SOUND DIPLOMACY
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Introduction

About

ABOUT THE PROJECT

The Vermont Music Strategic Economic Development Plan is led by Big Heavy World, an independent nonprofit music development office working to archive and promote the original music of Vermont, with the mentorship of Sound Diplomacy. The project will create a plan that will move a unique sector of vibrant but disconnected & marginalized artists and related businesses forward, recognizing that within our cultural ecology there are non-arts allies, champions, and beneficiaries of a strengthened arts community and economy.

The plan will address three objectives:

1. **Strengthen the community of Vermont musicians**, fostering employment as artists; professional acumen, social wellbeing, and social capital;

2. **Generate attention for and improve the profitability of Vermont’s music products** (Vermont as a music destination; sale of recordings; attendance for performances; the state’s brand identity); and

3. **Preserve and celebrate the aggregate cultural legacy produced by Vermont’s music community**

The strategies developed to accomplish these goals will bridge sectors, pursuing innovative relationship-building among arts and non-arts industries and government that elevates recognition of the value the arts have to our state, socially and economically.

The Vermont survey is made possible with support from a Rural Business Development Grant from USDA Rural Development, which assists the startup, expansion, and continuation of small and emerging businesses and nonprofits in rural communities. Big Heavy World is also supported in part by the National Endowment for the Arts.

ABOUT THE SURVEY

The Vermont Music Industries Survey was developed by Big Heavy World based on the proven model of the Austin Music Census and with the guidance of Sound Diplomacy. The purpose of the survey was gathering input from individuals all over Vermont to bring a better
understanding of the work of improving the state’s music economy. The survey targeted musicians, concert venue owners, and businesses that support music in Vermont creating different question itineraries.

The survey was available online and remained opened for 8 weeks starting October 8, 2019, until December 2, 2019. The survey form was created using Google Forms and hosted in the platform Google Drive. All respondents participated anonymously and voluntarily.

Big Heavy World’s volunteer crew helped disseminate the survey, and Sound Diplomacy has collected and analyzed survey results to create the present report. The data collected through this survey will supplement the statewide creative economy survey hosted by the Vermont Creative Network.

A total of 204 individual complete or substantially complete responses were gathered from the survey, which will be further referred to as ‘respondents’ throughout the report.

Topics covered included:

- Demographics
- Music ecosystem roles
- Musical skills and educational background
- Artist, professional and business finances and revenue streams
- Areas needing government support
- Live music ecosystem

ABOUT SOUND DIPLOMACY

Sound Diplomacy is the leader of the global music cities movement. As strategists for cities, developers, large private sector organizations and governments, Sound Diplomacy provides cutting edge research and market expertise in placing music and night time economy strategy in city, urban and development plans. Sound Diplomacy works in over 20 countries and counts the Mayor of London, City of San Francisco, Lendlease, Walton Family Foundation and City of Brisbane as clients. They also run the global leading series of conferences of music and public policy, called Music Cities Events.

What is a Music Ecosystem?

Music in a place is part of an ecosystem. Like in nature, this ecosystem is formed by a group of stakeholders, a set of resources and an environment where they develop their activities and they connect with each other and with other ecosystems. Like in all ecosystems, these
relationships are interdependent. Some stakeholders exist because others exist, and because there is a sustainable environment that favors their survival.

In the case of music, these agents are responsible for everything related to music, starting from the artists and going all the way to the audience. Some of its elements, like music venues or labels, are obvious. But some others aren’t like IT suppliers, police officers or government organizations. But they are all relevant, and play an important role in the chain.

As stated above, for the ecosystem to be healthy and thrive, all the agents must be resourced, connected and supported by the institutions. This is done by developing a music strategy and implementing it through policies and regulations that take into account every step of the chain, eases the operations, and facilitates the relationships between all of them.

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1 Source: Sound Diplomacy research
Survey Analysis - Summary

MUSIC ECOSYSTEM DEMOGRAPHICS

- A total of **204 stakeholders** completed the Vermont Music Industries Survey
- The average stakeholders who completed the survey were **male**, **white** and **40 years old or older**
- Female representation in the music ecosystem is extremely low (15%) compared to female representation in the general Vermont population (51%)
- Race and ethnicity diversity presents similar trends among the sample surveyed and the general Vermont population, with a lesser participation of individuals identifying as Asian and/or Latino/a.

MUSIC ECOSYSTEM ROLES

- The main stakeholders in Vermont’s music ecosystem are music artists (70%), including **performers** (57%) and **songwriters** (13%).
- Aside from **live performance** (59%) and **songwriting** (22%), the most common areas of expertise in the ecosystem are **audio engineering** (9%), **music education** (9%), **event production** (5%) and **audio mixing** (4%).
- The most popular music genre to work in Vermont is ‘**Acoustic music**’ (15%), followed by ‘**Rock**’ (14%).
- Only **5% of the ecosystem sample own a music business**
- Only **1 out of 4 respondents lives exclusively from music-related jobs**, with most respondents working at an additional job outside the music industry (63%).
- **Most respondents are highly experienced about music**, having worked in the music industry for more than 10 years (74%).

GOVERNANCE AND LEADERSHIP

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- 76% of artists are extremely affected by the 'stagnating pay for musicians' to afford the cost of living in Vermont

- 10% of respondents does not currently have health insurance coverage

- Only 1% of respondents had previously received a bank loan or line or credit to help develop their music activities

- Respondents urge to establish a responsible grant system for individuals and organizations and improve three key areas in the Vermont music ecosystem: artistic development, music industry mobility, and developing dry music venues and listening rooms that are accessible to minors.

- 1 out of 2 artists would be extremely impacted by government support in the form of two incentives proposed, one ‘for artists to make records in Vermont studios’ and/or ‘for promoters to use local acts with touring artists’.

**MUSICAL SKILLS & EDUCATION**

- 1 out of 4 respondents is extremely affected by the lack of city, state and nonprofit education resources in Vermont for musicians and industry professionals at any stage in their careers.

- Only 11% of respondents have a significant contribution from teaching music lessons, highlighting a possible lack of full-time instructors.

- There is a demand to build more collaborative spaces and rehearsal facilities across Vermont where musicians can connect and collaborate. These spaces should be available to underaged musicians, musicians who are starting in their career and/or have a low income.

- 1 out of 2 musicians under 55 years old would extremely benefit from having more opportunities and targeted events to connect music industry located in different cities

- 1 out of 3 musicians approximately would benefit from a digital one-stop online resource site that allows for peer-to-peer skill sharing and compiles all available support services in Vermont

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ARTISTS DEVELOPMENT

- 83% of artists made less than $15,000 from music industry sources in 2018.

- Live performance in general is the most important revenue source for the artists surveyed, and 29% of artists’ income is extremely affected by live performance shows in Vermont.

- The live music circuit in Vermont appears to be dominated by veterans: 88% of those heavily dependent on income from in-state performances have been living in Vermont for over 10 years.

- Vermont musicians still have revenue diversification opportunities to explore such as songwriting for-hire (no income for 86% of artists), song licensing (no income for 82%), and business partnerships or endorsements (no income for 81%).

- 87% of artists perform at least one in-state show per month, highlighting an abundance of performing opportunities in Vermont.

- 1 out of 2 artists travel regularly more than 20 miles to perform in venues, limiting the performance opportunities available for those who cannot drive regularly.

- Artists report that a large number of Vermont venues do not hold up to adequate standards in terms of professional backline, trained staff, etiquette, stage area and dancefloor.

- The perception of live music, both by audiences and venues, as a background amenity, seems to be aggravated by the abundant music concerts that charge no cover in Vermont, according to respondents.

INDUSTRY DEVELOPMENT

- 83% of the music businesses do not employ any full-time professionals other than the proprietor (72% in the case of music venues).
• 1 out of 2 music businesses have been around for more than 10 years, with only 18% of businesses established less than 2 years ago.

• The venue ecosystem is more dynamic, where 35% of venues exist since less than 2 years ago, while 35% have existed for over 10 years.

• 86% of the music venues and 73% of the music businesses surveyed earnt less than $25,000 in 2018 from music industry sources, indicating a dependence on non-music sources to complement their revenue.

• 2 out of 3 music venues and 4 out of 5 music businesses were dependent on personal investment for launching and financing their company

• There is a high demand to increase the number of professional-level PR and marketing companies, publishers, licensing companies, artist managers, booking agencies, and local reps from performing rights organizations.

AUDIENCE DEVELOPMENT

• There is a perception among artists that older demographics do not go to shows as frequently as younger generations, which could be challenging audience development in the Vermont demographic context.

• However, results show that 1 out of 5 of artists aged 55 and older perform at least 4 in-state shows per month, the same percentage as artists under 55, indicating a healthy audience base.

• Another common perception among respondents is that people who attend concerts regularly in Vermont, regardless of age, are largely other musicians. This may be challenging attracting regular audiences who are not trying to put shows on their own.

• The role of media should be further explored in research, as there appears to be a lack of commercial radios and local media supporting the wider variety of local musicians across Vermont.
MUSIC TOURISM & MARKETING

- 1 out of 2 artists believes they would be extremely impacted by:
  - Creating and promoting to tourists more city-zoned music friendly areas (i.e. Battery Park, Shelburn Museum)
  - Creating programs to drive tourist traffic to local venues and shows
  - Creating a Vermont marketing campaign to show tourists and newcomers how they can support and enjoy live music
  - Creating an official ‘Live Music Venue’ designation for quality music venues

- Respondents perceive that the State of Vermont does not promote the music sector like other products despite the abundance of regional talent and the appeal of the scene to visitors.

- A proposed solution is to create a Vermont music brand will be key to attracting outside investment to the state, articulated around three main programs: a central resource to coordinate the promotion of the local music sector, a state music festival celebrating Vermont musicians, and a regular program of concerts in state-owner public places.
Survey Analysis – Complete

Demographic Profile

A total of 204 Vermont music ecosystem participants completed the Vermont Music Industries Survey. The average respondents were male, white and 40 years old or older. They have mostly been residing in Vermont for at least 11 years and have a professional experience that also spans over more than 10 years.

According to U.S. Census data for the State of Vermont, this demographic profile of average respondents could indicate that the surveyed sample is representative in terms of race and ethnicity compared to the overall state population. Still, the Vermont music ecosystem should increase the accessibility and participation of persons with diverse gender and younger age, as well as continuing to maintain and grow its diversity in terms of race and ethnicity.

Table 1. Demographic participation in the survey

<table>
<thead>
<tr>
<th>Demographics for Vermont State, percent</th>
<th>Vermont, U.S. census data</th>
<th>Survey Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Race: White</td>
<td>94.2%</td>
<td>90.1%</td>
</tr>
<tr>
<td>Race: African American or Black</td>
<td>1.4%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Race: Native American or Alaskan Native</td>
<td>0.4%</td>
<td>0%</td>
</tr>
<tr>
<td>Race: Asian</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Ethnicity: Hispanic or Latino/a</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Race and Ethnicity: Prefer not to say</td>
<td>N/A</td>
<td>6.4%</td>
</tr>
<tr>
<td>Gender: Female persons</td>
<td>50.6%</td>
<td>15%</td>
</tr>
</tbody>
</table>

2 Please note the response ratio per question: “Race and Ethnicity” was 99.5%; “Gender” was 97.5%; “Age” was 98.5%; “Years living in Vermont” was 96.6% and “Years working in the music industry” was 97%.

Most respondents appear to be natives of Vermont and/or have moved there a long time ago, especially among older generations: 93% of respondents aged 40 or older and 77% of the people who are 39 or younger have lived for more than 6 years in Vermont.

Most of the people interviewed have a long experience in the music industry. Almost 3 out of 4 respondents have worked for more than 10 years in music, which also correlates with the older demographic surveyed: 84% of respondents who are 40 or older claim to have more than 10 years of experience in the music sector.

The larger representation of musicians aged 40 and older corresponds to the general demographics in the state of Vermont, which has a median age of 42.8, although the median age in Burlington city is 26.7. This age disparity between the state’s most populous city and the largely rural demographics of the state affects the music career development opportunities available for individuals of any age, and is considered in the present survey analysis.
Music Ecosystem Roles

Respondents work in a wide variety of music genres, although most of them could be grouped in the realm of commercial music: ‘Acoustic music’ is the main genre of work for 15% of respondents, followed by ‘Rock’ (14%), ‘Other’ (14%), and ‘Folk’ (12%). Other popular genres among respondents are ‘Jazz’ (7%) and ‘Alternative Rock’ (7%).

The large percentage of artists working in similar styles of music could also be used as an indicator of live music preferences in Vermont, which seem to gravitate towards guitar-based and instrumental music over other electronic-based music genres that have little to no representation in the survey, such as Hip Hop (4%), Pop music (2%), Dance & Electronic (1%) or Rap (0%).
Most respondents are working in music as a part-time musician and sustain themselves with a job in another industry (63%). However, 1 out of 4 respondents lives exclusively from music in Vermont, either as a part-time musician with another job in the music industry (15%) or as a full-time musician (12%). This respondent makeup indicates a healthy but limited job market within the regional music industry that we will further address in this analysis.

The majority of respondents involved in the Vermont Music Ecosystem identifies as a creative role, largely as performers (57.1%) or songwriters (12.8%), as Figure 4 below shows. These will be further referred to as ‘Artists’ in the survey.

Those with the role of ‘Venue Manager’ (3%) will be further referred to as venue respondents, and the collective of respondents with the role of ‘Music Business Owner’ (5%), ‘Music Business Employee’ (2%) and ‘Music Business Contractor’ (3%) will be further referred to as industry respondents.

The limited representation from business owners and contractors should be addressed in future research by organising roundtables and/or individual interviews focused on Vermont-based music organizations.
The areas of expertise reported by respondents reinforce this **creative ecosystem of individuals and organizations dedicated to live music and/or music creation**, although a smaller ecosystem of recording studios can also be identified in the sample, as Figure 5 below shows.

Aside from people who have a single and clear role such as live performance (59%) and songwriting (22%), the survey format challenged responses from individuals who have multiple roles in the Vermont music ecosystem, such as producer + performer + music store owner, which should be considered in future research methodologies.

![Figure 5. Top 5 areas of expertise among respondents](image)

**Governance & Leadership**

**LIVING AND AFFORDABILITY**

The living and affordability challenges of being a musician and/or music industry professional in Vermont touch on different factors that go beyond the music ecosystem itself. Issues related to the weather, transport and transit infrastructure, together with an ageing population, greatly influence the possibilities of music in Vermont to become a more competitive industry.
and grow sustainably.

The ‘stagnating pay for musicians’ is the area with the highest negative impact on the ability to afford the cost of living for 76% of artists, which affects them far beyond other areas like the increased cost of living, the lack of affordable housing for rent, or long commutes, as Figure 6 shows.

![Figure 6. Living and affordability needs and gaps rating](image)

It was brought up by some respondents that the format of questions regarding living and affordability in Vermont did not address the homeless population of musicians, which should be considered in future research to gain further insight on this group.

10% of respondents do not currently have health insurance coverage. While accessibility to

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*Greatly affected* translates to a rating of 6/7 out of 7 points in a likert scale of this particular question.
healthcare is an ongoing issue for musicians across the U.S., the lack of health insurance for full-time artists and the high cost of insuring through VT Health has been brought up by respondents in the open-ended comments. Since most of the Vermont music ecosystem appears to be comprised of small business owners and ageing music industry professionals, further insights into the impact of health insurance into the music ecosystem should be gathered and considered in the Vermont Music Strategic Economic Development Plan.

GRANTS & INCENTIVISATION

Accessing a music grant or bank loan to finance music activities appears to be extremely challenged in Vermont: only 1% of respondents had previously received a bank loan or line of credit to help develop their music activities. In fact, 88% of bands finance their development with personal cash, and a further 3% with ‘friends and family funds’.

Artists in open comments expressed their struggle to develop as a musician in Vermont without support in the form of grants or incentives with the current economic challenges in the music industry and the stagnant artist pay across the state. Respondents in open comments proposed a responsible grant system for individuals and organizations that helps the Vermont music ecosystem develop in three key areas:

- **Artistic development funds**, which could be used to record an album, for marketing and/or promotional purposes, to finance a skill development course, etc.
- **Music industry mobility funds**, which could be used to finance industry networking activities outside of Vermont and artist touring.
- **Opening and running dry music venues and listening rooms**, with a focus on local musician programs, access to backline and live audio engineers, and accessibility for musicians and patrons under 21 years old.

Furthermore, 1 out of 2 artists would be extremely impacted by government support in the form of two incentives, one ‘for artists to make records in Vermont studios’ and/or ‘for promoters to use local acts with touring artists’.

Although issues with permits and regulations were not widely mentioned throughout the survey, a couple of respondents highlighted that it would be very beneficial to allow for busking in public spaces and parks across Vermont, specifically for amplified music, through a permit or another system.

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Musical Skills & Education

MUSIC TRAINING

The most critical factors limiting skills development and education in the Vermont music ecosystem relate to the absence of public and community-oriented resources for individuals.

1 out of 4 respondents is extremely affected by:

- The lack of city/state or nonprofit resources for non-established aspiring musicians
- The lack of city/state or nonprofit resources for established, pro level artists
- The lack of city/state or nonprofit resources for aspiring industry professionals
- The lack of city/state or nonprofit resources for established, pro level artists

Only 11% of respondents have a significant contribution from teaching music lessons, as Figure 7 below shows, highlighting a possible lack of full-time instructors. The abundant representation of artistic creative roles of older age and the overall lack of music education professionals, even of primarily musicians who teach music on the side, could indicate a sustainability challenge in the provision of music education in Vermont. This issue should be considered and assessed in future research for this project.

Figure 7. Respondents who have some revenue contribution from ‘Teaching music lessons’
CONNECTIVITY & COLLABORATION

There appears to be a lack of spaces across Vermont where musicians and music professionals from different backgrounds and experiences can connect and collaborate. These spaces seem to exist for the arts in general, but music-specific services are in demand.

According to results, improving the offer of skills development and education appears to be a priority for about 1 out of 3 musicians only. The most urgent change needed is creating opportunities and targeted events to connect music industry located in different cities. This would have an extreme impact among 54% of respondents under 55 and 32% of respondents aged 56 and older.

There are great differences in the importance of two skills development and education areas in particular depending on the age of respondents, as Figure 9 shows.

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6 ‘Extremely affected’ translates to a rating of 6/7 out of 7 points in a likert scale of this particular question.
Open-ended comments reflected the demand for a peer-to-peer sharing system of skills and contacts, which would be particularly helpful when touring. One solution suggested by artists is creating a Vermont musicians forum that would allow to meet both in person and online, to bridge the gap between distant areas. As one respondent put it, “Using Craigslist, Facebook, ReverbNation and the like just isn't cutting it” since many of these platforms have a U.S. or even worldwide focus and sometimes charge a fee to use them.

Having a one-stop online resource site compiling all available support services in Vermont would overall benefit the ecosystem, and was voted as an extremely impactful idea by 32% of respondents. Platforms that connect musicians, venues, recording studios and local industry professionals with each other already exist in Vermont (i.e. bigheavyworld.com), so it is imperative that these are promoted to the music community across regions, genres, and experiences.

7 ‘Highest impact’ translates to a rating of 6/7 out of 7 points in a likert scale of this particular question.
REHEARSAL SPACES

In addition to formal training and skills development programs, rehearsal spaces are also crucial in the development of musical skills. Respondents brought up in their open comments the necessity to **build rehearsal facilities in Vermont with permanent equipment that are available to underaged musicians, musicians who are starting in their career and/or have a low income.**

Dedicated rehearsal spaces bring together musicians from different backgrounds and help them grow by encouraging experimentation and providing a variety of instruments and collaboration opportunities with other musicians at their disposal. Although the survey did not specifically ask about rehearsal spaces, the fact that it was brought up independently in relation to the lack of spaces to connect and collaborate highlights that **some people may be challenged by rehearsing at home, in a basement or in their garage** and not being able to **access appropriate instruments or sound equipment** to develop their craft.

Artists Development

ARTISTS ECONOMY

Career development opportunities that artists and professionals can opt to while in Vermont appear to be limited by the aforementioned lack of allocated skills development and education resources, the dependence on live performance income, and the geographic characteristics of Vermont:

- **83% of artists made less than $15,000 from music industry sources in 2018**
- **Performing in Vermont contributes ‘a lot’ to the revenue of 29% of artists**, and live performance in general is the most important revenue source for the artists surveyed, as seen in Figure 10A and Figure 10B below.
- **88% of those heavily dependent on income from in-state performances have been living in Vermont for over 10 years**, highlighting a possible entry barrier for newcomers or younger musicians.
- Despite the high percentage of artists earning income from Vermont performances, open comments addressed the **low artist fees, if any, that are paid to local artists**. In some cases, it can even escalate to pay-to-play deals or no-deals for regionally unestablished local musicians looking to perform outside of their area in Vermont.
Redirecting support and learning resources towards sync, scoring and directing collaboration opportunities would likely have a positive impact in the regional ecosystem: 60% of artists said the ‘creation of promotion programs to encourage the use of local music in advertising, film, tv, gaming, etc’ would have an extreme impact in helping them thrive as a musician in Vermont.

There are further opportunities for revenue diversification in key areas of the music industry that are currently not exploited by Vermont musicians, such as songwriting for-hire (no income for 86% of artists), song licensing (no income for 82%), and business partnerships or endorsements (no income for 81%).

Figure 10A. Respondents’ revenue contribution by type of activity (1)
Touring is a crucial part of an artists’ development path, but the experience of the majority of Vermont musicians surveyed could explain a possible saturation of performance opportunities available in the region:

- **87% of artists perform at least one in-state show per month**, highlighting an abundance of performing opportunities in Vermont.

- In comparison, **only 26% of artists perform at least one touring show per month**, which likely increases the competition for the 74% that exclusively performs in Vermont.

- **73% of those who heavily depend on Vermont performances travel more than 10 miles to perform**, which can signify a saturation of career development possibilities in the regional music circuit.

- In general, **1 out of 2 artists travel regularly more than 20 miles to perform** in venues, limiting the performance opportunities available for those who cannot drive regularly.
Open comments by artists also reflect on discrimination trends towards older musicians, who perceive to be less hired than younger peers despite their experience.

As Figure 11 shows, the reality of performing artists is that most concerts are held in places other than dedicated live music venues. Artists highlight in their open comments that a large number of Vermont venues do not hold up to adequate standards in terms of professional backline (e.g. soundboards, amplifiers, pianos), trained staff (e.g. booker, audio engineer), etiquette (e.g. dimming lights and sound once the show starts), stage area and dancefloor.

Venue typologies appear to strongly affect the perception of live music, both by audiences and venues, as a background amenity to enjoy food or drinks, talk with friends or watch a sports game on TV. This perception is aggravated when many of these spaces, according to respondents, decide not to charge a cover and this has a direct effect on artists’ pay.

Many respondents also reported the limited variety of dedicated music venues and listening rooms where audiences that want to enjoy live music of any kind can do so in good
conditions. It is also mentioned that the current ecosystem of venues excludes minors from performing and attending shows, and more dry venues are needed throughout the state.

The lack of dedicated, multi-genre performance venues also affects the wider diversity of the music ecosystem beyond commercial-friendly genres such as acoustic music, rock, folk and the likes: respondents working in jazz, punk, rap, metal and electronic genres were vocal about the lack of adequate venues to perform in Vermont, which in turn affects the development of diverse music communities.

It was also reported that many venues program cover bands, which challenges the development of artists and bands playing original music that currently lack the critical mass to perform in larger venues.

Industry Development

Vermont’s music industry appears to have a strong long-established ecosystem of companies and a dynamic music venue ecosystem, but it seems to lack a critical mass of clients and/or development resources that will allow it to reach a tipping point in its economic development.

83% of the music businesses do not employ any full-time professionals other than the proprietor (72% in the case of music venues), which can explain a relatively stagnant job market for music industry professionals.

1 out of 2 music businesses have been around for more than 10 years, with only 18% of businesses established less than 2 years ago. However, the music venue sector appears to be more dynamic: 35% of venues surveyed have existed for less than 2 years, but also 35% have existed for over 10 years.

Similarly to the case of artists, most music business owners are largely dependent on non-music sources to earn a living: 86% of the music venues and 73% of the music businesses surveyed earnt less than $25,000 in 2018 from music industry sources.

As previously mentioned under the ‘Grants’ section, most music businesses are dependent on personal cash and friends and family funds to launch and grow over the years: 2 out of 3 music venues and 4 out of 5 music businesses were dependent on personal investment for launching and financing their company. Remarkably, only 7% of businesses and music venues have been able to receive a loan in the past.
Despite the overall maturity of the Vermont music industry in terms of experience, open-comments also reinforce the difficulty to find high-paying jobs as an entrepreneur or professional in Vermont. The issue of the dormant regional music economy appears to be linked, according to respondents, to the small size of the population. A dynamic explained in the comments addressed that a limited pool of regional clients would hire the same professionals continuously, encouraging a siloed job market.

Comments by artists draw attention to the apparent lack of Vermont-based professional booking agents, artist managers, music marketeers and PR, content creators, and graphic designers. Their seems to have placed a big responsibility on musicians to become ‘360° artists’, challenging not only artist development but also the professionalization of the music industry in Vermont. Furthermore, some services appear to be externalized to companies outside of Vermont, such as venue bookings.

Figure 12 reinforces these findings regarding the urgent need to increase the number of professional artist support teams (e.g. publishing, booking, management) and accessing capital to stimulate Vermont’s music economy:

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Figure 12. Highest impact of industry needs and gaps, by role

8 ‘Highest impact’ translates to a rating of 6/7 out of 7 points in a likert scale of this particular question.
Open comments also urge two things regarding increasing music industry accessibility for certain groups to benefit the ecosystem as a whole: one is to incentivise gender diversity in professional sectors such as booking, concert production and promotion, to help bridge the gender gap and income diversification in Vermont; the second one is supporting Vermont musicians who want to record in Vermont-based studios, since rates can be unaffordable for unsigned and/or unestablished musicians.

Audience Development

The ageing population of Vermont is frequently brought up by respondents as a major challenge to develop a critical mass of audience regionally. Older demographics, according to respondents, do not go to shows as frequently as younger generations.

Although concert attendance was not asked in the survey, older age does not seem to influence the capacity to perform. If anything, experience seems to be an advantage in audience development for senior artists:

- 1 out of 5 of artists aged 55 and older perform at least 4 in-state shows per month, the same percentage as artists under 55
- 7% of artists aged 55 and older also performs more than 4 shows per month out of state, compared to 6% of artists under 55.

Respondents also brought up a related issue, that people who attend concerts regularly in Vermont, regardless of age, are largely other musicians. As one respondent puts it, the “overabundance of musicians relative to audience” leaves little room for music appreciators that are not busy trying to put on concerts of their own.

This issue was brought up specifically by respondents in Burlington and Brattleboro, and is also related to artist touring, ageing audiences and the lack of a critical audience mass that can sustainably support the music ecosystem. However, it appears to be an ecosystem trend, with other respondents claiming there are few commercial radios or local media outlets left that promote a wide diversity of local music (mainly community radios), and instead reinforce established commercial music, such as classic rock bands.
Music Tourism & Marketing

Artist respondents seem particularly optimistic about the positive impact that increasing the number of tourism and market development support would have among Vermont artists. **1 out of 2 artists believes they would be extremely impacted by:**

- Creating and promoting to tourists more city-zoned music friendly areas (i.e. Battery Park, Shelburne Museum)
- Creating programs to drive tourist traffic to local venues and shows
- Creating a Vermont marketing campaign to show tourists and newcomers how they can support and enjoy live music
- Creating an official ‘Live Music Venue’ designation for quality music venues

Respondents expressed in the open comments section that they feel the **State of Vermont does not promote the music sector like other products** despite the abundance of regional talent and the appeal of the scene to visitors.

Public buildings and state-owned parks and other facilities seem to be **under-utilized for music**, arguably because of political will or regulatory hurdles, according to respondents.

According to open comments in the survey, creating a Vermont music brand will be key to **attracting outside investment to the state**, but respondents also believe this would help local listeners discover new Vermont musicians from diverse genres. A couple of repeated suggestions related to this ‘Vermont Music’ brand were indicated by respondents to promote Vermont music inwards and outwards:

- First, a **central resource is needed to coordinate the promotion of live music events, local recording artists, and local music businesses**. This should be easily accessible online, regularly updated, and free to promote activities involving local musicians. This central resource should be developed and branded in collaboration between music industry stakeholders and the Vermont Department of Tourism & Marketing or similar state agency.

- Second, a **state music festival celebrating Vermont music that includes musicians from every county and music genre will grow the sense of pride in local music among audiences and visitors**. This event should also include panels, workshops and
an industry showcase program to become a learning and networking hub for musicians, professionals and investors in Vermont.

- Third, **a regular program of concerts in state-owned public places that facilitates the performance application for Vermont musicians**. This should encourage musicians to play in different counties to showcase a variety of music genres from different regions in Vermont. It will facilitate mobility across the state by having a single application, instead of having to apply through each individual municipality.

### Next Steps

The data gathered in this analysis aims to help Big Heavy World, the Vermont Creative Network and the music community in Vermont identify what areas of its music ecology need urgent support, how to structure its developing priorities, and execute the necessary actions to strengthen its music industry and community across Vermont.

The analysis conducted by Sound Diplomacy has identified key areas that were underrepresented in the survey and will require further research and acumen:

#### LIVE AND RECORDED MUSIC ECOSYSTEM

It is crucial to better understand Vermont’s live music ecosystem capacity, demand and offer dynamics, as well as booking and artist remuneration dynamics. A mapping of such facilities, their sources of income and their characteristics should assess the provision and sustainability of live music across Vermont.

Future roundtables or focus sessions should involve Vermont venue operators, festival directors and booking agents, including representatives from all regions and different venue typologies (e.g. music venues, bars, restaurants with music, DIY venues, etc.) to gather further insights on how to best support the development of the live music ecosystem.

The Vermont recorded music ecosystem was also underrepresented in survey results. In-depth sessions with Vermont recording studio owners and audio engineers from all regions should uncover any particular challenges that were briefly touched upon in the survey, particularly in terms of networking, business management and business development.

Musicians and professionals working in several music genres (including hip hop, rap, soul and R&B, dance and EDM, electronic music, classical, world music, punk-rock, metal, and gospel...
among others) and the non-pop music realm were underrepresented in the survey. Further research should aim to identify the main needs and challenges affecting underrepresented music genres in Vermont, particularly in terms of networking, paid performance opportunities and career development.

Lastly, an inquiry into the habits and preferences of music enthusiasts and audiences in Vermont would be crucial to understand how they engage with the live and recorded music ecosystem in Vermont, particularly with Vermont artists. This could be done through a quick survey or poll, followed by in-depth interviews or roundtables that allow to get a qualitative perspective on the main issues.

COMMUNITY ENGAGEMENT

Representing the wider diversity of music ecosystem agents in Vermont should be a fundamental priority moving forward in this study, including the involvement of more music business owners and contractors.

The low survey representation of women and non-binary persons, as well as persons identifying as racial and ethnic minorities, should be addressed by creating focus groups and/or in-depth interviews to better understand the roles and particular challenges they experience in Vermont.

In combination with those demographics, the specific challenges and priority development areas affecting over 55- and under 35-year-old musicians and industry professionals should be further researched with focus sessions and/or in-depth interviews, since the ageing population and the limited career development options for ageing musicians in Vermont were recurrent topics in the survey.

GOVERNANCE

Future roundtables and in-depth interviews should address qualitatively certain issues that emerged in the survey relating to the affordability of living and being a musician in Vermont, such as health insurance, mobility and infrastructure, access to housing and workspaces, and the availability of funding support to develop a music career and/or a music organization. The qualitative information should be compared between demographic groups to assess any accessibility challenges and inequality patterns in the Vermont music ecosystem, particularly related to paid work opportunities.

These conversations should involve a separate session artists and another one involving policy-makers and other governance leaders, to better understand how stagnant artist pay and the current state of the music economy affect the development of Vermont’s music ecosystem, considering its regional discrepancies. The end goal is to be able to identify in what ways policy and governance changes will be able to improve this situation in the future.
and create better infrastructure and support systems for the Vermont music ecosystem to thrive.

**EDUCATION**

The survey highlighted a possible lack of music education opportunities, as a revenue source for musicians and music professionals on the one hand, but also as an artistic and professional development tool for aspiring and developing artists and professionals. Further research should focus on mapping what opportunities are available across Vermont for music education and music industry training and how do they serve the music community. This will allow to better identify and design better support programs and collaborative spaces wherever is most needed in Vermont.

**MEDIA**

Topics related to music tourism and marketing emerged in the survey, and respondents received enthusiastically the idea of creating a music-focused campaign to promote a Vermont music brand that involves its regional musicians. Further research should aim to identify what is the current role of Vermont media and tourism organizations in promoting local musicians and music shows happening in-state and what development and collaboration opportunities could be implemented in the near future. These conversations should involve representatives from tourism and music PR/marketing, local press, commercial and community radios, music and culture journalists, and local tourism organizations.
Appendix - Survey Questions

1a. Race and Ethnicity

2a. Gender

3a. What is your age?

4a. Number of Years Living in Vermont

5a. Number of Years Working in the Music Industry

6a. Current Employment

7a. Health Care Coverage

8a. Housing: Renting or Owner

9a. Housing: Type of Residence

10a. Number of Household Contributors to Rent or Mortgage

11a. Which of the following best describes your role in the Music industry

12a. Area of Expertise

13a. What music genre do you work in or with the most?

Artist itinerary

1b. Type of Venue Played on a Regular Basis

2b. General Travel Distance to Venues (Miles)

3b. Average Number of Vermont (in-state) Shows Per Month
4b. Average Number of Touring Shows Per Month

5b. Please Identify Your Revenue Contribution by Activity Type [Live Performance Shows in Vermont]

5b. Please Identify Your Revenue Contribution by Activity Type [Live Performance Shows Outside Vermont]

5b. Please Identify Your Revenue Contribution by Activity Type [Digital Record Music Sales (iTunes, Band Camp, etc)]

5b. Please Identify Your Revenue Contribution by Activity Type [Performing Rights Organization Royalties]

5b. Please Identify Your Revenue Contribution by Activity Type [Mechanical Royalties (Publisher, Labels or Others)]

5b. Please Identify Your Revenue Contribution by Activity Type [Songwriting For-Hire Fees]

5b. Please Identify Your Revenue Contribution by Activity Type [Song Licensing Fees (Film, TV, Games, Commercials)]

5b. Please Identify Your Revenue Contribution by Activity Type [Session Studio Fees]

5b. Please Identify Your Revenue Contribution by Activity Type [Teaching Music Lessons]

5b. Please Identify Your Revenue Contribution by Activity Type [Producer Fees]

5b. Please Identify Your Revenue Contribution by Activity Type [Business Endorsements or Sponsorships]

5b. Please Identify Your Revenue Contribution by Activity Type [Physical Recorded Music Sales (CD's/ Vinyl from Shows)]

5b. Please Identify Your Revenue Contribution by Activity Type [Retail Stores]

6b. Please identify your 2018 pre-tax income from all income sources. ALL MUSICIANS please answer this question.
7b. Please identify your 2018 pre-tax income from music industry income only (playing shows, selling merchandise, streams, etc.).

8b. If you are a musician that relies solely on income from the music industry, please identify your 2018 pre-tax income.

9b. Has your individual income increased or decreased in the past 3 years?

10b. What form of financing does your band use for the band’s development?

11b. What was your band’s 2018 gross income?

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for rent]

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for purchase]

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Insufficient safe, late night transportation]

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Long Commutes]

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Increased cost of living: food/utilities/transportation]

12b. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Stagnating pay for musicians: difficult to make a viable income]
Vermont? [Difficulty traveling in winter months: lack of proper transportation, difficulty in keeping equipment safe]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Industry fragmentation: Difficult to network/collaborate with others]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Lack of Promotion of Existing Resources (Non-Profit Programs, Gov't Agencies, etc)]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Lack of Collaborative Programs (Non-Profit Programs, Gov't Agencies, etc)]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Lack of Targeted Promotion of Public Resources to Minority Groups]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Lack of Opportunity for Cross-Industry Film, Video Game, Theater/Visual Art Projects]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Not Enough Civic Engagement from Music Industry Stakeholders to Make Public Policy Changes]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [A Lack of Focus Towards Music in Arts Community]

13b. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with musicians in Vermont. [Lack of Community Space for Musicians]
14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Established, Pro Level Artists]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Established, Pro Level Industry Professionals]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Entrepreneurs/Small Business Skills Development]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of Sufficient Resource Info Site With All Available City and Nonprofit Resources]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of Inclusivity/Diversity in Existing City and Nonprofit Programs]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Non-Established Aspiring Musicians]

14b. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Non-Established Aspiring Industry Professionals]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Local Reps from Performing Rights Organizations]
15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Pro Level Managers/Booking Agencies]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Pro Level Publishing/Licensing Companies]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Pro Level PR/Marketing Companies]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Access to Capital for Business Growth]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Affordable Office Space For Rent]

15b. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Access to Interns & Low- Cost Employees]

16b. Please identify other needs and gaps that you have discovered as a Musician in Vermont

17b. This question aims to gauge Career Development and Connectivity ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of a Music Industry Central Hub/Buildings: Affordable Co-Working Space, Meeting Rooms, etc.]

17b. This question aims to gauge Career Development and Connectivity ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of One-Stop Online Resource Site: All Available Nonprofit and Local Gov’t Support Services]

17b. This question aims to gauge Career Development and Connectivity ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of a Career Resource Center: Extensive Library & Knowledge Center]
17b. This question aims to gauge Career Development and Connectivity ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Opportunities and Targeted Events to Connect with Music Industry Located in Different Cities]

18b. This question aims to gauge Tourism and Market Development ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Programs to Drive Tourist Traffic to Local Venues and Shows]

18b. This question aims to gauge Tourism and Market Development ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of official “Live Music Venue” Designation/Branding for Quality Live Music Venues]

18b. This question aims to gauge Tourism and Market Development ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of More City-Zoned Music Friendly Areas (i.e. Battery Park, Shelburn Museum) & Promote to Tourists]

18b. This question aims to gauge Tourism and Market Development ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Vermont Marketing Campaign - How Tourists and Newcomers Can Support and Enjoy Local Live Music]

19b. This question aims to gauge potential City/State ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of State Programs to Develop International Markets and Export Opportunities]

19b. This question aims to gauge potential City/State ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Incentives for Promoters to Use Local Acts With Touring Artists]

19b. This question aims to gauge potential City/State ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Promotion Programs to Encourage Use of Local Music in Advertising, Film, TV, Gaming, Etc.]

19b. This question aims to gauge potential City/State ideas. How helpful, if at all, would these ideas be in helping you thrive as a musician in Vermont. [Creation of Incentives for Artists to Make Records in Vermont Studios]

Please list any other potential ideas you may have to help improve the Vermont Music Sector:
1c. Number of Years in Operation

2c. Number of Full-Time Employees or FTE Equivalents

3c. Number of Employees by Years in Operation [Proprietor Only]

3c. Number of Employees by Years in Operation [1-5]

3c. Number of Employees by Years in Operation [6-10]

3c. Number of Employees by Years in Operation [11-20]

3c. Number of Employees by Years in Operation [21-50]

3c. Number of Employees by Years in Operation [More than 50]

4c. Where does financing for business launch and growth come from?

5c. 2018 Business Gross Income

6c. Please identify your 2018 pre-tax income from all income sources. All Industry OWNERS please answer.

7c. Please identify your 2018 pre-tax income from music industry sources. All Industry OWNERS please answer.

8c. Please identify your 2018 pre-tax income. Only Industry OWNERS w/100% Income from the Music Industry answer.

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for rent]

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for purchase]
9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Insufficient safe, late night transportation]

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Long Commutes]

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Increased cost of living: food/utilities/transportation]

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Stagnating pay for musicians: difficult to make viable income]

9c. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Difficulty traveling in winter months: lack of proper transportation, difficulty in keeping equipment safe]

10c. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with others in Vermont. [Lack of affordable housing for rent]

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10c. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with others in Vermont. [Long Commutes]
10c. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with others in Vermont. [Increased cost of living: food/utilities/transportation]

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11c. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Established, Pro Level Artists]

11c. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Established, Pro Level Industry Professionals]

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11c. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of Inclusivity/Diversity in Existing City and Nonprofit Programs]
your skills and education living in Vermont. [Lack of City/State or Nonprofit Resources for Non-Established Aspiring Musicians]

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12c. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Pro Level Managers/Booking Agencies]

12c. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Pro Level Publishing/Licensing Companies]

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12c. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Access to Capital for Business Growth]

12c. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Affordable Office Space For Rent]

12c. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Access to Interns & Low- Cost Employees]

13c. Please identify any other needs and gaps that you have noticed in the Vermont Music Sector:
1d. Number of Years in Operation

2d. Number of Full-Time Employees or FTE Equivalents

3d. Number of Employees by Years in Operation [Proprietor Only]

3d. Number of Employees by Years in Operation [1-5]

3d. Number of Employees by Years in Operation [6-10]

3d. Number of Employees by Years in Operation [11-20]

3d. Number of Employees by Years in Operation [21-50]

3d. Number of Employees by Years in Operation [More than 50]

4d. Business Launch and Growth Financing

5d. 2018 Business Gross Income

6d. Please identify your 2018 pre-tax income from all income sources. All Industry OWNERS please answer.

7d. Please identify your 2018 pre-tax income from music industry sources. All Industry OWNERS please answer.

8d. Please identify your 2018 pre-tax income. Only Industry OWNERS w/100% Income from the Music Industry answer.

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for rent]

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Lack of affordable housing for purchase]
9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Insufficient safe, late night transportation]

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Long Commutes]

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Increased cost of living: food/utilities/transportation]

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Stagnating pay for musicians: difficult to make viable income]

9d. This question aims to gauge the Living and Affordability needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to afford the cost of living in Vermont? [Difficulty traveling in winter months: lack of proper transportation, difficulty in keeping equipment safe]

10d. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with others in Vermont. [Lack of affordable housing for rent]

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10d. This question aims to gauge the Connectivity and Collaboration needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to collaborate and connect with others in Vermont. [Long Commutes]
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11d. This question aims to gauge the Professional Education and Skills Development needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to improve your skills and education living in Vermont. [Lack of Sufficient Resource Info Site With All Available City and Nonprofit Resources]

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12d. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Affordable Office Space For Rent]

12d. This question aims to gauge the Industry Resources needs and gaps in Vermont. Which factors have the greatest impact, if any, on your ability to grow and succeed living in Vermont. [Lack of Access to Interns & Low- Cost Employees]

14d. Please identify any other needs and gaps that you have noticed in the Vermont Music Sector: