Non-response for this question was 1% (2 respondents).

Musicians were asked how many individuals performed with them in their primary music ensemble. This question was intended to gauge musician participation and concentration in the Northeast Ohio economy. Of the 172 survey

participants who responded, over one-third are musicians who are solo acts and almost one quarter are individuals who perform in large ensembles with more than five people (Table 3-2).

Table 3-3: Primary Music Genre by Amateur/Professional Status

Genre	All Respondents		Amateur		Professional	
	Response Count	% of Respondents	Response Count	% of Respondents	Response Count	% of Respondents
Alternative	7	4.0%	4	3.8%	3	4.5%
Americana	7	4.0%	1	1.0%	5	7.6%
Bluegrass	1	0.6%	0	0.0%	1	1.5%
Blues	4	2.3%	1	1.0%	3	4.5%
Classical	53	30.6%	24	22.9%	28	42.4%
Country	1	0.6%	1	1.0%	0	0.0%
Folk	12	6.9%	9	8.6%	3	4.5%
Gospel	1	0.6%	1	1.0%	0	0.0%
Hip-Hop	1	0.6%	1	1.0%	0	0.0%
Jazz	10	5.8%	4	3.8%	6	9.1%
Pop	8	4.6%	5	4.8%	3	4.5%
Reggae	0	0.0%	0	0.0%	0	0.0%
Rock	23	13.3%	22	21.0%	1	1.5%
Roots	3	1.7%	3	2.9%	0	0.0%
R&B	2	1.2%	2	1.9%	0	0.0%
Salsa	1	0.6%	1	1.0%	0	0.0%
Other	39	22.5%	26	24.8%	13	19.7%
Total	173	100.0%	105	100.0%	66	100.0%

Notes: Percentage summations may be slightly above or below 100% because of rounding; Non-response for this question was 0.6% (1 respondent).

Table 3-4: Other Genres Identified by All Respondents

Genre	Respondent Count	% of Other
Sacred	2	5%
Christian	3	8%
Latin/Tropical/Brazilian	3	8%
Indie	2	5%
Punk	2	5%
All Other	27	69%
Total	39	100%

Survey participants were asked to self-identify their primary music genre.¹⁰ Of the 174

respondents who participated in the survey, over 30% identified *Classical* as their primary music genre. In addition, almost one quarter (22.5%) of respondents selected *Other* as their primary genre, implying that their genre was not listed (Table 3-3). This reinforces information collected by the Center from other research materials; specifically, it suggests that the Cleveland Music Sector is very diverse and spans multiple music genres. Table 3-4 displays grouped write-in categories by respondents.

Those respondents who identified their primary means of income as playing music/composing were categorized as professional musicians, and those who identified their primary means of income as being unrelated to the music sector were categorized as amateur musicians. It is interesting to note that almost half (42.4%) of self-identified professional musician survey respondents selected *Classical* as their primary music genre (Table 3-3).¹¹ In addition, over 20% of amateur musician survey respondents self-identified their primary music genre as either *Classical* (22.9%) or *Rock* (21.0%) (Table 3-3).

¹⁰ It is important to note that based upon feedback from other segments of this project, there may have been bias in the word “primary” because respondents may not have understood the classification of “primary music genre.”

¹¹ With such an overwhelming response of self-identified classical musicians, it can be inferred that there is a selection bias and response bias in this group, while there may be an unknown non-response bias in other musical groups.

Table 3-5: Primary Music Genre by Geographic Location

Genre	All Respondents with Addresses		Respondents Who Live in Cuyahoga County		Respondents Who Do Not Live in Cuyahoga County	
	Response Count	% of Respondents	Response Count	% of Respondents	Response Count	% of Respondents
Alternative	6	5%	2	6%	4	5%
Americana	3	3%	3	9%	0	0%
Bluegrass	1	1%	1	3%	0	0%
Blues	4	3%	0	0%	4	5%
Classical	27	23%	7	21%	20	24%
Country	1	1%	1	3%	0	0%
Folk	9	8%	1	3%	8	10%
Gospel	1	1%	1	3%	0	0%
Hip-Hop	1	1%	0	0%	1	1%
Jazz	10	9%	4	12%	6	7%
Pop	5	4%	2	6%	3	4%
Reggae	0	0%	0	0%	0	0%
Rock	11	9%	3	9%	8	10%
Roots	2	2%	0	0%	2	2%
R&B	2	2%	0	0%	2	2%
Salsa	1	1%	0	0%	1	1%
Other	32	28%	8	24%	24	29%
Total	116	100%	33	100%	83	100%

Notes: Percentage summations may be slightly above or below 100% because of rounding; Non-response for this question was 0.6% (1 respondent).

Removing respondents that did not report their address information created a total of 116 respondents with addresses. Of those, 83 respondents reported living within Cuyahoga County and 33 reported living outside Cuyahoga County. The residents of Cuyahoga County represented 72% of all respondents, which

made their answers statistically valid for the survey sample. This allows for defining main genres in Cuyahoga County and comparing genres by location. The statistical validity of non-Cuyahoga County respondents was not verified since the comparison was outside of the primary goal of the survey (Table 3-5).

Table 3-6: Venue Locations Where Respondents Primarily Perform by Amateur/Professional Status

Venue	All Respondents		Amateur		Professional	
	Response Count	% of Respondents	Response Count	% of Respondents	Response Count	% of Respondents
Formal Concert Venue	108	15%	54	14%	53	17%
Bar	88	12%	58	15%	30	9%
Club	85	12%	57	15%	28	9%
Private Parties	85	12%	42	11%	43	14%
Outdoor Pavilion	83	12%	45	12%	37	12%
School	64	9%	31	8%	33	11%
Church	62	9%	34	9%	27	8%
Public Spaces	55	8%	28	7%	26	8%
Corporate Events	53	8%	23	6%	30	9%
Other	22	3%	11	3%	11	3%
Total	705	100%	383	100%	318	100%

Note: Respondents selected all venues that applied; therefore, the total counts represent how frequently each venue was selected rather than the number of respondents.

Table 3-7: Other Venues Identified by All Respondents

Venue	Respondent Count
Cafes/Coffee Houses	5
Festivals	5
Theaters	4
Senior Citizen Facilities	3
Other	5
Total Other	22

Examining the responses regarding the venues respondents perform in shows that the top five selections were *Formal Concert Venue* (108), *Bar* (88), *Private Parties* (85), *Club* (85), and *Outdoor Pavilion* (83). It is interesting to note the change in these categories when investigating responses by amateur/profess-

ional status. Amateur musicians identified their top three venues as *Bar* (58), *Club* (57), and *Formal Concert Venue* (54); professional musicians identified their top three venues as *Formal Concert Venue* (53), *Private Parties* (43), and *Outdoor Pavilion* (37) (Table 3-6).

Table 3-8: Venue Locations Where Respondents Primarily Perform by Geographic Location

Venue	All Respondents with Addresses		Respondents Who Live in Cuyahoga County		Respondents Who Do Not Live in Cuyahoga County	
	Response Count	% of Respondents	Response Count	% of Respondents	Response Count	% of Respondents
Formal Concert Venue	77	15%	55	16%	22	13%
Club	63	12%	42	12%	21	12%
Outdoor Pavilion	63	12%	37	11%	26	15%
Private Parties	63	12%	39	11%	24	14%
Bar	62	12%	41	12%	21	12%
Church	46	9%	35	10%	11	7%
School	46	9%	32	9%	14	8%
Public Spaces	42	8%	28	8%	14	8%
Corporate Events	40	8%	25	7%	15	9%
Other	19	3%	15	4%	4	2%
Total	521	100%	349	100%	172	100%

Note: Respondents selected all venues that applied; therefore, the total counts represent how frequently each venue was selected rather than the total number of respondents.

Table 3-8 lists and organizes the venue locations where artists normally perform by survey respondents' geographic location. The responses showed the top five venues where they perform are *Formal Concert Venue* (77), *Club* (63), *Outdoor Pavilion* (63), *Private Parties* (63), and *Bar* (62). The responses of those participants who reside in Cuyahoga County are similar to the responses of amateur musicians in Table 3-6, and the responses of those participants who reside outside Cuyahoga County are similar to the responses of

professional musicians in Table 3-6. As shown in Table 3-1, the percentage of amateur respondents living inside Cuyahoga County is equal to the percentage living outside Cuyahoga County; at this time there is no accounting for the similarities in reported respondent behaviors. This occurrence may speak to the supply of venues in the two different geographic regions and infer that a larger supply of formal concert venues, clubs, and bars exists in Cuyahoga County.

Table 3-9: Geographic Locations Where Respondents Perform by Amateur/Professional Status

Geographic Locations where Respondents Perform	All Respondents		Amateur		Professional	
	Response Count	% of Respondents	Response Count	% of Respondents	Response Count	% of Respondents
Within Cuyahoga County	134	32%	80	35%	54	29%
Outside of Cuyahoga County, but within the Cleveland/Akron/Youngstown Region	108	26%	64	28%	44	23%
Outside of the Cleveland/Akron/Youngstown Region, but in the State of Ohio	69	17%	37	16%	32	17%
In other states than Ohio	76	18%	34	15%	42	22%
Internationally	31	7%	15	6%	16	9%
Total	418	100%	230	100%	188	100%

Note: Respondents selected all venues that applied; therefore, the total counts represent how frequently each geographic location was selected rather than the number of respondents.

The musicians who participated in this survey indicated the geographic locations in which they perform, and the responses were similar when categorized by amateur/professional status (Table 3-9). Thirty-five percent of amateur survey respondents and 29% of professional survey respondents perform within Cuyahoga County. The largest gap was in those that perform *In other states*

than Ohio: 15% of amateur survey respondents perform outside of Ohio, while 22% of professional survey respondents perform outside of Ohio. Based upon these responses, it is possible to infer that professionals are more likely to travel outside of Ohio and internationally while amateur musicians primarily perform in the Northeast Ohio region.

Table 3-10: Respondent Formal Music Training by Amateur/Professional Status

Received Formal Music Training	All Respondents		Amateur		Professional	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Yes	127	74%	75	71%	52	79%
No	44	26%	30	29%	14	21%
Total	171	100%	105	100%	66	100%

Note: Non-response for this question was 2% (3 respondents); one respondent failed to classify as amateur or professional.

Survey respondents were asked whether they had received formal music training in order to gauge the “professionalism” of the Cleveland Music Sector. Almost 75% of respondents (127) stated they had received formal music training. Additionally, the percentage of respondents with formal music training was a little higher among professional musicians than amateur musicians (Table 3-10).

Respondents also reported the organization/ institution from which they received their training. It is worth noting that most of the respondents reported that they obtained their training at an elite music institution. For more information and a listing of institutions/ organizations, see Appendix 3-2.

Table 3-11: Respondents who Play in Multiple Ensembles by Amateur/Professional Status

Respondents who Play in Additional Ensembles	All Respondents		Amateur		Professional	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Yes	120	70%	68	65%	52	79%
No	52	30%	37	35%	14	21%
Total	172	100%	105	100%	66	100%

Note: Non-response for this question was 1% (2 respondents); one respondent failed to classify as amateur or professional.

Survey respondents were asked if they played in other music ensembles in addition to their primary music ensemble. Overall, 70% of survey participants stated that they do play in additional music ensembles. It is interesting to

note that almost 80% of professional musicians play in multiple ensembles, while only 65% of amateur musicians play in multiple ensembles (Table 3-11).

Table 3-12: Self-Classification of Music Ensemble/Composing Business

Categories	All Respondent Count	% of Respondents
A registered for-profit organization	24	14%
A registered non-profit organization	17	10%
Not registered	40	23%
Independent contractor	68	40%
Other	8	5%
Skip question	14	8%
Total	171	100%

Note: Non-response for this question was 1% (2 respondents).

In order to gauge the business formality of the Cleveland Music Sector, survey participants were asked how they classify their ensemble/composing business; 40% of respondents stated that they identify themselves as an *Independent contractor* and 24% declared their ensemble/business *A registered for-profit*

organization or *A registered non-profit organization* (Table 3-12). This identifies two possibilities: (1) the Cleveland Music Sector operates within the formal boundaries like other industries, or (2) the selection bias of respondents favored formally registered individuals/groups.

Table 3-13: Number of Performances by Geographic Location of Performance

Number of Performances	Performances in Cuyahoga County		Performances Outside of Cuyahoga County	
	Respondents	% of Respondents	Respondents	% of Respondents
1 to 3	93	69%	91	72%
4 to 7	22	16%	17	13%
8 to 10	9	7%	6	5%
More than 10	10	8%	13	10%
Total	134	100%	127	100%

Table 3-14: Number of Attendees at Performances by Geographic Location of Performance

Number of People Attending Performances	Performances in Cuyahoga County		Performances Outside of Cuyahoga County	
	Respondents	% of Respondents	Respondents	% of Respondents
1 to 19	11	8%	6	5%
20 to 39	30	23%	27	21%
40 to 59	27	20%	26	20%
More than 60	65	49%	68	54%
Total	133	100%	127	100%

Respondents were asked questions about how frequently they perform in and out of Cuyahoga County and the attendance during their performances in order to estimate the supply and demand for music. Table 3-13 displays the responses of survey participants regarding the number of performances they give per month. Overall, a vast majority of respondents give one to three performances a month, regardless of the geographic location of a venue (inside or outside Cuyahoga County). In addition, most respondents perform concerts that are attended by more than 60 people, no matter the venue’s geographic location (Table 3-14).

Categorizing the responses to these questions by amateur/professional status provides interesting insights into the market of supply and demand of these occupations. A vast majority of amateur musicians who responded to this survey give less than three performances a month while the patterns are mixed amongst professional musicians (Table 3-15). Table 3-16 examines the attendance of these performances by respondent’s amateur/ professional status; the results are similar to those of all respondents in Table 3-14.

Table 3-15: Number of Performances of Professional/Amateur Musicians by Geographic Location

Number of Performances	Perform Inside Cuyahoga County				Perform Outside Cuyahoga County			
	Amateur		Professional		Amateur		Professional	
	Respondents	% of Respondents	Respondents	% of Respondents	Respondents	% of Respondents	Respondents	% of Respondents
1 to 3	64	80%	29	54%	59	83%	32	57%
4 to 7	11	14%	11	20%	7	10%	10	18%
8 to 10	3	4%	6	11%	1	1%	5	9%
More than 10	2	2%	8	15%	4	6%	9	16%
Total	80	100%	54	100%	71	100%	56	100%

Table 3-16: Number of Attendees at Performances of Professional/Amateur Musicians by Geographic Location

Number of Attendees	Perform Inside Cuyahoga County				Perform Outside Cuyahoga County			
	Amateur		Professional		Amateur		Professional	
	Respondents	% of Respondents	Respondents	% of Respondents	Respondents	% of Respondents	Respondents	% of Respondents
1 to 19	7	9%	4	8%	5	7%	1	2%
20 to 39	19	24%	11	20%	15	21%	12	22%
40 to 59	16	20%	11	20%	15	21%	11	20%
More than 60	37	47%	28	52%	37	51%	31	56%
Total	79	100%	54	100%	72	100%	55	100%

Table 3-17: Number of Performances Inside and Outside Cuyahoga County (per Month)

	Perform Inside Cuyahoga County			
Perform Outside Cuyahoga County	1 to 3	4 to 7	8 to 10	More than 10
1 to 3	50	13	6	3
4 to 7	7	2	1	5
8 to 10	2	0	0	0
More than 10	8	0	2	0

Table 3-18: Number of Attendees at Performances Inside and Outside Cuyahoga County (per Month)

	Perform Inside Cuyahoga County			
Perform Outside Cuyahoga County	1 to 19	20 to 39	40 to 59	More than 60
1 to 19	2	2	1	0
20 to 39	2	11	5	6
40 to 59	0	3	15	43
More than 60	2	3	4	43

Table 3-17 displays the matrix of respondents who perform both inside and outside of Cuyahoga County by the frequency they perform in each location. The majority of respondents play both geographic areas one to

three times a month. Analyzing the same content by the average number of attendees at concerts shows that those performances draw large crowds (Table 3-18).

Table 3-19: Amateur Musician Percentage of Income from Music

	Amateur	
% of Music Income	Respondent Count	% of Respondents
0%-10%	69	67%
11%-20%	17	16%
21%-30%	5	5%
31%-40%	0	0%
41%-50%	12	12%
Total	103	100%

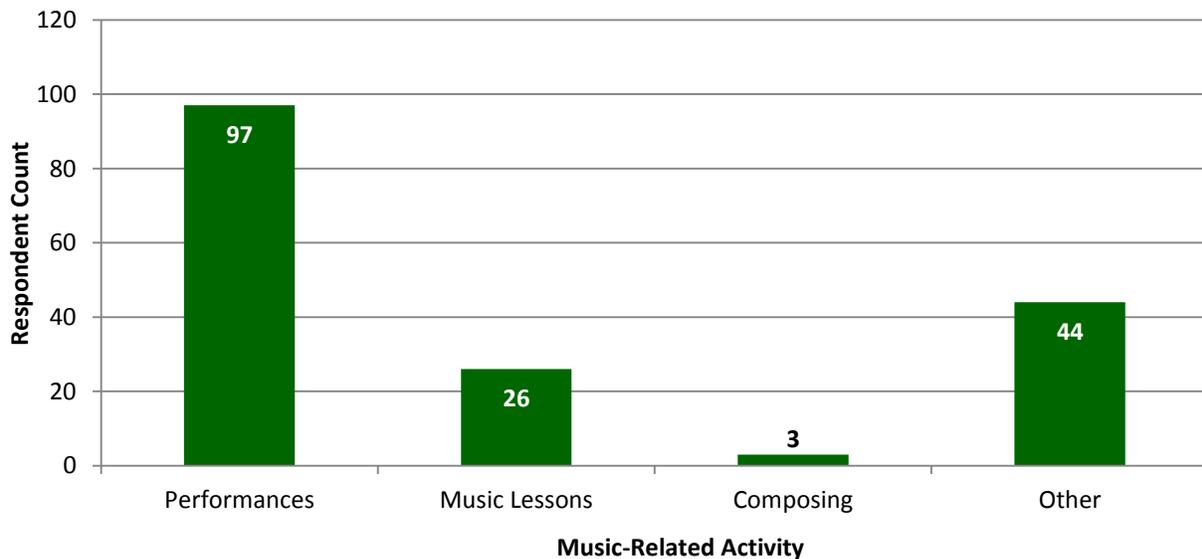
Table 3-20: Professional Musician Percentage of Income from Music

% of Music Income	Professional	
	Respondent Count	% of Respondents
51%-60%	8	12%
61%-70%	4	6%
71%-80%	4	6%
81%-90%	1	2%
91%-100%	49	74%
Total	66	100%

Musicians who self-identified as earning less than half of their income from music were classified as amateur musicians, and those who make more than half of their income from music were classified as professional musicians.¹² The majority of amateur musicians

(67%) make less than 10% of their income from music (Table 3-19). By contrast, the vast majority of professional musicians (74%) make more than 90% of their income from music (Table 3-20).

Figure 3-1: Music Income



Note: Respondents selected all music-related activities that applied; therefore, the total counts represent how frequently each music-related activity was selected rather than the number of respondents.

¹² See the methodology section at the beginning of this chapter for more information on the distinction between amateur and professional musicians.

Survey participants were asked how they earn their music-based income (Figure 3-1). *Performances* were the most commonly selected category (97) followed by *Other* (44)

and then *Music Lessons* (26). Only three respondents cited composing as their primary source of income.

Table 3-21: Length of Time Performing/Singing/Composing by Amateur/Professional Status

Years Performing	All Respondents		Amateur		Professional	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Less than 5	8	5%	6	6%	2	3%
6 to 10	11	6%	6	6%	5	7%
11 to 20	39	23%	26	25%	13	20%
More than 20	113	66%	67	63%	46	70%
Total	171	100%	105	100%	66	100%

Note: Non-response for this question was 2% (3 respondents).

The majority of musicians, both amateur and professional, have been performing for more than 20 years. In addition, approximately one quarter of respondents (23%) have been performing between 11 and 20 years (amateurs, 25%; professionals, 20%). A small portion of musicians (11%) has been performing

for less than 10 years. Only 3% of professional musicians have been performing less than 5 years and 8% have been performing between 6 and 10 years. Six percent of amateurs have been performing for less than 5 years, and 6% have been performing between 6 and 10 years (Table 3-21).

Table 3-22: Existence of Competition by Geographic Location

	Respondent Count
Yes - From Inside Cuyahoga	77
Yes - From Outside Cuyahoga	71
No	68

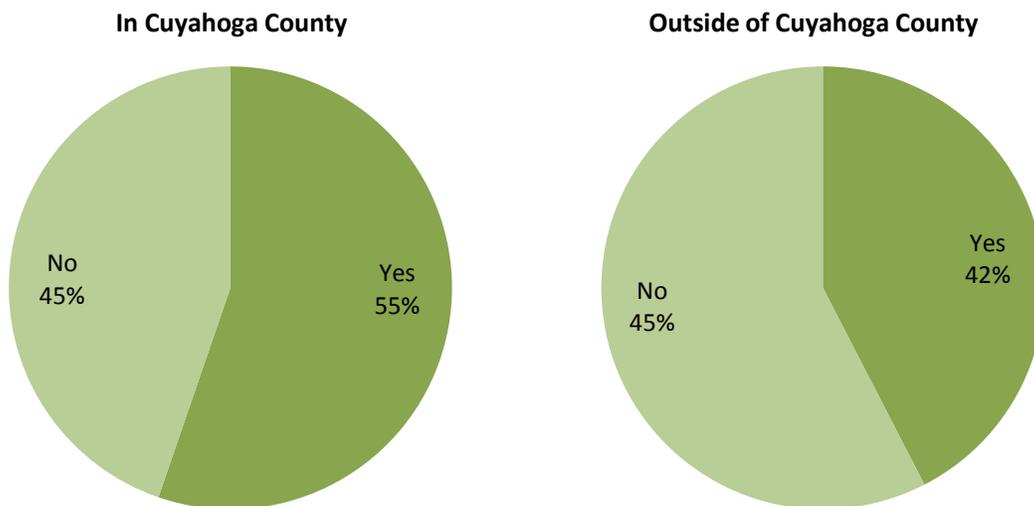
Note: Respondents selected all locations that applied; therefore, the total counts represent how frequently each location was selected rather than the number of respondents.

In order to identify the competition structure in the Cleveland Music Sector, respondents were asked the question: *Is there significant competition in your genre?* The options for answers included: (1) *Yes, there is a lot of competition in my genre within Cuyahoga County;* (2) *Yes, there is a lot of competition in my genre outside of Cuyahoga County;* and (3) *No, there is not significant competition in my genre.* Respondents were allowed to select all

options that applied to their situation.

Table 3-22 displays the raw counts of responses from each of the three answer choices. Overall, the results were mixed and inconclusive. The highest frequency of those that reported that there is indeed significant competition regardless of the geographic location was in the genres *Classical* and *Rock*.

Figure 3-2: Difficulty getting Gigs at Local Venues by Geographic Location



Survey respondents were asked a variety of questions regarding their ability to get gigs at local venues; their responses were designed to explore local musicians' perceptions of being able to perform at local venues. Figure 3-2 examines responses to this question by geo-

graphic location of respondents. Fifty-five percent of respondents who live in Cuyahoga County believe that it is difficult to get gigs at local venues. By contrast, only 42% of those living outside Cuyahoga County believe that it is difficult to get gigs at local venues.

Table 3-23: Respondents who do not find it Difficult getting Gigs – Local Venues by Geographic Location

Venue	Respondents Who Live in Cuyahoga County		Respondents Who Do Not Live in Cuyahoga County	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Bar	22	15%	12	13%
Church	11	8%	8	9%
Club	18	12%	12	13%
Corporate Events	9	6%	6	7%
Formal Concert Venue	23	16%	12	13%
Outdoor Pavilion	17	12%	14	16%
Private Parties	14	10%	11	12%
Public Spaces	12	8%	9	10%
School	12	8%	5	6%
Other	8	5%	1	1%
Total	146	100%	90	100%

Note: Respondents selected all venues that applied; therefore, the total counts represent how frequently each venue was selected rather than the number of respondents.

Further insights may be provided by apportioning the answers of respondents who said that it was easy to get gigs at local venues according to a different variable. For those respondents who do not have difficulty performing gigs at local venues, the above table (Table 3-23) examines the venues they play. *Bars, Clubs, Outdoor Pavilions, and Formal Concert Venues* are all popular.

Responses were mixed within each geographic location category (inside Cuyahoga County and

outside Cuyahoga County), but the two categories differed in that a larger percentage of respondents living in Cuyahoga County most frequently perform at *Formal Concert Venues* and *Bars*. Unfortunately, this survey does not provide information that would enable us to determine whether this occurrence is because of the supply of venues or if there are simply more *Formal Concert Venues* and *Bars* in Cuyahoga County than in other counties surveyed.

Table 3-24: Explanation of Difficulty Getting Gigs at Local Venues by Geographic Location

Response Choices	All Respondents with Addresses		Respondents Who Live in Cuyahoga County		Respondents Who Do Not Live in Cuyahoga County	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Not enough venues	16	16%	12	16%	4	16%
Not enough venues in my genre	38	38%	29	39%	9	36%
Venues in my genre are not seeking local musicians	27	27%	19	25%	8	32%
Not enough resources to promote myself/my genre	16	16%	12	16%	4	16%
Playing local venues is too expensive	3	3%	3	4%	0	0%
Total	100	100%	75	100%	25	100%

Respondents who replied that it was hard to get local gigs were given an additional question asking why it was difficult to get local gigs. Options for answers included: (1) *Not enough venues*; (2) *Not enough venues in my genre*; (3) *Venues in my genre are not seeking local musicians*; (4) *Not enough resources to promote myself/my genre*; and (5) *Playing local venues is too expensive*. Respondents were allowed to select as many answers to this question as

their situation deemed appropriate.

Thirty-eight percent of respondents believe that the difficulty of getting gigs is due to a lack of venues in their genre (39% in Cuyahoga County; 36% outside Cuyahoga County) (Table 3-24). The response *Venues in my genre are not seeking local musicians* was selected by 27% of respondents (25% in Cuyahoga County; 32% outside Cuyahoga County).

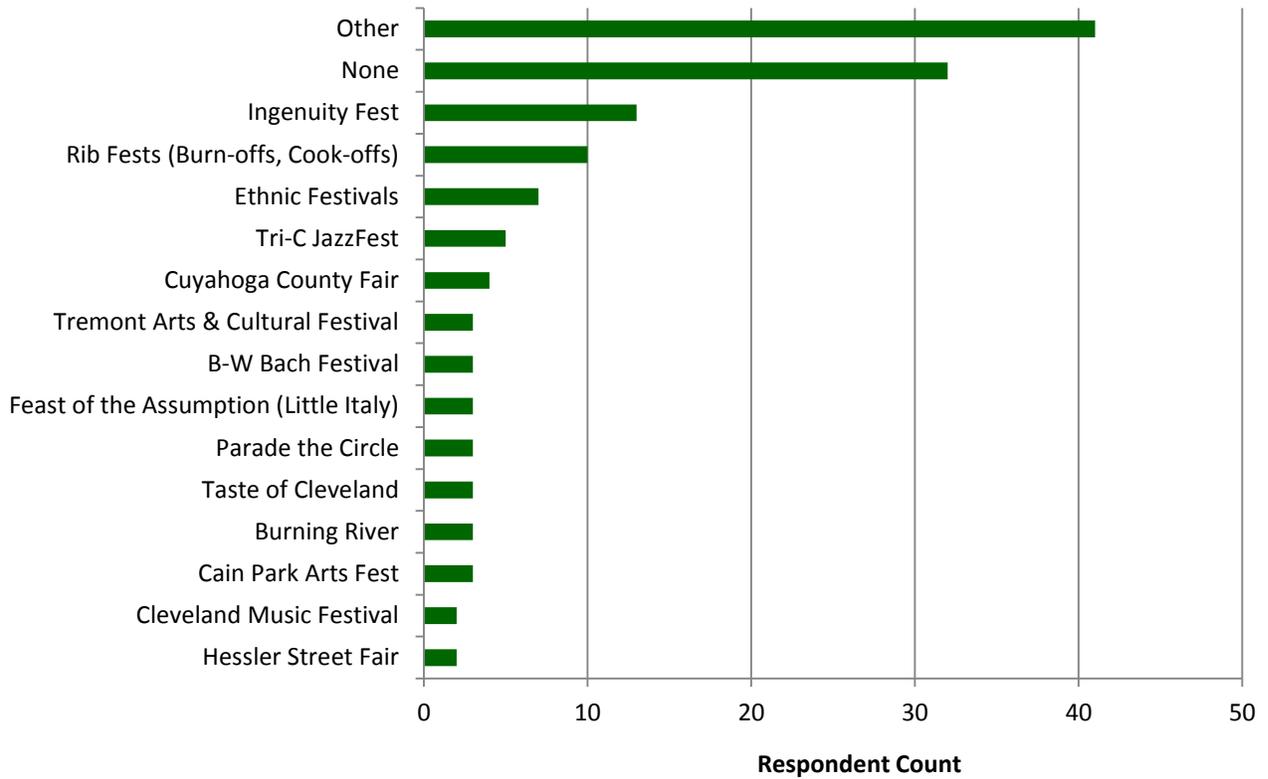
Table 3-25: Explanation of Difficulty Getting Gigs at Local Venues by Amateur/Professional Status

Response Choices	All Respondents		Amateur		Professional	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Not enough venues	22	16%	12	16%	10	15%
Not enough venues in my genre	52	37%	26	36%	26	38%
Venues in my genre are not seeking local musicians	34	24%	17	23%	17	25%
Not enough resources to promote myself/my genre	26	18%	13	18%	13	19%
Playing local venues is too expensive	7	5%	5	7%	2	3%
Total	141	100%	73	100%	68	100%

Table 3-25 displays the same content as Table 3-24, but organizes the data according to amateur/professional status rather than geographic location. Both amateur and professional musicians largely believe that the difficulty

in getting local gigs is due to a lack of venues in their genre (36%, amateur; 38%, professional); 23% of amateurs and 25% of professionals selected *Venues in my genre are not seeking local musicians*.

Figure 3-3: Major Festivals in Cuyahoga County Respondents Attend

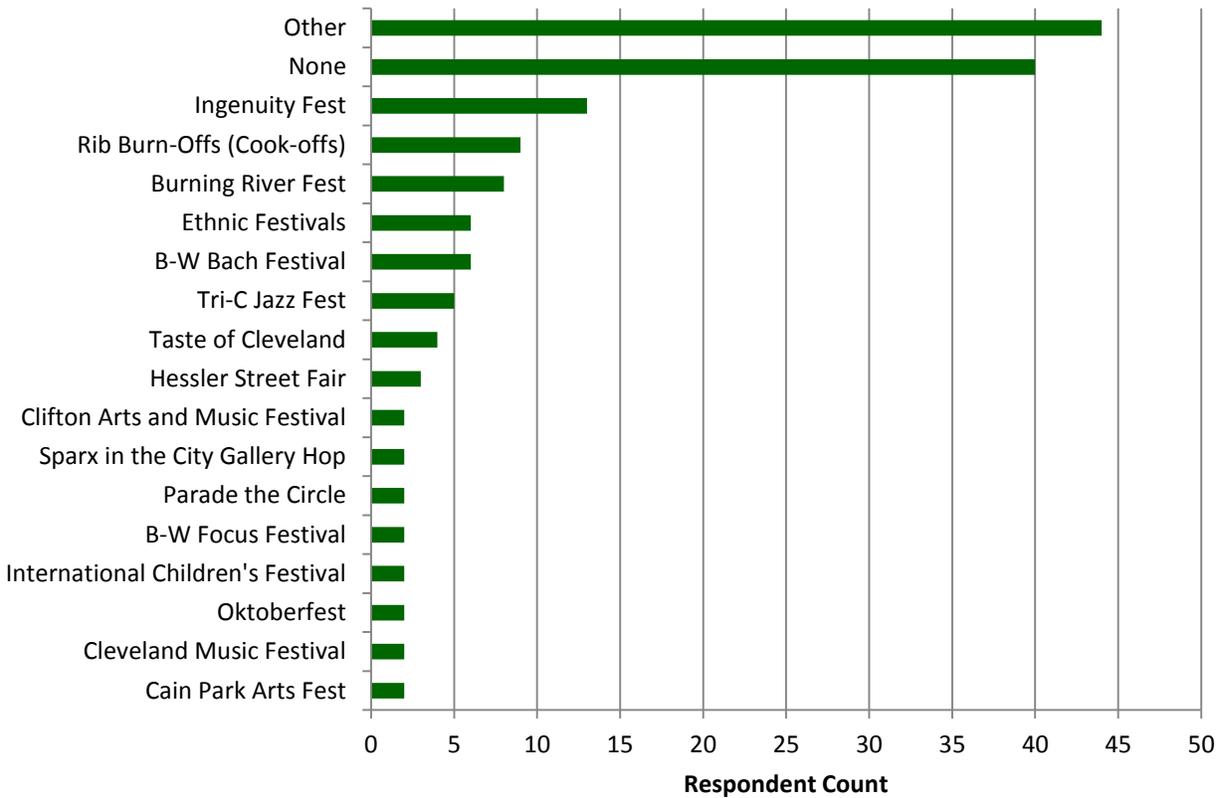


Note: Respondents selected all festivals that apply; therefore, the total counts represent how frequently each festival was selected rather than the number of respondents.

Figure 3-3 reports the variety of major festivals in Cuyahoga County that respondents attend. Seven respondents cited that they attend Cleveland Orchestra concerts at the venue Blossom Music Center, but this was excluded

because Blossom Music Center is located outside Cuyahoga County. The highest respondent count was in the *Other* category, which suggests the Cleveland Music Sector is highly diverse.

Figure 3-4: Major Festivals in Cuyahoga County in which Respondents Participate

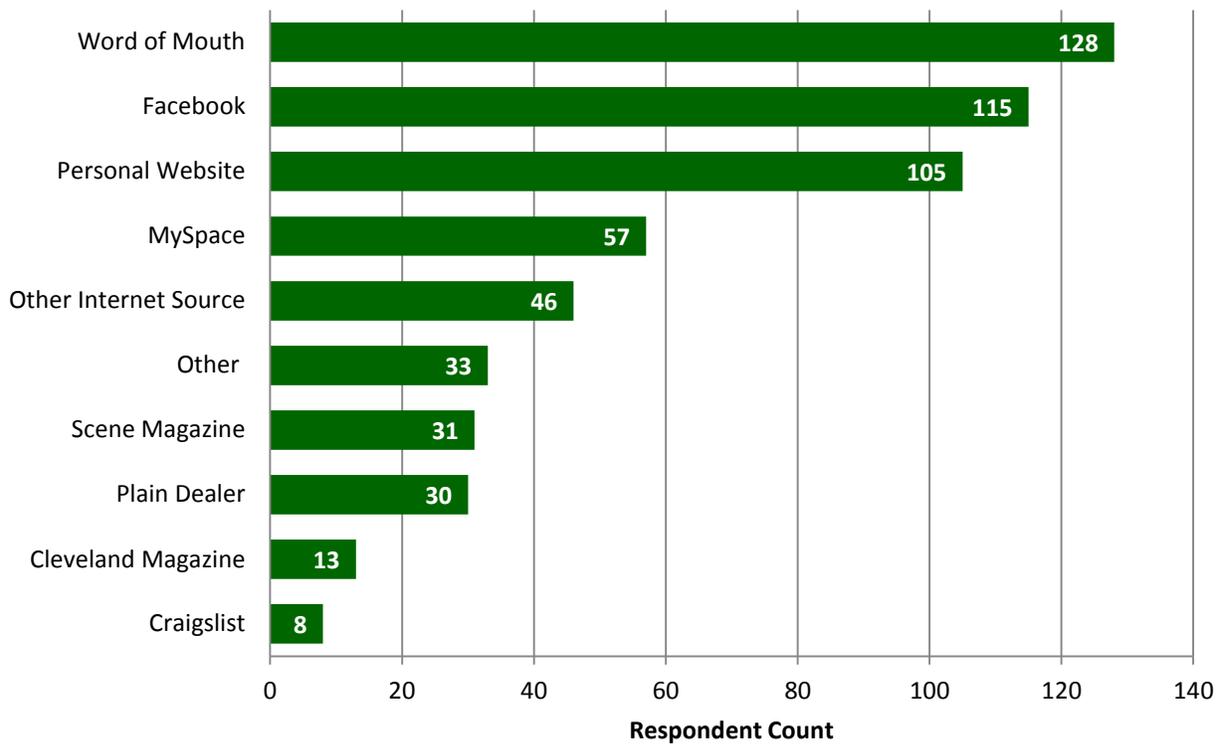


Note: Respondents selected all festivals that apply; therefore, the total counts represent how frequently each festival was selected rather than the number of respondents.

Figure 3-4 reports the variety of major festivals in Cuyahoga County that respondents participate in as an artist or composer. Three respondents cited that they participate in Cleveland Orchestra concerts at the venue

Blossom Music Center, but this was excluded because Blossom is located outside Cuyahoga County. The highest counts were *Other* and *None*, which suggest a fragmentation in the participating population.

Figure 3-5: Advertising Medium



Note: Respondents selected all mediums that apply; therefore, the total counts represent how frequently each medium was selected rather than the number of respondents.

The question was posed to survey participants: *Where do you primarily advertise your music or ensemble?* This question was designed to understand primarily how amateur musicians in the Cleveland Music Sector promote their music

and music groups. The top three answers for this question were: *Word of Mouth* (128), *Facebook* (115), and *Personal Website* (105). *Craigslist* and conventional print magazines were among the least popular.

Table 3-26: Advertising Medium by Genre

	Cleveland Magazine	Craigslist	Facebook	MySpace	Personal Website	Plain Dealer	Scene Magazine	Word of Mouth	Other Internet Source	Other
Alternative	1	1	7	4	4	0	1	6	2	0
Americana	3	0	5	5	5	3	2	4	3	3
Bluegrass	1	0	0	0	1	0	0	1	0	1
Blues	1	0	3	2	4	1	1	3	1	1
Classical	5	1	19	0	18	13	4	36	13	9
Country	0	0	1	0	0	0	0	1	0	0
Folk	0	1	11	6	10	2	4	10	6	3
Gospel	0	0	1	0	1	0	0	1	1	0
Hip-Hop	0	0	1	0	1	0	0	1	1	0
Jazz	0	0	7	3	6	1	1	7	2	1
Pop	0	0	6	3	8	1	1	6	2	2
Reggae	0	0	0	0	0	0	0	0	0	0
Rock	2	2	20	15	17	4	9	17	5	1
Roots	0	0	3	1	3	0	1	3	0	0
R&B	0	0	2	0	0	1	1	2	1	0
Salsa	0	0	1	1	1	0	0	1	0	0
Other	0	3	28	17	26	4	6	29	9	12
Total	13	8	115	57	105	30	31	128	46	33

Note: Respondents selected all mediums that apply; therefore, the total counts represent how frequently each medium was selected rather than the number of respondents.

Examining self-reported music advertising medium by genre reveals that these trends remain consistent across genre (Table 3-26). In addition, six respondents stated that they use direct promotional

materials such as flyers, mailings, and postcards to get information to their consumers.

ANALYSIS OF SUPPLY AND DEMAND

INTRODUCTION

This chapter of *Remix Cleveland* is designed to assess and compare the concentration of musicians and music-related activities in the Cleveland region and in comparable areas. Through an analysis of the market forces in the Cleveland Music Sector, it is possible to see the supply and demand of music and music-related activities in the Cuyahoga County economy.

The following analysis takes into account data gathered by federal statistical agencies, as well as local viewpoints derived from in-person interviews and focus groups. Data gathered for the analysis of supply and demand was taken from the U.S. Census Bureau and the U.S. Bureau of Labor Statistics in order to encapsulate the formal music economy in Cleveland and comparable communities reported by the federal government. The comparable communities (Cincinnati, Ohio

MSA; Columbus, Ohio MSA; Indianapolis, Indiana MSA; and Pittsburgh, Pennsylvania MSA) were chosen because of similarities in their population size when compared to the Cleveland area, and because all four communities were identified during the interviews and focus groups as having strong music sectors in the Midwest and Great Lakes region.

Additional information and data was assembled from personal interviews and focus groups conducted by Cleveland State University's Center for Economic Development ("Center") with local stakeholders, including musicians, concert promoters, club owners, and other music-related individuals in the Cleveland Music Sector. Finally, information was also collected from the Cleveland Amateur Musician Survey, which was also administered by the Center.

PERCEPTIONS OF SUPPLY AND DEMAND

Personal interviews, focus groups, and an online survey were conducted in order to interpret local artists' perceptions of the supply and demand of the Cleveland Music Sector. Overall, the majority opinion of those interviewed and

surveyed is that the supply of musicians in Cuyahoga County exceeds the demand for music-related activities. Several factors that led to this perception are discussed in the subsections below.

Interviews and Focus Groups

Two focus groups and multiple interviews with local music stakeholders were conducted from October 2010 to February 2011. The questions asked were designed to gather data on a number of factors including the strengths and weaknesses of Cleveland/Cuyahoga County as a stage for the music industry, the impact of the recent recession on the music sector, and specifically the supply and demand of music in the Greater Cleveland area.

Respondents and focus group participants listed a number of variables that could conceivably account for the large supply of local musicians in Cuyahoga County. First, the cost of living in Cuyahoga County is lower than in other major metropolitan areas, making it relatively easier to afford basic living expenses on an artist's wage. An analysis of 2009 cost of living data shows that the index for cost of living is smaller in the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA) (88.59) than in the four comparable, previously mentioned communities (Columbus, OH MSA, 92.77; Cincinnati-Middletown, OH-KY-IN MSA, 91.24; Indianapolis-Carmel, IN MSA, 90.72; and Pittsburgh, PA MSA, 92.67).¹³ In addition, the cost of living index is much smaller in the Cleveland MSA as compared to MSAs that house cities typically identified as major music cities, including the New York-White Plains-Wayne, NY-NJ MSA (128.39); the Los Angeles-Long Beach-Glendale, CA MSA (117.43); the Chicago-Joliet-Naperville, IL-IN-WI MSA (102.28); and the Austin-Round Rock-San Marcos, TX MSA (107.87).

¹³ For the cost of living analysis, the baseline, or that which represents 100 in the analysis, was the national cost of living. Each MSA was compared to the United States as a whole. The data were provided by Moody's Economy.com.

Second, the population of Cleveland is shrinking at a faster rate than other major metropolitan regions, which arguably creates an environment where a musician is more likely to be noticed. The population of Cuyahoga County declined 1.4% between 2007 and 2009. When compared to the counties that house the cities used for comparison in the cost of living analysis, this decline is quite substantial. Two other counties, Hamilton County, Ohio (Cincinnati), and Allegheny County, Pennsylvania (Pittsburgh), also declined in population between 2007 and 2009 (-0.1% each), but at a slower rate than Cuyahoga County. All other counties increased in population between 2007 and 2009; increases ranged from a 1.0% growth (New York, New York) to a 7.2% growth (Austin, Texas). Taking into account a longer period of time, the Cleveland MSA lost 8.4% of population from 2000 to 2009, while Chicago lost 1.0%, New York population increased 4.7%, and Austin, Texas, grew by 35.3%.¹⁴

Third, the music education programs in Cuyahoga County are of superior quality, which leads to a greater output of musicians. U.S. College Rankings¹⁵ placed the Cleveland Institute of Music 17th on its list of Top Music

¹⁴ For this analysis, population was analyzed at the county level rather than the city level. This decision was made because the Cleveland Music Sector is defined in this report as the entirety of Cuyahoga County, not just the city of Cleveland. Due to the fact that some cities cross county lines, the cities of New York, Austin, and Chicago included the populations of multiple counties. The data were provided by the 2007 and 2009 U.S. Census Population Estimates.

¹⁵ U.S. College Rankings, Top Music Schools Rankings in 2010, <http://www.uscollegeranking.org/music/top-music-schools-ranking-in-2010.html>. The methodology used for these rankings can be found at <http://www.uscollegeranking.org/ranking-methodology>

Schools in 2010. Oberlin College Conservatory, located in Northeast Ohio but not within the formal geographic boundaries of the Cleveland Music Sector used in this report, was ranked 8th. The high quality of music educational programs in other Cleveland colleges was acknowledged in interviews with music managers, educators, and local musicians with the national reputation.

Finally, it was also mentioned in these discussions that a vibrant and rich scene exists for private music lessons in the Cleveland economy. Although this scene is immeasurable since many instructors only moonlight as private lesson teachers, the value that their work brings to the Cleveland Music Sector is still important to document.

By contrast, respondents and focus group participants also identified several hypotheses that could account for a decrease in the local demand for music and music-related activities. Paramount among those hypotheses is the effects of the recent recession on Cuyahoga County. Due to the poor economic climate, county residents have suffered a decline in disposable income. Per capita income in Cuyahoga County, which peaked in 2007 at \$42,640,¹⁶ has declined since 2007 when the recession began; specifically, Cuyahoga County's per capita income declined 2.9% from 2007 to 2009. This decline in per capita income affected the amount of disposable income spent on arts and recreation and, in turn, has led to a decrease in tickets sold and attendance at performances. In addition, the recession has made it more difficult for unknown musicians to

enter the local music scene because venues are in a "survival" mode. Several music venues owners indicated that they are still adjusting to a decrease in their revenue fostered by lower attendance. Venues are drawing in known talent to make money, which decreases the ability of local musicians to earn a living as a musician.

Another factor hypothesized as decreasing the local demand for music is Cuyahoga County's shrinking population. While this population decline was previously viewed as a positive in facilitating a large supply of musicians, it can also be viewed negatively as decreasing demand for music consumption, i.e., fewer people living in the region means fewer attendees at concerts.

Finally, a major theme of the interviews and focus groups was a decrease in the demand for music due to a lack of performance opportunities and promotion. In other words, local musicians believe there are too few venues to perform in, and that the public is unaware of the performances that do take place because no vehicle exists by which to effectively advertise. This lack of resources will be addressed again later in this chapter during the discussion of the results of the amateur musician survey.

A final perception worth noting concerns not demand as a whole, but the type of music acts demanded. During the interviews and focus groups, it was suggested that demand for music is not the issue; rather, the issue is that the significant demand in the Greater Cleveland area is for national music acts, not local artists. In other words, Clevelanders are going to see national/international artists instead of local

¹⁶ Adjusted to 2009 dollars to account for inflation. Data retrieved from the U.S. Bureau of Economic Analysis (BEA).

musicians, thereby limiting local musicians' performance opportunities and making it more difficult financially to be a full-time musician. This is consistent with the analysis of the import of music shows into Cleveland. The Billboard Hot 100¹⁷ list cites 75 unique artists, 45 of which toured in 2010.¹⁸ Of these 45 artists, 20

performed in Cleveland, which is 44.4% of all touring acts in 2010.¹⁹ As a result, a competitive music environment facilitated by a perceived lack of venues is made even more difficult by venues seeking outside acts rather than local musicians.

Survey of Amateur Musicians

In January 2011, the Cleveland Amateur Musician Survey was administered online by the Center for Economic Development to assess the perceptions of amateur musicians in the Cleveland Music Sector; 174 unique respondents participated in the survey.²⁰ They were asked questions on a number of topics including their perception of the supply and demand of music in the Greater Cleveland area. Of the 174 respondents, 116 provided address information, which allowed the survey results to be tabulated by respondents' self-identified county affiliation: those living in Cuyahoga County and those living outside of Cuyahoga County. This differentiation allowed for the analysis of the two different groups to see if patterns emerged based upon respondents' self-identified residential location.

Survey results were also tabulated by respondents' amateur/professional status. Survey respondents were asked: *Is playing music/composing your primary means of income?* If respondents replied *Yes*, they were categorized as professional musicians. If

respondents said *No*, they were categorized as amateur musicians.

The first question regarding supply and demand asked respondents whether competition existed within the Cleveland Music Sector. The options for answers included: (1) *Yes, there is a lot of competition in my genre within Cuyahoga County*; (2) *Yes, there is a lot of competition in my genre outside of Cuyahoga County*; and (3) *No, there is not significant competition in my genre*. The distribution of responses to this question can be seen below in Table 4-1.

As shown by Table 4-1, approximately two-thirds of respondents indicated competition existed in the Cleveland Music Sector. Specifically, 36% of respondents said competition existed from inside Cuyahoga County, and 33% of respondents said competition existed from outside of Cuyahoga County. These responses provide evidence to support the perception espoused during the interviews and in focus groups that a large supply of musicians exists in the Greater Cleveland area.

¹⁷ Billboard Hot 100, <http://www.billboard.com/charts/hot-100#/charts/hot-100>

¹⁸ Tour Tracker was used to identify which performers toured in 2010, <http://www.tourtracker.com>

²⁰ For a full survey analysis, see Chapter 3.

¹⁹ This includes all performances in Cuyahoga County and at Blossom Music Center in Cuyahoga Falls. A detailed analysis of the import and export of the Cleveland Music Sector can be found in Chapter 5.

Table 4-1: Existence of Competition by Geographic Location

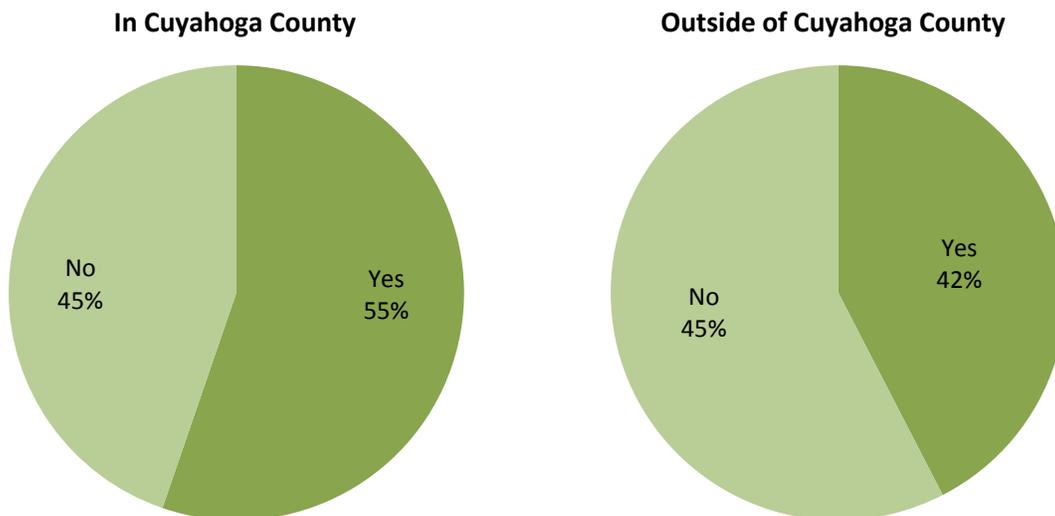
	Respondent Count	Percentage of Respondent Count
Yes - From Inside Cuyahoga	77	36%
Yes - From Outside Cuyahoga	71	33%
No	68	31%
Total	216	100%

Note: Respondents selected all locations that applied; therefore, the total counts represent how frequently each location was selected rather than the number of respondents.

Additionally, respondents were asked if it is difficult obtaining gigs at local venues. Figure 4-

1 below shows the responses to that question by respondents' geographic location.

Figure 4-1: Difficulty getting Gigs at Local Venues by Geographic Location



As Figure 4-1 shows, 55% of respondents who live in Cuyahoga County believe it was difficult getting gigs at local venues. By contrast, only 42% of respondents living outside Cuyahoga County expressed difficulty getting local gigs.

These statistics support the musicians' perception that a supply-demand imbalance exists in the Cleveland Music Sector. Also, the fact that only 42% of respondents outside Cuyahoga County said it was difficult obtaining

local gigs can most likely be attributed to either a smaller supply of artists or a greater demand for music outside of Cuyahoga County.

A third question was asked to those survey participants who responded affirmatively that it was difficult getting gigs at local venues. This question, which asked respondents why it was difficult getting local gigs, was designed to

gather data specifically geared toward discovering what factors produce the perceived music supply-demand imbalance in Cuyahoga County. Two tables were created from the responses to this question; one examined the responses by geographic living location (Table 4-2), the other by the respondents' amateur/professional status (Table 4-3).

Table 4-2: Explanation of Difficulty getting Local Gigs by Geographic Location

Response Choices	All Respondents with Addresses		Respondents Who Live in Cuyahoga County		Respondents Who Do Not Live in Cuyahoga County	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Not enough venues	16	16%	12	16%	4	16%
Not enough venues in my genre	38	38%	29	39%	9	36%
Venues in my genre are not seeking local musicians	27	27%	19	25%	8	32%
Not enough resources to promote myself/my genre	16	16%	12	16%	4	16%
Playing local venues is too expensive	3	3%	3	4%	0	0%
Total	100	100%	75	100%	25	100%

Table 4-3: Explanation of Difficulty getting Local Gigs by Amateur/Professional Status

Response Choices	All Respondents		Amateur		Professional	
	Respondent Count	% of Respondents	Respondent Count	% of Respondents	Respondent Count	% of Respondents
Not enough venues	22	16%	12	16%	10	15%
Not enough venues in my genre	52	37%	26	36%	26	38%
Venues in my genre are not seeking local musicians	34	24%	17	23%	17	25%
Not enough resources to promote myself/my genre	26	18%	13	18%	13	19%
Playing local venues is too expensive	7	5%	5	7%	2	3%
Total	141	100%	73	100%	68	100%

Regardless of whether the responses were split by geographic location or amateur/professional status, a majority of survey participants in both tabulations (38%, Table 4-2; 37%, Table 4-3) responded that difficulty getting local gigs was due to a lack of venues in their self-identified genre. A lack of genre-specific venues was also the majority response to this question when viewing the responses by whether participants live inside Cuyahoga County (39%) or outside Cuyahoga County (36%), or whether participants have amateur status (36%) or professional status (38%). The second most popular answer in all cases is that the genre-specific

venues that do exist are not seeking local musicians.

Tables 4-2 and 4-3 build upon the perception espoused in the interview and focus group section that the demand for music is less than the supply of musicians in part because of a lack of venues. The survey data supports this notion but provides the potential insight that the issue may not necessarily be a small number of overall venues; rather, the Cleveland Music Sector may be lacking the appropriate genre-specific venues for musicians.

THE REALITY OF SUPPLY AND DEMAND

The previous section discussed the perceptions held by local musicians and music-related stakeholders regarding the supply and demand of music in the Cleveland Music Sector. While

that section delved into the hypothetical and subjective, this section is designed to use objective data in an attempt to determine the reality of the supply and demand for music in

the Cleveland Music Sector.

Supply

The supply of musicians and music-related professions can be determined using occupational data from the U.S. Bureau of Labor Statistics' Occupational Employment Statistics (OES) database. To gather this data, keywords used in this report's industry analysis (Chapter 1) that denoted music-related activities were used to search the OES database for music-related occupations and their accompanying Standard Occupational Codes (SOC). Once the list of occupations was finished, the occupations were divided by Center staff into two categories: (1) core music occupations and (2) support music occupations. Finally, the OES data was gathered for the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA) and, for purposes of comparison, four other MSAs.²¹ The MSAs chosen (Cincinnati-

Middletown, OH-KY-IN; Columbus, OH; Indianapolis-Carmel, IN; and Pittsburgh, PA) were selected because their population sizes are similar to the Greater Cleveland area, and because each MSA was identified during the interview process as having a strong music sector.

Core music occupations are defined as those that result in the creation and/or performance of music. For the purposes of this analysis, core music occupations include the OES categories Music Directors and Composers (SOC 272041) and Musicians and Singers (SOC 272042). Table 4-4 below provides a more in-depth and detailed description of the kinds of occupations that comprise the core music occupations.

²¹ OES data is not available at the county level so MSA level data was substituted.

Table 4-4: Core Music Occupations

SOC Description (SOC Code)	
Core Music Occupations	Music Directors and Composers (272041)
	Arrangers, Music
	Composers
	Composers, Music
	Conductors, Orchestra
	Directors, Choral
	Directors, Music
	Jingle Writers
	Music Composers
	Music Directors
	Music Directors and Composers
	Songwriters
	Writers, Jingles
	Musicians and Singers (272042)
	Instrumentalists
	Musicians
	Musicians and Singers
	Oboists
	Rappers

Support music occupations are defined as occupations that support and participate in music, but do not result in the creation or performance of music. For the purposes of this analysis, support music occupations feature 10 unique OES categories including Agents and Business Managers of Artists, Performers, and

Athletes (SOC 131011); Art, Drama, and Music Teachers Postsecondary (SOC 251121); and Musical Instrument Repairers and Tuners (SOC 499063). Table 4-5 provides a more in-depth and detailed description of the kinds of occupations that comprise the support music occupations.

Table 4-5: Support Music Occupations

SOC Description (SOC Code)	
Support Music Occupations	General and Operations Managers (111021)
	Radio Station Managers
	Advertising and Promotions Managers (112011)
	Directors, Promotions
	Managers, Promotions
	Promotions Directors
	Promotions Managers
	Agents and Business Managers of Artists Performers and Athletes (131011)
	Agents, Theatrical
	Band Managers
	Business Managers of Artists
	Managers, Band
	Performers Agents
	Art Drama and Music Teachers Postsecondary (251121)
	Music Teachers, Postsecondary
	Teachers, Music, Postsecondary
	Radio and Television Announcers (273011)
	Radio Disc Jockeys
	Audio and Video Equipment Technicians (274011)
	Audio Equipment Engineers
	Broadcast Technicians (274012)
	Audio Engineers
	Sound Engineering Technicians (274014)
	Audio Recording Engineers
	Sound Editors
	Sound Effects Technicians
	Sound Engineering Technicians
	Electronic Home Entertainment Equipment Installers and Repairers (492097)
	Electronic Musical Instrument Repairers
	Repairers, Electronic Musical Instrument
Musical Instrument Repairers and Tuners (499063)	
Brass and Wind Instrument Repairers	
Musical Instrument Tuners	
Musical Instrument Repairers	
Musical Instrument Repairers and Tuners	
Repairers, Brass and Wind Instruments	
Repairers, Musical Instrument	
Tuners, Musical Instruments	
Tuners, Piano	

Table 4-6: Occupational Shares of Musicians and Music-Related Activities

		Metropolitan Statistical Area														
		Cleveland-Elyria-Mentor, OH			Cincinnati-Middletown, OH-KY-IN			Columbus, OH			Indianapolis-Carmel, IN			Pittsburgh, PA		
SOC Code	SOC Description	Emp	Share	Annual Wage (\$)	Emp	Share	Annual Wage (\$)	Emp	Share	Annual Wage (\$)	Emp	Share	Annual Wage (\$)	Emp	Share	Annual Wage (\$)
Core Occupations																
272041	Music Directors and Composers	40	0.004%	\$48,020	60	0.006%	\$52,460	80	0.009%	\$52,650	50	0.006%	\$48,680	170	0.015%	\$47,460
272042	Musicians and Singers	500	0.050%	D	410	0.041%	D	370	0.041%	D	S	n/a	D	310	0.028%	S
Support Occupations																
111021	General and Operations Managers	6,180	0.616%	\$120,510	7,210	0.725%	\$111,830	5,530	0.609%	\$120,190	8,960	1.029%	\$114,600	8,820	0.791%	\$101,300
112011	Advertising and Promotions Managers	160	0.016%	\$87,070	170	0.017%	\$90,020	220	0.024%	\$93,180	200	0.023%	\$89,180	190	0.017%	\$104,560
131011	Agents and Business Managers of Artists Performers and Athletes	S	n/a	\$78,800	40	0.004%	\$74,020	n/a	n/a	n/a	S	n/a	\$79,510	60	0.005%	\$68,110
251121	Art Drama and Music Teachers Postsecondary	1,180	0.118%	\$50,140	730	0.073%	\$59,270	850	0.094%	\$65,600	190	0.022%	\$53,420	610	0.055%	\$62,150
273011	Radio and Television Announcers	140	0.014%	\$38,880	140	0.014%	\$36,570	140	0.015%	\$28,790	190	0.022%	\$41,040	210	0.019%	\$46,160
274011	Audio and Video Equipment Technicians	180	0.018%	\$36,870	180	0.018%	\$40,940	200	0.022%	\$37,610	210	0.024%	\$40,810	270	0.024%	\$36,570
274012	Broadcast Technicians	270	0.027%	\$32,370	220	0.022%	\$39,340	270	0.030%	\$40,160	210	0.024%	\$41,640	190	0.017%	\$33,140
274014	Sound Engineering Technicians	60	0.006%	\$40,750	40	0.004%	\$33,710	50	0.006%	\$41,520	S	n/a	\$50,450	90	0.008%	\$35,750
492097	Electronic Home Entertainment Equipment Installers and Repairers	150	0.015%	\$30,340	150	0.015%	\$30,860	120	0.013%	\$34,020	310	0.036%	\$37,510	S	n/a	\$28,610
499063	Musical Instrument Repairers and Tuners	S	n/a	\$31,640	S	n/a	\$33,280	S	n/a	\$38,500	S	n/a	\$33,110	n/a	n/a	n/a
Total MSA		1,003,270	100.00%	\$41,930	994,930	100.00%	\$42,340	908,190	100.00%	\$43,070	870,660	100.00%	\$41,900	1,114,880	100.00%	\$41,450

Notes: D- Wages for some occupations that do not generally work year-round full time are reported either as hourly wages or annual salaries depending on how they are typically paid; S- Estimate not released; Annual Wage is Annual Mean Wage

Source: U.S. Bureau of Labor Statistics - Occupational Employment Survey (OES), <http://data.bls.gov/oes/>

Table 4-6 above shows the music employment, music employment as a share of total employment, and the annual mean wage of the core and support music occupations defined in

CORE MUSIC OCCUPATIONS

The Cleveland-Elyria-Mentor MSA has the largest number of musicians and singers (500) when compared to the four other MSAs. Consequently, the musicians and singers (SOC 272042) in the Cleveland-Elyria-Mentor MSA also represent the largest occupational share of music employment to total regional employment (0.050%) when compared to the other MSAs in Table 4-6. The Cleveland-Elyria-Mentor MSA's share of musicians and singers occupational employment to total regional employment is almost twice that of the Pittsburgh MSA (0.028%) and is only slightly higher than the shares of the other two Ohio MSAs, Cincinnati-Middletown (0.041%) and Columbus (0.041%).

Despite the Cleveland-Elyria-Mentor MSA having the largest number of musicians and singers, it has the smallest number of music directors and composers (40) when compared to the other four MSAs. While the Indianapolis-Carmel MSA has only ten more music directors and composers (50) than the Cleveland-Elyria-Mentor MSA (40), the Pittsburgh MSA has more than four times the number of music directors and composers in the Cleveland-Elyria-Mentor MSA (170). This occupational employment, despite being large comparatively, only accounts for a 0.015% occupational share of the Pittsburgh MSA economy. In addition to having

Tables 4-4 and 4-5. From this data, several important points can be made that will help assess the supply and demand of music in the Cleveland Music Sector.

the smallest number of music directors and composers (SOC 272041), the Cleveland-Elyria-Mentor MSA has the smallest share of music employment to total regional employment (0.004%) when compared to the other MSAs.

In the case of each MSA, the annual mean wage of music directors and composers is greater than the annual mean wage for the entire MSA. The annual mean wage of music directors and composers in the Cleveland-Elyria-Mentor MSA is \$48,020, which exceeds the total MSA's annual mean wage by \$6,090. This difference is the fourth smallest difference in annual mean wages, surpassing only the Pittsburgh MSA (\$6,010). The two largest differences in annual mean wages are seen in the other two Ohio MSAs, Cincinnati-Middletown and Columbus (\$10,120 and \$9,580, respectively).

When the core occupations are considered as a whole, the Cleveland-Elyria-Mentor MSA has the largest music employment (540) and the largest share of music employment to total regional employment (0.054%) when compared to the other MSAs. These statistics provide evidence affirming the perception that the Cleveland Music Sector includes a large supply of local musicians, which is similar to the other MSAs.

SUPPORT MUSIC OCCUPATIONS

When analyzing only the available employment data for the support music occupations defined in Table 4-6 above, music support occupations in the Cleveland-Elyria-Mentor MSA employ 8,320 individuals. Compared to the other four MSAs, the Cleveland-Elyria-Mentor MSA has the second smallest number of music support employees, exceeding only the Columbus MSA (7,380). The largest music support employment is found in the Pittsburgh MSA (10,440), followed by the Indianapolis-Carmel MSA (10,270).

The Cleveland-Elyria-Mentor MSA also has the second smallest share of music support employment to total regional employment (0.892%). This percentage share once again only exceeds the Columbus MSA (0.812%). The MSA with the greatest share of music support

employment to total regional employment is the Indianapolis-Carmel MSA (1.179%), followed by the Pittsburgh MSA (0.936%).

When reviewing the occupational employment data, it is clear why the Cleveland-Elyria-Mentor MSA has a low ranking in regard to both music support employment and the share of music support employment to total regional employment. In the case of every support occupation except one, the Cleveland-Elyria-Mentor MSA is either relatively on par with or exceeded by the other MSAs in terms of employment. The one support occupation in which the Cleveland-Elyria-Mentor MSA exceeds the other four MSAs in employment is Art, Drama, and Music Teachers Postsecondary (SOC 251121). This occupation includes 1,180 employees in the Greater Cleveland area.

Demand

The demand for musicians and music-related activities can be determined using population data from the U.S. Census Bureau and annual establishment data (2009) gathered from the U.S. Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) database. Using the 2009 population estimates provided by the U.S. Census Bureau, total population data was gathered for Cuyahoga County, the Cleveland-Elyria-Mentor MSA, and the four additional MSAs used for comparative purposes in the previous subsection.

Concurrently, the U.S. Bureau of Labor Statistics' QCEW database was used to gather the number of establishments that existed in

NAICS code 722410 (Drinking Places (Alcoholic Beverages)) in each of the same geographic regions. The decision to use a single NAICS code to represent the locations that musicians normally perform in was based on our estimation of the methodology used in "The Role of Music in the Austin Economy", a study of the music sector in Austin, Texas.²² In that study, the authors created a ratio using population and establishment data to represent the demand for music in Austin. The authors focused specifically on those establishments that were considered "dancehalls" or "clubs,"

²² *Texas Perspectives: The Role of Music in the Austin Economy*, <http://www.ci.austin.tx.us/telecom/musicstudy.htm>

where music would be consumed. NAICS code 722410 is the best representation of this focus.

Using the gathered population and establishment data, a ratio was created to represent regional demand for music and music-related

activities. This ratio is designed to represent the number of residents living in a region per one establishment. Each of the ratios, along with the population estimates and number of establishments, for each geographic region can be found in Table 4-7.

Table 4-7: Ratio of Persons per Music Establishment by County and MSA, 2009

	County	Metropolitan Statistical Area (MSA)				
	Cuyahoga County, OH	Cleveland-Elyria-Mentor, OH	Cincinnati-Middletown, OH-KY-IN	Columbus, OH	Indianapolis-Carmel, IN	Pittsburgh, PA
Population	1,275,709	2,091,286	2,171,896	1,801,848	1,743,658	2,354,957
No. of Establishments	421	602	439	402	265	865
Ratio (Persons per Establishment)	3,030	3,474	4,947	4,482	6,580	2,722

Note: Total Population; Number of establishments categorized as part of NAICS code 722410.

Sources: U.S. Bureau of the Census, Population Estimates; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

As seen in Table 4-7, the Cleveland-Elyria-Mentor MSA has the second smallest ratio of any MSA (3,474 residents to 1 establishment), exceeding only the Pittsburgh MSA. This implies that the Greater Cleveland area has a larger total number of establishments than most MSAs that are available to service the music demand of local residents. By extension, the Cleveland-Elyria-Mentor MSA, because of its large number of establishments, has a larger demand for music and music-related activities than the other four MSAs.

The demand for music becomes even more acute when comparing the ratio of Cuyahoga County to the MSA ratios. The ratio of Cuyahoga County (3,030 residents to 1

establishment) is smaller than the ratio of the Cleveland-Elyria-Mentor MSA, providing evidence that the demand for music is even greater in Cuyahoga County than in the remaining portions of the local MSA.

It is recognized that every establishment in Cuyahoga County classified by a 722410 NAICS code is not considered a music venue. As a component of *Remix Cleveland*, a listing of music venues was created in conjunction with the development of a music directory. Using this venue list, we recreated the ratio for Cuyahoga County using the new, more conservative number of music establishments (57) (Table 4-8).

Table 4-8: Ratio of Persons per Music Establishment in Cuyahoga County, 2009

	Cuyahoga County
Population	1,275,709
No. of Establishments	57
Ratio (Persons per Establishment)	22,381

Notes: **Number of establishments identified as music-related by the Center;** and bias can be seen in the establishment total; Total Population; Number of establishments categorized as part of NAICS code 722410.
Sources: U.S. Bureau of the Census, Population Estimates; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

The new ratio, using the number of establishments identified as music-related by the Center for Economic Development, yielded a larger ratio (22,381 residents for 1 establishment) than the ratio in Table 4-7 (3,030 residents to 1 establishment). This ratio paints a different picture in terms of the demand for music in Cuyahoga County. Specifically, the ratio in Table

4-8 provides evidence that a much smaller number of establishments exists to service the supply of local musicians. Moreover, the ratio in Table 4-8 can serve to show that the demand for music in general and the demand for venues that play music in particular are not nearly as great as those present in the other MSAs.

CONCLUSIONS AND POLICY IMPLICATIONS

The preceding sections in this chapter have provided valuable insights and statistics regarding the supply and demand of music and music-related activities in the Cleveland Music Sector. Overall, the data gathered supports the perception of local musicians and music stakeholders that an imbalance exists between the local supply of musicians and demand for music and music-related activities. Through the analysis of the supply and demand of the Cleveland Music Sector, one is able to create a policy discussion concerning potential methods by which to address this supply-demand imbalance. This policy discussion can also be used to hypothesize how potential corrective measures will impact the future of the Cleveland Music Sector.

One of the Cleveland Music Sector’s greatest assets is its supply of musicians. Although considered of average size in the cohort of comparable MSAs, the supply of musicians in the Greater Cleveland area is commonly characterized as rich and diverse. Despite its notoriety, however, a priority of the Cleveland Music Sector should be to both retain and expand its supply of musicians. This can potentially be done by publicizing the advantages of Cuyahoga County and the city of Cleveland as ideal locations for a successful music scene. The Greater Cleveland area has a low cost of living, superior music education programs, and a well-established arts scene that should be exploited as incentives for local musicians to remain local and for non-local

musicians to relocate.

A second potential method by which to increase the Cleveland Music Sector's supply of musicians is to institute measures designed to support the music scene. The respondents and focus group participants who contributed their insights to this report provided several examples of factors, such as a lack of funding and poor advertising, that are detrimental to the Cleveland Music Sector. The best policy for correcting this is to alter the culture of the music scene to create a sector that is both supportive of the current music scene and conducive to its growth. This means implementing programs that unify the Cleveland Music Sector by facilitating collaboration between local artists, better promotion of performances and music-based events to raise public awareness, and seeking out additional funding sources. Unfortunately, a well-rounded supply alone, though advantageous, cannot create an economically dynamic

music sector; attention must be paid to the demand for music as well.

The existing supply-demand imbalance in the Cleveland Music Sector is due to the demand for music not being adequate enough to support the supply of musicians. A potential method to correct this imbalance, and the alternative most commonly suggested during the interviews and focus groups, is to increase the number of opportunities to perform. Respondents and focus group participants associated this increase with the creation of new venues, but while formal venues are essential to the development of the Cleveland Music Sector, they are not necessarily the first step. Increased opportunities to perform could be satisfied by a growth in festivals, home concerts or private parties, and other music-based events. Only when the demand for music and music-related activities has grown to meet the supply of musicians can the Cleveland Music Sector truly prosper.

ANALYSIS OF IMPORT AND EXPORT

INTRODUCTION

The analysis of the import and export of music performances inside and outside Cuyahoga County aims to show the respective position of the Greater Cleveland area as compared to outside regions, the state, and the world in regard to frequency of performances, average attendance, and average earnings from performances.

Interviews conducted during the initial stage of

this report identified Cleveland as a mid-point destination between four major music cities: New York, Chicago, Philadelphia, and Detroit. This favorable geographic position, coupled with the time it takes to travel between major music cities, creates an incentive for music stars to stop in Cleveland and deliver a performance for a lower price compared to what they would charge in major music cities.

IMPORTS

National Acts in the Cleveland Music Sector

One sign of the success of performers is the frequency of national tours. While more performers have been touring nationally and internationally in recent years, Cleveland remains a stop on many of these tours. The Billboard Hot 100²³ list cites 75 unique artists, 45 of which toured in 2010.²⁴ Twenty of these acts performed in Cleveland, which is 44.4% of

all touring acts in 2010.²⁵ Figure 5-1 below shows, by genre, both the number of acts that toured nationally and those that stopped in Cleveland. Cleveland only hosted about half of the country acts, and lagged in the number of hip hop, pop, and R&B acts. None of the performers on Billboard's list were originally from Cleveland.

²³ Billboard Hot 100, <http://www.billboard.com/charts/hot-100#/charts/hot-100>

²⁴ Tour Tracker was used to identify which performers toured in 2010, <http://www.tourtracker.com/>

²⁵ This includes all performances in Cuyahoga County as well as Blossom Music Center in Cuyahoga Falls as most summer performances in the region occur at this site.

Figure 5-1: Billboard Hot 100 Acts that Toured in 2010 by Genre

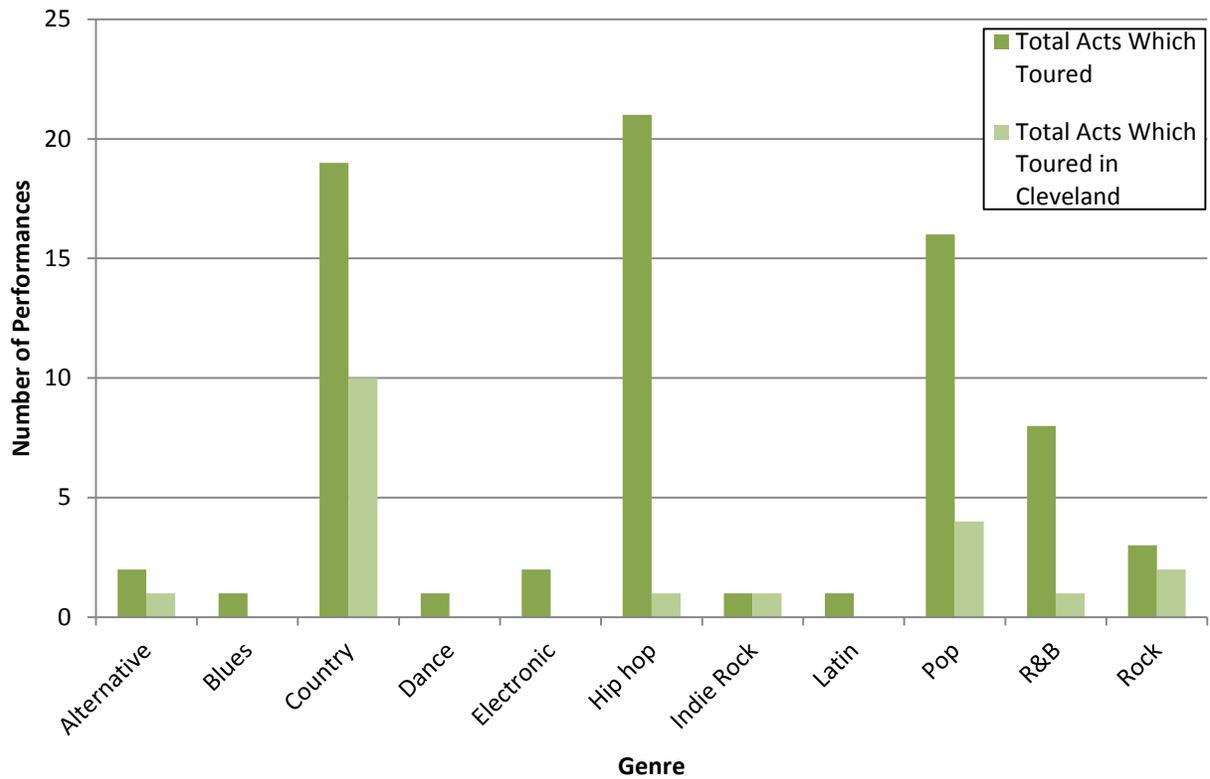
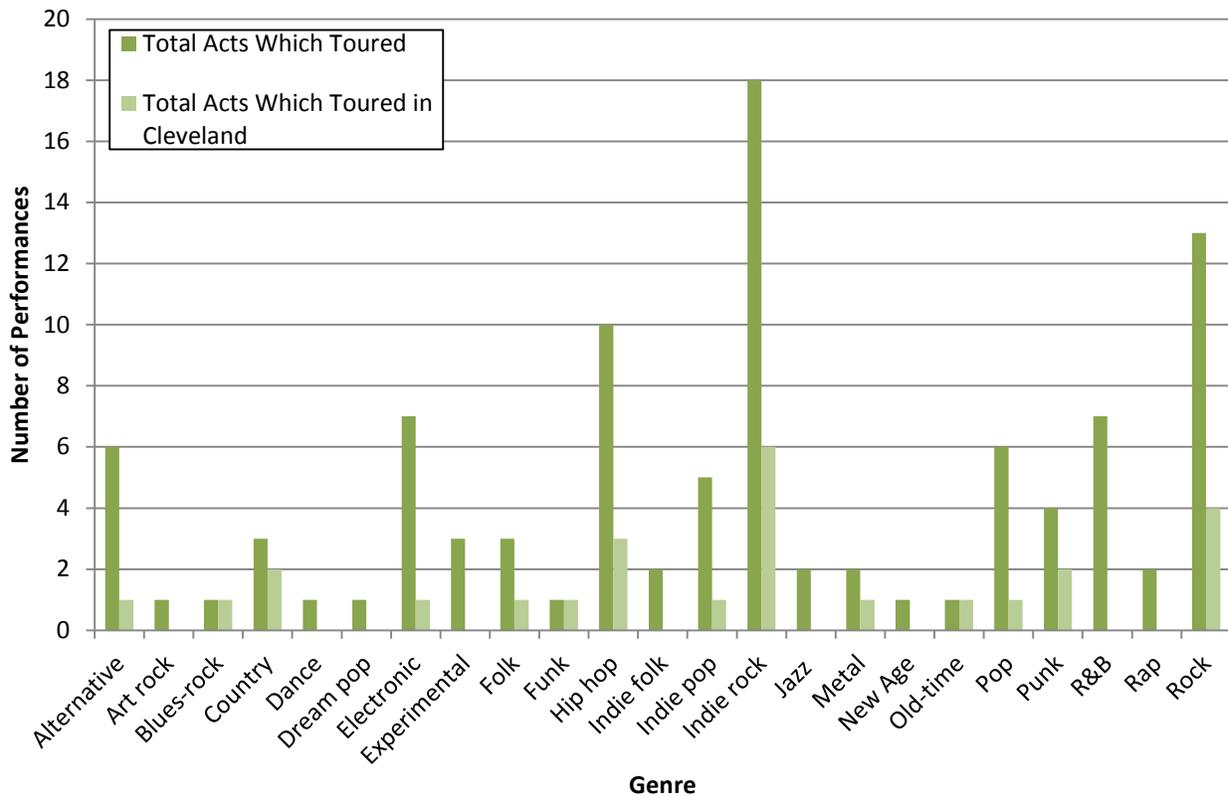


Figure 5-2 shows The Village Voice PazzNJop Top 100 albums of 2010²⁶ by genre. This ranking contains 100 unique artists in 23 varied genres. Seventy-six of these acts toured in 2010 but only 26, or 34%, came to Cleveland. The

most popular genre was Indie Rock, in which 6 of 18 acts performed in Cleveland. The second most popular genre was Rock; 4 out of 13 Rock acts performed in Cleveland.

²⁶ The Village Voice PazzNJop, Top 100 Albums of 2010, <http://www.villagevoice.com/pazznjop/albums/2010/>

Figure 5-2: The Village Voice PazzNJop Acts that Toured in 2010 by Genre



Figures 5-3 and 5-4 show the percentage each music genre represents of all of the Billboard Hot 100 acts and all of The Village Voice PazzNJop artists that performed in Cleveland in 2010, respectively. The music genre that appeared in Cleveland most frequently from the Billboard Hot 100 list was Country, followed by Pop and Rock (Figure 5-3). Each of the other genres had only one performance in Cleveland in 2010.

The most popular genre of acts that performed in Cleveland from The Village Voice PazzNJop list was Indie Rock (6), followed by Rock (4), Hip Hop (3), Country (2), and Punk (2) (Figure 5-4).

Of these two lists, which combined consist of 170 unique artists, only one band – Emeralds – is from the Greater Cleveland area. Emeralds is an electronic band with three members. They performed a North American tour in 2010 with Caribou, another electronic band.²⁷

²⁷ Carlick, S. (2010, August 10). Caribou and Emeralds Team Up For North American Fall Tour. *Exclaim! Magazine Online*. Retrieved from http://exclaim.ca/News/Caribou_Emeralds_Team_Up_for_North_American_Fall_Tour

Figure 5-3: Billboard Hot 100 Acts that Toured in Cleveland by Genre

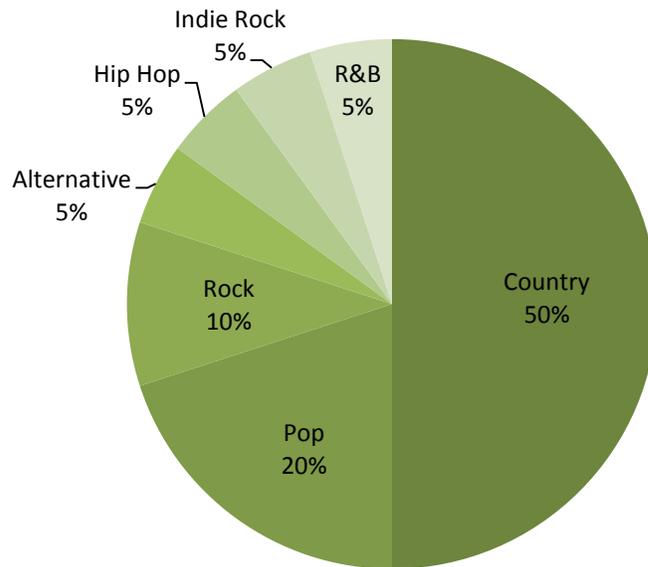
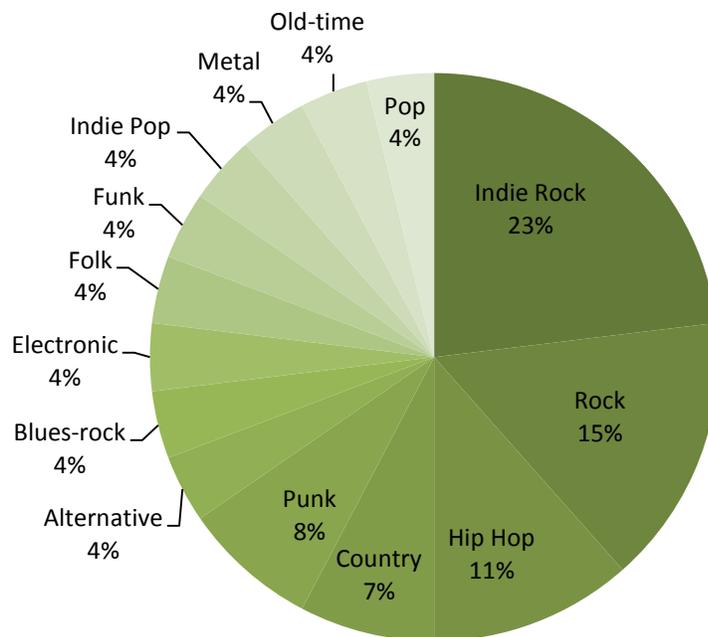


Figure 5-4: The Village Voice PazzNJob Acts that Toured in Cleveland by Genre

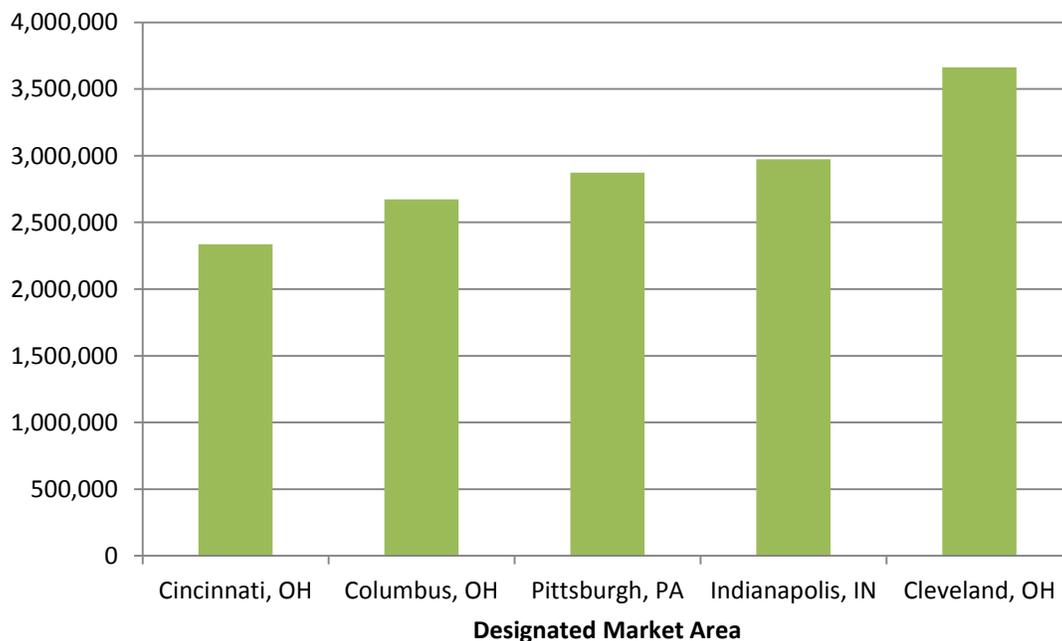


Album Sales in the Cleveland Designated Market Area (DMA)

Nielsen SoundScan data tracks the number of albums sold by Designated Market Area (DMA).²⁸ A DMA is defined as the 50-mile radius surrounding a central city. This measure evaluates the demand for recordings in an area. In 2010, album sales in the Cleveland DMA were 3,664,000. Cleveland's sales were greater than those of the four cities used in this report for

comparison purposes (Figure 5-5). The four cities—Cincinnati, Ohio; Columbus, Ohio; Indianapolis, Indiana; and Pittsburgh, Pennsylvania – were selected because their population sizes are similar to Cleveland's, and each city was identified during the interviews and focus groups as possessing strong music sectors.

Figure 5-5: Total Album Sales by Designated Market Area, 2010



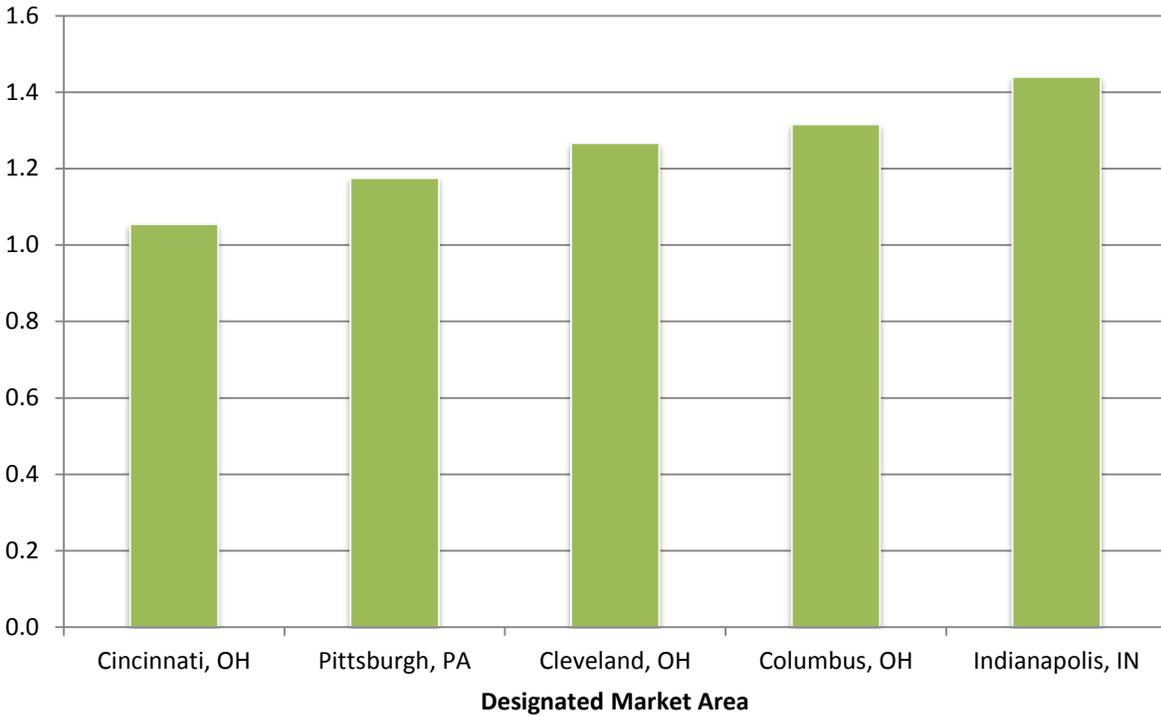
Although the Cleveland DMA has the most overall album sales of the comparable cities, when the sales are considered in regard to population, Indianapolis emerges as having the greatest sales per person (Figure 5-6).²⁹ In

2010, an average of 1.44 albums was purchased per person in Indianapolis, compared to an average of 1.27 albums purchased per person in Cleveland.

²⁸ Data from Nielsen SoundScan, 2010 Overall Album Sales. Nielsen SoundScan is an information system that tracks music and music video product sales in the United States. Sales data from point-of-sale cash registers is collected weekly from over 14,000 retail, mass merchant, and non-traditional (online stores, venues, et cetera) outlets.

²⁹ Population estimates use the 2009 Combined Statistical Area (CSA) population from U.S. Census Bureau Population Estimates, <http://www.census.gov/popest/metro/CBSA-est2009-annual.html>. The CSA was used as it most closely mirrors the Designated Market Area used by Nielsen with a 50-mile radius around the central city.

Figure 5-6: Total Record Sales by Population, 2010



EXPORTS

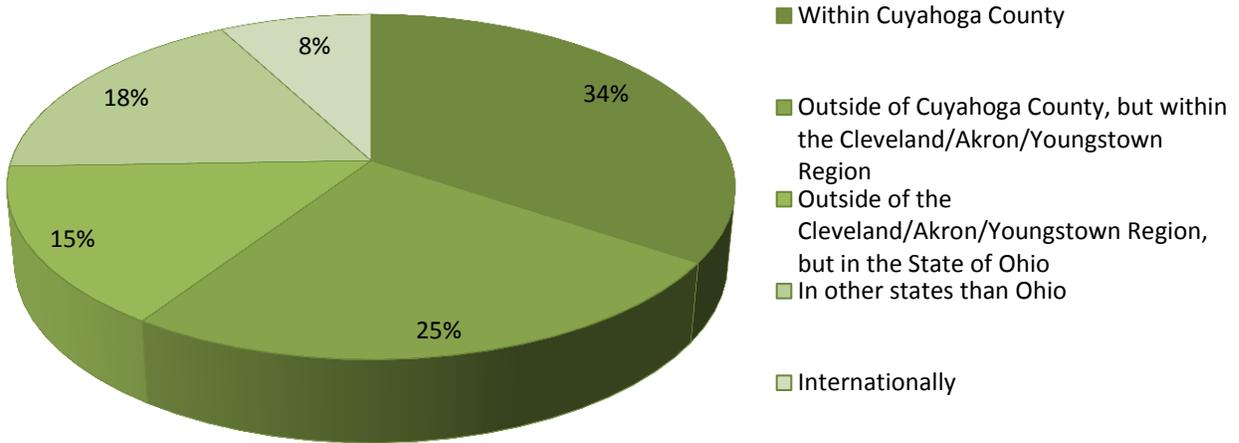
Survey Analysis

The Cleveland Amateur Musician Survey was administered online by the Center for Economic Development in January 2011.³⁰ Of the 174 unique respondents who participated in the survey, 116 provided address information, which allowed the Center to identify 83 respondents from Cuyahoga County. Using the responses from these 83 self-identified Cuyahoga County residents, the following section will analyze the results of survey questions regarding their performances outside of Cuyahoga County, particularly the number of performances and the level of attendance.

One survey question was designed to discover the geographic locations where artists ordinarily perform each month, which would help to identify the Cleveland Music Sector's geographic boundaries (Figure 5-7). Due to the fact that respondents were able to select all the answers that applied, the question received 192 total responses. Sixty-six percent of all respondents perform at a location(s) outside of Cuyahoga County. Of that 66%, the largest portion of artists (25%) performs within the Cleveland/Akron/Youngstown region. In addition, over one quarter of the respondents (26%) perform in different states or internationally.

³⁰ For the full survey analysis, see Chapter 3.

Figure 5-7: Geographic Locations where Artists Perform



Another survey question inquired as to the average number of performances that take place outside of Cuyahoga County each month (Figure 5-8). The question received 60 total

responses. Nearly three quarters of the respondents (73%) perform on average between one and three performances outside of Cuyahoga County per month.

Figure 5-8: Average Number of Performances Outside Cuyahoga County per Month

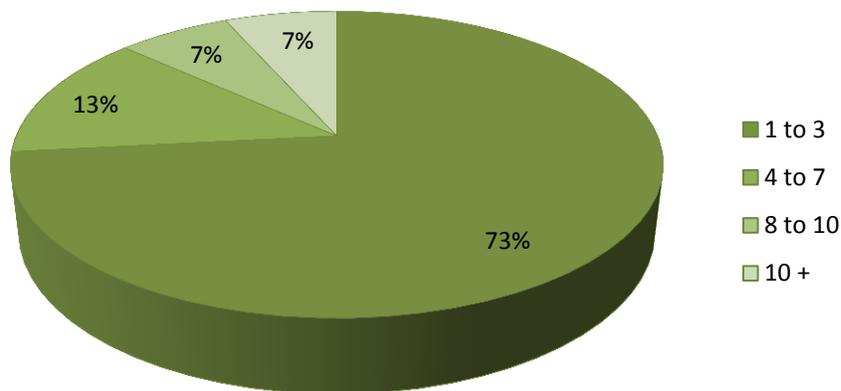


Figure 5-9 further splits the data presented in Figure 5-8 by musicians' amateur/ professional status. Amateur/professional status was determined by a survey question that asked respondents to identify what percentage of

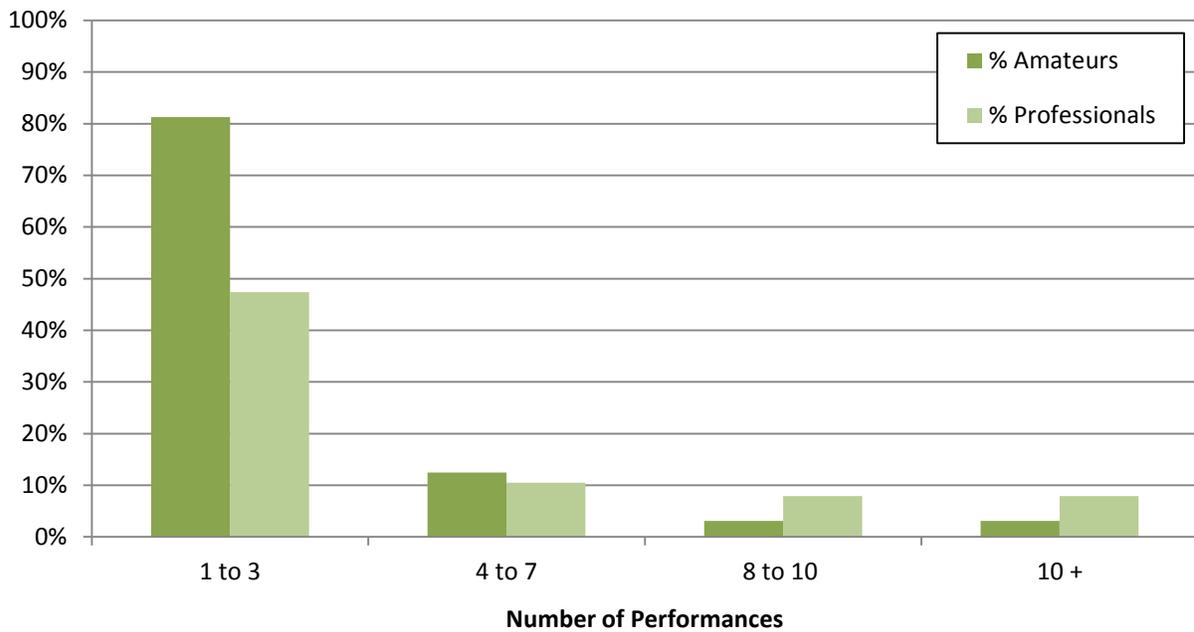
their annual income resulted from music-related activities. Those who received up to 50% of their annual income from music-related activities were classified as amateur, and those who received 51 to 100% of their annual

income from music-related activities were classified as professional.

Of the 60 participants who responded to the question presented in Figure 5-8, 32 were

classified as amateur and 28 as professional. The largest share of both amateur and professional artists (81% and 64%, respectively) gave an average of one to three performances per month outside of Cuyahoga County.

Figure 5-9: Average Number of Performances Outside Cuyahoga County per Month by Amateur/Professional Status



A third survey question was designed to discover the average number of people who attend the performances outside of Cuyahoga County (Figure 5-10). This question received 60 total responses. A significant portion of the respondents (63%) stated that more than 60

people attend their performances outside Cuyahoga County. By contrast, only one respondent (2%) indicated that 1 to 19 people attend his or her performances outside Cuyahoga County.

Figure 5-10: Average Number of Attendees at Performances Outside Cuyahoga County

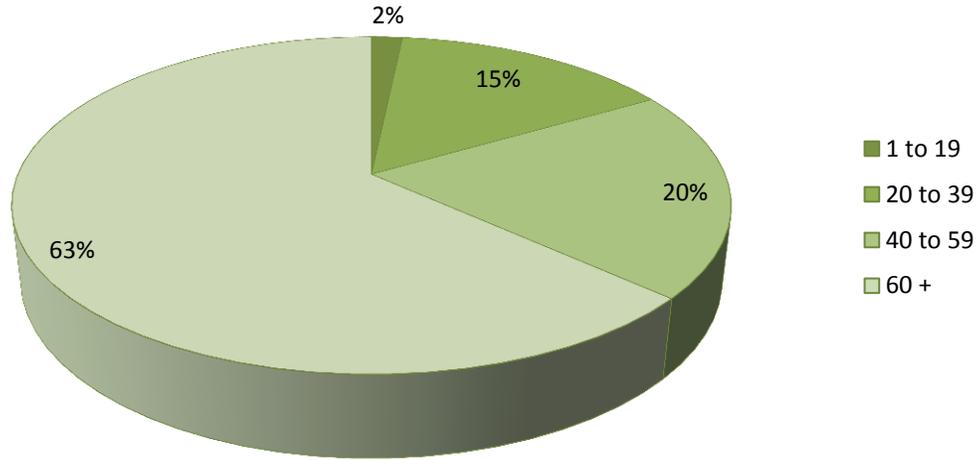


Figure 5-11 further splits the data presented in Figure 5-10 by the musicians' amateur/professional status. Of the 60 participants who responded to the question presented in Figure 5-10, 32 were classified as amateur and 28 as professional. The largest share of both amateur

and professional artists (63% and 47%, respectively) had more than 60 people attend their performances outside of Cuyahoga County. Only one amateur act indicated that his or her shows outside the county had less than 20 audience members.

Figure 5-11: Average Number of Attendees at Performances Outside Cuyahoga County by Amateur/Professional Status

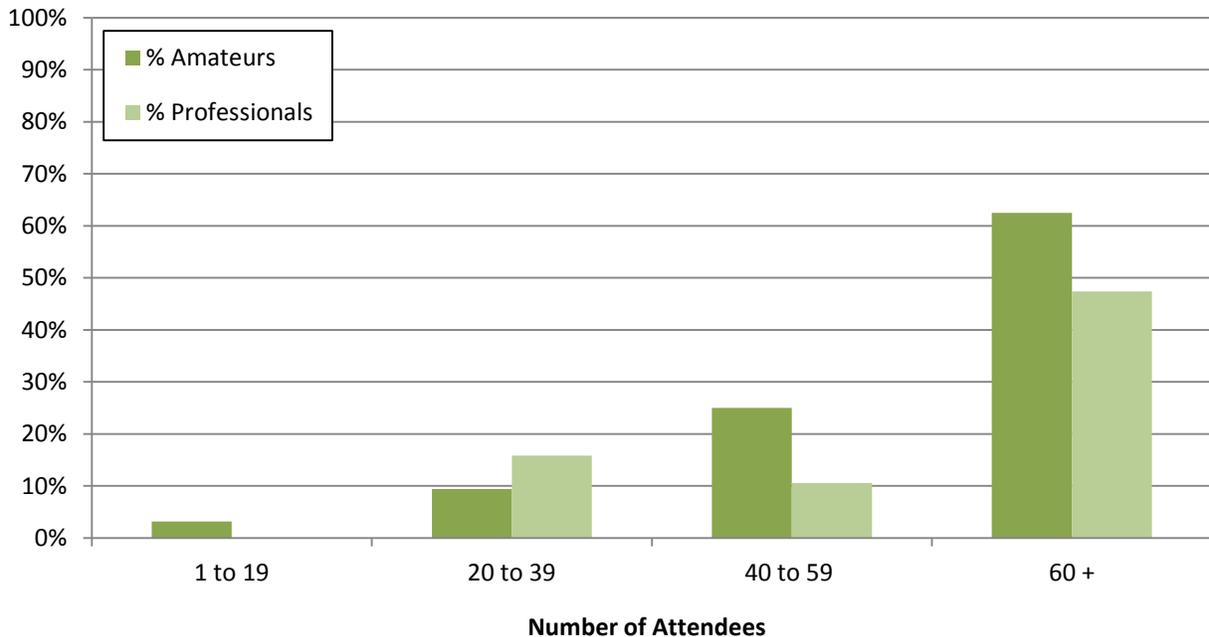
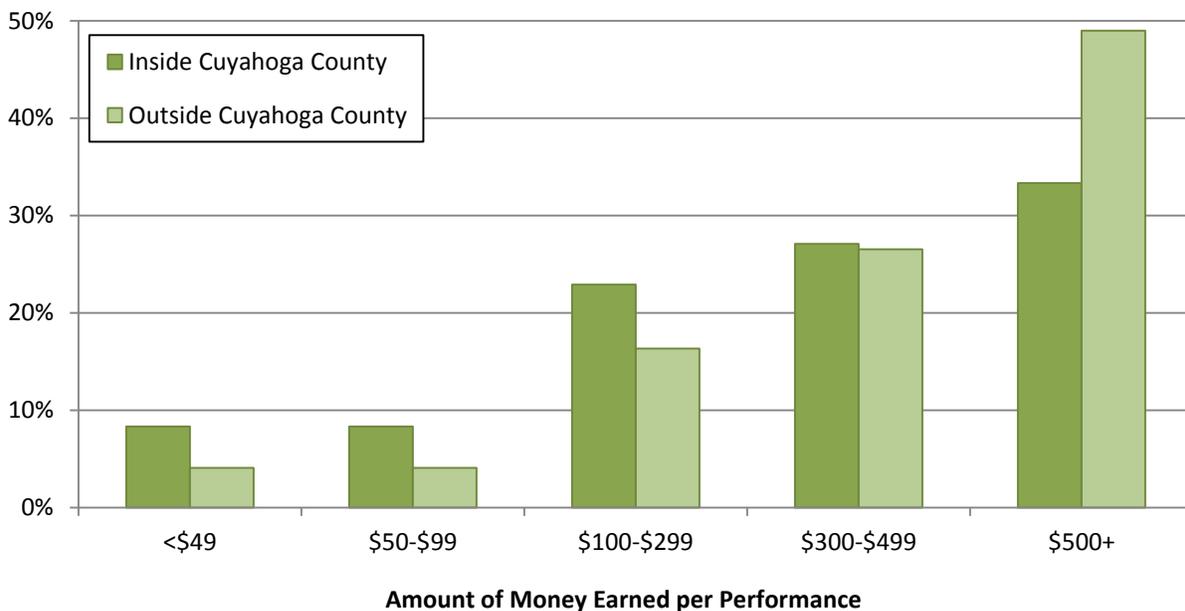


Figure 5-12 shows the average amount of money professional musicians made individually per performance both inside and outside of Cuyahoga County. Of the total 49 professional musicians that answered this question, 49% reported getting over \$500 per gig outside of the county. Only 33% reported getting over \$500 inside the county.

Gigs that paid less than \$500 per performer were more likely to take place within Cuyahoga County than outside of it. This finding is

consistent with information provided during initial interviews regarding the money professional and amateur musicians receive for their performances in Cuyahoga County. Both professional and amateur musicians acknowledged that performances in Cleveland are lower paying compared to those outside the region. The low cost of living in Cleveland mitigates these differences and provides local musicians with a higher quality of life compared to what they could afford in major music cities such as New York, Los Angeles, or Chicago.

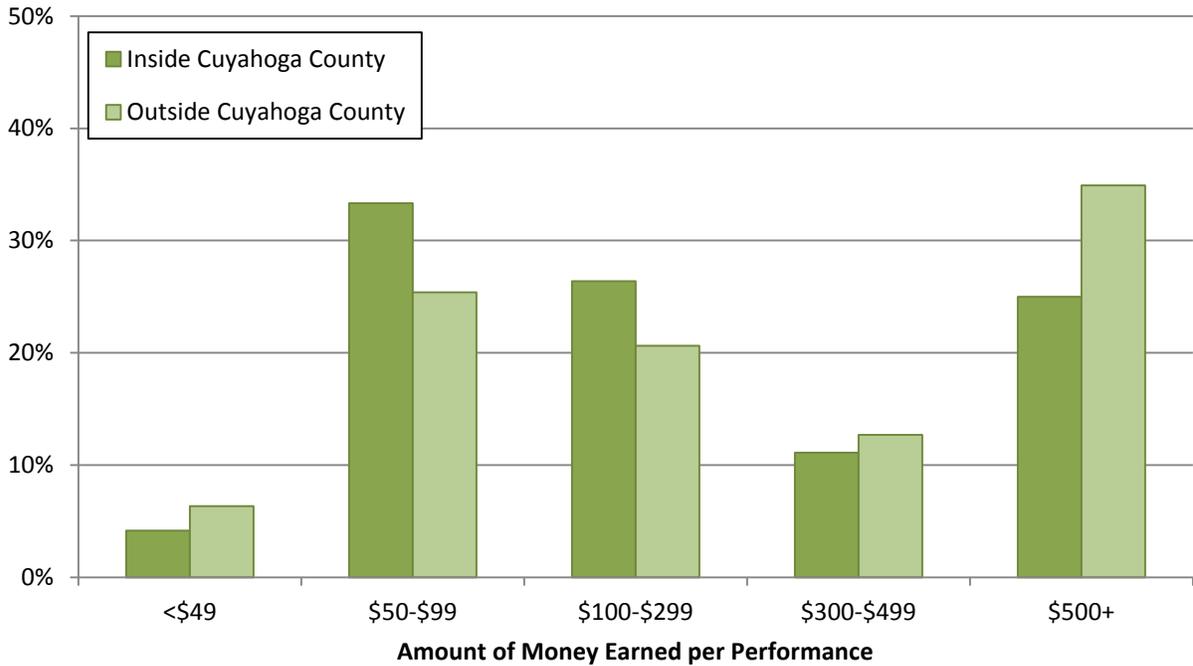
Figure 5-12: Amount of Money Earned by Professionals per Performance inside and outside Cuyahoga County



The average amount of money amateur musicians made individually per performance both inside and outside of Cuyahoga County is shown in Figure 5-13. Seventy-two amateur musicians answered this question. Of those 72, 35% reported making over \$500 outside the

county and only 25% earned that much inside the county. Gigs below \$50 and between \$300 and \$499 per person were more likely outside the county. Gigs which paid between \$50 and \$299 were more likely inside Cuyahoga County.

Figure 5-13: Amount of Money Earned by Amateurs per Performance Inside and Outside Cuyahoga County

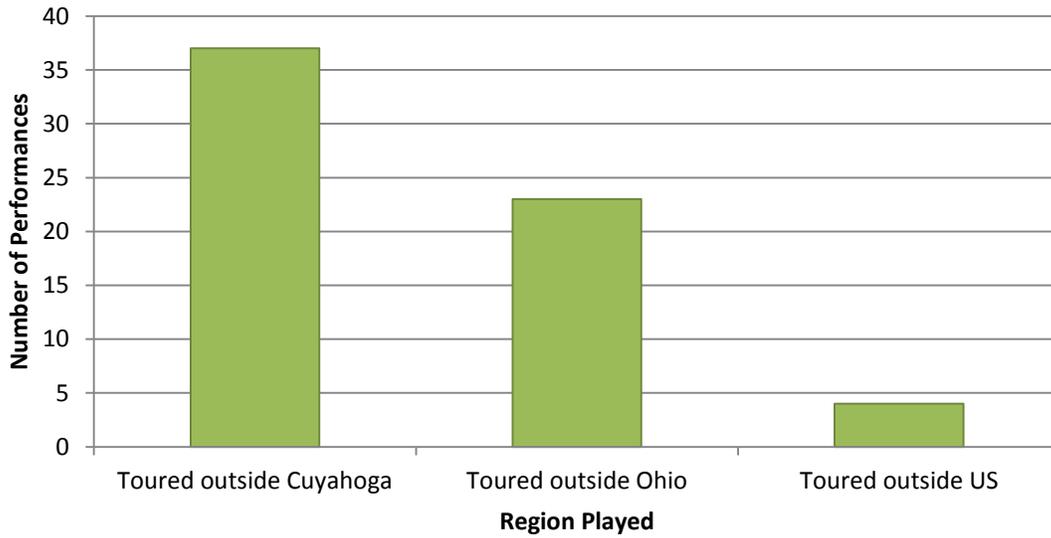


Musician Directory Analysis

The Center for Economic Development compiled a directory of 261 Cleveland-based bands and performers representing 31 different genres. Performance schedules for 2010 were found for 65 of these acts. Combined, these 65 acts performed 1,093 shows both inside and

outside Cuyahoga County. The number of shows ranged from one to 185; the average number of shows was 17. Thirty-seven acts toured outside the county, 23 performed outside the state, and four performed outside the country (Figure 5-14).

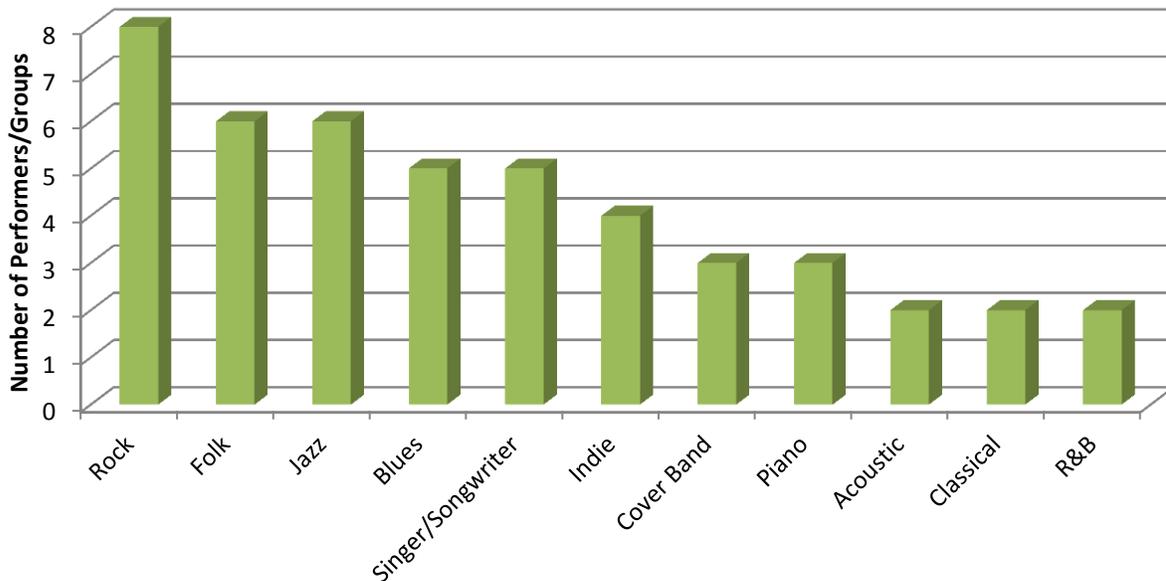
Figure 5-14: Number of Performances by Cleveland-based Acts Outside Cuyahoga County by Region Played, 2010



The most popular genre of a performer who was from Cuyahoga County and toured in 2010 was *Rock* with eight acts going on tour. This was followed by *Folk* (6), *Jazz* (6), *Blues* (5), and

Singer/Songwriters (5). The other genres which had more than one act that toured in 2010 are shown in Figure 5-15.

Figure 5-15: Cleveland Performers/Groups that Toured in 2010 by Genre



ANALYSIS OF THE ECONOMIC IMPACT OF THE CLEVELAND MUSIC SECTOR

METHODOLOGY

To estimate the economic impact of the Cleveland Music Sector, a data set of music and music-related establishments in Cuyahoga County was created by gathering data from four sources: the Quarterly Census of Employment and Wages (QCEW) database, the survey of key music venues and institutions in Cuyahoga County, the Cleveland Amateur Musician Survey, and Pollstar. The data entered into the model represent our best attempt to gather all of the employment, wages, and sales of the Cleveland Music Sector.

The QCEW (also known as the ES202 data) is managed, maintained, and edited by the Center for Economic Development at Cleveland State University's Levin College of Urban Affairs ("Center"). The Center receives quarterly updates of this data from the Ohio Department of Jobs and Family Services. The QCEW includes information such as company name, address, city, county, industry classification code (NAICS), employment, and wages on most establishments with paid employees (by site location) in Ohio. Although the database includes company level information, only industry level data can be reported because of confidentiality restrictions. For the purposes of this study, the Center used QCEW data on 146 individual music establishments for 2010.

The Center collaborated with the Community

Partnership for Arts and Culture (CPAC) to contact the management of various music and music-related venues, institutions, and education programs and departments in Cuyahoga County. We received data from: Apollo's Fire, Baldwin-Wallace College, the Beachland Ballroom, the Beck Center for the Arts, Cleveland Institute of Music, the Cleveland Metropolitan School District, the Cleveland Orchestra, Cleveland State University, Cuyahoga Community College (including the Tri-C Jazz Fest), the Happy Dog, the House of Blues, Nautica Pavilion, PlayhouseSquare, Quicken Loans Arena, and the Rock and Roll Hall of Fame and Museum. The Center used two types of data from performing venues: (1) the number of employees and their operating budget for year 2010, and (2) data on year 2010 music performances, such as average number of visitors and total sales. With an Internet search, the Center was able to approximate the number of music-related staff at Case Western Reserve University.

The data estimates for local amateur musicians came from the Cleveland Amateur Musician Survey. The data regarding performances and income received from outside of Cuyahoga County was averaged and annualized based on the responses of amateur musicians who live in Cuyahoga County but perform outside the county.

Pollstar is a trade publication that provides in-depth information on the worldwide concert industry to professionals in the live entertainment business. Pollstar's website features annual data including a venue's capacity, total tickets sold, and average gross sales. The Center gathered data on the following venues from Pollstar: The Agora, Breakfast Club, Evans Amphitheatre, the Grog Shop, the Jigsaw, Lakewood Civic Auditorium, Phantasy Nightclub, Roc Bar, West Park Station, and The Winchester. Further detail on the methodology is located in Chapter 9.

We captured the large, dominant music institutions in Cuyahoga County. Most of these were captured through QCEW employment and wages data as institutions that are strictly music are included in the data set.

Although we attempted to contact all of the institutions that have large music-related employment, we were not able to include data for every institution. It would be impossible to capture data for all of the establishments and events that showcase musicians. Therefore,

INTRODUCTION

This analysis uses IMPLAN Professional and IMPLAN Data Files. IMPLAN Professional® 3.0 is an economic impact assessment software system. The IMPLAN Data Files allow for the creation of sophisticated models of local economies based on relationships between industries in order to estimate a wide range of economic impacts.

The Cleveland Music Sector is linked to other industries through buy-sell relationships which

only the major venues and events were targeted; small venues and events were omitted. Also, some venues which were targeted did not respond to the data gathering survey for the economic impact study.

The earnings of amateur musicians are also undercounted due to data gathering limitations, and represent in this study only a small fraction of the total number of amateur performers and bands that exist in Cuyahoga County. In addition, some musicians may not have reported all of their income on the survey. It must be noted that this estimate is an underestimation of the amateur side of the Cleveland Music Sector in its entirety.

The concert industry data from Pollstar is not a complete source. It was, however, helpful in filling in information that we were unable to gather from the venues. Only major venues are tracked and for those venues, only major national acts are tracked. This is an underestimation of the activity of the Cleveland Music Sector.

contribute to the impact of the sector. In order to produce goods and services, companies in this sector buy intermediary goods and services from other companies both inside and outside the music sector.

Total economic impact is estimated based on the assumption that the Cleveland Music Sector came into existence at the beginning of 2010 and instantly generated a demand for goods and services needed for its operation. Five

measures of impact estimated by the model are analyzed here: employment, output, value added, labor income, and taxes.

- *Employment* measures the number of jobs that are present because of the existence of the Cleveland Music Sector.
- *Output* measures the total value of goods and services produced as a result of the activities of the Cleveland Music Sector.
- *Value added* measures the value of goods and services less the intermediary goods and represents a portion of output.
- *Labor income* is payroll paid to employees plus proprietors' income.
- *Taxes* include federal, state, and local

tax revenues.

Each of the impacts, except taxes, is a summation of direct impact, indirect impact, and induced impact.

- *Direct impact* is the initial value of goods and services the Cleveland Music Sector purchases.
- *Indirect impact* measures the jobs and production needed to manufacture goods and services required by the Cleveland Music Sector.
- *Induced impact* is the increase in spending of local households due to the income received through their work in the Cleveland Music Sector and with its suppliers.

ECONOMIC IMPACT OF THE CLEVELAND MUSIC SECTOR

With the four sources of 2010 data, this model included a total of 2,934 employees, \$127,480,014 in payroll, \$3,662,592 in increased household income, and \$57,952,874 in ticket and concession sales. From this direct impact, the Cleveland Music Sector accounted for 6,210 total jobs created in Cuyahoga County in 2010 from the activities of the music sector. Fifty-five percent (3,384) of these jobs were the direct impact representing jobs in the

music sector (i.e., musicians and composers). An additional 25% of the jobs (1,550) were the result of the indirect impact of industries that buy or sell goods or services to the music sector (i.e., advertising companies). Finally, 21% (1,275) of the impact is from the induced effect, which represents the household spending of people who work in the music sector and its associated suppliers (i.e., doctor's offices) (Table 6-1).

Table 6-1: Economic Impact of the Cleveland Music Sector (by Direct, Indirect, and Induced Impacts), 2010

Impact Type	Employment	Labor Income	Value Added	Output
Direct Effect	3,384	\$149,960,039	\$249,351,430	\$454,277,551
Indirect Effect	1,550	\$71,535,945	\$128,125,120	\$230,201,468
Induced Effect	1,275	\$52,901,369	\$96,581,226	\$155,293,196
Total Effect	6,210	\$274,397,353	\$474,057,774	\$839,772,215

Note: Data inflated to 2011 dollars.

Labor income represents wages paid to employees. The total labor income impact generated by the Cleveland Music Sector was \$274.4 million in 2010. Of this, approximately \$150 million is paid directly to those working in the Cleveland Music Sector (55%), \$71.5 million is paid to those working in industries that buy or sell goods or services to the music sector (26%), and \$52.9 million is paid to people through the household spending of those that work in the music sector and its suppliers (19%).

Value added measures the value of goods and services less the intermediary goods. In the Cleveland Music Sector, the total value added in 2010 was \$474.1 million. Almost \$250 million is from the Cleveland Music Sector (53%), \$128.1 million from the industries that buy or sell goods or services to the music sector (27%), and \$96.6 million is from the household spending of those associated with the Cleveland Music Sector (20%).

The total output of the Cleveland Music Sector was \$839.8 million in 2010. Fifty-four percent

was from the direct effect (\$454.3 million), 27% was from the indirect effect (\$230.2 million), and 18% was from the induced effect (\$155.3 million).

A total of \$91.6 million in tax revenues were associated with the Cleveland Music Sector. Of this, \$51.9 million were federal tax revenues and \$39.7 million were state and local tax revenues.³¹

For each employee that works in the music sector, an additional 1.12 jobs are created outside of the music sector (Table 6-2). Also for each person who works in the music sector, there is an associated increase in labor income of \$93,523 (including the income of the music sector employee), an increase in value added of \$161,574, and an increase in output of \$286,221. In terms of each \$1 spent in music sector payroll, there is an additional \$2.15 in labor income (outside of the music sector), \$3.72 in value added, and \$6.59 in generated output.

Table 6-2: Impact per Employee and per Dollar spent in Cleveland Music Sector Payroll

	Employment	Labor Income	Value Added	Output
Per Employee	2.12	\$93,523	\$161,574	\$286,221
Per \$1 in Payroll	0.00	\$2.15	\$3.72	\$6.59

ECONOMIC IMPACT OF THE MUSIC SUBSECTORS

This section analyzes the total impact of the Cleveland Music Sector by its eight subsectors, which are outlined in the trend analysis section of this report (Chapter 1, page 3). An additional

subsector was added in an attempt to capture the work and impact of local amateur musicians.

³¹ The IMPLAN model does not separate the taxes generated for local government and for the state government.

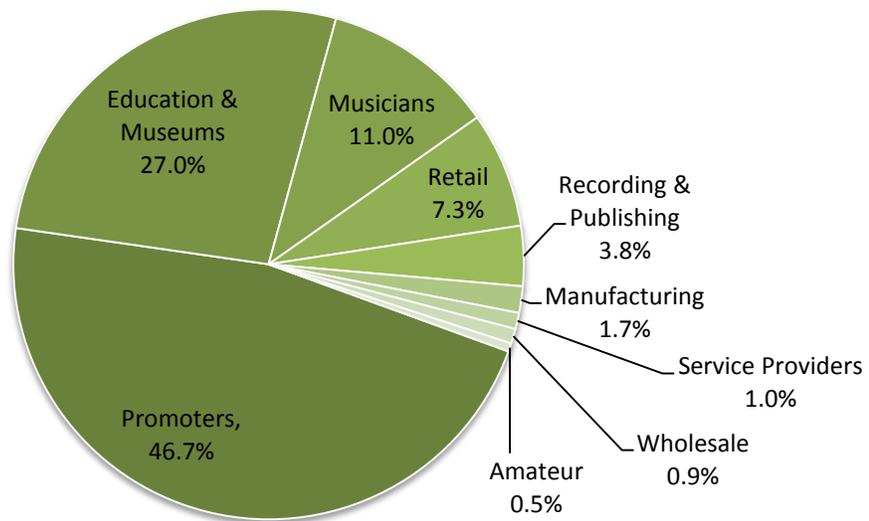
Based on the data gathered by the Cleveland Amateur Musician Survey, the earnings per year from performances were added for a subgroup of amateur musicians that reside in Cuyahoga County. We accounted only for the income these musicians received while performing outside of Cuyahoga County; the income received inside Cuyahoga County would be washed out due to a substitution effect. The substitution effect means the possibility exists of amateur musicians earning supplemental income from other types of activities within Cuyahoga County.

The same principle applies to the attendance at local music events by Cuyahoga County residents. Instead of going to a music concert or a club, they could have gone to non-music performances or alternative types of recreational activity within Cuyahoga County. Twenty-seven responses out of 105 total amateur musicians that completed the survey

were included (26%). This errs on the side of caution due to some survey non-responses and the likely undercounting of amateur musicians' income.

The largest music subsector in terms of all measures of impact was *Promoters* (Figure 6-1). This group represents an employment impact of 2,901 jobs, a labor income impact of \$138.1 million, a value added impact of \$258.5 million, an output impact of \$519.9 million, and a tax impact of \$47.9 million (Table 6-3). *Promoters* include companies in such industries as Wholesale Trade Agents and Brokers, Newspaper Publishers, Radio Networks, Radio Stations, Media Representatives, Promoters of Performing Arts, Sports, and Similar Events without Facilities, Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures, Full-Service Restaurants, Limited-Service Restaurants, and Drinking Places (Alcoholic Beverages).

Figure 6-1: Employment Impact by Music Subsector, 2010



Promoters represents 46.7% of the total employment impact, 50% of the total labor

income impact, 55% of the total value added impact, 62% of the total output impact, and

52% of the total tax impact. The next largest subsector in terms of all measures of impact was *Education & Museums*; *Musicians* ranked

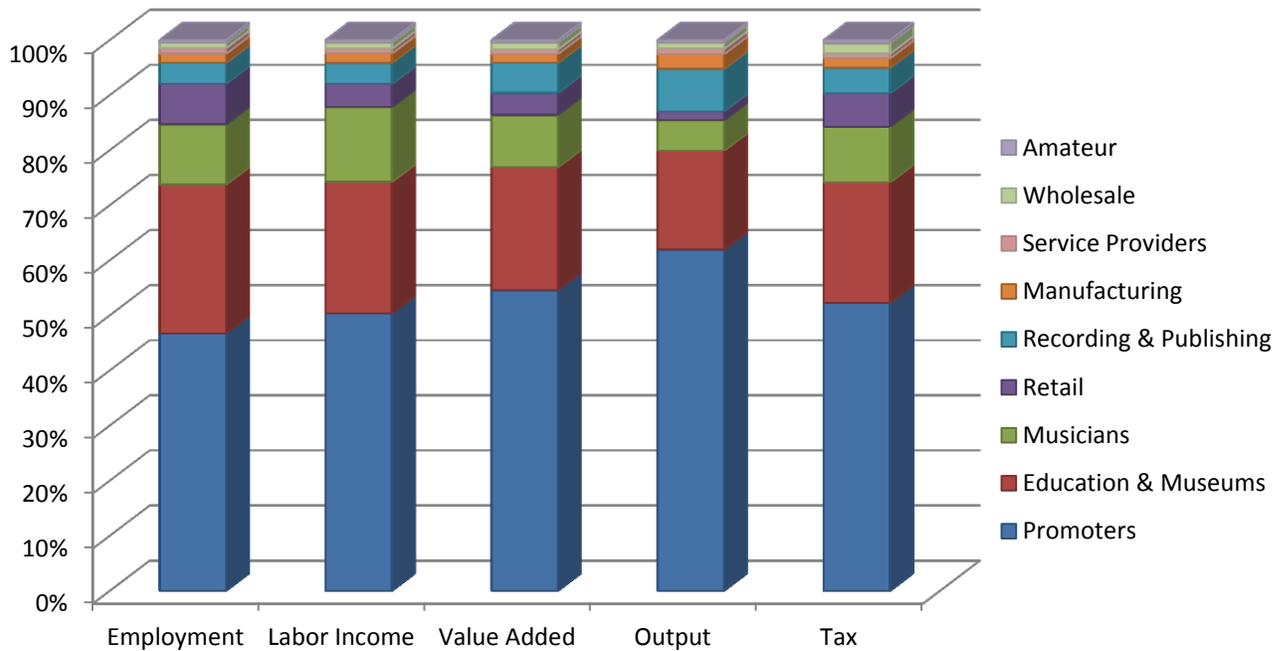
third in all measures except output. Figure 6-2 shows the percentages of the music impact represented by each of subsector.³²

Table 6-3: Economic Impact of the Cleveland Music Sector by Subsector, 2010

Subsector	Employment	Labor Income	Value Added	Output	Tax
Promoters	2,901	\$138,065,498	\$258,536,706	\$519,860,250	\$47,861,286
Education & Museums	1,676	\$65,591,820	\$105,842,838	\$150,995,713	\$20,066,343
Musicians	681	\$37,298,547	\$45,143,631	\$46,271,383	\$9,257,064
Retail	456	\$11,527,988	\$18,894,062	\$13,709,581	\$5,550,983
Recording & Publishing	236	\$10,384,221	\$25,889,639	\$64,728,603	\$4,238,066
Manufacturing	104	\$4,808,865	\$7,664,692	\$22,498,352	\$1,617,705
Service Providers	64	\$2,380,584	\$3,968,294	\$8,169,586	\$783,070
Wholesale	59	\$2,973,760	\$5,677,288	\$9,602,919	\$1,724,961
Amateur	33	\$1,366,070	\$2,440,624	\$3,935,828	\$541,581
Total	6,210	\$274,397,353	\$474,057,774	\$839,772,215	\$91,641,059

Note: Data inflated to 2011 dollars.

Figure 6-2: Percentage of Economic Impact by Music Subsector, 2010



³² Information on the direct, indirect, and induced impacts of each subsector is located in Appendix 6-2.

ECONOMIC IMPACT OF THE CLEVELAND MUSIC SECTOR BY FOR-PROFIT/NON-PROFIT STATUS

To feature the economic impact generated by the for-profit and non-profit portions of the Cleveland Music Sector, the data were split into three sections: for-profit organizations and events, non-profit organizations and events, and the amateur sector from the amateur musician survey (Table 6-4).³³ The for-profit entities in the Cleveland Music Sector accounted for 62% of the total employment

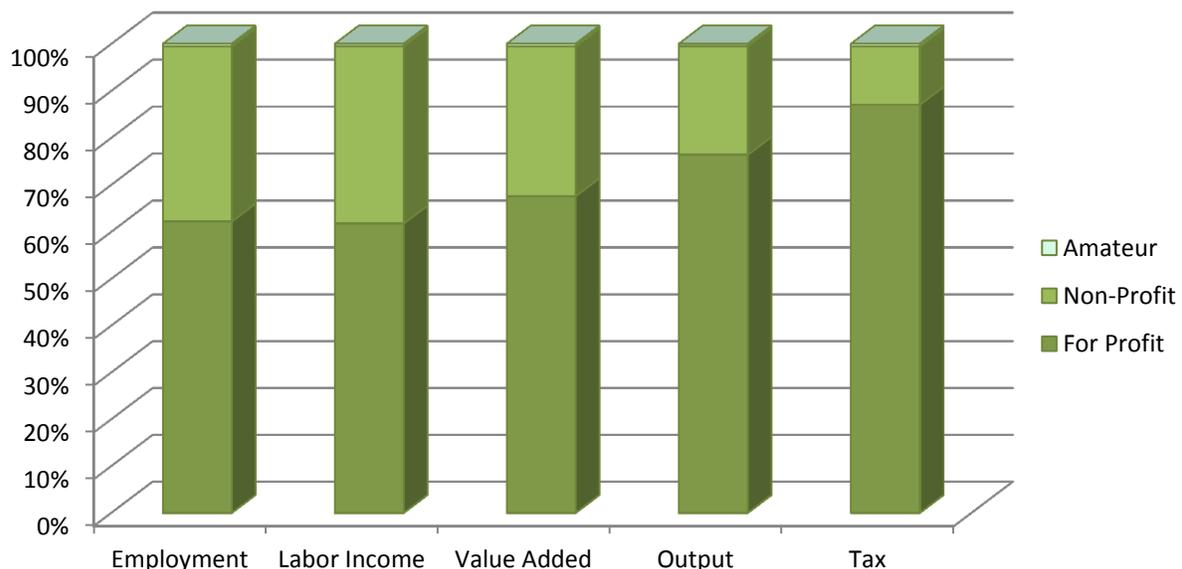
impact (3,863 jobs), 62% of the total labor income impact (\$169.5 million), 68% of the total value added (\$320.5 million), 76% of the total output (\$641.6 million), and 87% of the total tax impact (\$79.8 million). Figure 6-3 shows the percentages of the music impact represented by the for-profit, non-profit, and amateur divisions.³⁴

Table 6-4: Economic Impact of Music by For-Profit, Non-Profit, and Amateur Status, 2010

Subsector	Employment	Labor Income	Value Added	Output	Tax
For Profit	3,863	\$169,522,444	\$320,482,227	\$641,601,397	\$79,785,850
Non-Profit	2,314	\$103,508,839	\$151,134,923	\$194,234,990	\$11,313,628
Amateur	33	\$1,366,070	\$2,440,624	\$3,935,828	\$541,581
Total	6,210	\$274,397,353	\$474,057,774	\$839,772,215	\$91,641,059

Note: Data inflated to 2011 dollars.

Figure 6-3: Percentage of Music Economic Impact by For-Profit, Non-Profit, and Amateur Status, 2010



³³ The amateur musicians group was included in this breakdown of the data to derive the same totals of economic impact generated by the Cleveland Music Sector.

³⁴ Information on the direct, indirect, and induced impacts of the for-profit, non-profit, and amateur portions of the Cleveland Music Sector is located in Appendix 6-3.

ECONOMIC IMPACT OF THE CLEVELAND MUSIC SECTOR BY EMPLOYMENT AND EVENTS

The Cleveland Music Sector generates an impact on the local economy that can also be conceptualized through the economic impact from: the music base; employment and income of people who work in industries related to the music sector; and from the spending by visitors that come from outside of Cuyahoga County and spend their income within the region by buying tickets for music events and making complementary travel expenditures such as staying in hotels, buying food and souvenirs, and paying for parking.

To assess the differences between the activities related to base employment in the music sector and the visitor spending from the music-related events in the Cleveland Music Sector, the data was again split into three groups: the base employment, wages, and sales in the music sector; the employment, wages, and sales related to events; and the group of amateur musicians from the survey instrument (Table 6-5).

The base employment in the Cleveland Music Sector is far larger than the employment generated by music events in terms of economic impact. This is explained by the fact that employment generated by visitors relates only to a fraction of base employment in the Cleveland Music Sector and shows mainly the employment generated in other music-related industries generated through spending patterns (such as employment in the hospitality and food industries). The base employment represented 86% of the total employment impact (5,352), 87% of the total labor income and value-added impacts (\$239.2 million and \$412.4 million, respectively), 88% of the output impact (\$736.6 million), and 86% of the tax impact (\$78.8 million).

The events represented 12% to 13% of the total impact and the amateurs represented 0.5-0.6% of the total impact. Figure 6-4 shows the percentages of the employment, events, and amateur impacts.³⁵

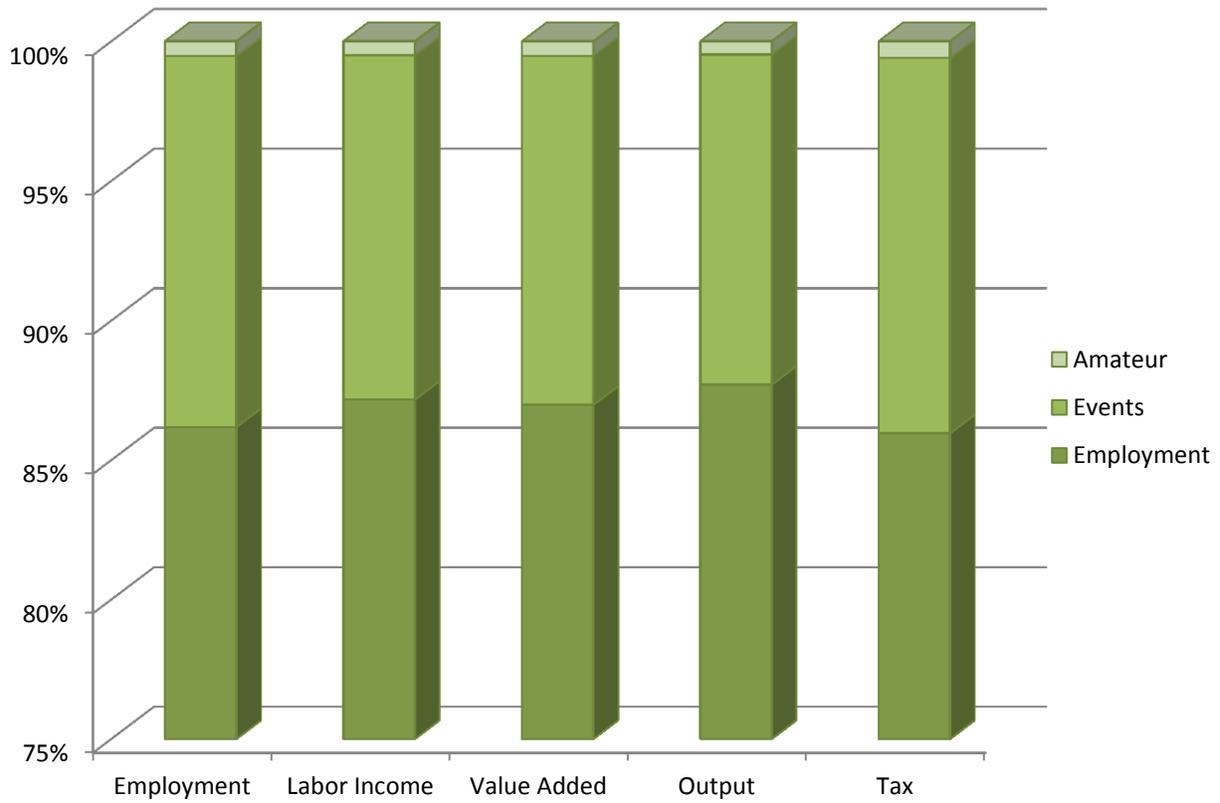
Table 6-5: Economic Impact of Music by Employment, Events, and Amateurs, 2010

Subsector	Employment	Labor Income	Value Added	Output	Tax
Employment	5,352	239,199,297	412,366,218	736,563,938	78,779,564
Events	825	33,831,986	59,250,932	99,272,449	12,319,914
Amateur	33	\$1,366,070	\$2,440,624	\$3,935,828	\$541,581
Total	6,210	\$274,397,353	\$474,057,774	\$839,772,215	\$91,641,059

Note: Data inflated to 2011 dollars.

³⁵ Information on the direct, indirect, and induced impacts of events, employment, and amateurs is located in Appendix 6-4.

Figure 6-4: Percentage of Economic Impact by Employment, Events, and Amateurs, 2010



CONCLUSION

The Cleveland Music Sector is a vital part of our history and our future. The Cleveland Music Sector accounted for 6,210 jobs, \$274 million in labor income impact, \$474 million in value-added impact, and \$840 million in output impact in 2010. While these may not seem like large numbers, it is important to emphasize that there is merit to the term “starving artists” as they are generally not the highest paid people in the workforce. Also, the employment in the Cleveland Music Sector represents only 0.39% of the total employment in Cuyahoga County. It also represents only 0.47% of the total establishments and 0.35% of the total payroll. Based on this, the impact is quite noteworthy.

We acknowledge the limitations of this study; specifically, as with similar studies done in the past, capturing all the data from music organizations, venues, events, and especially from the amateur sector is impossible. Many amateurs view their supplemental income from music-related activities as so minute that they neglect responding to the survey. Also, the survey does not capture the unquantifiable moral pleasure amateur musicians receive from performing music as a hobby. We learned from interviews and focus groups that some of the artists have strong incentives not to report all of their income, especially during recessions.

Finally, it should be noted that although these measures show the economic impact of the Cleveland Music Sector, the benefits of the arts in enhancing the quality of life for Cleveland

residents and visitors far outpace the financial return. The music scene enhances the experience of the city. After all, Cleveland Rocks!

APOLLO'S FIRE: NOT YOUR GRANDMOTHER'S BAROQUE BAND

Apollo's Fire has been captivating audiences for nearly two decades with performances that are both passionate and thought-provoking. Baroque music at its finest, Apollo's Fire, simply put, is brilliant music-making. Invoking elements of historical accuracy, musicians play period instruments with exuberance in the manner Handel or Vivaldi would have imagined. This makes for a fresh and surprising twist to familiar music that is sure to delight casual listeners and Baroque enthusiasts alike.

What is Apollo's Fire?

Formed as a non-profit art organization in 1992 by harpsichordist and conductor Jeannette Sorrell, Apollo's Fire received initial funding from the Cleveland Foundation and the Ohio Arts Council. In nearly 20 years of entertaining audiences they have earned a reputation as one of the country's hottest baroque bands.

Apollo's Fire has experienced local acclaim through performances of *Mysteries*, *Handel's Messiah*, and *Fire and Folly*. In addition, the ensemble recently presented the program *Bach, Telemann and the Bohemian Gypsies*, a selection of reconstructed gypsy pieces along with Bach and Telemann concertos.

Because the band has a strong following, they have toured extensively throughout the United States performing at well-known venues such as the Aspen Music Festival, the Boston Early Music Festival series, the Library of Congress, the Ojai International Festival in California, and the Chautauqua Institution. Furthermore, their reputation has spread beyond the United States; they have performed internationally in the Netherlands, Spain, and the United Kingdom.

Apollo's Fire has also released several commercial CDs and each season the ensemble can be heard on many of the nation's most prominent radio broadcasts, including National Public Radio, Canada's CBC, Britain's BBC, and the European Broadcasting Union.

It's About Authenticity, Period

There are more orchestras in Northeast Ohio than any comparable economic area, including The Cleveland Orchestra, CityMusic, The Ohio Philharmonic Orchestra, The Cleveland Chamber Symphony, Akron Symphony, The Canton Symphony Orchestra & Chorus, and the Warren Philharmonic Orchestra.

The list goes on and on as one travels outside the region: The Dayton Philharmonic Orchestra, The Clermont Philharmonic Orchestra, Columbus Symphony, Toledo Symphony, Erie Philharmonic, Central Ohio Symphony, Southern Ohio Symphony Orchestra and the Springfield Symphony Orchestra.

Because of this oversaturation, naysayers think that there is little need for yet another classical music orchestra. However, what's so unique about Apollo's Fire is that they go one step further than other bands, combining passionate renditions of baroque music with an intriguing dose of authenticity to the musical experience. Jeannette Sorrell notes, "I have always loved this [baroque] music and working with period instruments. It involves improvisation, and is based on simple harmonies that are rooted in Nature."

Paul Jarrett, Managing Director of Apollo's Fire says, "There was a demand for baroque music and music from 1700s and earlier to be performed on instruments of the time. That's the difference between us and other orchestras; we play music on instruments that would have originally played period music the same way it was scored."

An Apollo's Fire performance is also much quieter than a full orchestra, making for a more intimate affair. It's like a time warp; the musical pieces are played according to the composer's ear, the way they were originally written. This allows audience members to time travel back to the 1700s for a few hours to enjoy the music as the composer originally intended.

The Cleveland Orchestra

Founded by a group of local citizens in 1918, The Cleveland Orchestra has grown to be one of the most critically-acclaimed, nationally recognized orchestras in the country.

Current Music Director Franz Welser-Möst created the Community Music Initiative, which works with the Cleveland Metropolitan School District to expose students to world-class classical music. In 2007, the orchestra established a Miami residency. This partnership, supported by the Musical Arts Association of Miami, brings the exceptional, world-class music of The Cleveland Orchestra to broader constituencies.

In 2009, the Cleveland Orchestra announced a new community engagement initiative. This initiative will create programming to educate and excite Northeast Ohio residents of all ages. The many facets of the community engagement initiative include bringing musicians into local Head Start programs, providing Cleveland Orchestra concerts for school-age children at Severance Hall, mentoring talented youth, and supporting high school orchestras and choirs. Engaging with the broader Cleveland community, the program also offers educational programming for adults.

Website: <http://www.clevelandorchestra.com/>

Sunfire and Song

Named for the Greco-Roman god of the sun and music, Apollo's Fire's aspiration is to take its audience on an emotional journey via music. Baroque music, a lively and cheerful form of classical music characterized by repetitious rhythms, functional harmony, and complex melodies, wasn't written for

large concert halls. It was popular in the 17th and 18th centuries, and usually performed in smaller settings. Jarrett explains, “There were a lot of house concerts that would take place in the home during that period, so we try to recreate that sort of intimate feeling.”

Imagine sitting in the atrium of a majestic gothic style church along with an audience of about 50 listening to a small music ensemble performing sacred pieces such as the Bach or Mozart masses. Perhaps food and wine is served. The musicians play and talk to the audience without barriers.

The music is able to resonate with you in an emotional and spiritual way. That’s the artistic philosophy of Apollo’s Fire. Performers endeavor to evoke an *Affekt* or emotional state in their listeners, just as their 18th Century predecessors did.

Apollo’s Fire often eliminates the “invisible barrier” between its audiences, performing in close proximity to listeners. To further engage their audience, Sorrell speaks directly to the audience between pieces enabling them to connect on a deeper level. She notes, “We try to project the rhetorical idea or mood of each phrase of music, in a way that the audience will feel drawn in. We also cultivate a lot of interaction on stage between the players.”

This connection is stronger than others developed in more formal classical ensemble performances. It contributes to a spiritual experience that resonates with audience members and keeps them coming back for more.

It’s a Musician’s Life

Depending on the project, Apollo’s Fire varies in both the size of its ensemble and the music performed. Musicians are not necessarily drawn from classical performers in the Cleveland area. They are specialists with considerable training and experience in performing early music styles on period instruments. Musicians with this specialty are rare and for that reason, many of the group’s artists are not from

CityMusic Cleveland

Cleveland is a hub for classical music. CityMusic Cleveland is one of the most distinctive music ensembles in the city’s classical music scene. It is a professional chamber orchestra whose objective is to present quality music for the cultural enhancement of the community at a price everyone can afford... free!

Currently in its 7th year of operation, the 40-piece ensemble performs at different community venues to bring music to audiences who otherwise may not have had the opportunity to experience classical music. The ensemble and its musicians, conductors, soloists, teaching staff, and stage hands are all supported by a wide range of funding sources including Cuyahoga Arts and Culture, National Endowment for the Arts (NEA), several foundations, corporations, and local communities.

CityMusic has been very successful because it places ownership of the concerts on the community, which increases local involvement in the cultural growth of residents. Local musicians and educators are thrilled to work with CityMusic because of its dual enthusiasm for classical music and community improvement.

Website: <http://www.citymusiccleveland.org/>

Northeast Ohio.

Jarrett says, “Our musicians are from all over the world. While our musicians are here, they make up Apollo’s Fire but when our concerts are done they fly back to their homes and have other engagements around the country where they make up other ensembles.”

Many of the local musicians teach at Oberlin College or Case Western Reserve University and supplement their work with Apollo’s Fire. That’s not an anomaly unique to the baroque orchestra; it is a trend that is very common throughout the nation. One of the strongest benefits of Cleveland’s music scene is the on-going opportunity to teach here. Both formally trained students and hobbyists are eager to take lessons from the area’s finest performing musicians. Cleveland may offer fewer hours to teach, but the pay per hour is comparable or even higher than in other cities around the country.

For Apollo’s Fire there is a relatively short window for a typical performance week. It’s not uncommon for musicians to arrive in Cleveland on Sunday, rehearse Monday and Tuesday, and then perform Wednesday through Sunday, returning home after their last scheduled performance. This arrangement is a win-win situation for Apollo’s Fire since Jarrett is able to employ world quality artists as demand warrants, and musicians are able to earn supplemental income from performances.

Why Cleveland?

Apollo’s Fire is a mobile-performing baroque ensemble. Despite the fact they perform all over North America and Europe, and employ many out-of-state musicians, Apollo’s Fire is based in Cuyahoga County.

A major factor in the decision to set up shop here was the wealth of opportunities available at the time.

Ohio Philharmonic Orchestra

It’s quite a testament to the Cleveland music scene that classical music enthusiasts are willing to support yet another orchestra in the Cleveland area. Clearly, Clevelanders understand the importance of classical music and education.

The Ohio Philharmonic Orchestra is the brainchild of Music Director and Conductor Domenico Boyagian. In 2010, he was awarded a \$20,000 Creative Workforce Fellowship from the Community Partnership for Arts and Culture, which he used to create the Midway Ensemble, a training repertory orchestral democracy. The Creative Workforce Fellowship is generously funded by the citizens of Cuyahoga County through Cuyahoga Arts and Culture.

William Laufer, a local filmmaker, began the ensemble with the goal of producing free classical music performances and innovative programming. This emerging orchestra focuses on music education and community outreach by connecting younger audiences from several inner-city schools with classical music through school visits, the Young Composers Series, Concerto Competition and Recording Series, and the Educational Video Series. Under Boyagian’s innovative direction, the Ohio Philharmonic Orchestra is becoming a leader in classical music and youth education.

Website: <http://www.ohiophilharmonic.com>

Sorrell isn't a Cleveland native, but did her graduate work at Oberlin College. She founded Apollo's Fire while collaborating with Roger Wright who was the Artistic Administrator of the Cleveland Orchestra.

Jarrett notes that there is a significant amount of support for classical music in Cleveland, "Clevelanders expect to have world class music. There are generations of culture lovers that you won't find in other places due in large part to the legacy of the Cleveland Orchestra."

Sorrell agrees, "Cleveland has an unusually sophisticated audience for classical music— larger and more educated than other cities of this size. The legacy of George Szell, who convinced the Cleveland philanthropic families to support classical music on a world-class level, has benefited Apollo's Fire".

Catch 22

With fewer people buying tickets and less grant funding and donations available, many non-profits in the music sector are seeking alternative sources of revenue. Jarrett notes, "We're being asked to fund ourselves through ticket

prices and concerts and less through individual and foundation support. Ticket prices have to be higher, and this creates a financial barrier for people who want to see our performances."

Apollo's Fire recently started touring internationally and has just signed a record contract with a London-based record label. To date, they have produced 18 CDs.

They are starting to see the benefits of using such alternate means to increase operating sustainability, but switching over to this new budget model has a downside. Jarrett explains, "Some grant makers say that we're not really a non-profit anymore if we make recordings and tour. In their eyes we're starting to become an act. They challenged us with finding other ways to make ourselves sustainable, so it's an ongoing issue on how to balance both sides."

The Cleveland Chamber Symphony

It is evident that Cleveland is home to some of the world's most notable classical music organizations. For nearly a quarter of a century, The Cleveland Chamber Symphony has been dedicated to presenting music solely from our time. There is no other organization in Cleveland that focuses primarily on contemporary, American composers.

The symphony has presented an astounding 170 world premiere performances. The Cleveland Chamber Symphony also records, produces, and distributes contemporary music. Currently, the symphony has released 15 recordings, one of which received a Grammy Award in 2007.

Like many other ensembles in the city, the symphony works to promote youth participation in the genre. Twice a year, the organization partners with local educational institutions, including Baldwin-Wallace College and the Music Settlement, for a contest to present and record new works by students. Among its notable awards, the Cleveland Chamber Symphony has been recognized by the American Society of Composers and Authors and Publishers' Edwards Award for its strong commitment to American music.

Website: <http://www.clevelandchambersymphony.org/>

How to Make a More Music Friendly Town

For Apollo's Fire, the main concern is getting the word out. It's a marketing issue, a need to connect with their target audience—and it's a challenge. There's local TV, but that's not the primary source for arts patrons according to Jarrett. For one performing group in the midst of many it can be difficult to advertise without getting lost among other artists that are here.

"The city will be vibrant and attractive to newcomers if there is an arts scene in Cleveland," says Sorrell. She believes there should be more communication between classical music orchestras and ensembles. Discussing performance schedules to avoid conflicts, sharing plans about new programming, and collaborating on events would help present a more unified classical music presence in Cleveland.

Future Plans

In 2012, Apollo's Fire will celebrate their 20th anniversary. They will continue to be based in Cuyahoga County and have every intention of continuing for another 20 years.

To sustain them, Apollo's Fire will rely less on a patron subscription-based model and focus efforts on touring and maintaining a global rather than regional presence. They will also continue development of crossover/folk programming in addition to their baroque repertoire.

"It's about reaching other audiences. We will go to them; we will go where the demand is," says Jarrett.

Website: <http://www.apollosfire.org/>

CINDY BARBER AND THE BEACHLAND BALLROOM AND TAVERN KEEPS ON KEEPIN' ON

Cindy Barber is one of Cleveland's unsung heroes. A Cleveland native, Cindy has worked for more than a decade to make her city a better place through the creation of the Beachland Ballroom and Tavern with partner Mark Leddy. Her dedication, hard work, and inventive spirit has allowed Cindy to make a positive, long-lasting impact on Cleveland's North Shores Collinwood neighborhood.

Cindy and the Waterloo Arts District

Prior to Cindy's efforts, the commercial area around Waterloo Road in the North Collinwood neighborhood had been steadily declining since the 1970s. "The road really didn't have any sort of identity and no reason to be on the map until Cindy's vision of creating an arts destination in that location," says Brian Friedman, Executive Director of the Northeast Shores Development Corporation, "Today there are several businesses that occupy space that was previously vacant and that's due in large part to Cindy's efforts."

According to Brian, Waterloo Road has improved its vacancy rate by 40%. Today there are approximately 65 full- and part- time jobs, and a once dilapidated and desolate area is brimming with activity and vibrancy. So much activity in fact, that the roadway is not capable of handling the traffic the district generates. "Next year," Brian says, "the city is going to spend 5 million dollars rebuilding the streetscape." North Shores Collinwood was once a neighborhood forgotten by the city; this type of reinvestment proves it is again becoming a prime destination.

Longtime residents and community activists agree that the Beachland Ballroom and Tavern is a leading cause of the district's incredible transformation.

Hangin' Out at the Beachland

If any live music venue represents the heart and soul of the Cleveland music scene, it's the Beachland Ballroom and Tavern. It's the kind of place where you can enjoy a beer, a home-cooked meal, and great music. This popular Cleveland hangout is known for its high-caliber artists, presenting performances from bands that have a national following as well as major artists from the Greater Cleveland area.

The Beachland Ballroom reflects Cleveland's multifaceted personality, catering to the city's diverse population with an eclectic combination of shows from jazz and blues to punk, blue grass, indie, and classic rock. "You don't just hear one style of music there and that's increasingly a rare thing," says one Cleveland music professional, "I go there because I know I'll always hear something interesting."

Located at 15711 Waterloo Road, people who visit this Cleveland landmark will find memorable musical

performances, reasonable prices, and friendly staff—all in a homey and unpretentious setting.

It's the Best of Old School Cleveland

Since opening in 2000, Cindy and Mark's intentions from the beginning were to create a place to help improve the North Collinwood neighborhood. Fresh off her role as editor of the *Cleveland Free Times*, an alternative weekly newspaper, Cindy teamed up with Mark who worked as a booking agent for Pat's in the Flats, a popular Cleveland entertainment venue, to open the ballroom. Drawing from their previous careers in the music industry, knowledge of local bands, and a love of Cleveland, an almost accidental enterprise has become a world class music venue, recognized by *Esquire* as one of the "Top 100 Bars in America".

"I set out to do something for the neighborhood I live in," says Cindy, "I decided that I needed to do something really local and try to turn my neighborhood around."

Cindy and Mark set out to find the perfect location—a 50-year-old brick building a half mile from Euclid Beach State Park.

"I looked for the biggest building and what could I do with it. I am still surprised oftentimes at the success we have had. We went in there very naively and just started by booking shows," admits Cindy.

In addition to booking artists for performances, Cindy also employs artists to work as waiters, bartenders, and other ballroom employees. Her reasoning—many artists need day jobs because they are not able to make enough money working solely as performers. Only 20% of Cleveland based musicians make a living working as full-time performers. Many artists delve into teaching, composing, music technology, or working for music venues. "Besides a steady full-time job with the Cleveland Orchestra or at PlayhouseSquare, musicians freelance and teach at multiple places," says one performer and non-profit activist, "to make ends meet many musicians have day jobs and perform evenings and weekends."

Local Boys Make Good

Having booked literally thousands of shows over the last decade, when asked to name one of her most memorable relationships with local artists, Cindy mentioned The Black Keys. With the Billboard chart topping song "Tighten Up" and multiple 2011 Grammy awards including *Best Alternative Music Album* and *Best Rock Performance by a Duo or Group with Vocals*, this blues-rock duo from Akron is one of the largest success stories to come out of the Cleveland music scene in recent years— and Cindy gave them their big break.

"We gave The Black Keys their first show and helped them get their booking agent and their manager when they first started out. They paid us back with the relationship we've had over the years," says

Cindy. It's this dynamic relationship that Cindy has with musicians and the neighborhood that makes her a pillar of the community and a stand-out in the Cleveland music scene.

Since making it big, The Black Keys have performed several times at the Beachland Ballroom to a sold-out house each time—earning Cindy much needed profits in a depressed economy.

There's Always a Challenge

Despite booking approximately 600 shows a year, and having a great location and very affordable ticket prices, the one-two punch of continued urban sprawl and the current economic recession has taken a toll on the Beachland Ballroom.

Cindy remarks, "The Cleveland market is shrinking and it is very hard to compete with other cities. The thing about Cleveland is that we have amazingly talented people here and an unbelievable amount of venues and entertainment options every night of the week. We probably have as many options as Chicago does, but we have a third of the population to support those places."

There is also a psychological East/West divide in Cleveland that prevents the co-mingling of audiences. People from suburbia are no longer coming into downtown for events.

Cindy says, "Restaurants, theaters and every other place are competing for a limited amount of people. Sometimes we are very fortunate in that we book big artists that draw people from out of town to the ballroom. Often there are more people from out of town at performances than Clevelanders."

According to the U.S. Census Bureau, Cuyahoga County's population in 2000 was estimated at 1,393,848. In 2009 the population fell to 1,275,709. This 8.5% decrease has affected nearly all aspects of the Cleveland music scene. There has been decreased attendance at local venues and special events, resulting in substantially less private/corporate sponsored performance opportunities. Without a stable audience, musicians face dwindling performance opportunities and lower income.

Perhaps for this reason, the hardest hit music organizations in Cleveland have been small- to medium-size venues. With lower ticket sales and less money coming in the Beachland Ballroom has accrued a significant amount of debt.

As of March 2011, Cindy was researching the possibility of converting the Beachland Ballroom and Tavern to non-profit status. She believes this would enable the ballroom to remain open; however Cindy has more altruistic goals. She intends to use her knowledge and expertise in the music industry to teach bands how to become more professional.

Pearls of Wisdom

How can this be done? Throughout her professional career, Cindy has amassed an incredible amount of knowledge and insight about the Cleveland music industry.

She started working for record labels when she was a teenager. “Cleveland used to have a lot of record companies, warehouses, and distribution facilities back in the old days.” she reflects.

Early in her career, Cindy worked for Warner Brothers and ABC records. After a brief stint outside Ohio with a boyfriend who was a vice-president for Warner Brothers Records, she came back to Cleveland, managed a few local bands and started an underground newspaper.

“Cindy has a go-getter personality. She loves getting involved in new ventures and hooking up with new people. She has an inventive, out of the box attitude” says Sarah Gyorki, former Director of Arts Collinwood. “She is fully invested, completely 100%. This is her entire life.”

Cindy understands the importance of cross-promotion and collaboration with other Cleveland-based venues. She works regularly with many organizations including the Rock and Roll Hall of Fame and Museum, the Happy Dog, and the Root Café. She intends to put her knowledge to good use providing artists with guidance on how to become successful.

How Could the Cleveland Music Scene be Improved?

Despite great talent and top-notch venues, a major problem with today’s music scene in Cleveland is that artists have a difficult time finding financial support and services to make a living solely as performers. As a result, many artists leave Cleveland for the possibility of greener pastures.

Cindy states, “It’s about creating a product and then selling that product based out of Cleveland, and that doesn’t happen here. People are moving to Austin or Nashville or New York or Chicago where there is a better infrastructure and more overall support from a business standpoint.”

Cindy believes that the Cleveland music scene can be improved by aggressively marketing Cleveland as a music friendly town. She speculates that incentives for affordable housing and rehearsal space would be a key message to attract and keep artists.

Cleveland can be an appealing city for musicians because of its considerably lower cost of living compared to other major music cities. “The low cost of living [in Cleveland makes it] 1/3 the cost of New York or LA,” said a local artist.

Many musicians’ wages are equal to those in larger cities. This fact coupled with Cleveland’s low cost of living creates a musician-friendly living environment. “Cleveland has a low-cost of living and that allows

artists to freely explore their music”, said one of our interviewees, “In some cases, they may be able make more money in this smaller market than for a gig in a larger city.”

What’s the Story?

Cindy and the Beachland Ballroom are one of Cleveland’s success stories. With a standard of first-rate musical performances and continued popularity among Clevelanders and out-of-towners alike, it has amassed a reputation as the “place to be” for a great night out and good music in a uniquely Cleveland setting.

However, even the most successful of undertakings can have its share of bumps in the road. While financial burdens continue to plague the Beachland Ballroom, Cindy has the knowledge, skills, and “chutzpa” to reinvent the bar. If Cindy is able to shift to non-profit status, she believes the ballroom will not only continue, but expand its services, helping local artists become more successful. In true Cleveland spirit the Beachland Ballroom and Tavern rocks on.

Website: <http://www.beachlandballroom.com>

AND THE BEAT GOES ON... BILL RANSOM'S CLEVELAND RHYTHM

If you're looking for the perfect example of what a Cleveland musician can be, look no further. Bill Ransom does it all, from teaching to performing to recording music on his own record label, Bongo Time Records, Ransom personifies the idea of what musicians can achieve through hard work, immense talent, and an open mind.

The rhythmic, up-tempo beat on a bass drum, the electrifying crescendo on a cymbal, the rat-a-tat-tat on a snare that makes you want to get up and boogie; these are the sounds that emerge from Bill Ransom. Well, not from him--but from the percussion instruments he plays while teaching at Cleveland State University and The Music Settlement.

Known for his versatility, creative energy, and physically demanding playing style, Bill Ransom is a force to be reckoned with. Picking up his first set of drumsticks at age 10 and obtaining a formal music education at Ohio University, he has played drums and percussion for 37 years and loves every minute of it.

Through formal instruction, his directing of "Jazz Meets Hip Hop" at the Tri-C JazzFest, and his role as a consultant to the Shaker Heights school system, Ransom has taught literally hundreds of aspiring musicians.

He is a local talent with a national following. Ransom is known mostly for his performances in the jazz, neo-soul, R&B, and hip-hop genres, however his understanding of contemporary and classical music makes him a sought after musician for a wide variety of gigs. He has worked with many national level artists including Gerald Levert, Patrice Rushen, Beth Hart, Marion Meadows, Cecil Bridgewater, Diane Reeves, Mary Wilson, and James Newton.

Ransom has appeared in a number of theatrical productions including "Love, Janis", has performed music for several TV commercials, and has made appearances on TV shows including *Late Night with David Letterman*.

In 2005 he released his debut album *Generations*, which features some of Cleveland's top musicians performing modern mainstream jazz standards by standouts like Chick Corea, Miles Davis, and Leonard Bernstein.

Talk to Me!

As a successful, experienced Cleveland-based artist, Ransom has a lot to say about music in Cleveland.

The Cleveland area is fortunate because there is an abundance of amazing musicians who call the city their home. According to data collected from the U.S. Bureau of Labor Statistics, the number of

musicians and singers in the Cleveland Metropolitan Statistical Area (MSA) is higher than comparable MSAs such as Cincinnati, Columbus, and Pittsburgh.

Almost like a high school clique, most musicians have an inner circle of fellow musicians with whom they have strong relationships and perform with on a frequent basis.

There is, however, a noticeable lack of communication and organization among them, especially when they try to connect with artists outside their own niche genre. Understandably, this lack of a structured communication system has led to a strong word-of-mouth trade.

According to the Cleveland Amateur Musician Survey conducted by the Center for Economic Development, word-of-mouth was the most popular means of advertising for artists. On an informal basis, artists network and promote themselves referring each other for gigs and lending support when needed.

Ransom stresses the importance of networking. While

Formal Music Education in Cleveland

The Cleveland area is a bit of an anomaly in that a large number of educational institutions exist regionally that offer collegiate level degrees for students wishing to pursue formal music study. These institutions include Baldwin-Wallace College, Case Western Reserve University, Cleveland Institute of Music, Cleveland State University, Cuyahoga Community College (Tri-C), and Oberlin College.*

These institutions offer exceptional music programs and share the goal of advancing Cleveland's music students toward excellence.

- Baldwin-Wallace College is home to the Bach Festival, an extremely successful and well-known classical music festival. Now in its 79th year, the Bach Festival is the oldest collegiate festival of this type in the United States.
- The Cleveland Institute of Music has had an astounding 37 graduates join The Cleveland Orchestra. In 1969, the Cleveland Institute of Music and Case Western Reserve University created a partnership, resulting in some of the finest music education offered in the state of Ohio.
- Cleveland State University's Department of Music offers world-class training to its students through instruction from prestigious musicians including members of the Cleveland Orchestra and Cleveland Jazz Orchestra. The chance to learn from influential musicians in a brand-new, state-of-the-art recording studio provides wonderful learning opportunities for students.
- Tri-C offers an affordable associate's degree in music. After students graduate, they have the option of transferring coursework to several other universities to earn a bachelor's degree, including the notable Berklee College of Music in Boston.
- Oberlin College's Conservatory of Music has for years been regarded as a leading music school in the nation, mentioned with the likes of Juilliard and other internationally known institutions. The college was a recipient of the 2009 National Medal of Arts.

With a plethora of diverse programs available, anyone interested in pursuing a music degree can easily do so in Cleveland and its surrounding region.

*In 2010, Oberlin College was ranked 8th and Cleveland Institute of Music was ranked 17th on the list of Top 30 America's Best Music Schools and Colleges. U.S. College Rankings, <http://www.uscollegeranking.org/music/top-music-schools-ranking-in-2010.html>

many seasoned artists may over time amass a shortlist of contacts they can call on to perform with, Ransom takes it one step further.

He notes, “I’ve created a pretty big database. Let’s say I need a bass player to cover for a gig, but he has to be an acoustic player or a fretless bass player– I know who to go to for that.” His database consists of people he has performed with over the years as well as “friend of a friend” contacts.

Friend Me...Please!

While this method works well for Ransom, most artists (especially those just starting out) don’t have a comprehensive list of contacts. He suggests “Cleveland Musicians,” a Facebook group, as a great place for musicians to build relationships. It provides a large, universal structure that enables artists from the Cleveland area to communicate with each other.

It’s a closed group, meaning administrator Tony Quarles must approve you to become a member.

However, the consistently growing group of (currently 283) local artists benefit immensely from the connections made there.

Ransom mentions that it’s a useful tool for musicians to ask for advice, organize groups for spur-of-the-moment gigs, and spread the word about upcoming performances. Now, that is a step in the right direction!

Promotion, Promotion, Promotion

Ransom notes that the number of Cleveland area gigs has decreased in recent years due to the current economic recession.

Forty-five percent of Cleveland Amateur Musician Survey respondents indicated that it was difficult to get gigs in Cuyahoga County. Respondents also mentioned that there are not enough venues within their specific genre in which to perform.

While the local economy is beginning to improve, Ransom advises that it is important for musicians to

The Music Settlement

Located in the heart of University Circle, The Music Settlement provides exceptional music education for students of all ages. The Settlement was founded in 1912 and, nearly a century later, has become one of the largest community music education organizations in the United States.

The Music Settlement specializes in private and group music instruction, early childhood education, and music therapy. In any given week the Settlement educates approximately 3,000 students. It also provides a popular summer music camp program, which includes musical theater and music lessons for younger students. Undoubtedly, The Music Settlement adds immeasurable value to music education in Cleveland while enriching its community on a daily basis.

Website: <http://www.thecmss.org/>

promote themselves as much as possible.

Sites like Facebook and YouTube offer a free means for musicians to do just that. Ransom notes, “YouTube is a beautiful thing. You can tell people, hey look up my YouTube channel. I get that a lot. It’s free and you can control who sees you by giving certain people passwords to get in. It is not open to the public unless I want it to be, so ultimately I control who sees me.”

Private Lessons & the Cleveland Musician

According to Ransom, while private lessons are a significant way for musicians to supplement their income, most musicians do not teach. Only 15% of survey respondents indicated that they received some of their income from music lessons. Private lessons, however, can be an artist’s bread and butter; they are a relatively easy way to earn money in a short amount of time.

Ransom gives private lessons and believes they are beneficial for both the student and the teacher. He mentions, “I learn from my students, as I am instructing them.” Currently he has 33 students per week from Cleveland State University and the Music Settlement, but in the past he’s had up to 40.

There is no definitive mechanism for finding teachers for private lessons. Students find teachers primarily by word-of-mouth. Also many schools maintain a musician referral list. Other students call educational institutions like the Music Settlement for recommendations.

According to Ransom, hourly rates for lessons vary, just like gas prices. In Cleveland the going rate is about \$40 to \$50 per hour.

Despite the informal manner in which teachers and students are brought together, there is usually an official contract in place that sets the ground rules for the sessions. Ransom explains, “If a student doesn’t show up, he has to pay the fee. If the teacher misses a lesson the student gets a credit. Usually students pay for 4 lessons at the beginning of the month and if the teacher misses a lesson then next month the student gets 4 lessons but only has to pay for 3.”

You Can’t Throw a Rock Without Hitting a Music School

Cleveland has its fair share of artists. There is a large sub-culture of musicians that call Cleveland their home. While some are self-educated many, including Ransom, received formal training through a post-secondary education at an Ohio college or university. An interviewee from our advisory committee on the Cleveland music scene notes, “Cleveland is a bit of an anomaly. We have several higher education institutions in the Cleveland area. These colleges and universities offer exceptional formal instruction for aspiring musicians. I can only think of a handful of other cities that have what we do here. We’re pretty lucky in this regard.”

3 Words: Cost of Living

When asked to name the biggest benefit Cleveland has to offer for a local artist, Ransom mentioned the relatively low cost of living Clevelanders enjoy especially when compared to other cities like New York or Los Angeles.

Ransom notes, “Housing is relatively inexpensive. You can have a decent lifestyle here. If you want to be comfortable, I’d suggest getting a day job, but if music is your passion and you want to do it full-time it’s possible because the cost of living is so low. After all, you can still be a starving artist and live in a loft. That’s a great thing about Cleveland. I can’t say that’s the case in other cities.”

Challenges for Cleveland-Based Musicians

According to Ransom there are a few challenges facing Cleveland musicians today.

Many Cleveland-based artists would like to see more support from local music industry employers. “With all the talent that’s here, why go elsewhere? If record labels, venues and other music industry employers focus more on local artists, musicians would feel even more excited about the city in which they play,” says Ransom.

There’s also the matter of perception. Ransom notes that there is a need to promote Cleveland as a music town. He says, “I’ve toured both nationally and internationally since 1990 and I’ve seen how other cities operate. I’ve been in situations where musicians on the bandstand say ‘You don’t play like you’re from Cleveland.’ We need to promote a music identity in Cleveland that outsiders can believe in.”

Advice for Cleveland-Based Artists

As a seasoned musician who has done it all, Bill Ransom has some words of advice for musicians to be successful in Cleveland:

- (1) Wear as many hats as you can. Teach, perform, and compose. Do as many things as possible so you have multiple streams of income.
- (2) Know how to market yourself. Be a shameless self-promoter. Talent is good, but you should talk to people and promote yourself as much as possible. Have an electronic press kit—the musician’s resume, which includes a discography, links to videotaped performances, band photos and bios, and business cards. Also maintain an updated presence on online social networking sites.
- (3) Learn different genres of music. Musicians should be proficient in different genres and be more receptive to gigs outside their main niche area. No one can play every genre extremely well, but if you increase your knowledge about different kinds of music, it will help you in the long run.

(4) Be active. Conduct music clinics, set up recitals, and actively network with other musicians and venue owners so you are on their radar.

Future Plans – This Could be the Start of Something Big

Between teaching and performing gigs, Ransom fits recording into his busy schedule. He plans to release his second CD later this year. He also plans to use what he has learned after nearly 40 years of playing music in Cleveland and open a music school. Ransom says, “It will focus on percussion and small-group play. Of course we will have lessons, but also symposiums and events for famous percussion artists.” In addition, the school will emphasize something Ransom thinks every artist should know—how musicians can market themselves to be successful in the Cleveland area.

Ransom plans to set up shop in Cleveland or Cleveland Heights, staying close to the city that has shaped his experiences as an artist.

Roots of American Music

Founded in 1999, Roots of American Music (ROAM) is a non-profit organization that reaches out to over 40,000 students annually through a wide variety of educational music programs.

At ROAM, students expand their horizons through exposure to jazz, folk, and blues music. This organization conducts several activities; most popular are the Assembly and Residency programs. The Assembly program is a one-time music event held at schools in which students are exposed to several music genres. Before the performance portion of the assembly starts, musicians teach students about the history of each genre. The Residency program aims to link roots music with history and social change. Upon completing the program, students perform self-written songs in a school assembly.

ROAM works with local organizations to present public programs. These programs include after-school music workshops, song writing for teens at several public libraries, Tri-C High School Rock Off, and involvement with the Natural History Museum and The Rock and Roll Hall of Fame.

Website: <http://www.rootsofamericanmusic.org/>

In a Sentimental Mood

By all means, Bill Ransom is the quintessential Cleveland musician. He is an example of what a Cleveland musician can aspire to be. For Ransom, success is not just about how many gigs you have, or how many classes you teach, it’s about how your music can touch other people.

He explains, “Our job as musicians is to promote a positive emotional feeling in the audience and enrich people’s lives through music. If you can touch that one person in the back of the room that doesn’t know anything about music but likes what he is hearing, then you have arrived.”

Anyone who has seen Ransom perform knows he has arrived. In the years that follow, we can expect to see great things from this Cleveland son.

Website: <http://www.facebook.com/people/Bill-Ransom/1366724984>

CLEVELAND HITS THE JACKPOT WITH THE CLEVELAND LOTTERY LEAGUE

What do you get when you combine the performances of Cleveland-based artists with the utter randomness of the Ohio lottery? An innovative musical experience that is sure to entertain audiences in an excitingly new way.

It's creative and zany and the ultimate music experiment. The Cleveland Lottery League is a uniquely Cleveland experience. It involves randomly selecting 4 or 5 artists, setting them up in a rehearsal space for several weeks, and then inviting them to perform for a raucous Cleveland crowd. Typically, the musicians don't know each other and are from different genres and backgrounds, so you never know what you're going to end up with.

"It's an event that is a game that you play with people. Victory is obtained by going through the trials and tribulations of being an artist attempting to create a successful end product, however you also want to have a good time and make new friends," says Ed Sotelo, co-founder of the League.

A Brainchild of the Council of Chiefs

The Cleveland Lottery League was created by local musicians Ed Sotelo, Jae Kristoff, Michael Pultz, and John Delzoppo (emeritus), who are known in the League as the Council of Chiefs.

Santina Protopapa & Progressive Arts Alliance

The Progressive Arts Alliance (PAA) is at the forefront of arts education advocacy in Cleveland. Since its inception in 2002, the PAA has educated over 20,000 students using cutting edge programs.

One of the organization's more intriguing programs is the RHAPSODY Hip Hop Education Program. Using Hip Hop as a tool for student development, it offers a unique approach to learning and improving self-esteem.

Now in its 10th year, PAA also offers a Hip Hop Summer Arts Camp. Presenting contemporary, "cool" programs students can relate to makes PAA one of the most unique music education organizations in Cleveland.

Website: <http://www.paalive.org/>

"What inspired us was another thing that binds Clevelanders together besides music—that's sports! We are big sports fans, so we like the idea of a draft like they do in the NFL or NBA and we try to use some of the language," says Sotelo. Unlike a typical sports draft however, participation in the League is non-competitive and not based on ability. It's more about artists' willingness to build new relationships and to work outside their comfort zone to produce something unique and engaging.

It all began with a simple question- What would happen if pre-existing groups broke up and started all over again? To Sotelo and his friends it seemed that local artists performed with a select group of fellow musicians in a limited number of genres. So if you break up a musician's comfort niche and put him in an unfamiliar setting, he has the potential to grow and produce something of great musical significance for his audience.

Each member of the Council brings something to the plate in the creation and development of the League. “Jae came up with the seeds for the system that creates the bands. Michael is a great motivator and speaker. We spent a lot of time brainstorming ideas. We all had different strengths and weaknesses and pooled everything together,” says Sotelo.

What’s the Play?

How is this done? The scenario is simple.

A survey is sent out to former participants as well as emerging artists on the Cleveland Music Scene. Artists’ names, what instruments they play, and other information is entered into a spreadsheet. Baseball cards are made of each musician. The cards list what bands musicians were in, what instruments they play, and other useful information.

VIVA! Concert Series

The Cleveland Museum of Art’s VIVA! Concert series is a hidden gem of which more and more Clevelanders are becoming aware. With the addition of the newly renovated Gartner Auditorium, the series has been gaining momentum and esteem as part of the Cleveland music scene. The amazing and diverse wealth of talent that can be seen at VIVA! will astonish even the most eclectic of music enthusiasts.

The series is a trip around the world, showcasing acts including a Russian classical choir, a Cuban Flamenco dance and music act, a musician playing the pipa (a Chinese instrument), and a Mariachi band. This is simply a short list of the incredible culture brought into Cleveland through the VIVA! Concert Series.

Website: <http://www.clevelandart.org/events/music%20and%20performances/viva%20gala.aspx>

On “Draft Night” musicians are assigned a number. Bands are formed by selecting numbers from an old-fashioned lottery hopper. The only stipulation is that each group is assigned some sort of percussion (drums, bass, etc) and at least one member of the group has access to rehearsal space.

“Anyone can be part of the draft,” says Sotelo, “but they must have experience playing in a band that has recorded or toured in the past.”

After the bands are assigned, they begin the creative process—writing, rehearsing, and recording 10-15 minutes of music. During this time bands come up with a name, logo, and biography.

The end result is a performance at The Big Show, a biannual event at the Beachland Ballroom and Tavern in North Shores Collinwood.

This Isn’t a Popularity Contest, But...

More than the Council of Chiefs could have ever imagined, both the 2008 and 2010 shows were hugely successful. Approximately 150 artists formed 33 distinct groups that performed at each show.

“No one else has accomplished what we have in Cleveland,” says Sotelo. While there have been similar attempts in other cities including Los Angeles, no other city has presented an event of this magnitude in

terms of both the number of bands performing and the tickets sales for The Big Show.

There are other positive effects that spring from the League's hard work. In 2010 they recognized six bands that were still together after performing in 2008. Also, Sotelo notes that some friendships, business relationships and even romances developed thanks to the League's musical experiment.

Is the League popular? Yes! Will it continue to grow? You betcha! This is one of a growing trend of "cool" things to do in Cleveland.

It's Not Just a Cleveland Thing

Part of the Lottery League's success is that it's about local artists performing for fellow Clevelanders, or so they thought...

While their audience is mostly comprised of family and friends, audiences from outside Cleveland are also drawn in due to the unique and interesting concept of this musical experiment.

"Local shows tend to bring in better crowds—friends like to see their friends perform," says Kristoff, "but there's also this idea that we're putting something out there that others could enjoy."

According to the Survey of Local Venues, 25-30% of the people who attend Cleveland-based music events are not residents of Cuyahoga County. However when national or international music stars perform, out-of-towners make up 80-85% of show audiences.

The League also takes advantage of Cleveland's weather. The draft for The Big Show is in winter, February through April, which is usually a slow time for local artists.

"In Cleveland it's cold and gets dark early and there are not a lot of big events going on. We promote The Big Show at that time and it is easier to build an excitement around it for Clevelanders and out-of-towners alike," says Kristoff.

Memorable Performances

A memorable performance stood out in 2008 according to Sotelo: "We had a group that had the obnoxious but funny name of "Homeless Sexual," who were very creative." The band wrote a script, acted in the movie, and performed the soundtrack live as the movie was viewed by the audience."

Another interesting performance took place at the 2010 Big Show. Sotelo notes, "That night we had a group called the 'Newdicals' who wrote and recorded a 15-minute musical that was an abbreviated version of *The Breakfast Club*, but with really strange and serial plot twists. They sang and wore costumes and performed to previously recorded music, so it was like a mini-theatrical production. It was completely crazy and absurd and a lot of fun."

What are the Lottery League’s Future Plans?

In 2012 the Council of Chiefs plans to film a documentary about the development of the bands focusing on the complex relationships formed by strangers who work together to produce music.

Also, the Council is currently seeking non-profit status. They believe this will enable them to keep ticket prices low, get reimbursed for out-of-pocket expenses, have a bigger production value for the Big Show, and a better “Draft Night”.

Sotelo notes, “This is ultimately about community building and it shouldn’t be about getting rich.”

The Lottery League fosters positive relationships between musicians, creating new ones and strengthening existing ones. Outside the League’s busy season, they continue to interact, but in the warmer months, the focus shifts to softball. Kristoff notes, “We have ten softball teams made up of musicians and artists. Games take place in Clark Fields and Gordon Park. We have a great time and the softball league gets bigger year after year.”

Cleveland Rocks – the Plus Side for Artists in Cleveland

While some findings from our research revealed the existence of difficult working relationships between local musicians, especially when competing for gigs, many artists state that positive relationships abound in the Cleveland area both inside the League and out.

The Council is comprised of musicians who have performed in the Cleveland area for several years. A common theme among them is the relative ease with which musicians meet and interact with each other and the existence of supportive relationships that develop over time.

“Friends are like family in the musicians’ circle. I live with musicians, I date a musician—we are all together. For many musicians, the comfort of the music scene here has kept them in Cleveland,” notes Kristoff.

Wade Oval in University Circle

What started out as a small Wednesday evening concert series has grown into a weekly “Party in the Park” Cleveland event. More than 10,000 visitors each summer bring their families, friends, blankets, and lawn chairs to relax and enjoy music at WOW! Wade Oval Wednesdays.

Performed in a beautiful setting surrounded by the Cleveland Botanical Garden, the Cleveland Museum of Art, and the Cleveland Museum of Natural History, this one-of-a-kind concert-going experience combines the outdoor charm of Wade Oval with the excitement of live music.

Wade Oval in University Circle hosts a variety of music events that represent the richness of our region in genre and culture. Whether one is a fan of rock and roll, jazz, folk, gospel or Jamaican reggae, there’s a concert that’s perfect for everyone.

Website: <http://www.universitycircle.org/uci.aspx?page=84>

Matthew Charboneau, the Arts Network Leader at COSE (Council of Smaller Enterprises) notes, "There is competition, but then again, it seems that people are much more open and friendly in Cleveland. There is also a generational aspect to it. Older players often take younger players under their wing to show them the ropes. That is prevalent here especially with jazz and traditional music genres. Cleveland has a really open music community."

Sotelo agrees, "People are easy to talk to, it is easy to network if you are not a jerk. It was a bit of an uphill struggle when I started out, but hanging out in local venues with like-minded folks was a great experience. I've met a ton of people and some of them are still my friends. That is one of the beauties of Cleveland. It is really easy to meet creative people."

It's All About Perception

Sotelo also mentions an important issue—the need for Cleveland to identify or brand itself with a label so that people can easily recognize Cleveland as a music-friendly city. Cities with that reputation draw large audiences to music-based events and are perceived to be financially supportive of musicians.

According to the survey, Cleveland musicians are paid as well or in some cases better than musicians in other comparable cities, especially for music lessons. There are also more opportunities to teach in the Cleveland area—through formal instruction at local educational institutions or through private lessons in the home or another meeting place. There is a significant demand for private lessons in Cleveland and, interestingly enough, a big portion of that demand is coming from adults who decide to study music as a hobby.

Another issue brought out in the interviews is that Cleveland does not do a good job marketing music, especially promoting local artists. "If Cleveland will not care about its musicians, musicians will not care about Cleveland" said one local artist.

Kristoff also stresses the importance of marketing, "It's about getting the word out to as many people as possible. Marketing should be focused promoting Cleveland events. More people should be aware of what is going on in Cleveland, not just the big events."

There's Nothing to it, But to do it

When asked what advice Sotelo would give to up-and-coming local musicians, he says, "If your goal is to sustain yourself by art alone, you really have to just stick it out. Surround yourself with good people. Be patient and creative in building your own network of supportive fellow artists, fans, and friends. Be content with that."

Of those musicians that identified music as their primary means of income in the survey, 75% earned almost all their income from music-related activities. In addition, 60% of those individuals earned \$300

or more per gig within Cuyahoga County; that number grows to 80% if we examine individuals who get paid \$100 or more per gig in the county.

According to Sotelo, Cleveland already has two-thirds of what it takes to make itself a more music-friendly city. We have an abundance of both talented musicians and venues for which they can perform. That in large part accounts for the success of the Cleveland Lottery League. All we need now is to focus efforts on marketing to attract larger audiences from outside the Cleveland area to enjoy all the great music that Cleveland has to offer.

Cleveland has hit a home run with The Cleveland Lottery League. The Big Show is part of a surge in new performances. The Council of Chiefs is currently planning the 2012 Big Show, re-doubling efforts to find new artists from varied backgrounds to take part in the draft. Looking ahead, the League has nowhere to go but up.

Websites: <http://lotteryleague.blogspot.com/>

<http://www.facebook.com/pages/2010-Cleveland-Lottery-League/208343709847#!/pages/2010-Cleveland-Lottery-League/208343709847>

CLEVELAND'S GETTING ITS GROOVE ON— VINCE SLUSARZ AND THE RESURGENCE OF VINYL

Cleveland native Vince Slusarz has reinvented the wheel, or should we say record? Building on Cleveland's legacies of manufacturing and music, he opened Gotta Groove Records— a record-pressing business in Cleveland. Operating a small manufacturing facility to produce records in a supposedly dead industry in the midst of an economic recession may seem like a foolhardy venture, but with insight, research, and a little luck, Slusarz has established a thriving business.

It's a Simple Case of Supply and Demand

Back in 2009, Vince Slusarz wanted to create a business from the ground up. He had no prior experience with business startups, but knew two things: he wanted it to be based in manufacturing and he wanted it located in Cleveland.

Slusarz comments, "I just started thinking about things I like. I've always liked vinyl and I've always liked music." While Slusarz didn't have a background in the music industry, he certainly had an interest in it. During his college years, he worked part-time for his father-in-law who was a sales representative for Capitol Records.

A deciding factor for Slusarz to start his business was the notion that it wasn't just about nostalgia anymore. In recent years, the vinyl business has become a growing market that appeals to a wider range of consumers. He observes, "I saw that younger people were buying vinyl. Through research I found that the actual figures from vinyl being produced have been going up year after year since 2006. With those things happening I thought, 'Geez it might be a good idea to start a vinyl record plant, especially if demand is going up.'"

Vinyl is experiencing something of a comeback. According to Nielsen SoundScan, an information system that tracks music sales throughout North America, although total album sales fell, the sale of vinyl albums has grown consistently since 2008. Vinyl sold 1.9 million units in 2008 and 2.8 million units in 2010. Last year's sales represent the largest amount of units sold since Nielsen SoundScan began gathering data in 1991.

Slusarz has a background in manufacturing. In a previous life he worked as a Chief Operations Officer for a plastics manufacturing company, so to him this was a no-brainer. "The demand is going up, capacity is fixed since record presses aren't made anymore, so you're going to get business just by opening the doors." Slusarz's experiences in the music and manufacturing industries represent a microcosm of Cleveland and pay tribute to its legacies in both industries by reinvigorating the vinyl-manufacturing business in Cleveland.

Before Slusarz could set up shop he encountered a stumbling block—finding the proper equipment. With the emergence of other music media, the manufacturing of record presses had become a dying art. Luckily, after contacting a few companies, Slusarz came across Dynamic Sun, a record-pressing plant in New Jersey that was thinking about selling its equipment. The timing was perfect! So in the spring of 2009, Slusarz bought and relocated the equipment to Cleveland.

From Soup to Nuts

Gotta Groove Records is a one-stop shop for pretty much everything associated with vinyl records. Customers are provided not only with vinyl records, but also with liners, inserts, and covers. All the customer needs to do is provide the music, cover, and label art and Gotta Groove will do the rest.

Slusarz says, “Generally speaking, artists provide music to us by downloading it to our site or giving us a CD. Then we translate that ultimately into a vinyl record.”

Some clients, especially those from major record companies, ship the print materials to Slusarz, but many customers use templates provided by Gotta Groove Records to create jacket and label art.

At full capacity Gotta Groove Records is able to produce over 11,000 records a week. Operating at this level helps to pay off Slusarz’s initial investment which was based on his retirement fund. Soon Slusarz hopes to bring two more presses into operation, and purchase two additional presses. Running at full capacity (at three shifts per day), operation could increase to as much as 66,000 records per week. Mr. Slusarz has invested his heart and soul in the vinyl business. His plans for expansion in this relatively short time bodes well for the future.

The Cool Factor: Why is Vinyl so Popular?

Competing against the portability of CDs and transferability of MP3s, vinyl has not been a viable contender for mainstream audiences in quite some time. While vinyl was once thought to be extinct, it’s still here and it accounted for a tiny portion—less than 1%—of total album sales in 2010.

That 1% translates to a formidable number, however. According to the Recording Industry Association of America, last year’s vinyl record sales were estimated at 4.3 million units. Slusarz believes the actual number of vinyl record sales is much higher. He explains, “These figures only account for units with UPC codes that are sold to major retailers. Our estimate is that this figure only accounts for about 15% of the overall true market.”

Despite the lack of a definitive count, vinyl’s popularity among enthusiasts has been on the rise for the past couple of years.

One reason for this resurgence onto the music scene is the arguably better sound quality when

considering frequency rather than volume. Slusarz comments, “In many cases, CDs are compressed to make them super loud which means you lose the nuances on both the high and low ends of the spectrum. Many people find that vinyl sounds better.”

Records are especially known to have better capacity for lower frequencies. For this reason, they are often preferred by DJs on the night club circuit to play bass-heavy tracks.

Another factor accounting for the popularity of records is an album’s overall look. When comparing a record to a CD, for example, there have dissimilar canvas sizes. Vinyl albums allow artwork to be showcased over a much bigger area; it’s almost like a mini-poster. The art represents the artists and what they want their music to visually portray. Appearance creates a critical first impression when it comes to artists’ releases.

Also, there’s the cool factor that lends itself to collectability. Slusarz notes, “I think a lot of bands are finding that they have a difficult time selling CDs at their merchandise tables so they need to have vinyl, and it is viewed as legitimate. Over time, more and more bands and labels are finding this out.”

Slusarz also says that playing a record is about the whole music listening experience. It’s a different kind of listening style, “When listening to CDs or MP3s you could shuffle play songs and do a lot of other stuff while you are listening to music. Playing vinyl requires you to basically sit down and listen to it. I think a lot of people are finding out (a) that is what the artist intended and (b) it’s a great way to disengage from all the constant technological interruptions we have every day.”

Why Set up Shop in the 216?

Gotta Groove Records is located in Tyler Village, the heart of Cleveland's Midtown Asian community, among an eclectic combination of recording studios and a brewery. Slusarz says his decision to base operations out of Cleveland was in part a symbolic gesture. He comments, “Manufacturing is an important part of the strength for not just the city, but the whole region, so that was really my primary driver.”

Manufacturing is an important Northeast Ohio legacy. As early as the 1860s, Cleveland had an expanding commodity-based economy due in large part to the development of shipping along the Great Lakes and the construction of railroads lines throughout Cleveland. As a manufacturing center, the city developed a skilled workforce specializing in the production of a wide variety of products.

Although in later years Cleveland shifted its focus to a knowledge-based economy, manufacturing continues to be important as a platform for innovation as well as employment. In 2010, manufacturing was Northeast Ohio’s largest sector, creating 17.8% of the gross regional product. Also it’s the second largest sector in employment, providing 13.2% of the region’s jobs. Manufacturing in Cuyahoga County delivers 11.4% of county’s gross product and employs almost every 10th person with a job.

Another factor that led to the decision to headquarter in Cleveland is the abundance of free publicity Gotta Groove Records has received since opening its doors. People are intrigued about what Slusarz is doing. He has been on TV several times and stories about his business have appeared in local newspapers and magazines. This probably would not have happened if Gotta Groove Records set up shop somewhere else.

During its early months of operation, Gotta Groove Records pressed records mostly from local artists. These days the business has gone global with orders coming in from all over the world including Canada, Australia, and China. Today, the Cleveland area currently accounts for only 5-10% of their business.

While running a business in Cleveland has been a relatively smooth ride for Gotta Groove Records, Slusarz notes that enticing manufacturing businesses through city-based funding incentives would make Cleveland a more business friendly town and increase manufacturing innovation.

The idea is simple: Make more grant money available for manufacturing startups. Slusarz comments, “I could have gotten money for putting out a shingle and having some sort of retail environment here. That kind of struck me as funny in the sense that retailers usually don’t pay employees as well as manufacturers. My perspective on that is the city should be focusing its efforts to attract more manufacturing-based businesses here.”

How Can a Good Thing be Great?

Slusarz believes that Cleveland has as good a music scene as any place in the country due to the sheer number of shows available from both local and national artists.

Findings from interviews, focus groups, and the Cleveland Amateur Musician Survey show that there is a large amount of talented musicians performing in Cleveland. One focus group participant mentioned that there are several venues in town that provide musical performances seven days a week. The availability of quality entertainment on such a frequent basis is an asset to Cleveland’s music scene.

While the Cleveland music scene is top notch, there is always room for improvement. It’s chiefly about promotion according to Slusarz. Cities like Nashville or Austin are thought to be “music cities” since they are marketed that way. He also stresses the need for a “Music Czar”, a phrase coined by Beachland Ballroom and Tavern co-owner Cindy Barber. This community leader should be at the forefront of promoting all the great things that Cleveland has to offer.

Besides promotion, it’s about organization. Slusarz believes organizing people in Cleveland’s music industry is another crucial part of the solution, and he suggests creating an association responsible for gathering the disparate businesses in Cleveland—the manufacturing portion of the music industry, the venues, the recording studios, and others—would be a great asset to better market Cleveland.

Sometimes Being Under the Radar is a Good Thing

The future looks rosy for Gotta Groove Records. Slusarz notes, “We often hear the comment ‘Gee they still make vinyl records?’ That tells me is that record manufacturing has not reached the level of any kind of mass consciousness. We’ve got a ways to go until I think that will happen and then it will probably start to plateau, but I do see record manufacturing continuing.” With only about 12 pressing plants nationally and a steadily increasing demand in the foreseeable future, it’s a pretty sure bet that Gotta Groove Records will continue to prosper in the future as it gives Cleveland’s manufacturing industry a creative spin.

Website: <http://gottagrooverecords.com/>

MUSIC: THE MEDICINE OF THE MIND

Traditionally, music has been a ubiquitous part of everyday life. We use music in worship, entertainment, even exercising. In most instances the objective of music is to elicit an emotional response from the listener, but how about using music to develop motor skills, regulate heartbeat, or treat pain? Over the last few decades, there has been a significant increase in the use of music in the medical field. Leading medical facilities including the Cleveland Clinic, University Hospitals, and MetroHealth use it on a daily basis. Educational institutions including Cleveland State University and Baldwin-Wallace College offer degrees in music therapy. While the use of Music and Medicine is still in its infancy, over time it has gained in popularity for doctors and patients alike.

We all know that music can make us feel better, reduce stress, and soothe the soul, but who knew these commonly held beliefs were actually based in fact? It's a science; in case studies and empirically-based research, the use of music has been demonstrated to help patients recover and increase quality-of-life outcomes.

In more scientific terms, "Music and Medicine is the clinical practice and research related to music interventions and applications for clinical music strategy in medicine," according to Dr. Eric Ziolek, Chairman of the Department of Music at Cleveland State University.

So, What is Music Therapy?

Music therapy combines music and therapeutic techniques during treatment of an illness to help improve the physiological, psychological and emotional well-being of the individual.

According to the American Music Therapy Association, music therapy is a clinical and evidence-based approach to treating patients. It uses music interventions to accomplish individualized goals within a therapeutic relationship with a credentialed professional.

It's not about listening to music while getting a massage at a spa or falling asleep at night to a nature CD. Through structured sessions in a controlled setting, a board-certified music therapist (MT-BC) uses research and observation to assess a patient's emotional and physical well-being and then uses music to help treat the patient's ailments.

Music Inspires the Soul

Music affects the listener in different ways depending on the manner in which it is used. It can help manage stress, alleviate pain, and enhance memory— or meet a specific developmental, psychological or cognitive need. Music can also be used to help relieve feelings of anxiety and depression, promote self-expression and improve self-worth.

“If a person is in pain, music therapy can be used to help calm the person, decreasing their vital signs, relaxing their musculature, stabilizing blood pressure, heart and respiration rates. The more relaxed a person is, the less pain they will experience.” says Deforia Lane, Director of Music Therapy at University Hospitals of Cleveland.

Music therapy is preferred by many because music is familiar and non-invasive. “Music is a natural part of most people's life experience and as such is generally seen as a pleasurable activity. It's less threatening than some other treatments and therapies,” says Lalene Kay, Director of the Cleveland Music Therapy Consortium.

Cleveland Clinic

In 2010, The Cleveland Clinic was nationally ranked in 23 specialties, including a #1 national ranking in Heart and Heart Surgery. The hospital holds 1,214 beds with 54,038 admissions per year. Of its surgical procedures, 27,142 were inpatient and 52,757 were outpatient (according to the ranking of *US News Best Hospitals*).

The Cleveland Clinic's newly created Arts and Medicine Institute functions to assist the healing process through the arts. This institute uses all art forms, including music to accomplish this goal.

The Cleveland Clinic, as a whole, employs 37,000 people who serve 3.2 million patients per year. As part of the Arts and Medicine Institute, Cleveland Clinic has developed a Music Therapy Program directed by Dr. Iva Frattorini.

Website: <http://my.clevelandclinic.org/default.aspx>

Ziolek can attest to the benefits of music therapy. Through the National Association of Schools and Music, he conducts site visits, supervising teachers and music therapy students.

One session involved a 4-year-old child who had severe coordination problems. Ziolek explains, “He didn't have enough control of his body to walk confidently without stumbling or falling down. Therapists had him balance one hand on a drum while beating the drum with his other hand, then change positions rhythmically while he was in motion to improve his sense of balance.”

Another session attended by Ziolek focused on improving memory and motor skills of geriatric nuns in various stages of Alzheimer's disease. Through a session comprised of various components of music—singing *Hail, Hail, the Gang's All Here*, addressing each nun by name, playing a recording of Frank Sinatra singing *Moonlight Serenade*, and having the nuns rhythmically manipulate scarves to the music, the nuns regained muscle control.

Cleveland – A Music Therapy Mecca?

Why is music therapy so prominent in Cleveland's medical sector?

According to Kay, music therapy in Cleveland originated in 1966 when Anita Louise Steele received funding to create the music therapy program at the Music Settlement. One of music therapy's pioneers, the program has been instrumental in helping people with autism and other developmental disorders.

She notes, “From there, other nationally recognized programs [at] (the former) St. Luke's Hospital in the 1970's, Corinne Dolan Alzheimer Center at Heather Hill Hospital in the 1980s and University Hospitals began ground-breaking programs which have been a template for programs all over the world.”

Today, Cleveland’s top three medical institutions—the Cleveland Clinic, University Hospitals, and MetroHealth have music therapy programs and are actively engaged in research. “These organizations are looking for the newest and most innovative ways to approach medical treatment,” notes Ziolek.

Money Talks

Music therapy is also successful due to the amount of funding provided over the years for both research and practice.

Founded in 1937, The Kulas Foundation is a non-profit organization that promotes music in Cleveland. A major portion of its annual funding goes toward several aspects of music, including music education, grants to music-based institutions, and music therapy. The foundation has funded research on the use of music therapy in a variety of areas including Alzheimer’s disease, schizophrenia, abused children, premature infants, burn patients, cardiac patients, hospice patients and the homeless.

Dr. Lane, a member of the Kulas board, has read several grant proposals from physicians who collaborate with the Music Therapists in research.

“We’re supported by physicians in many of our institutions,” says Dr. Lane, “When you have this kind of support both financially and clinically and our patients respond well with this therapy on a consistent basis, it makes Cleveland a great place to be for this field.”

University Hospitals

In 2010, University Hospitals was nationally ranked in 14 specialties, including a #4 ranking in Neonatology (a branch of pediatrics that treats disorders and studies the development of newborn children). According to *US News Best Hospitals*, University Hospitals holds 769 beds with 44,634 admissions per year. Of its surgical procedures, 10,562 were inpatient and 14,801 were outpatient. In 2010, University Hospitals had an operating income of \$88 billion and employed 4,236 physicians and 12,888 non-physician employees (according to UH’s 2010 annual report).

Doctors at the University Hospital Neurological Center for Music and Medicine specialize in nearly every aspect of medicine relating to music. The Center consists of over 50 health care professionals from 11 institutions in Northeast Ohio. They use music to treat a wide variety of physical and psychological disorders. The Center’s goal is to facilitate healing through the exposure of patients to music.

Even more impressive is UH’s nationally recognized Music Therapy program lead by Dr. Deforia Lane. Musicians with career threatening diseases can find solace in UH’s dedication to finding cures and treatment plans, which allow musicians to continue doing what they love, playing music.

Website: <http://www.uhhospitals.org/>

Lane also leads an outreach program called Toddler Rock at the Rock and Roll Hall of Fame comprised of 11 music therapists who use music therapy techniques to increase the literacy skills of nearly 300 headstart preschoolers 3-5 years old. Lane explains, “PNC bank has funded us very well- \$450,000, not just to support the existing program but to expand it over a 3-year period. They look at music therapy and the art influence in the preschool classroom as being very important. That is certainly a shot in the arm for us.”

The Challenge

As with any emerging science, it takes time to become accepted by the general population. There’s a bit of skepticism that exists despite research supporting the music therapy field.

Ziolek notes, “Certain segments of the health profession won’t recognize these alternative therapies as being legitimate. Some people have never heard of music therapy. I don’t think people understand it well enough yet.”

There is a need to continue educating health care professionals and the public about music therapy. Research is readily available explaining the benefits of this form of treatment. Others can surely benefit; they only need to have an open mind.

Good Problems to Have

Kay mentions another challenge; the field of music therapy is expanding at such a fast rate that keeping current with research and clinical innovations is often difficult. She comments, “It’s exciting and sometimes overwhelming at the same time. We have incredible resources in many different clinical specialties as well as active researchers publishing and presenting their work worldwide.”

Lane notes that despite the boom of recent years in this field, at this time there are not enough music therapists to go around. “I don’t think we have saturated the market,” Lane says. “There are not too many of us yet. We are all carving niches in places, so at this point there is more to do than there are Music Therapists to do it.”

MetroHealth Medical Center

In 2010, MetroHealth Medical Center was noted as high performing in six adult specialties including Diabetes and Endocrinology, Geriatrics, Gynecology, Kidney Disorders, Pulmonology, and Urology. According to *US News Best Hospitals*, MetroHealth holds 860 beds and admits 25,746 patients per year. Of the hospital’s surgical procedures 5,342 were inpatient while 12,469 were outpatient.

MetroHealth’s Art Therapy program is housed in the Activity Therapy Division at the hospital. The program, which was founded in 1967, is the oldest art therapy program in the country. The Art Therapy program uses a variety of artistic outlets, including music, to achieve its goals of engaging the patient’s mind and creativity to promote healing in a calm environment. Also, MetroHealth partners with Ursuline College’s Master in Art Therapy student interns. Dedicated staff, therapists, and volunteers foster a nurturing and creative environment for both patients and families.

Website: <http://www.metrohealth.org/>

What is the Future of Music Therapy?

While music therapy hasn't reached mass consciousness yet, it's starting to trickle in. Lane notes that patients are coming in and asking for the service by name, "I think we are really holding our own. I have more on my plate today that I hope I can get around to, and most of my colleagues are in a similar situation."

As the field develops, Music Therapists and professional musicians are beginning to collaborate in the treatment of patients. Lane explains, "I am not good at jazz, but I know a jazz musician who is more than willing to come in when I have a support group for families of people who have prostate cancer or something like that. The musician is willing to say, 'I'll pair with you, let's do this together.' I appreciate the musicianship he has and he sees a different side to music in how I facilitate the group. We are seeing more and more of these collaborative relationships." Lane has similar relationships with the Cleveland Orchestra, the Cleveland Institute of Music, and the Cleveland School of the Arts.

Cleveland Music Therapy Consortium

The Cleveland Music Therapy Consortium (CMTC), comprised of the Baldwin-Wallace College Conservatory of Music, The College of Wooster, and Cleveland State University, is a significant contributor to the prominence of music therapy in the Cleveland area.

The consortium offers a four-and-a-half year bachelor's degree in music therapy in which students take classes at Cleveland State University and the Baldwin-Wallace College Conservatory of Music, complete a six-month internship and pass a certification exam.

Created in 1976 through a grant from The Cleveland Foundation, this was the first music therapy degree offered in Northeast Ohio and the first in the nation involving a cooperative arrangement among educational institutions. The clinical and educational programs offered by the CMTC are recognized as unique and ground-breaking. So much so that programs from around the country continually seek information to replicate innovations the CMTC has made in the music therapy field.

Website: <http://www.bw.edu/academics/conservatory/people/Therapy/>

While music therapy provides effective treatment, we are still learning how music affects the brain. There is a need for more research to be conducted in this area. Ziolk says, "People are starting to think that there is something in our brains that music triggers which can elicit certain kinds of physical, emotional, and social responses. They are beginning to figure out how and why that happens. I think this is something that is showing positive results. Physicians are recognizing it and use music therapy more and more. I think this field will have a future."

Websites: <http://www.bw.edu/academics/conservatory/academics/mtherapy/>

<http://www.csuohio.edu/class/music/degreeprograms/undergrad/musictherapy.html>

MUSICIAN AND MUSIC ORGANIZATION DIRECTORIES

Two directories were compiled: a directory of music organizations and a directory of musicians. The music organizations directory has a total of 293 companies. These companies were found through suggestions from CPAC and searches on the Internet. The music organizations were searched for in the ES202 database as well as four public databases: LexisNexis, Hoover's, Reference USA, and Guidestar. Of the 293 music organizations, 106 were found in the ES202 database. The 106 companies found in ES202 were then checked against the public sources; 58 were also found in LexisNexis, 76 were found in Hoover's, 75 were found in Reference USA, 43 were found in LexisNexis and Hoover's, 41 were found in LexisNexis and Reference USA, 55 were found in Hoover's and Reference USA, and 33 were found in LexisNexis, Hoover's, and Reference USA. Of the 293 music organizations, 92 were found in LexisNexis, 130 in Hoover's, and 139 in Reference USA.

The directory of musicians was compiled using

databases and popular networking sources, including MusicCleveland.com, MySpace, Facebook, Cleveland Scene Magazine, Cleveland.com, OhioBandsOnline.com, and others. Leads from CPAC, the initial interviews, and survey responses were also added. This directory was then defined in terms of genre and type of performer (solo act or band). In total, the directory has 260 musicians, 118 of which are bands and 142 that are solo acts. The genres listed include all occasion, acoustic, alternative, Americana, big band, blues, Celtic, chamber, Christian, classical, country, cover bands, electric rock, folk, hip hop, indie, jazz, Latin, metal, pop, punk, R&B, rock, roots, and singer/songwriter.

Both directories are intended to give the reader only a sense of the scope and scale of the Cleveland Music Sector. They are not intended to be inclusive of all music organizations and musicians that exist in the Cleveland Music Sector. All-inclusive directories were not achievable given the limitations of this research.

MUSIC ORGANIZATIONS DIRECTORY

	Name	Lexis Nexis	Hoover's	Reference USA
1	40th Street Studio		Yes	Yes
2	6th Street Under Jazz Club	Yes		
3	95.5 The Fish WFHM-FM			
4	A Thru Z's Complete Piano Service	Yes	Yes	Yes
5	A to Z Audio Service	Yes	Yes	Yes
6	A Top Shelf Entertainment			Yes
7	AAA Record Man	Yes	Yes	Yes
8	Aba Music Inc	Yes	Yes	Yes
9	Academy Music Co.	Yes	Yes	Yes
10	Academy Music Company of Solon, Inc.		Yes	Yes
11	African American Music Association			
12	After Five	Yes		Yes
13	Agee Public Recording Co.	Yes		Yes
14	Agora	Yes	Yes	Yes
15	Alan Nemeth Piano Tuning		Yes	Yes
16	Alien Sound	Yes	Yes	Yes
17	Allegro Organ Service	Yes	Yes	Yes
18	Almira Sound Studio	Yes	Yes	Yes
19	American Federation of Television and Radio Artists			
20	American Music Theater Arts			
21	American Orff-Schulwerk Association			
22	American String Teachers Association Inc			
23	American-Slovenian Polka Foundation			
24	Ante Up Audio	Yes	Yes	Yes
25	Antonio Janigro Foundation Inc			
26	Apollo's Fire	Yes		Yes
27	Art House, Inc.		Yes	Yes
28	Art Quest			Yes
29	Art Song Festival		Yes	
30	Arts Renaissance Treemont			
31	Audio Recording Studios		Yes	Yes
32	Azica Records	Yes	Yes	Yes
33	B & Y Music Co, Inc.	Yes	Yes	Yes
34	B G Records Inc	Yes	Yes	Yes
35	B Side			
36	Baldwin-Wallace Arts Management Association			
37	Be Free Gospel Productions			Yes

38	Beachland Ballroom & Tavern	Yes	Yes	Yes
39	Bedford Music Center		Yes	Yes
40	Bela Dubby			
41	Bent Crayon	Yes	Yes	Yes
42	Bill Kap Piano Co.	Yes	Yes	Yes
43	Blossom Music Center Endowment Fund			
44	Boddie Recording Inc		Yes	Yes
45	Bop Stop			
46	Borodi Refinishing	Yes	Yes	Yes
47	Bourgard College of Music & Art Endowment Fund			
48	Brass Band of the Western Reserve			
49	Brecksville Music Shoppe	Yes	Yes	Yes
50	Brickman Concerts	Yes		Yes
51	Broadway School of Music	Yes		Yes
52	Brother's Lounge		Yes	Yes
53	Bruno Brothers Music		Yes	Yes
54	Cadillac Music & Amusements		Yes	Yes
55	Carpe Diem Media Services		Yes	Yes
56	Cavani String Quartet	Yes		
57	Chris' Warped Records			
58	Cifani Accordion Studio		Yes	Yes
59	Citizen Groove		Yes	
60	CityMusic Cleveland		Yes	Yes
61	Cleveland Arts Prize			
62	Cleveland Boy Choir			
63	Cleveland Chamber Collective			
64	Cleveland Chamber Music Society			
65	Cleveland Chamber Symphony			Yes
66	Cleveland Choral Arts Association		Yes	
67	Cleveland Christian Music Inc			
68	Cleveland Classical Radio LLC		Yes	Yes
69	Cleveland Clinic Arts and Medicine Institute			
70	Cleveland Composer's Guild			
71	Cleveland Festival of Art and Technology		Yes	
72	Cleveland Heights Gospel Choir Scholarship Foundation			
73	Cleveland Institute of Music	Yes	Yes	Yes
74	Cleveland Institute of Music Alumni Association			
75	Cleveland Interfaith Choir Inc			
76	Cleveland International Piano Competition	Yes		Yes
77	Cleveland Jazz Orchestra			Yes
78	Cleveland Lottery League			

79	Cleveland Lutheran A Cappella Choir			
80	Cleveland Music Center			Yes
81	Cleveland Music Therapy	Yes		Yes
82	Cleveland Orchestra	Yes	Yes	Yes
83	Cleveland Philharmonic Orchestra		Yes	Yes
84	Cleveland POPS Orchestra	Yes	Yes	Yes
85	Cleveland Recording Studios	Yes		Yes
86	Cleveland Scene			Yes
87	Cleveland TOPS Swingband		Yes	
88	Cleveland Violin Inc.			Yes
89	Cleveland Women's Orchestra			Yes
90	Cliff Hill Music			Yes
91	Clockwerke Sound Studio	Yes	Yes	Yes
92	Closer Look Studios			Yes
93	Commercial Recording Studios Inc.	Yes	Yes	
94	Community Partnership Arts-Culture	Yes		Yes
95	Conquisidores Studios		Yes	Yes
96	Contemporary Youth Orchestra		Yes	
97	Crescent Piano Tuning		Yes	Yes
98	C-Town Sound	Yes	Yes	Yes
99	Cultural Productions		Yes	Yes
100	D & D Music Supply	Yes		Yes
101	DeChant Art Consulting, LLC		Yes	
102	DiFiore's Music House			Yes
103	Dok Rok Records Inc			
104	Don Richards Piano & Organ		Yes	Yes
105	Downtown Records and Tapes	Yes		Yes
106	Dr. Z Amps	Yes	Yes	
107	Early Music America	Yes		Yes
108	Eastman Violin Inc.	Yes	Yes	
109	Edinger Guitars		Yes	
110	Educator's Music	Yes	Yes	Yes
111	Elite Music Entertainment	Yes	Yes	Yes
112	Empire Audio	Yes	Yes	
113	Envision Radio Networks			Yes
114	Euclid Orchestra			
115	Euclid Tavern	Yes	Yes	Yes
116	Fairmount School of Music	Yes		Yes
117	Fairview Violin & Piano Studio			Yes
118	Fame City Recording Studio	Yes		
119	Fat Fish Blue			

120	Filthy Hands Company (DBA Mushroom Head)		Yes	
121	Fishhead Records, Inc			Yes
122	FiveOne Music			
123	Flannery's Pub	Yes	Yes	Yes
124	Flip City Inc		Yes	Yes
125	Forty Watts Recording Studio			
126	FYE, Record Town Inc.		Yes	
127	Gallera Music LLC		Yes	Yes
128	George A Sipl Productions		Yes	Yes
129	Gerard's	Yes	Yes	Yes
130	Gilpin Chamber Music Society			
131	Glaesel String Instrument Service/Conn-Selmer			Yes
132	Goose Acres Folk Music Center	Yes		
133	Gorilla Productions	Yes		
134	Gotta Groove Records			
135	Grand Poo-Bas Record Shoppe	Yes	Yes	Yes
136	Gremin-M Studio		Yes	Yes
137	Grog Shop		Yes	Yes
138	Grover Musical Products	Yes	Yes	Yes
139	Guitar Center	Yes	Yes	Yes
140	Guitar Conservatory	Yes	Yes	Yes
141	Heads Up			Yes
142	Heights Arts Collaborative			Yes
143	Heights Band and Orchestra Parents Organization			
144	Heights Chamber Orchestra Inc			
145	Heights Guitars		Yes	Yes
146	Hill Guitar Co.			
147	Holtkamp Organ Company	Yes		Yes
148	Horn and Son String Instrument, Inc.			
149	Horst's Violin Shop	Yes	Yes	Yes
150	House of Blues		Yes	Yes
151	Independence School of Music			
152	Independent Music United			
153	Irish Music Academy of Cleveland Inc			
154	Jamie Belkin		Yes	Yes
155	Jerry Bruno Productions	Yes	Yes	Yes
156	Jesse Jaye Music, LLC		Yes	
157	Jimick Products			
158	Joyful Noise Music School		Yes	Yes
159	Junior Committee of the Cleveland Orchestra			
160	Kathryn Joy Foster Music Ministries			

161	Kindermusik of Cleveland	Yes	Yes	
162	Landmark Recording			
163	Lava Room Recording	Yes	Yes	Yes
164	Lentine's Music	Yes		
165	Lightyearmusic.com	Yes	Yes	
166	Little Warehouse			
167	Local 4 Music Fund Inc			
168	Lochaber Pipe Band Inc			
169	Mad Music Empire			
170	Makin' Music		Yes	Yes
171	Masterpiece Music Production	Yes	Yes	Yes
172	Mattlin-Hyde Piano Company	Yes		
173	Mayfield High School Chorale Music Boosters			
174	Mehrling Studios			
175	Memphis Ridge Music Center	Yes	Yes	Yes
176	Metrosync Studios		Yes	
177	Modern Arts and Music			
178	Modern Music Repairs and Sales		Yes	
179	Motter's Music House		Yes	Yes
180	MS Rock Recording		Yes	Yes
181	Musart Society			
182	Music & Performing Arts at Trinity Cathedral Inc.		Yes	
183	Music for Saint Gall			
184	Music Manor (15789 Broadway Corp.)		Yes	Yes
185	Music of the Cross Ministries Inc.			
186	Music Stack		Yes	
187	Music Therapy Enrichment Center	Yes	Yes	Yes
188	Music Workshop, Inc.		Yes	Yes
189	Musical Arts Association	Yes	Yes	
190	Musically Yours			
191	Musicians Heaven			
192	Musicians Swap Shop			
193	Musicians Towers			Yes
194	Musicland			
195	Musicon Inc	Yes	Yes	
196	My Mind's Eye Records			
197	National Federation of Music Clubs			
198	Nighttown	Yes	Yes	Yes
199	North Coast Men's Chorus			
200	Northeast Ohio Jazz Society			
201	Northern Ohio Children's Performing Music Foundation Inc/Singing Angels	Yes	Yes	Yes

202	Noteworthy Federal Credit Union	Yes	Yes	Yes
203	Now That's Class			
204	Ohio Music Education Association			
205	Olson Guitar Studio		Yes	
206	Opera Circle	Yes	Yes	Yes
207	Opera Cleveland	Yes	Yes	Yes
208	Ostrander Piano Service	Yes		Yes
209	Paul Green School of Rock			Yes
210	Peabody's Concert Club	Yes		
211	Pearl Road Video Corporation	Yes	Yes	Yes
212	Percussion Specialties			
213	Peter Zaret Violins		Yes	Yes
214	Pianofest Inc			
215	Pipes and Drums of the Cleveland Police			
216	Popular Demand	Yes	Yes	
217	Professional Percussion Products			
218	Progressive Arts Alliance		Yes	
219	Proof Records	Yes	Yes	Yes
220	Prospect Music	Yes	Yes	Yes
221	Prosperity Social Club			
222	Radio One (formerly Blue Chip Broadcasting)	Yes		Yes
223	Ragapriya School of Carnatic Music			
224	Rainey Institute			
225	Ray Fogg Productions		Yes	Yes
226	RCR Recording Studio			
227	Red 40 Productions			
228	Red-An Orchestra			
229	Reel Thing		Yes	Yes
230	Rettig Music		Yes	Yes
231	Rhea E Miller Music Education Endowment Fund			
232	River Valley Ringers			
233	Riverside Academy of Music			
234	Robert Russell			
235	Rob's Musicworks			
236	Rock and Roll Hall of Fame and Museum	Yes	Yes	Yes
237	Rock Capital Sound Corp		Yes	
238	Rock the House Entertainment			Yes
239	Rocky's Entertainment Emporium			
240	Roots of American Music	Yes	Yes	
241	Roxboro Orchestra and Band Organization Inc			
242	Royalton Music Center	Yes	Yes	Yes

243	Rust Records	Yes	Yes	
244	SAFMOD Performance Ensemble			
245	Sam Ash Music Stores			Yes
246	Scorpio Productions		Yes	
247	Shaker Symphony Orchestra			
248	Shop Hip Hop			
249	Singers' Club of Cleveland	Yes		Yes
250	SJ's Casa Demusica		Yes	
251	Skyline Music		Yes	Yes
252	Slipped Discs			
253	Smoke 2 Records			
254	Sodja Music Inc	Yes		
255	Southwest Music Studio			Yes
256	Spectra Cd's	Yes	Yes	
257	Sperzel Inc, Sperco	Yes	Yes	Yes
258	Stone Mad Pub			
259	Suburban Symphony Orchestra			
260	Sweet City Records			
261	Taw's Drum Works			
262	Telarc International Corporation			
263	Terry Carlin Violins			Yes
264	The Exchange			
265	The Music Settlement		Yes	
266	The Musical Theater Project			
267	The Sheet Music Company			
268	The Winchester			
269	Third Story Music Inc.			Yes
270	Timeless Guitars		Yes	Yes
271	TKO Entertainment			
272	Tomahawk Records, LLC.		Yes	
273	Touch Supper Club			
274	Tower 2012			
275	Troy Entertainment	Yes	Yes	Yes
276	Tubthumpers Music			
277	Undercover Records			
278	University Hospital Music and Medicine			
279	Vance Music Studios		Yes	Yes
280	Velvet Tango Room	Yes	Yes	Yes
281	VJ Rendano Wholesale Music		Yes	Yes
282	WCLV Foundation			
283	West Shore Chorale			

284	Western Reserve Chorale			
285	Western Reserve Theater Organ Society			
286	Westgate Music Center		Yes	Yes
287	Wilbert's	Yes		Yes
288	Windsong			
289	Women's Committee of the Cleveland Orchestra			
290	Wonder Bar			
291	Woodwind Workshop			Yes
292	Woody Coleman Presents	Yes	Yes	
293	Young Audiences		Yes	Yes
* Included in the full directory will be industry affiliation (NAICS), addresses and contact information.				

MUSICIANS DIRECTORY

	Name	Type of Performer	Genre(s)
1	1988	Band	Hard Rock
2	(19) Action News	Band	Indie
3	2nd Half	Band	Rock
4	400 Pieces	Band	Rock, Dance
5	70 Lewis	Band	Alternative
6	Aaron Lafette	Band	Pop
7	Ace and the Ragers	Band	Rock
8	Ace Molar	Band	Blues
9	Adamo Fiscella	Solo	Rock
10	Afternoon Naps	Band	Indie
11	Alec Donaldson	Solo	Classical
12	Alexis Antes	Band	Folk
13	Allan Hinkle	Solo	Classical
14	Almost Famous	Band	Rock, Pop
15	Amory Silvertson	Band	Singer/Songwriter
16	Anafair	Band	Pop, Rock
17	Andy Basinger	Solo	Electro-Acoustic, Jazz
18	Anne E. Dechant	Band	Rock
19	Anthony DeMore & the Dirty Recipe	Band	Folk Rock
20	Antoine C. Smith	Solo	Jazz, Rap
21	APG	Band	Metal
22	Ark Peninsula	Band	Rock
23	Arkana	Band	Metal
24	Armstrong Bearcat	Band	Blues
25	Ashley Brooke Toussant	Solo	Folk
26	Asleep	Band	Pop, Rock
27	Attack Cat	Band	Pop, Rock
28	Austin "Walkin' Cane"	Solo	"Damn Fine Blues"
29	Bad Boys of Blues	Band	Blues
30	Bald Paul's Irish Blues Band	Band	Irish
31	Bears	Band	Pop
32	Ben	Solo	
33	BERNARDUS Ensemble for Medieval Music	Band	Classical-Medieval
34	Beverly Simmons	Solo	Choral Music
35	Bill Corcoran	Solo	Piano
36	Blazing River Freedom Band	Band	Marching Band
37	Blue Lunch	Band	Blues
38	Bluebird	Band	Folk
39	BMZ Music	Band	Rock
40	Bob	Solo	
41	Bob Frank	Solo	Blues
42	Bobby Selvaggio	Solo	Jazz

43	Bottle	Band	Indie Rock
44	Brad Walk	Solo	Singer/Songwriter
45	Brad Wyner	Solo	Rock, Musical Theater
46	Brian Bennett	Solo	Percussion
47	Brian Henke	Solo	New Age, Folk
48	Brian Michael Hill	Solo	Rock
49	Brian Straw	Solo	Folk
50	Britni Elise	Solo	R&B
51	Burning Down Broadway	Band	Rock
52	Burning Vegas	Band	Rock
53	Call Me Constant	Band	Rock
54	Call Us Kings	Band	Pop Punk
55	Carie Volkar	Solo	Opera, Classical Singer
56	Cats on Holiday	Band	Roots
57	Charie Mosbrook	Solo	Folk
58	Charlie Christopherson	Solo	Singer/Songwriter
59	Chris Bihary	Solo	Psychedelic, Rock, Acoustic
60	Chris Allen	Solo	Singer/Songwriter
61	Chris Castle	Solo	Americana
62	Christopher A. Burge	Solo	Clarinet
63	Christopher Venesile	Solo	Jazz
64	Chrome Kickers	Band	Punk
65	Cletus Black	Solo	Rock
66	Cleveland Chamber Symphony	Band	Chamber
67	Cleveland Contemporary Players	Band	Classical
68	Cloud Nothings	Band	Pop
69	Clovers	Band	Pop, Rock
70	Colin Dussault's Blues Project	Band	Blues
71	Collage	Band	Cover Band
72	Conya Doss	Solo	R&B
73	Cory Smith	Solo	Rock, Pop
74	Craig Ramsey	Solo	Indie, Pop
75	Dan Kearsey	Solo	Pop, Rock
76	Dan Rose	Solo	Pop, Rock
77	Daniel Balaze	Solo	Jazz
78	Daniel Grigson	Solo	Indie
79	Dave Kasper	Solo	"Music for All Occasions"
80	Dave Sterner	Solo	Jazz
81	Dave Thomas and Marty Conn Band	Band	All Occasion
82	David Cintron	Solo	Ambient
83	David J. Fox	Solo	Modern Folk
84	David Mansbach	Solo	Electro-Rock
85	Deborah Van Kleef	Solo	Folk
86	Debra Nagy	Solo	Classical
87	Dee Jay Doc	Solo	Hip Hop
88	Dominic Tancredi	Solo	Drums

89	Doug Wood	Solo	New Age, New Music
90	Dreadful Yawns	Band	Rock
91	Dwight Oltman	Solo	Classical Orchestra
92	Ed Sotelo	Solo	Drums
93	Ernie Krivda	Solo	Jazz
94	Eye Conspire	Band	Rock
95	Fern Jennings	Solo	Classical
96	Filmstrip	Band	Rock
97	Fireside Symphony	Band	Folk
98	Flora Nevarez	Solo	Violin
99	Flowers in Flames	Band	Punk
100	Frederick Lautzenheiser	Solo	Harp
101	Gary Willard	Solo	Modern Rock
102	George Bachmann	Solo	Classical
103	George Carr	Solo	Vocal
104	Goodmorning Valentine	Band	Indie
105	Gravity	Band	Progressive, Rock
106	Harry Bacharach	Solo	Jazz
107	Harvey Hall-Nickerson	Solo	R&B
108	Helen Welch	Solo	Jazz, Show Tunes, Popular Songs
109	Hey Mavis	Band	Folk
110	HisNameHigh	Band	Christian Rock
111	HotChaCha	Band	Indie
112	Howie Smith	Solo	Jazz
113	Humble Home	Band	Folk, Rock
114	Ida Mercer	Solo	Classical-Piano Trio
115	J.C. Sherman	Solo	Classical
116	Jackie	Band	Rock
117	Jackie Warren	Solo	Jazz
118	Jacob Wynne	Solo	Jazz
119	James Marron	Solo	Classical Guitarist
120	Jane Dough	Solo	Rock and Roll (originals, covers)
121	Jay Albert	Solo	Classical
122	JD Eicher	Solo	Acoustic, Pop, Rock, Indie
123	Jeff Sherman	Solo	Guitarist
124	Jeffrey Quick	Solo	Composer
125	Jennifer Maurer	Solo	Zydeco, Cajun
126	Jennifer Woda	Solo	Opera
127	Jerry Popiel	Solo	Americana
128	JJ Magazine	Band	Pop
129	Joan Ellison	Solo	Voice
130	Joe [no last name was provided]	Solo	Jazz, Blues, Rock, Dance, Country
131	Joe Rohan	Solo	American Rock
132	Joey Ariemma	Solo	Rock
133	Joey Tomsick Orchestra	Band	All Occasion
134	John Brady	Solo	Ska, Rock, Electro, Punk

135	John Eddie	Solo	Country
136	Johnny Givens	Solo	Hip-Hop
137	Johnny Red and the Skammunists	Band	Ska
138	Jon Mosey	Solo	Original, Roots
139	Jonathan F. Cooper	Solo	Classical
140	Josh Rzepka	Solo	Classical, Jazz
141	Julian Ross	Solo	Violin
142	Julio Rodriguez	Solo	Latin
143	KB Sporck - KB and the Riptides	Band	Variety
144	Keith	Solo	
145	Keith Fitch	Solo	Composer
146	Ken Wadenpfohl	Solo	Classical
147	Kevin T. Richards	Solo	Roots Music
148	Kip Reed	Solo	Jazz
149	Kira Seaton	Solo	Vocalist
150	Kristin Baumlier	Solo	Pop
151	Kristine Jackson	Solo	Blues
152	Laurel Myers Hurst	Solo	
153	Leslie Braidech	Solo	Classical
154	Lowly, The Tree Ghost	Band	Folk
155	Machine Gun Kelly	Solo	Rap
156	Marcia Sindelar	Solo	Blues
157	Mark Alan Schulz	Solo	Classical
158	Matthew Abelson	Solo	Instrumentalist
159	Matthew Dudack	Solo	Classical
160	Matthew Forcefed	Solo	Hip Hop
161	Megachurch	Band	Christian Rap
162	Michael Bay	Solo	Blues
163	Michael Cormier	Solo	Rock
164	Midnight Buford	Band	Rock
165	Mike McDonald	Solo	Rock
166	Mike Pella	Solo	Rock
167	Mike Petrone	Solo	Jazz
168	Miles Boozer	Solo	Oldies, Classics, Rock, R&B
169	Miss Amanda Jones	Solo	Rock
170	Missile Command	Band	Electric Rock
171	MOJO Big Band	Band	Big Band
172	Morticia's Chair	Band	Punk
173	Mother Country Madmen	Band	Blues
174	mr. Gnome	Band	Indie
175	Nadia Tarnawsky	Solo	Dalcroze Eurhythmics
176	Nicholas Kloss	Solo	Rock
177	Nicholas Stipanovich	Solo	Classical
178	Nick Perry	Solo	Rock
179	Nick Riley	Solo	Indie Rock
180	Noel Quintana	Solo	Latin

181	Nox Arcana	Band	Goth
182	One 4 Seven	Band	Cover Band
183	Pale Hallow	Band	Americana
184	Pat & Nikki Custy (Pitch the Peat)	Band	Celtic, Folk
185	Patrick Wickliffe	Solo	Classical, Church
186	Paul Kovac	Solo	Classic Country, Bluegrass
187	Paul Samuels	Solo	Jazz
188	Presque Vu	Band	Hip Hop
189	Queue Up	Band	Gothic
190	Quinn Sands	Solo	Folk
191	Rachel Hoskins	Solo	Rock
192	Rebecca Harper	Solo	Alternative
193	Return of Simple	Band	Piano
194	Rob Kovacs	Solo	Pop
195	Robert Lloyd Peeples	Solo	Acoustic
196	Robert Szorady	Solo	
197	Robin Snyder	Solo	Early Music Vocalist
198	Roger Friedman	Solo	Jazz
199	Rosella	Band	Rock
200	Roy Book Binder	Solo	Acoustic
201	Run Avril Run	Band	Pop
202	Running in Circles	Band	Pop
203	Russian Duo	Band	Russian Folk
204	Scott Smith	Solo	Singer/Songwriter
205	SesTor	Solo	Christian Hip Hop
206	Smokin Fez Monkeys	Band	Americana
207	Spacer Ace	Band	Rock
208	State Fair	Band	Rock
209	Stella Park	Solo	Pop, Punk
210	Stephen Mlinarcik	Solo	Rock
211	Stone Pony	Band	Rock Tribute Band
212	Sumrada	Band	Rock
213	Sweet Apple	Band	Indie, Rock
214	Ted Rounds	Solo	Jazz
215	Teresa Henderson	Solo	
216	Terminal Blues	Band	Blues
217	Tezo	Band	Hip Hop
218	The Celebrity Pilots	Band	Indie
219	The Cletus Black Revue	Band	Rock, Blues
220	The Cleveland Jazz Orchestra	Band	Trumpet
221	The Dead Enders	Band	Punk
222	The Discovery Band	Band	Pop
223	The Facials	Band	Punk
224	The Geeze Cats	Band	Cover Band
225	The Hesitations	Solo	R&B
226	The Hot Rails	Band	Rock

227	The Jack Fords	Band	Folk
228	The JiMiller Band	Band	Folk
229	The Lighthouse and the Whaler	Band	Indie
230	The Lorax Tree	Band	Progressive, Rock
231	The Madison Crawl	Band	Rockabilly
232	The Manhattan Scene	Band	Rock, Pop, Soul
233	The Misery Jackals	Band	Punk Bluegrass
234	The Missing	Band	Rock
235	The Modern Electric	Band	Americana
236	The New Barleycorn	Band	Celtic
237	The Promise Hero	Band	Indie
238	The Spazmatics	Band	Cover Band
239	The Sunrise	Band	Christian
240	The Swamp Boogie Band	Band	Blues
241	The Very Knees	Band	Freestyle
242	The Whiskey Daredevils	Band	Rock, Country
243	The Womack Brothers Family Band	Band	Folk
244	THIS IS A SHAKEDOWN!	Band	Electric Rock
245	Thomas Moore	Solo	Classical
246	Tina D. Stump	Solo	Musical Theatre
247	Tom Evanchuck	Solo	Singer/Songwriter
248	Tom Todd	Solo	All Genres
249	Tony Koussa Jr. Band	Band	Wedding, Event
250	Tony Schaffer	Solo	Acoustic, Folk Rock
251	Tracy Marie	Solo	Singer/Songwriter
252	Ty Kellogg	Solo	Folk, Country
253	Unicycle Loves You	Band	Rock
254	Vincent Veith	Solo	Jazz
255	Vitium	Band	Funk, R&B
256	Wilfredo Gonzalez-Pagan	Solo	Tropical
257	Winslow	Band	R&B
258	Wish You Were Here	Band	Tribute Band
259	You're Among Friends	Band	Pop, Rock
260	Zach	Solo	Singer/Songwriter, Pop, Rock

* Included in the full directory will be addresses and contact information

MUSIC STUDY METHODOLOGIES

STUDY FRAMEWORK

The research team took a multifaceted approach to studying the Cleveland Music Sector. The geography of the study was identified by the Community Partnership for Arts and Culture (CPAC) and captured its primary service area: Cuyahoga County. Named for Cuyahoga County's central city, "Cleveland Music Sector" reflects the area commonly identified with the music domain in the region. Some parts of the research, including the amateur musician survey, supply-demand analysis, and import-export analysis, broaden this geographic area beyond Cuyahoga County to the Greater Cleveland region or Cleveland Metropolitan Statistical Area (MSA) because of data limitations. Opinions expressed in the focus groups and interviews often reflected perceptions of the Greater Cleveland music scene with borders extending beyond Cuyahoga County. The research team developed a framework that illustrates a methodological approach to studying an arts and culture cluster (the Cleveland Music Sector in the proposed study). This approach includes the following replicable procedures:

- Identify a cluster
- Delineate its typology based on different characteristics, such as:
 - Industrial affiliation (industry classification, NAICS)
 - Significance for the vitality of cluster (major and supporting function/ industry)
 - Types of products (music genres)
 - Ownership of companies and other entities (for-profit, non-profit)
 - Primary occupation (professional musician, amateur musician)
- Create a directory of companies and individuals in the cluster
- Assign employment and wage data for 2000-2009 from ES202 (individual company data from ES202 are confidential)
- Analyze and visualize the structure and dynamics of the cluster and its components
- Identify sources, compile information, and build the database for economic impact assessment(s)
- Assess the economic impact of the cluster and the components of the cluster according to the functions of the components, ownership of entities, and types of activity (entities and events)
- Identify unique companies, other entities, and individuals to be featured in case studies
- Verify, confirm, share information with and learn from major industry experts and decision makers
- Synthesize the results from the economic impact analysis and qualitative contributions into a framework
- Illustrate the cluster's associated quality of life and social impacts
- Develop and prepare final products and deliverables

The tools of economic analysis used in the study included:

- Individual interviews (for initial typology and case studies)
- Survey (amateur musicians assessment, supply-demand, and economic impact data)
- Industry analysis (typology analysis)
- Economic impact analysis based on IMPLAN modeling

METHODOLOGIES OF THE RESEARCH COMPONENTS OF THE STUDY

Individual Interviews Methodology

Initial interviews were conducted to identify key components of the Cleveland Music Sector, including major genres, companies, institutions, support infrastructure, events, stakeholders, and individuals. The list of musicians and community leaders to be interviewed was compiled from CPAC leads, the Center's knowledge and expertise, and research from secondary sources like news articles, websites, and directories.

A primary goal was to ensure that the list of respondents embodied the varied segments of Cleveland's music scene. Respondents included companies and individuals representing musicians, composers, educators from large formal schools and smaller music schools, industrial sectors such as manufacturing and music retail, music organizations such as unions and small business organizations, service providers, venue owners, and organizers of music events. The list included representatives of the Rock and Roll Hall of Fame and Museum; Local 4, the Cleveland branch of the union, the American Federation of Musicians; the Cleveland Institute of Music; Cuyahoga County Community College's (Tri-C) music program; Cleveland State University's music department; The Council of Smaller Enterprises (COSE); musicians that perform solo and in bands; local jazz clubs and other clubs; professional and amateur musicians; music schools involving children and adults; music retail stores; and companies manufacturing music instruments and music-related equipment.

The interview instrument was designed to include questions regarding (1) the vision of the Cleveland Music Sector, (2) the typology of the Cleveland Music Sector, (3) information for the economic impact study, and (4) information on stories of success in the Cleveland Music Sector. Specific questions captured formal and informal components of the Cleveland Music Sector, major Cleveland musical events, and prominent success stories about companies and individuals that could serve as case studies or as supporting material for other issues related to the study.

The interviews were conducted by three core researchers, mainly at the premises of the respondents. Each interview lasted about an hour, and each interviewer used a similar questionnaire (Figure 9-1). Each interviewee received a letter of invitation to participate in the study and a list of questions to be asked (Figure 9-2). In addition, each interviewee was asked to sign a consent form at the time of

interview. The audio recordings of each interview were transcribed and used to frame the various sections of the study.

Figure 9-1: Interview Questionnaire for the Researcher

Questions for the first round interview

Cleveland Music Sectors (CMS) questions

To emphasize: the study focuses on Cuyahoga County

1. **How would you describe the Cleveland music scene?**
2. **What is the greatest strength of the CMS compared to other prominent music cities?**
(follow-ups)
 - a. What are the major competitors of the CMS?
 - b. What is the most rewarding aspect of being part of the CMS?
 - c. What is the most challenging aspect?
 - d. What is the one thing that would surprise most people about CMS?
 - e. What defines the region for the CMS; city of Cleveland, Cuyahoga County, or broader?
 - f. What role does the CMS play in the region?
3. **In what genre can an artist “make a name” in the CMS?**
 - a. Do all artists need to go to Nashville or NY or LA or other prominent music city to “make a name”?
 - b. Is there a venue in Cleveland that people in the industry identify as “you have made it in Cleveland” if you play at this venue?
4. **What would people outside the region say the CMS is best known for?**
 - a. What do you wish they did know?
 - b. What is our success story?

CMS typology questions

5. **Speaking from a local stand point, what types of music can be found in Cleveland?**
 - a. Can you list the 5 most prominent types of music in Cleveland?
 - b. What artists come to mind that represent those genres?
 - i. Are these local, regional, national actors?
 - c. Are there any significant music organizations, businesses, or venues that support any of these types?
 - i. Are these organizations public, private, non-profit?
 - ii. Is there any GREAT patron of the arts in Cleveland that helps support local artists?
6. **From a local standpoint, how can an artist/musician have a successful music career?**

7. **Is there enough support for people working in the music industry in Cleveland?**
 - a. What organizations or companies help support the CMS (networks, suppliers, services, manufacturers)
 - b. What is the best asset in the CMS support system?
 - c. What organization/network comes to mind to represent it?
 - d. Where are the gaps?
 - e. Do you know any examples from other regions that filled such gaps? Can you name them?
8. **Has the current economic recession had a major impact on the success of local artist/musician?**

CMS Impact Study and import-export questions

9. **What are the main music-related events in Cuyahoga County? Main venues?**
 - a. Do we have many people attending these events from outside of the region?
 - b. Do they stay multiple days?
 - c. Where do you think they go while staying for these events? (Restaurants, shopping, bars)
 - d. Could you suggest names of people who might have knowledge about events and the visitors to these events (*for our impact study*)?
10. **Do many of our artists travel and perform outside the region?**
 - a. Are those trips primarily for promoting their name or generating income?
 - b. How often does an artist need to travel to consider music as his/her main line of occupation and income?
 - c. Is it possible to make a living as an artist staying in Cleveland?
11. **Does the CMS suffer from a lack of musicians/musical performances?**
 - a. Do we import musicians from outside because of this lack or just for increased variety? Where are these acts coming from?
 - b. Are there enough venues for local acts?

CMS Case Studies

12. **Could you please suggest a “success story” related to CMS that can distinguish Cleveland among other music scenes?**
13. **Could you suggest the names of other people who should be engaged in our study?**

Figure 9-2: Preliminary Questions for Respondents

Interview Questions

1. How would you describe the Cleveland music scene?
2. What is the greatest strength of the CMS compared to other prominent music cities?
3. In what genre can an artist “make a name” in the CMS?
4. What would people outside the region say the CMS is best known for?
5. Speaking from a local stand point, what types of music can be found in Cleveland?
6. From a local standpoint, how can an artist/musician have a successful music career?
7. Is there enough support for people working in the music industry in Cleveland?
8. Has the current economic recession had a major impact on the success of local artist/musician?
9. What are the main music-related events in Cuyahoga County? Main venues?
10. Do many of our artists travel and perform outside the region?
11. Does the CMS suffer from a lack of musicians/musical performances?

Methodology of Creating the Music Sector Directories

Within the study framework, two directories were compiled: a music organizations directory and an individual musicians’ directory. The music organizations directory has a total of 293 companies. These companies were found through suggestions from CPAC, Internet searches, and information received from interviews and focus groups.

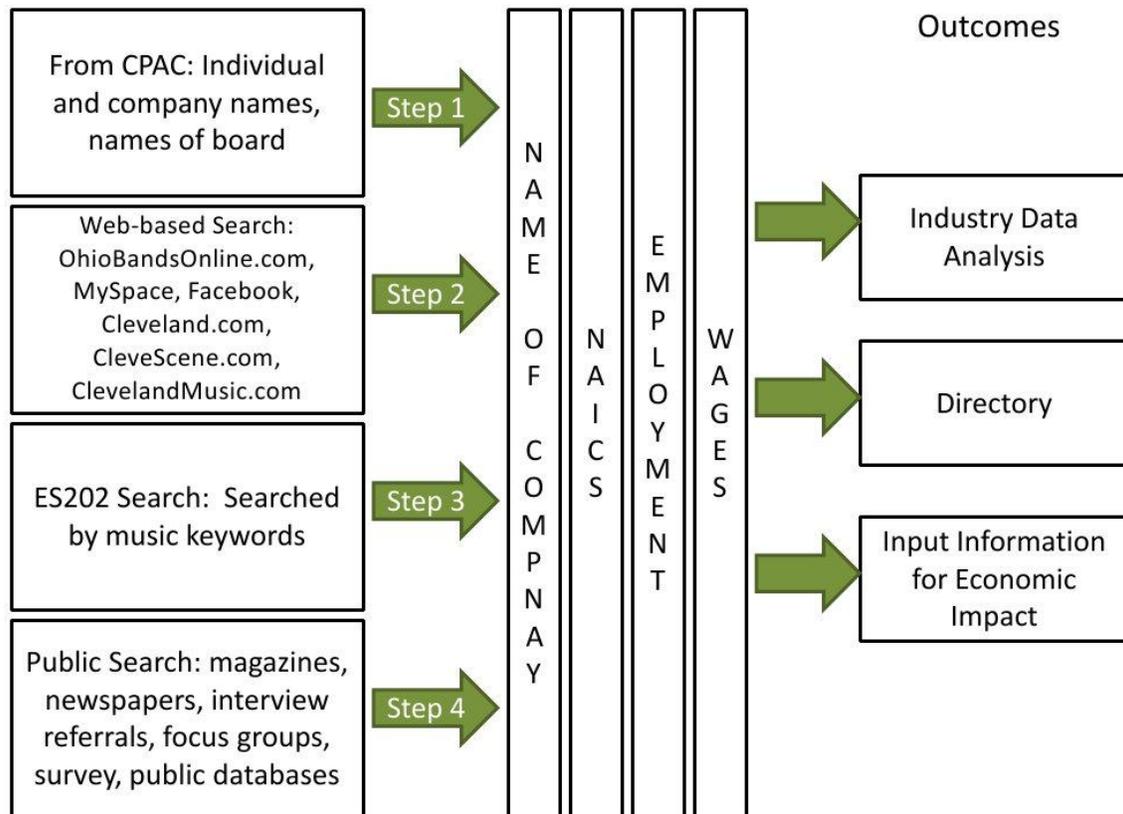
Searches for the music organizations were conducted in the Quarterly Census of Employment and Wages database (the ES202), as well as in three public databases: LexisNexis, Hoover’s, and Reference USA. Of the 293 music organizations, 106 were found in the ES202 database. The 106 companies found in the ES202 were then checked against the public sources; 58 were also found in LexisNexis, 76 were found in Hoover’s, 75 were found in Reference USA, 43 were found in LexisNexis and Hoover’s, 41 were found in LexisNexis and Reference USA, 55 were found in Hoover’s and Reference USA, and 33 were found in LexisNexis, Hoover’s, and Reference USA. Overall, from the complete list of 293 music organizations, 92 were found in LexisNexis, 130 in Hoover’s, and 139 in Reference USA.

The directory of musicians was populated through databases and popular networking sources, including MusicCleveland.com, MySpace, Facebook, Cleveland Scene Magazine, OhioBandsOnline.com Cleveland.com, and others. Leads from CPAC, the initial interviews, and survey responses were also added.

The musicians in this directory were then classified in terms of genre and type of performer (solo act or band). In total, the directory had 260 musicians, 118 of which were bands and 142 that were solo acts. The genres listed include All Occasion, Acoustic, Alternative, Americana, Big Band, Blues, Celtic, Chamber, Christian, Classical, Country, Cover Bands, Electric Rock, Folk, Hip Hop, Indie, Jazz, Latin, Metal, Pop, Punk, R&B, Rock, Roots, Singer/Songwriter.

The extensive data searches for the music directories were combined with collecting data as input information for the industry data analysis and economic impact study (Figure 9-3).

Figure 9-3: Algorithm of Data Searches for Music Directories, Industry Data Analysis, and Economic Impact Study



Cleveland Music Sector Typology and Trend Analysis Methodologies

The typology of the Cleveland Music Sector was created based on information collected from earlier steps of the project implementation: conducting the initial interviews, developing the directories of the music sector, and conducting the Cleveland Amateur Musician Survey. The typology is based on classification by different characteristics such as industry affiliation, music genre, ownership of companies or institutions (for-profit, non-profit), and importance for cluster vitality (major, supporting groups of industries).

An additional component of this section is the trend analysis derived from a comprehensive database created from the ES202 data. Analysis of this data illustrates the structure of the Cleveland Music Sector and how the dynamics of the music sector changed from 2000 to 2009. Data from the ES202 include employment, annual wages, and number of establishments, which provide information on 98% of the total employment and wages in the state of Ohio. These data are analyzed and described by industry, but not by individual company due to confidentiality restrictions associated with the ES202. This analysis resulted in a number of data displays such as diagrams and charts. The preliminary typology and trend analysis of the Cleveland Music Sector were shared with CPAC and included comments made during the focus groups and advisory committee meetings.

The algorithm for conducting the trend analysis included several steps:

Step 1. Using previous studies, identify “music” NAICS codes in the ES202 and account for companies in Cuyahoga County assigned these NAICS codes.

- The Center examined previous research studies on music sectors and derived a list of NAICS codes used to delineate the music sector.
 - Identified Level 1 NAICS, which are NAICS codes that include only music-related establishments (Table 9-1).
 - Identified Level 2 NAICS, or NAICS codes that include both music-related and non-music-related establishments. Each establishment in these NAICS codes was examined in detail and a determination was made whether it was music-related and could be included appropriately as part of the music sector (Table 9-2).
 - Identified Level 3 NAICS as those that contain some music-related establishments. All establishments in 2009 were examined and a determination was made as to whether they were music-related (Table 9-3).

Table 9-1: Level 1 NAICS Codes

NAICS Code	Definition
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Producing
339992	Musical Instrument Manufacturing
451140	Musical Instrument and Supplies Stores
451220	Prerecorded Tape, Compact Disc, and Record Stores
512210	Record Production
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
711130	Musical Groups and Artists

Table 9-2: Level 2 NAICS Codes

NAICS Code	Definition
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, & Other Public Figures

Table 9-3: Level 3 NAICS Codes

NAICS Code	Definition
334613	Magnetic and Optical Recording Media Manufacturing
515112	Radio Stations
522130	Credit Unions
611610	Fine Arts Schools
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists
711510	Independent Artists, Writers, and Performers
712110	Museums
813410	Civic and Social Organizations

- All other NAICS codes gathered through review of previous music studies were not included either because:

- They do not exist in Cuyahoga County
- They are not related to the music industry and were probably included in previous research to capture a specific local establishment (like “314991 Rope, Cordage, and Twine Mills” for guitar string manufacturing).

Step 2. Using the ES202 database to identify companies that are part of the Cleveland Music Sector but are not listed under a “music” NAICS code

- Keywords were identified that would augment the list. A search of the identified keywords was performed in the ES202. Each company that was found from this search was identified as either:
 - Not being a music establishment, and therefore not included in the final dataset
 - Being a music establishment
 - For these, each establishment was assigned a secondary NAICS code (from Levels 1-3) and was included in the final dataset

Step 3. Include music companies that were suggested by CPAC or in the individual interviews, focus groups, and advisory committee meetings that were not captured by NAICS codes from the ES202 database

- Specific establishments that were known as music establishments were individually added. These names came from organization and artist lists from CPAC, interviews, Internet research, and personal knowledge of the researchers. Each of these was given a secondary music NAICS code (from Levels 1-3).

As a result of this stage of the research, a total of 45 unique music and music-related NAICS codes were identified (Table 9-4). Of the total 45 NAICS codes, 10 NAICS codes were determined to contain only establishments (companies) that were related to music. These 10 NAICS codes are the Level 1 codes listed in Table 9-1. The remaining 35 NAICS codes were identified as encompassing both music-related and non-music-related establishments. As a result, the establishments in these 35 NAICS industries were examined individually to determine whether or not each belonged to the music sector.

Table 9-4: Industries Encompassing Music-Related Establishments (by NAICS code)

NAICS Code	Definition	Level
334310	Audio and Video Equipment Manufacturing	Level 1
334612	Prerecorded Compact Disc (except Software), Tape, & Record Reproducing	Level 1

33992	Musical Instrument Manufacturing	Level 1
423690	Other Electronic Parts and Equipment Merchant Wholesalers	Secondary
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	Secondary
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	Secondary
425120	Wholesale Trade Agents and Brokers	Secondary
443112	Radio, Television, and Other Electronics Stores	Secondary
451110	Sporting Goods Stores	Secondary
451120	Hobby, Toy, and Game Stores	Secondary
451140	Musical Instrument and Supplies Stores	Level 1
451220	Prerecorded Tape, Compact Disc, and Record Stores	Level 1
452990	All Other General Merchandise Stores	Secondary
454111	Electronic Shopping	Secondary
484210	Used Household and Office Goods Moving	Secondary
511110	Newspaper Publishers	Secondary
512110	Motion Picture and Video Production	Secondary
512210	Record Production	Level 1
512230	Music Publishers	Level 1
512240	Sound Recording Studios	Level 1
512290	Other Sound Recording Industries	Level 1
515111	Radio Networks	Secondary
515112	Radio Stations	Level 3
518210	Data Processing, Hosting, and Related Services	Secondary
522130	Credit Unions	Level 3
524126	Direct Property and Casualty Insurance Carriers	Secondary
532299	All Other Consumer Goods Rental	Secondary
541430	Graphic Design Services	Secondary
541519	Other Computer Related Services	Secondary
541840	Media Representatives	Secondary
611610	Fine Arts Schools	Level 3
621340	Offices of Physical, Occupational and Speech Therapists, & Audiologists	Level 3
711110	Theater Companies and Dinner Theaters	Secondary
711130	Musical Groups and Artists	Level 1
711320	Promoters of Performing Arts, Sports, & Similar Events without Facilities	Level 2
711410	Agents & Managers for Artists, Athletes, Entertainers, & Other Public Figures	Level 2
711510	Independent Artists, Writers, and Performers	Level 3

712110	Museums	Level 3
722110	Full-Service Restaurants	Secondary
722211	Limited-Service Restaurants	Secondary
722410	Drinking Places (Alcoholic Beverages)	Secondary
811490	Other Personal and Household Goods Repair and Maintenance	Secondary
813319	Other Social Advocacy Organizations	Secondary
813410	Civic and Social Organizations	Level 3
813930	Labor Unions and Similar Labor Organizations	Secondary

ES202 DATA SEARCH FOR MUSIC SECTOR ESTABLISHMENTS

The ES202 data is from the search of data within the time frame, 2000 to 2009, first quarter, and geography, Cuyahoga County.

We also performed a search by music-related keywords, using SAS programming and the ES 202 database. The trade and legal names of companies were searched for the following keywords: "CONSERVATOR," "MUSIC," "BAND," "ROCK," "POP," "JAZZ," "ORCHESTRA," "CASSETTE," "TAPE," "COMPACT DISC," "RECORD," "RADIO," and "AUDIO." The identified establishments were reviewed and compared with their personal websites when necessary. Only those affiliated with music-related activities were included in the database. Duplicated records between the NAICS list and the keyword list were eliminated.

CREATING THE MUSIC SUBSECTORS

All the music-related industries (identified by NAICS code) were divided into groups of industries representing functional subsectors of the Cleveland Music Sector. These groups were assembled to minimize the need for data suppression mandated by ES202 confidentiality agreements.

While the majority of music NAICS codes could be logically assigned to one subsector, a few NAICS codes were able to fit into two or more subsectors. These NAICS codes underwent further review to determine what kinds of companies and goods or services were encompassed in each NAICS code. Based on this extra information, industries were assigned to the appropriate subsector.

After additional research, the following subsectors were derived:

- *Education & Museums*
- *Manufacturing*
- *Musicians*
- *Promoters*
- *Recording & Publishing*
- *Retail*
- *Service Providers*
- *Wholesale*

Table 9-5 defines the eight music subsectors by the NAICS codes each encompasses.

Two sections of the trend analysis used a smaller scale of the Cleveland Music Sector (10 industries as opposed to all 45 industries) to compare the local music sector to other regions. This was necessary to obtain statewide data that could be accurately compared to the Cleveland Music Sector. The 10 industries, listed in Table 9-1, were selected because they contain only music-related establishments.

These same 10 industries were categorized into six subgroups to conduct an analysis of the Cleveland Music Sector’s economic base. One subgroup was omitted from the analysis due to confidentiality requirements of the ES202 data. These industries and their group affiliations are listed in Table 9-6.

Table 9-5: Music Subsectors by NAICS Code

NAICS Code	Definition	NAICS Code	Definition
Education & Museums		Retail	
611610	Fine Arts Schools	443112	Radio, Television, and Other Electronics Stores
712110	Museums	451110	Sporting Goods Stores
Manufacturing		451120	Hobby, Toy, and Game Stores
334310	Audio and Video Equipment Manufacturing	451140	Musical Instrument and Supplies Stores
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	451220	Prerecorded Tape, Compact Disc, and Record Stores
339992	Musical Instrument Manufacturing	452990	All Other General Merchandise Stores
Musicians		454111	Electronic Shopping
711110	Theater Companies and Dinner Theaters	Service Providers	
711130	Musical Groups and Artists	484210	Used Household and Office Goods Moving
711510	Independent Artists, Writers, and Performers	518210	Data Processing, Hosting, and Related Services
Promoters		522130	Credit Unions
425120	Wholesale Trade Agents and Brokers	524126	Direct Property and Casualty Insurance Carriers
511110	Newspaper Publishers	532299	All Other Consumer Goods Rental
515111	Radio Networks	541519	Other Computer Related Services
515112	Radio Stations	621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists
541840	Media Representatives	811490	Other Personal and Household Goods Repair and Maintenance
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	813319	Other Social Advocacy Organizations
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	813410	Civic and Social Organizations
722110	Full-Service Restaurants	813930	Labor Unions and Similar Labor Organizations
722211	Limited-Service Restaurants	Wholesale	
722410	Drinking Places (Alcoholic Beverages)	423690	Other Electronic Parts and Equipment Merchant Wholesalers
Recording & Publishing		423920	Toy and Hobby Goods and Supplies Merchant Wholesalers
512110	Motion Picture and Video Production	423990	Other Miscellaneous Durable Goods Merchant Wholesalers
512210	Record Production		
512230	Music Publishers		
512240	Sound Recording Studios		
512290	Other Sound Recording Industries		
541430	Graphic Design Services		

Table 9-6: Industry Subgroups by NAICS Code

NAICS Code	Definition
Music-Related Manufacturing	
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
339992	Musical Instrument Manufacturing
Musical Instrument and Supplies Stores	
451140	Musical Instrument and Supplies Stores
Prerecorded Tape, Compact Disc, and Record Stores	
451220	Prerecorded Tape, Compact Disc, and Record Stores
Music Production and Publishing	
512210	Record Production
512230	Music Publishers
512290	Other Sound Recording Industries
Sound Recording Studios	
512240	Sound Recording Studios
Musical Groups and Artists (Omitted)	
711130	Musical Groups and Artists

Cleveland Amateur Musician Survey Methodology

SURVEY QUESTIONNAIRE FOR MUSIC ARTISTS

The main goal of the Cleveland Amateur Musician Survey was to capture the dynamics of the amateur music subsector in Cuyahoga County. To implement this goal, the names of individuals and businesses were collected from databases and popular sources, including directories like MusicCleveland.com, Craigslist, GarageBand.com, Social Media Club – Cleveland, and others. Other sources of information included leads from CPAC, and information from the study’s initial interviews, focus groups, and advisory committee meetings.

The second goal of the survey was to provide information that would enhance the initial typology and qualitative description of the Cleveland Music Sector.

The third goal was to provide additional information on the major music events that take place in the Greater Cleveland area. Questions appropriate to address these goals were included in the survey instrument (Figure 9-4).

Figure 9-4: Cleveland Amateur Musician Survey Instrument

1. What do you consider as your primary music genre?
 - a. Rock/Alternative
 - b. Jazz
 - c. R&B
 - d. Blues
 - e. Gospel
 - f. Hip-Hop
 - g. Classical
 - h. Country
 - i. Bluegrass
 - j. Folk
 - k. Pop
 - l. Other (please list)

2. How many people are in your ensemble?
 - a. Self only
 - b. 2
 - c. 3
 - d. 4
 - e. 5 or more

3. Do you participate in any other groups?
 - a. Yes
 - b. No
 - c. If yes, please explain

4. Do you perform original pieces or covers?
 - a. Original pieces
 - b. Cover pieces
 - c. Both originals and covers

5. In what types of locations do you normally perform? (Please select all that apply)
 - a. Formal concert venue (i.e. concert hall)
 - b. Bar
 - c. Club
 - d. Church
 - e. School

- f. Outdoor pavilion
- g. Public spaces (i.e. street corner, public square, farmer's market)
- h. Other (please list)

6. Geographically, where do you perform? (Please select all that apply)
 - a. Within Cuyahoga County
 - b. Outside of Cuyahoga County, but within Northeast Ohio (16 county region)
 - c. Outside of Northeast Ohio, but in the State of Ohio
 - d. In other states than Ohio
 - e. Internationally
7. How many performances do you play in a month?
 - a. <1
 - b. 1 to 3
 - c. 3 to 5
 - d. 6 to 10
 - e. >10
8. On average, how many people attend your performance?
9. Do people from outside of Cuyahoga County come to your performance?
10. Have you had formal training in your music specialty?
 - a. Yes
 - b. No
 - c. If yes, where did you receive your training? (Please provide organization, city, and state)
11. Is playing music your primary occupation?
 - a. Yes
 - b. No
 - c. If no, what is your primary occupation?
12. How long have you been playing?
 - a. <5 years
 - b. 5 to 10 years
 - c. 10-20 years
 - d. 20+ years
13. How much time do you spend on average each week working on your music?
 - a. <10 hours
 - b. 10-20 hours
 - c. 20-30 hours
 - d. 30-40 hours

- e. 40+ hours

14. Do you tutor or give private lessons in your musical specialty?
 - a. Yes
 - b. No
 - c. If yes, how many hours do you normally tutor/give instruction a week?
15. Do you take private lessons?
 - a. Yes
 - b. No
 - c. If yes, how many hours a week do you normally get instruction?
16. Where do you normally purchase your musical equipment from (i.e. instruments, accessories, music)?
 - a. Within Cuyahoga County
 - b. Outside of Cuyahoga County, but within Northeast Ohio (16 county region)
 - c. Outside of Northeast Ohio, but in the State of Ohio
 - d. In other states than Ohio
 - e. Internet
 - f. Other (please list)
17. Where do you primarily get your information about the music scene in Cuyahoga County?
 - a. Plain Dealer
 - b. Cleveland Magazine
 - c. Scene Magazine
 - d. Facebook
 - e. MySpace
 - f. Word of mouth
 - g. Other Internet Sources (please list)
 - h. Other (please list)
18. Which major festivals in Cuyahoga County do you attend? (Open-ended)
19. Which major festivals in Cuyahoga County do you participate in as an artist? (Open-ended)
20. How far would you travel to see a musical performance you were interested in?
 - a. < 10 miles
 - b. > 10 miles but < 20 miles
 - c. > 20 miles but < 50 miles
 - d. > 50 miles but < 100 miles
 - e. > 100 miles

21. Please provide your contact information:

- a. Name
- b. ~~Address, City, State, Zip Code~~
- c. Telephone Number
- d. Email Address
- e. Website

22. Would you like be included in the Directory of Artists, Organizations, & Arts Entities provided to Cleveland Partnership for Arts and Culture?

- a. Yes
- b. No

The survey was conducted online using the Internet-based survey software Qualtrics, and was disseminated via email. The Center also publicized the survey via Facebook, local and college radio stations, and the Internet in order to garner support and participation. The letter of invitation (attached) was sent to all survey participants, and two email reminders were sent to encourage participants to respond. An incentive was offered to respondents who completed the survey; specifically, their names were entered into a drawing to win one of two \$50 gift cards.

Focus Groups Methodology

MUSIC STUDY FOCUS GROUP QUESTIONS

Two focus groups were conducted for the purposes of finalizing the typology of the music sector; verifying, confirming, and sharing information with major public players and experts in the music industry; and learning from those same music stakeholders. The input received from the focus groups was helpful in achieving those goals, as well as in verifying the newly-created musician and music organization directories and identifying major music events in the Greater Cleveland area.

The two focus groups were organized in public spaces, one on the city's east side and one on the west side, opposite sides of Cuyahoga County, for the convenience of participants. The number of participants was limited (up to 25) to encourage discussion and to receive comprehensive feedback on the completed parts of the study. The focus groups were conducted by two experienced professionals with participation by two more researchers from the research team. The letters of invitation and consent distributed to all focus group participants are attached. Framing every focus group involved introduction by the project manager, which included providing information about the project, its phases, and the role of the focus group. The focus group was conducted using the following information on the process of the focus group and the main questions that were discussed:

“We are looking to get help in gaining a full understanding of the Cleveland Music Sector’s genres, components, and typology. Based on the results from interviews, data analyses, and the survey, we would like to further vet and endorse the results of our study thus far and also to gather additional relevant information. During the focus group meeting, you will be presented with the preliminary results of our research on the typology of the Cleveland Music Sector, a description of the major advantages and challenges the Cleveland Music Sector faces, and the findings of a survey of amateur musicians. Your input and advice on these components is important to us, as well as your identifying of prominent success stories to highlight the Cleveland Music Sector. With your help, we plan to further investigate all facets of the music sector, qualitative and quantitative.

1. What are the first three words that come to mind in describing Cleveland’s music scene? (explore: what are its strengths? What are barriers? Is diversity a strength or a weakness?)
2. Please share one CMS success story that inspires you and can serve as Cleveland music “business card”.
3. What would people outside of Cleveland say about TODAY’S Cleveland music scene? What is the perception? What would surprise people about the current CMS?
4. Please review the typology. Does this list of genres make sense? Are there too many? Is that an advantage or a disadvantage that Cleveland has such a wide variety of genres?
5. Are these the industries that you would say are necessary for the music industry to exist? Are there any missing? Any here that don’t make sense to you? Do the changes that “hard” data present make sense?
6. What music-related events and venues in Cuyahoga County are most important to CMS?
7. Is there anything missing? PROBES: Are musicians supported in all necessary ways? Name some of the organizations that offer support? Is this enough? Are resources sufficient? FOLLOW-UP: Do you think there is a need for an organization that allows local artists to rehearse, collaborate and work on compositions and hone their craft? Would you take advantage of such an organization if it were available [this suggestion came repeatedly on the individual interviews and needed a confirmation from the focus groups]?
8. How do you see the music industry in general changing? Where does Cleveland fit in the future? What is your prognosis for the future of Cleveland’s Music Industry?”

Economic Impact Analysis Methodology

The economic impact of the Cleveland Music Sector was based on the annual employment and payroll data of music sector employees, tourist expenditures at major music events, and income earned by amateur musicians outside of Cuyahoga County. We measured the Cleveland Music Sector’s economic impact in terms of output (total value of goods and services produced in the economy), value added (value of goods and services produced in the economy less intermediary goods and services), employment (number of jobs), labor income (household earnings), and taxes. The economic impact

estimates measured the benefits of the music sector to the Greater Cleveland area, identified geographically as Cuyahoga County.

DATA COLLECTION

To estimate the economic impact of the Cleveland Music Sector, a dataset of music and music-related establishments in Cuyahoga County was created by gathering data from three sources: the ES202 database, Pollstar, and contacts within key music venues and institutions in Cuyahoga County.

The ES202 database is managed, maintained, and edited by the Center for Economic Development at Cleveland State University's Levin College of Urban Affairs ("Center"). The Center receives quarterly updates of this data from the Ohio Department of Jobs and Family Services. The ES202 includes information such as company name, address, city, county, industry classification code (NAICS), employment, and wages on most establishments with paid employees (by site location) in Ohio. It includes data for the years 2000 through 2010 and is aggregated by industry and region.

Pollstar is a trade publication that provides in-depth information on the worldwide concert industry to professionals in the live entertainment business. Pollstar's website features data including a venue's capacity, total ticket sold, and average gross sales.

The Center collaborated with the Community Partnership for Arts and Culture (CPAC) to gather employee counts from various music and music-related venues, institutions, and educational programs throughout Cuyahoga County, including the Rock and Roll Hall of Fame and Museum, Quicken Loans Arena, PlayhouseSquare, and the Cleveland Institute of Music. The Center and CPAC sent a letter to these employers (attached) asking for their assistance in gathering data such as average number of visitors, salary expenditures, and total sales. The response rate to these data inquiries was positive.

With the data in hand, the first step in creating the impact data set was to pull the 2010 ES202 data for each organization located in Cuyahoga County that was assigned a NAICS code included as part of the Cleveland Music Sector definition.³⁶ In addition, the 2010 data was pulled for each venue identified by the Center as music-related.

Data calculations were done using the data received from Pollstar and from the local venues and institutions to yield specific data. The objective was to discover each institution's number of staff and/or students, total salary costs, additional budget allocations, total gross sales from ticket and food/beverage sales, and, for music education institutions, the average spending by students. Each venue and institution was also asked to provide a ratio of the consumers or students who traveled from outside Cuyahoga County. Using this ratio, we were able to estimate the spending of visitors who came from outside Cuyahoga County. For venues that did not provide a ratio, we used an average of the available ratios from venues that we considered to be of a similar local/non-local consumer base.

³⁶ See the typology and trend analysis methodology for that definition.

ECONOMIC IMPACT

This analysis uses IMPLAN Professional and IMPLAN Data Files. IMPLAN Professional® 3.0 is an economic impact assessment software system. The IMPLAN Data Files allow for the creation of sophisticated models of local economies in order to estimate a wide range of economic impacts.

Economic impact estimates were provided for total employment impact (direct, indirect, and induced employment impact); total output impact (direct, indirect, and induced output impact); total value added impact (direct, indirect, and induced output impact); total labor income (household earnings) impact (direct, indirect, and induced income impact); and tax impact (federal, state, and local taxes).

The first four impact measures contain three distinct components. *Direct impact* refers to the initial value of goods and services, including labor, purchased by the Cleveland Music Sector within a defined economic region. These purchases are sometimes referred to as the “first-round effect.” The example of the direct economic effect could be a salary of a musician employed as a professional. *Indirect impact* measures the value of labor, capital, and other inputs of production needed to produce the goods and services required by the music industry (second-round and additional-round effects). The example of the indirect economic effect could be a purchase in a local store of a music instrument or other supplies by a musician. *Induced impact* measures the change in spending by local households due to increased earnings by employees working in local industries that produce goods and services for the Cleveland Music Sector and its suppliers. The example of the induced effect could be an income of a store cashier where a musician buys musical instruments and other supplies. The cashier spends the income on buying groceries, paying for utilities, and purchasing other goods and services from local vendors. In turn, all employees benefiting from the purchases made by the cashier will receive a fraction of their income due to the cashier’s spending and, sequentially, will spend their income through purchasing goods and services from vendors in the local economy. This trickle-down effect in the local economy is accounted as induced impact.

Supply and Demand Analysis Methodology

This component of the project was designed to assess the concentration of musicians and music-related activities in the Cleveland area and compare it with the “buyer’s market” for the local music industry.

We used establishment-level ES202 data and inputs from the interviews and the amateur musician survey to derive the supply and demand analysis. The data from the ES202 and interviews allowed us to assess local and external demand for the multiple components of the Cleveland Music Sector. Interviews conducted with local stakeholders, including musicians, concert promoters, club owners, technology companies, non-profit social service providers, and staff at the Council of Smaller Enterprises (COSE), the Convention & Visitors Bureau of Greater Cleveland (Positively Cleveland), and other local businesses and institutions helped us to analyze present and future demand for existing components of

the music sector, and unique components that can be developed to capture the potential market.

These future, unique components might enrich the core of the Cleveland Music Sector's traditional competitive advantage and include new components and venues, such as music-based medical treatment (e.g., the Cleveland Clinic's art and music healing concept/program, "*Moving Beyond Medicine*"; the "*Music and the Brain*" mini symposium; and incorporating music components into many medical and preventive treatments) and incorporating music into developing marketing ideas for Cleveland (e.g., Cleveland Twestival, Positively Cleveland, ThisTim.com, Cleveland's Aerotropolis, and others).

Analysis of Import and Export Methodology

This section examined the "import" of musical performances into the Greater Cleveland area and the "export" of local performers outside the region. We assessed two data sources for this analysis. The first was the Pollstar database, which measures the supply of live music (number of shows performed in a year). The second data source was the Nielsen SoundScan information system, which tracks the sale of music and music video products throughout the United States. The Nielsen SoundScan data helped to determine sales data from Cleveland cash registers, which are collected by this database weekly from over 14,000 retail, mass merchant, and non-traditional outlets (on-line stores, venues, etc.). We used year-end sales figure summaries to estimate the effect.

These and other sources, such as the "Billboard Top 100", "Village Voice Pazz + Jop Critics Poll," the Cleveland Amateur Musician Survey, and the initial interviews, provided the data needed to analyze Cleveland's position in the greater music market.

The import and export analysis included: (1) An illustration of the genres of the performers that toured in Cleveland in 2010, including acts from the Hot 100; (2) The analysis of album sales in Cleveland and comparable regions (Cincinnati, OH; Columbus, OH; Pittsburgh, PA; and Indianapolis, IN), and (3) the number of performances by professional and amateur musicians outside of Cuyahoga County.

Case Studies Methodology

The goal of the case studies was to highlight successful musicians, music ensembles, music venues, and businesses in Cleveland that focus on the region's competitive advantages which can lead to personal and business success. The case studies, selected to reflect signature areas in the Cleveland Music Sector, feature a successful solo musician who is also a teacher and mentor (or tutor) to young musicians; an ensemble of musicians that is successful based on a unique style, type of music, and/or an innovative business model; a highly regarded, successful music venue that plays a significant role in one Cleveland neighborhood; new models in music performances/formats; and new models in creating

music-related industries, companies, or venues. The case studies were selected to reflect the most prominent genres of music in Cleveland and to feature diverse artists.

In addition to providing rich insights into existing and potential components of the Cleveland Music Sector, the case studies followed the rigor of research. In-depth interviews were conducted for each case study. The interviews were conducted on the premises of the interviewee or by phone. Each interviewee was invited (the letter of invitation is attached) and sent a preliminary list of questions (questions differed for each interview, following only the common theme of highlighting the advantages each individual or venue possessed by being located in Cleveland). Secondary data sources were studied to prepare for each interview and provide additional details for the case studies.

Finally, snapshots of information about other Cleveland-based arts and culture organizations relevant to each case study were added in the form of vignettes throughout each case study.

APPENDIX

APPENDIX 1-1: DESCRIPTIONS OF MUSIC NAICS CODES BY SUBSECTOR

NAICS	Industry Name	Definition
Education and Museums		
611610	Fine Arts Schools	This industry comprises establishments primarily engaged in offering instruction in the arts, including dance, art, drama, and music.
712110	Museums	This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.
Manufacturing		
334310	Audio and Video Equipment Manufacturing	Establishments primarily engaged in manufacturing electronic audio and video equipment for home entertainment, motor vehicle, public address and musical instrument amplifications.
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	Establishments primarily engaged in mass reproducing audio and video material on magnetic or optical media.
339992	Musical Instrument Manufacturing	Establishments primarily engaged in manufacturing musical instruments (except toys).
Musicians		
711110	Theater Companies and Dinner Theaters	(1) Companies, groups, or theaters primarily engaged in producing the following live theatrical presentations: musicals; operas; plays; and comedy, improvisational, mime, and puppet shows and (2) establishments, commonly known as dinner theaters, engaged in producing live theatrical productions and in providing food and beverages for consumption on the premises.
711130	Musical Groups and Artists	(1) Groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions), and (2) independent (i.e., freelance) artists primarily engaged in providing live musical entertainment.
711510	Independent Artists, Writers, and Performers	Independent individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions.
Promoters		
425120	Wholesale Trade Agents and Brokers	Wholesale trade agents and brokers acting on behalf of buyers or sellers in the wholesale distribution of goods.
511110	Newspaper Publishers	Establishments in this industry carry out operations necessary for producing and distributing newspapers, including gathering news; writing news columns, feature stories, and editorials; and selling and preparing advertisements.
515111	Radio Networks	Establishments primarily engaged in assembling and transmitting aural programming to their affiliates or subscribers via over-the-air broadcasts, cable, or satellite. The programming covers a wide variety of material, such as news services, religious programming, weather, sports, or music.
515112	Radio Stations	Establishments primarily engaged in broadcasting aural programs by radio to the public.

541840	Media Representatives	Establishments of independent representatives primarily engaged in selling media time or space for media owners.
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	Promoters primarily engaged in organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, in facilities that are managed and operated by others.
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	Establishments of agents and managers primarily engaged in representing and/or managing creative and performing artists, sports figures, entertainers, and other public figures.
722110	Full-Service Restaurants	Establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating; in combination with selling alcoholic beverages, providing carry out services, or presenting live nontheatrical entertainment.
722211	Limited-Service Restaurants	Establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating.
722410	Drinking Places (Alcoholic Beverages)	Establishments known as bars, taverns, nightclubs, or drinking places primarily engaged in preparing and serving alcoholic beverages for immediate consumption.
Recording & Publishing		
512110	Motion Picture and Video Production	Establishments primarily engaged in producing, or producing and distributing motion pictures, videos, television programs, or television commercials.
512210	Record Production	Establishments primarily engaged in record production (e.g., tapes, CDs)
512230	Music Publishers	Establishments primarily engaged in acquiring and registering copyrights for musical compositions in accordance with the law and promoting and authorizing the use of these compositions in recordings, radio, television, motion pictures, live performances, print, or other media.
512240	Sound Recording Studios	Establishments primarily engaged in providing the facilities and technical expertise for sound recording in a studio.
512290	Other Sound Recording Industries	Establishments primarily engaged in providing sound recording services (except record production, distribution, music publishing, and sound recording in a studio).
541430	Graphic Design Services	Establishments primarily engaged in planning, designing, and managing the production of visual communication in order to convey specific messages or concepts, clarify complex information, or project visual identities.
Retail		
443112	Radio, Television, and Other Electronics Stores	(1) Establishments known as consumer electronics stores primarily engaged in retailing a general line of new consumer-type electronic products; (2) establishments specializing in retailing a single line of consumer-type electronic products (except computers); or (3) establishments primarily engaged in retailing these new electronic products in combination with repair services.
451110	Sporting Goods Stores	Establishments primarily engaged in retailing new sporting goods.

451120	Hobby, Toy, and Game Stores	Establishments primarily engaged in retailing new toys, games, and hobby and craft supplies.
451140	Musical Instrument and Supplies Stores	Establishments primarily engaged in retailing new musical instruments, sheet music, and related supplies; or retailing these new products in combination with musical instrument repair, rental, or music instruction.
451220	Prerecorded Tape, Compact Disc, and Record Stores	Establishments primarily engaged in retailing new prerecorded audio and video tapes, compact discs (CDs), digital video discs (DVDs), and phonograph records.
452990	All Other General Merchandise Stores	Establishments primarily engaged in retailing new goods in general merchandise stores
454111	Electronic Shopping	Establishments engaged in retailing all types of merchandise using the Internet.
Service Providers		
484210	Used Household and Office Goods Moving	Establishments primarily engaged in providing local or long-distance trucking of used household, used institutional, or used commercial furniture and equipment.
518210	Data Processing, Hosting, and Related Services	Establishments primarily engaged in providing infrastructure for hosting or data processing services.
522130	Credit Unions	Establishments primarily engaged in accepting members share deposits in cooperatives that are organized to offer consumer loans to their members.
524126	Direct Property and Casualty Insurance Carriers	Establishments primarily engaged in initially underwriting insurance policies that protect policyholders against losses that may occur as a result of property damage or liability.
532299	All Other Consumer Goods Rental	Establishments primarily engaged in renting consumer goods and products.
541519	Other Computer Related Services	Establishments primarily engaged in providing computer-related services; providing computer disaster recovery services or software installation services.
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	Establishments of independent health practitioners primarily engaged in one of the following: (1) providing physical therapy services to patients who have impairments, functional limitations, disabilities, or changes in physical functions and health status resulting from injury, disease or other causes, or who require prevention, wellness or fitness services; (2) planning and administering educational, recreational, and social activities designed to help patients or individuals with disabilities, regain physical or mental functioning or to adapt to their disabilities; and (3) diagnosing and treating speech, language, or hearing problems.
811490	Other Personal and Household Goods Repair and Maintenance	Establishments primarily engaged in repairing and servicing personal or household-type goods without retailing new personal or household-type goods; repair items, such as garments; watches; jewelry; musical instruments; bicycles and motorcycles; motorboats, canoes, sailboats, and other recreational boats.
813319	Other Social Advocacy Organizations	Establishments primarily engaged in social advocacy.

813410	Civic and Social Organizations	Establishments primarily engaged in promoting the civic and social interests of their members; may operate bars and restaurants for their members.
813930	Labor Unions and Similar Labor Organizations	Establishments primarily engaged in promoting the interests of organized labor and union employees.
Wholesale		
423690	Other Electronic Parts and Equipment Merchant Wholesalers	Establishments primarily engaged in the merchant wholesale distribution of electronic parts and equipment
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	Establishments primarily engaged in the merchant wholesale distribution of games, toys, fireworks, playing cards, hobby goods and supplies, and/or related goods.
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	Establishments primarily engaged in the merchant wholesale distribution of durable goods

APPENDIX 1-2: EMPLOYMENT, NUMBER OF ESTABLISHMENTS, PAYROLL, AND AVERAGE WAGES IN THE CLEVELAND MUSIC SECTOR BY SUBSECTOR, 2000-2009

Table 1: Employment by Music Subsector

<i>Subsector</i>	<i>Year</i>										<i>Change in Employment</i>	<i>% Change in Employment</i>
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2000-2009	2000-2009
Education	450	396	392	507	506	559	492	505	533	571	121	26.9
Manufacturing	84	88	76	52	54	49	51	54	58	49	(35)	(41.9)
Musicians	474	643	635	552	517	516	486	461	399	378	(96)	(20.2)
Promoters	634	600	753	735	826	962	1,122	1,309	1,238	1,143	509	80.3
Recording & Publishing	87	91	88	84	96	90	82	75	84	76	(11)	(12.6)
Retail	728	739	697	666	685	546	522	484	418	395	(332)	(45.7)
Service Providers	171	NA	NA	63	99	109	127	110	106	70	(101)	(59.1)
Wholesale	43	NA	NA	37	35	42	35	34	34	36	(7)	(16.4)
Total Music Sector	2,670	2,692	2,761	2,697	2,818	2,872	2,917	3,033	2,871	2,718	47	1.8

Table 2: Establishments by Music Subsector

<i>Subsector</i>	<i>Year</i>										<i>Change in Establishments</i>	<i>% Change in Establishments</i>
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2000-2009	2000-2009
Education	7	7	7	7	8	9	9	10	14	15	8	114.3
Manufacturing	9	9	7	8	8	8	7	6	6	5	(4)	(44.4)
Musicians	18	17	19	18	21	20	18	15	21	22	4	22.2
Promoters	26	26	28	31	33	34	38	41	43	43	17	65.4
Recording & Publishing	10	11	13	14	13	12	12	12	12	11	1	10.0
Retail	84	83	78	76	73	64	60	58	53	45	(39)	(46.4)
Service Providers	7	NA	NA	11	11	10	13	12	12	10	3	42.9
Wholesale	3	NA	NA	3	3	4	4	4	4	4	1	33.3
Total Music Sector	164	162	166	168	170	161	161	158	165	155	(9)	(5.5)

Table 3: Payroll by Music Subsector

Subsector	Year							
	2000	2001	2002	2003	2004	2005	2006	2007
Education	\$14,291,084	\$15,063,092	\$15,911,419	\$14,490,902	\$14,507,167	\$14,618,446	\$14,994,121	\$15,203,411
Manufacturing	\$3,283,575	\$3,288,679	\$2,748,117	\$1,753,579	\$1,976,598	\$1,530,624	\$1,744,391	\$1,786,873
Musicians	\$24,611,125	\$25,101,334	\$23,389,440	\$23,048,459	\$25,746,030	\$21,868,449	\$23,212,665	\$22,654,912
Promoters	\$20,556,232	\$21,890,148	\$25,468,775	\$27,202,928	\$28,946,308	\$30,444,453	\$55,409,266	\$58,560,114
Recording & Publishing	\$5,298,987	\$7,010,761	\$4,670,549	\$5,058,882	\$6,828,511	\$4,728,297	\$4,706,333	\$4,090,516
Retail	\$13,169,433	\$12,711,672	\$12,365,285	\$12,010,085	\$12,825,997	\$9,846,308	\$9,486,214	\$9,507,859
Service Providers	\$2,535,271	NA	NA	\$1,995,466	\$1,658,012	\$2,296,041	\$2,264,241	\$1,721,307
Wholesale	\$1,715,664	NA	NA	\$1,592,094	\$1,595,683	\$1,499,707	\$1,613,656	\$1,644,507
Total Music Sector	\$85,461,370	\$88,319,790	\$87,838,386	\$87,152,395	\$94,084,306	\$86,832,326	\$113,430,888	\$115,169,499

Subsector	Year		Change in Payroll	% Change in Payroll
	2008	2009		
Education	\$15,305,687	\$16,461,068	\$2,169,984	15.2
Manufacturing	\$1,751,309	\$1,706,404	(\$1,577,171)	(48.0)
Musicians	\$25,166,110	\$26,239,356	\$1,628,231	6.6
Promoters	\$55,716,726	\$55,502,952	\$34,946,720	170.0
Recording & Publishing	\$5,559,895	\$3,871,496	(\$1,427,491)	(26.9)
Retail	\$8,513,608	\$8,037,072	(\$5,132,361)	(39.0)
Service Providers	\$1,709,714	\$1,341,652	(\$1,193,619)	(47.1)
Wholesale	\$1,596,130	\$1,601,880	(\$113,784)	(6.6)
Total Music Sector	\$115,319,179	\$114,761,880	\$29,300,510	34.3

Table 4: Average Wages by Music Subsector

Subsector	Year										Change in	% Change in
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Avg. Wage	Avg. Wage
Education	\$31,782	\$38,038	\$40,625	\$28,563	\$28,689	\$26,135	\$30,496	\$30,086	\$28,716	\$28,845	(\$2,936)	(9.2)
Manufacturing	\$38,936	\$37,371	\$36,159	\$33,508	\$36,379	\$31,237	\$34,204	\$33,296	\$30,023	\$34,825	(\$4,111)	(10.6)
Musicians	\$51,886	\$39,018	\$36,853	\$41,729	\$49,799	\$42,353	\$47,763	\$49,179	\$63,073	\$69,355	\$17,469	33.7
Promoters	\$32,440	\$36,504	\$33,838	\$37,011	\$31,157	\$31,658	\$49,370	\$44,725	\$45,005	\$48,573	\$16,133	49.7
Recording & Publishing	\$60,908	\$77,041	\$53,276	\$59,987	\$267,261	\$52,732	\$57,628	\$54,298	\$65,928	\$50,941	(\$9,967)	(16.4)
Retail	\$18,098	\$17,201	\$17,749	\$18,033	\$37,604	\$18,045	\$18,173	\$19,631	\$20,368	\$20,330	\$2,232	12.3
Service Providers	\$14,826	NA	NA	\$31,843	\$260,941	\$21,129	\$17,782	\$15,601	\$16,129	\$19,166	\$4,340	29.3
Wholesale	\$40,211	NA	NA	\$43,030	\$742,688	\$35,993	\$46,547	\$48,846	\$46,945	\$44,912	\$4,702	11.7
Total Music Sector	\$32,004	\$32,804	\$31,814	\$32,315	\$9,137	\$30,234	\$38,891	\$37,976	\$40,172	\$42,228	\$10,224	32.0

Notes:

All payroll and average wage figures have been inflated to 2009 dollars.
 NA indicates data suppressed due to QCEW confidentiality restrictions.

Source:

Quarterly Census of Employment and Wages (QCEW)

APPENDIX 3-1: LISTING OF ELECTRONIC SOURCES

1. Ashland University
2. Baldwin-Wallace College
3. Case Western Reserve University
4. Cleveland Scene Magazine
5. Cleveland State University
6. Cleveland.com
7. ClevelandScene.com
8. Cleveland Magazine
9. Cleveland State University
10. College of Wooster
11. Cuyahoga Community College
12. Facebook
13. Flannery's
14. Happy Dog
15. Hiram College
16. John Carroll University
17. Kent State University
18. MusicCleveland.com
19. MySpace.com
20. Nighttown
21. Peabody's
22. The Beachland Ballroom & Tavern
23. The Grog Shop
24. University of Akron

APPENDIX 3-2: LISTING OF WHERE RESPONDENTS RECEIVED FORMAL MUSIC TRAINING

Institution/Organization	Respondent Count
Private Instruction/Self-taught	20
Cleveland Institute of Music (Cleveland, OH)	13
Cleveland State University (Cleveland, OH)	12
Kent State University (Kent, OH)	10
University of Akron (Akron, OH)	10
Oberlin College (Oberlin, OH)	8
Eastman School of Music (Rochester, NY)	7
Baldwin-Wallace College (Berea, OH)	5
Cuyahoga Community College	5
Case Western Reserve University (Cleveland, OH)	4
The Ohio State University (Columbus, OH)	4
University of Michigan (Ann Arbor, MI)	4
Berklee College of Music (Boston, MA)	3
Indiana University at Bloomington (Bloomington, IN)	3
Manhattan School of Music (New York, NY)	3
University of Cincinnati (Cincinnati, OH)	3
Bowling Green State University (Bowling Green, OH)	2
The Cleveland Music School Settlement (Cleveland, OH)	2
Ithaca College (Ithaca, NY)	2
New England Conservatory (Boston, MA)	2
Northwestern University (Evanston, IL)	2
Rutgers University (New Brunswick, NJ)	2
University of Illinois (Champaign-Urbana, IL)	2
Yale School of Music (New Haven, CT)	2
Other	60
Total	190

**APPENDIX 6-1: MUSIC IMPACT BY SUBSECTORS IN CUYAHOGA COUNTY
(BY DIRECT, INDIRECT, AND INDUCED IMPACTS), 2010**

TOTAL	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	3,384	\$149,960,039	\$249,351,430	\$454,277,551
	Indirect Effect	1,550	\$71,535,945	\$128,125,120	\$230,201,468
	Induced Effect	1,275	\$52,901,369	\$96,581,226	\$155,293,196
	Total Effect	6,210	\$274,397,353	\$474,057,774	\$839,772,215

AMATEUR	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	0	\$0	\$0	\$0
	Indirect Effect	0	\$0	\$0	\$0
	Induced Effect	33	\$1,366,070	\$2,440,624	\$3,935,828
	Total Effect	33	\$1,366,070	\$2,440,624	\$3,935,828

WHOLESALE	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	29	\$1,569,497	\$3,268,648	\$5,719,025
	Indirect Effect	16	\$842,932	\$1,383,246	\$2,235,285
	Induced Effect	14	\$561,331	\$1,025,395	\$1,648,609
	Total Effect	59	\$2,973,760	\$5,677,288	\$9,602,919

SERVICE PROVIDERS	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	38	\$1,253,112	\$1,984,687	\$4,934,585
	Indirect Effect	14	\$677,763	\$1,162,101	\$1,914,209
	Induced Effect	11	\$449,709	\$821,506	\$1,320,792
	Total Effect	64	\$2,380,584	\$3,968,294	\$8,169,586

RETAIL	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	396	\$9,013,381	\$14,267,299	\$6,269,457
	Indirect Effect	8	\$360,951	\$693,479	\$1,115,726
	Induced Effect	52	\$2,153,656	\$3,933,284	\$6,324,398
	Total Effect	456	\$11,527,988	\$18,894,062	\$13,709,581

RECORDING & PUBLISHING	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	53	\$1,935,657	\$10,866,637	\$37,193,344
	Indirect Effect	135	\$6,459,809	\$11,389,016	\$21,693,309
	Induced Effect	48	\$1,988,754	\$3,633,986	\$5,841,950
	Total Effect	236	\$10,384,221	\$25,889,639	\$64,728,603

PROMOTERS	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	1,252	\$63,896,661	\$125,996,397	\$285,718,439
	Indirect Effect	1,019	\$48,029,782	\$84,788,565	\$157,369,438
	Induced Effect	630	\$26,139,055	\$47,751,744	\$76,772,373
	Total Effect	2,901	\$138,065,498	\$258,536,706	\$519,860,250

MUSICIANS	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	441	\$27,099,592	\$27,357,575	\$17,500,837
	Indirect Effect	71	\$3,208,727	\$5,018,753	\$8,242,315
	Induced Effect	168	\$6,990,228	\$12,767,303	\$20,528,231
	Total Effect	681	\$37,298,547	\$45,143,631	\$46,271,383

MANUFACTURING	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	48	\$1,798,698	\$2,815,046	\$14,495,277
	Indirect Effect	34	\$2,090,203	\$3,168,662	\$5,300,722
	Induced Effect	22	\$919,965	\$1,680,984	\$2,702,353
	Total Effect	104	\$4,808,865	\$7,664,692	\$22,498,352

EDUCATION & MUSEUMS	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	1,127	\$43,393,441	\$62,795,141	\$82,446,587
	Indirect Effect	252	\$9,865,778	\$20,521,298	\$32,330,464
	Induced Effect	297	\$12,332,601	\$22,526,400	\$36,218,662
	Total Effect	1,676	\$65,591,820	\$105,842,838	\$150,995,713

Note: Data inflated to 2011 dollars.

**APPENDIX 6-2: MUSIC IMPACT BY AMATEUR, FOR-PROFIT, AND NON-PROFIT STATUS IN
CUYAHOGA COUNTY (BY DIRECT, INDIRECT, AND INDUCED IMPACTS), 2010**

TOTAL	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	3,384	\$149,960,039	\$249,351,430	\$454,277,551
	Indirect Effect	1,550	\$71,535,945	\$128,125,120	\$230,201,468
	Induced Effect	1,275	\$52,901,369	\$96,581,226	\$155,293,196
	Total Effect	6,210	\$274,397,353	\$474,057,774	\$839,772,215

AMATEUR	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	0	\$0	\$0	\$0
	Indirect Effect	0	\$0	\$0	\$0
	Induced Effect	33	\$1,366,070	\$2,440,624	\$3,935,828
	Total Effect	33	\$1,366,070	\$2,440,624	\$3,935,828

FOR-PROFIT	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	1,847	\$78,190,415	\$158,268,081	\$356,097,605
	Indirect Effect	1,241	\$59,228,073	\$103,565,163	\$191,211,717
	Induced Effect	774	\$32,103,956	\$58,648,986	\$94,292,075
	Total Effect	3,863	\$169,522,444	\$320,482,227	\$641,601,397

NON-PROFIT	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	1,537	\$71,769,624	\$91,083,349	\$98,179,946
	Indirect Effect	309	\$12,307,872	\$24,559,957	\$38,989,751
	Induced Effect	468	\$19,431,343	\$35,491,616	\$57,065,293
	Total Effect	2,314	\$103,508,839	\$151,134,923	\$194,234,990

Note: Data inflated to 2011 dollars.

**APPENDIX 6-3: MUSIC IMPACT BY AMATEUR, EMPLOYMENT, AND EVENTS IN CUYAHOGA COUNTY
(BY DIRECT, INDIRECT, AND INDUCED IMPACTS), 2010**

TOTAL	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	3,384	\$149,960,039	\$249,351,430	\$454,277,551
	Indirect Effect	1,550	\$71,535,945	\$128,125,120	\$230,201,468
	Induced Effect	1,275	\$52,901,369	\$96,581,226	\$155,293,196
	Total Effect	6,210	\$274,397,353	\$474,057,774	\$839,772,215

AMATEUR	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	0	\$0	\$0	\$0
	Indirect Effect	0	\$0	\$0	\$0
	Induced Effect	33	\$1,366,070	\$2,440,624	\$3,935,828
	Total Effect	33	\$1,366,070	\$2,440,624	\$3,935,828

EVENTS	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	481	\$20,017,220	\$32,611,554	\$56,718,262
	Indirect Effect	190	\$7,433,465	\$14,982,696	\$23,812,698
	Induced Effect	154	\$6,381,301	\$11,656,681	\$18,741,489
	Total Effect	825	\$33,831,986	\$59,250,932	\$99,272,449

EMPLOYMENT	Impact Type	Employment	Labor Income	Value Added	Output
	Direct Effect	2,903	\$129,942,819	\$216,739,876	\$397,559,289
	Indirect Effect	1,360	\$64,102,480	\$113,142,424	\$206,388,770
	Induced Effect	1,088	\$45,153,998	\$82,483,921	\$132,615,879
	Total Effect	5,352	\$239,199,297	\$412,366,218	\$736,563,938

Note: Data inflated to 2011 dollars.