The Following Section Includes All Respondents

Topics:
Geography, Sector/Role, Training, Industry Membership, Pandemic Recovery, Housing, Business Growth, Financial Assistance
Participation and Completion Rate

2022 All Respondents

Participation and Completion Rate

WHO PARTICIPATED?

2,260 online respondents

July 15 – September 12, 2022

43% Down from 2014

Completion Rate: 71%

2014 Census: 3968 Responses, 66% Completion Rate

Fewer participants with this Census. There could be a lot of different reasons for this… survey fatigue, shrinking music industry services post-pandemic, pandemic impacts overall.

Excellent! Industry standard is 42%
These are the five counties that make up the Greater Austin MSA...
Geography: Reside within the City of Austin

- Yes: 73%
- No: 27%

Important to know for a lot of reasons…
Geography: Distance from Downtown

Half live at least 8 miles from downtown…

Average Miles: 10.7
Median Miles: 8
Geography: Distance of Home from Downtown

There are a lot of different sub-groups, but these varied the most from Overall…
Geography: Home Zip Codes Comparison 2014 to 2022

Comparison of Ten Most-Central Home Zip Codes (2014-2022)

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>City</th>
<th>2014 % of total</th>
<th>2022 % of total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>78704</td>
<td>(Austin)</td>
<td>12.8%</td>
<td>6.1%</td>
<td>-6.6%</td>
</tr>
<tr>
<td>78702</td>
<td>(Austin)</td>
<td>5.8%</td>
<td>4.0%</td>
<td>-1.9%</td>
</tr>
<tr>
<td>78741</td>
<td>(Austin)</td>
<td>4.7%</td>
<td>3.5%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>78746</td>
<td>(Austin)</td>
<td>1.7%</td>
<td>0.8%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>78701</td>
<td>(Austin)</td>
<td>1.3%</td>
<td>0.7%</td>
<td>-0.7%</td>
</tr>
<tr>
<td>78756</td>
<td>(Austin)</td>
<td>1.6%</td>
<td>1.1%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>78703</td>
<td>(Austin)</td>
<td>2.1%</td>
<td>1.7%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>78751</td>
<td>(Austin)</td>
<td>2.9%</td>
<td>2.7%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>78723</td>
<td>(Austin)</td>
<td>4.7%</td>
<td>4.7%</td>
<td>0.0%</td>
</tr>
<tr>
<td>78705</td>
<td>(Austin)</td>
<td>1.9%</td>
<td>2.3%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

Most of these are further out of town...

78704 used to have the most (12.3%)

78745 has the most music population currently (9.8%)

Home Zip Codes with Highest Growth (2014-2022)

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>City</th>
<th>2014 % of total</th>
<th>2022 % of total</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>78666</td>
<td>(San Marcos)</td>
<td>1.0%</td>
<td>2.2%</td>
<td>1.2%</td>
</tr>
<tr>
<td>78660</td>
<td>(Pflugerville)</td>
<td>1.2%</td>
<td>2.2%</td>
<td>1.0%</td>
</tr>
<tr>
<td>78747</td>
<td>(Austin)</td>
<td>0.5%</td>
<td>1.4%</td>
<td>0.9%</td>
</tr>
<tr>
<td>78653</td>
<td>(Manor)</td>
<td>0.4%</td>
<td>1.3%</td>
<td>0.8%</td>
</tr>
<tr>
<td>78610</td>
<td>(Buda)</td>
<td>1.0%</td>
<td>1.8%</td>
<td>0.8%</td>
</tr>
<tr>
<td>78602</td>
<td>(Bastrop)</td>
<td>0.2%</td>
<td>0.9%</td>
<td>0.7%</td>
</tr>
<tr>
<td>78681</td>
<td>(Round Rock)</td>
<td>0.6%</td>
<td>1.2%</td>
<td>0.6%</td>
</tr>
<tr>
<td>78691</td>
<td>(Pflugerville)</td>
<td>0.0%</td>
<td>0.6%</td>
<td>0.6%</td>
</tr>
<tr>
<td>78640</td>
<td>(Kyle)</td>
<td>0.4%</td>
<td>0.9%</td>
<td>0.5%</td>
</tr>
<tr>
<td>78724</td>
<td>(Austin)</td>
<td>0.7%</td>
<td>1.2%</td>
<td>0.5%</td>
</tr>
</tbody>
</table>
Flexible workforce that has irregular transportation needs...
Geography: Work Location (top 10 by zip code)

Not many in the workforce regularly commute…

…but those who do, it is pretty central…

---

### Top 10 Workplace Zip Codes (2022)
(If outside the home, and at same location)

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>78701</td>
<td>19.0%</td>
</tr>
<tr>
<td>78702</td>
<td>15.5%</td>
</tr>
<tr>
<td>78704</td>
<td>10.2%</td>
</tr>
<tr>
<td>78745</td>
<td>5.3%</td>
</tr>
<tr>
<td>78705</td>
<td>3.5%</td>
</tr>
<tr>
<td>78722</td>
<td>3.2%</td>
</tr>
<tr>
<td>78712</td>
<td>2.6%</td>
</tr>
<tr>
<td>78703</td>
<td>2.6%</td>
</tr>
<tr>
<td>78746</td>
<td>2.3%</td>
</tr>
<tr>
<td>78753</td>
<td>2.0%</td>
</tr>
</tbody>
</table>
Primary Industry Sector

This choice defines which branch of sector-specific questions respondents receive…
Primary Industry Sector (Comparing 2014 to 2022)

More Creatives, fewer solely Industry-focused…
Primary Industry Sector + Secondary Branch Participation

Music people play more than one role in the ecosystem.

44% Total Participation

14% Total Participation
"I play solo and in several bands. I am a songwriter in all cases. None of the bands have a formal business structure. We go gig to gig."

"Having an LLC makes it easier to contribute to the pension we have through the Austin Musician's Union."

"Many projects - always hustling. Try for passive income opportunities."

"I do various things in the industry including freelance promotion, work for a promotion company, work at a record store, and DJing."

"I have an LLC that manages and books talent and an LLC that owns bands."

"Not much of a business structure since I feel that I have to maintain and exert most energy to a separate, unrelated full-time job to sustain myself."
One in five consider their other job “primary”

Very few (8%) do creative work (outside of music)

A third are full-time in music
Years of Profession Experience (vs 2014)

Fewer people are getting into this work
Types of Music-Related Training Participants Have Received

- **77%** Experience
- **38%** K-12 public school
- **29%** Music industry education/training
- **21%** Degree in music
- **12%** Other

Learning is mostly through informal channels.
Local Activity Participation

- 61% Local Music Social Media
- 44% Music Industry Networking
- 34% Mentor Others in the Music Industry
- 32% Local non music groups
- 22% Grassroot advocacy local gvmt
- 21% Business Networking
- 18% None of These

Music people can be hard to reach...

Mentoring is promising!

“Wish there were more groups I knew about to join.”

“Rarely join activities outside of my work commitments.”

“Board of local music non-profit.”

“Pre-pandemic I held a regular networking/connecting get together for industry professionals.”
All respondents (not just creatives)

For just creatives, this is 50%
"Pretty much anything would help. Royalty collection is a full-time job that I don't have the time to devote to."

"I already set this up myself."

"Would love to learn!"

"I play music to share it with others, not to collect $$.

"It's not difficult but is rather expensive to copyright a song."

"We need a Sync Team that teams up with local music supervisors and we submit for the musicians."

"…An entertainment lawyer who is affordable."

This is just for those who have copyrights.

**Suggested Assistance for Registering/Activating Royalty Collections**

- Not worth it: 42%
- Online resources to help apply: 42%
- Local in person seminar: 31%
- Local in person registration drive: 19%
- A local expert for hire: 19%

*This is just for those who have copyrights.*
Music Work Returned to Pre-Pandemic Levels?

As of July-Sept 2022

“Places for small acts to play have vanished. The ones that exist are struggling.”

“I work more because a lot of creatives left, causing less job competition.”

“The pandemic forced me to find online means of earning money through music, so I learned livestream and offered virtual events more, and continue to.”

“With all the changes and the new people coming to town, it is as if we are in a brand-new city. There is no memory of what was important from the past.”

“I’m not making the money I made before but I’m also having to pay more rent so it’s constantly living in fear of not having a place and as a female that’s very difficult.”

“Places for small acts to play I work in non-profit Tech now. I do music less. It makes me sad but my bills are paid.”

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Commitment to Music Career vs Staying in Austin

Plan to Continue Music Career (2022: next 3 years)

- Very No: 2%
- Somewhat No: 8%
- Somewhat Yes: 29%
- Very Yes: 89%

Plan to Stay in Austin (2022: next 3 years)

- Very No: 10%
- Somewhat No: 5%
- Somewhat Yes: 29%
- Very Yes: 64%
Separate Workspace Needs

"I have a space but I cannot afford it, so I will have to move out."

"I share a rented rehearsal space with other musicians."

"I converted my garage."
“It is over $500 for a small room at a rehearsal space.”

“Month to month.”

“It is a collaborative space within my community.”

Such as property taxes

Lease Conditions

Expires within 5 years
Includes variable costs
Longterm (5+ Years)

65%
37%
18%
Plan to Renew Lease?

Q21: "Will you renew this lease?"

- **Very No**: 14%
- **Somewhat No**: 35%
- **Neutral**: 35%
- **Somewhat Yes**: 12%
- **Very Yes**: 2%

Overall, 14% Plan to Renew Lease, 35% Neutral or Undecided, and 49% Aren't Saying "Yes".
"This basically requires business schooling for working musicians and boldly getting help from colleagues with greater skills."

"I prefer pro-bono professional services, such a TALA, which includes a reasonable membership fee."

Most don’t want to take on debt.
Most want grants!
Confidence in Skills to Navigate Grant Process

- Extremely Confident: 29%
- Very Confident: 28%
- Somewhat Confident: 29%
- Not So Confident: 11%
- Not At All Confident: 2%

This is promising!
“Please hire people at the cultural arts division to help with this complex and confusing process. The city’s grant application process siphons creative energy and time so I don’t do it independently, only when working with community groups because the process demands more that I can give on my own.”

“I’ve done it before and got it, it was a big help in 2022.”

“Awareness of grants that match our eligibility and needs.”
Any and all training is helpful. After our label performed at Austin City Limits Music Festival, we woke up the next day the same locals we were the week before. Learning as many skills as possible and expanding our network to be able to get paid outside of Austin and ultimately bring back more money to the city is key to our survival.”

“Much of this training is presently available through other orgs in Austin and around the country. In a way its quite disappointing how the students of these programs are given very little opportunity to develop musically in addition to learning how to run a music-based business.”

“Musicians are leaving Austin ‘cause they can’t afford it. It’s not because they didn’t learn how to promote themselves on facebook properly.”

“Applying for grants and attracting gifts.”

“Safety.”

Strong interest in these skills
It’s not just what you teach, but also understanding the skills and experience that music people already have.
DEMOGRAPHICS

The Following Section Includes All Respondents
Gender Comparison 2014 to 2022

Q66: Respondent Gender Comparison

- Male: 2014 - 71%, 2022 - 62%
- Female: 2014 - 29%, 2022 - 29%
- Prefer not to say: 2014 - 4%, 2022 - 4%
- Non-binary: 2014 - 4%, 2022 - 4%
- Prefer to self-describe: 2014 - 1%
Gender: Benchmarking against 8 other music studies
All Respondents

Race and Ethnicity (2014 vs 2022)

Race and Hispanic Ethnicity (Aggregated)
Austin Music Census (2014 vs 2022)

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>2014</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/European Origin</td>
<td>67.0%</td>
<td>60.3%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>10.4%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>8.6%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Black, African or African American</td>
<td>3.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Two or more races</td>
<td>4.2%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Asian or Asian American</td>
<td>1.6%</td>
<td>0.6%</td>
</tr>
<tr>
<td>MENA (Middle Eastern or North African)</td>
<td>2.6%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Native American or Alaska Native</td>
<td>0.4%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Native Hawaiian or Pacific Islander</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Other</td>
<td>10.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td></td>
<td>20.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td></td>
<td>30.0%</td>
<td>40.0%</td>
</tr>
<tr>
<td></td>
<td>40.0%</td>
<td>50.0%</td>
</tr>
<tr>
<td></td>
<td>50.0%</td>
<td>60.0%</td>
</tr>
<tr>
<td></td>
<td>60.0%</td>
<td>70.0%</td>
</tr>
</tbody>
</table>
Race and Ethnicity: Benchmarking against 8 other music studies
If fewer younger people are getting into the industry, then it is shrinking.
Sexual Orientation

- Heterosexual: 72.5%
- Prefer Not to Say: 9.8%
- Bisexual: 7.2%
- Pansexual: 3.2%
- Queer: 2.5%
- Lesbian: 1.7%
- Prefer to Self-Describe: 1.5%
- Gay: 1.3%
- Asexual: 0.4%
BUSINESS OF MUSIC CREATIVES

The Following Section Includes
Creatives Only
Creatives: Sources of Current Music Income

<table>
<thead>
<tr>
<th>Source</th>
<th>All</th>
<th>Most</th>
<th>Some</th>
<th>Little</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Gigs (Local)</td>
<td>16%</td>
<td>38%</td>
<td>24%</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Live Gigs (Road)</td>
<td>11%</td>
<td>37%</td>
<td>27%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Recordings Royalties</td>
<td>4%</td>
<td>23%</td>
<td>42%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Merchandise</td>
<td>3%</td>
<td>23%</td>
<td>29%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Studio Work</td>
<td>7%</td>
<td>25%</td>
<td>25%</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Songwriting Mechanicals</td>
<td>3%</td>
<td>16%</td>
<td>31%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Teaching</td>
<td>2%</td>
<td>12%</td>
<td>14%</td>
<td>14%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Live local gigs are still the most important.
Creatives: Sources of Current Music Income (vs 2014)

Live local gigs are still the most important source, but in 6 out of 7 categories, musicians report income sources have improved since 2014.

Incomes are diversifying.
Creatives: Number of Local Paid Gigs per Month

- 14% of creatives have 0 shows per month.
- 51% of creatives have 1-3 shows per month.
- 18% of creatives have 4-6 shows per month.
- 8% of creatives have 7-10 shows per month.
- 5% of creatives have 11-15 shows per month.
- 4% of creatives have 16+ shows per month.

About a third are sustaining more than 3 gigs a month.

35%
Creatives: Paid Local Gigs per Month
Comparison 2014 to 2022

Local gigs are declining since 2014
Creatives: Paid Local Gigs (adjusting for pandemic impacts)

A fairer comparison to include only those creatives whose say their work has returned to pre-pandemic levels. Still down but not as much.

Also, this shows The devastating impacts the pandemic continues to have on almost a third of creatives.

*2022 Creatives filtered based on how they answered, "Has your music work returned to pre-pandemic levels?" with 67% replying "Yes" and 29% replying "No"
When and Why Percentage Deals are Accepted

“I do not accept percentage gigs. Our overhead is too high. We need a guaranteed base pay, and we negotiate and contract that well before the gig.”

“The places that make the most sense to play for the growth of our fan base are primarily percentage. Places that have a flat rate (ie. 6th St) are less likely to allow you to play original music.”

“We are trying to work with only guarantees now because in the percentage scenario the venue puts a lot of pressure on the band to sell tickets and takes money from the band’s percentage to pay for ads.”

“It is rewarding to sell tickets to fans and push myself to promote my live shows every so often.”

“I would never accept a percentage deal for a cover gig, but original music is a different animal. If I believe in the artist/songwriter, I’m willing to the hit.”

“The chance to make more money when more money is made. And also to maintain a good relationship with venues when no money is made.”

54% Gigs paying a base guarantee

Creatives exercise various strategies locally

“I don’t accept them.”

“If it’s a 3-hour gig, percentage of bar sales is almost always higher than a base pay + tips.”

“Want to play shows and that’s all that the venue offers.”
Creatives: Annual Spending by Category (Average)

- Avg Annual Spend: $10,500
- Local Spend: $6,300
- Almost 3x any other category

Spent Locally

60%
Creatives: Presenting / Promoting Gigs (in addition to performing)

“Curating, Building Community”

“There are several venues in town that put the work on the bands (ie. we need to build the bill and make the poster). Not a great system imo.”

“I book and promote collective underground parties in addition to performing DJ sets.”

“I began a streaming show during the pandemic, and it received a lot of favorable response. This is a platform for both my solo work and collaborative spirit.”

“I run the genre night at a coffeehouse.”

“I enjoy curating bills and presenting an event that makes sense. A show where someone can come and stick around the entire night and enjoy bands they never knew about before gives me great satisfaction.”
Creatives: Where they go for music industry services

- **Top Local Service:** Recording Studios (77%)
- **Top National Service:** Publishing/Licensing (46%)
- **Top DIY Service:** Publicity/Social Media (30%)
- **Top Don’t Need:** Record Label (19%)

The green (local providers) is impressive! That’s what a big music city ecosystem looks like.
BUSINESS OF VENUES/PRESENTERS

The Following Section Includes

Venues and/or Presenters Only
Venue / Presenters: Venue Ownership Structure

- For Profit: 61.8%
- Other: 20.3%
- Charity / Nonprofit: 17.5%
- Governmental: 0.5%

Most traditional support funding requires non-profit status.
Venue / Presenters: Venue Type

- Live Music Venue: 82%
- Bar: 42%
- Community Space: 35%
- Other: 21%
- Restaurant: 18%
- Coffee Shop: 12%

This is a “select all that apply” question.
6.6% chose Community Space in 2014.
Venue / Presenters: Role of Live Music in Business

- More indie promoters doing special events now.

“Record shop that hosts in-store performances about once a week.”
“We present music for the musicians. We don’t make any income from this venue.”
“DIY with performances.”
Venue / Presenters: Legal Capacity

“Rent local venues like Stubbs, Quacks, Far Out, Mohawk...”

“It depends on where we can secure, usually 300 or less.”

“Requires special event permit.”

“No limit since it’s online only.”

Larger Venues include multiple employee responses

A growing sector...
Under 100 Cap is growing. 500-1000 Cap is shrinking.

Venue / Presenters:
Size of Venue Where Staff is Working

Size of Venue Where Staff is Working:
Comparision 2014 to 2022

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Venue / Presenters: Can Host Live Music Outdoors

- Yes: 53%
- No: 25%
- Varies depending on venue: 22%

40% had an outdoor permit in 2014
**Venue Owners/Operators Only: Greatest Challenges**

<table>
<thead>
<tr>
<th>Challenge</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property tax</td>
<td>25%</td>
<td>10%</td>
<td>15%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labor cost retention</td>
<td>14%</td>
<td>15%</td>
<td>8%</td>
<td>16%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
<td>12%</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance operations</td>
<td>14%</td>
<td>19%</td>
<td>10%</td>
<td>17%</td>
<td>16%</td>
<td>9%</td>
<td>4%</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent costs</td>
<td>10%</td>
<td>6%</td>
<td>15%</td>
<td>10%</td>
<td>16%</td>
<td>10%</td>
<td>14%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changing demand</td>
<td>10%</td>
<td>12%</td>
<td>9%</td>
<td>6%</td>
<td>13%</td>
<td>12%</td>
<td>14%</td>
<td>10%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neighborhood redevelopment</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>16%</td>
<td>16%</td>
<td>10%</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changing fixed costs</td>
<td>8%</td>
<td>6%</td>
<td>22%</td>
<td>18%</td>
<td>14%</td>
<td>12%</td>
<td>6%</td>
<td>5%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ordinances, Permitting</td>
<td>6%</td>
<td>12%</td>
<td>8%</td>
<td>10%</td>
<td>9%</td>
<td>12%</td>
<td>19%</td>
<td>13%</td>
<td>10%</td>
<td></td>
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</tr>
<tr>
<td>Marketing</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
<td>8%</td>
<td>14%</td>
<td>16%</td>
<td>22%</td>
<td>13%</td>
<td>13%</td>
<td></td>
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</tr>
</tbody>
</table>

Reflects pressures of running a physical space.
See how different the business model is for venues vs. promoters
Venue / Presenters: Deal Structure with Creatives*

<table>
<thead>
<tr>
<th>Guarantee (business expense)</th>
<th>Guarantee (Cover)</th>
<th>% of Door (cover)</th>
<th>Tips only</th>
<th>% of Bar (no cover)</th>
</tr>
</thead>
<tbody>
<tr>
<td>200%</td>
<td>100%</td>
<td>90%</td>
<td>80%</td>
<td>70%</td>
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<tr>
<td>11%</td>
<td>9%</td>
<td>10%</td>
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<td>8%</td>
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<td>13%</td>
<td>10%</td>
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<td>12%</td>
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<tr>
<td>36%</td>
<td>9%</td>
<td>15%</td>
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<td>35%</td>
<td>27%</td>
<td>20%</td>
<td>65%</td>
<td>68%</td>
</tr>
<tr>
<td>20%</td>
<td>20%</td>
<td>29%</td>
<td>65%</td>
<td>68%</td>
</tr>
</tbody>
</table>

*Most Recent Quarter

Guarantees reported similarly by venues and artists

“Guarantee vs %.”

“A lot of the shows we book are donation only.”

“Minimum guarantee vs 10% of bar sales whichever is more.”

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Venue / Presenters: Local Talent Bookings*

* Most Recent Quarter
Venue / Presenters: Intent to book more local artists*

*Next three years

Optimistic about the future for local music
BUSINESS OF INDUSTRY SERVICES

The Following Section Includes
Industry Only
Industry: Music-Related Industry Occupations

More evidence of a diversified and highly skilled industry locally

Wordcloud of how industry describes itself

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Industry: Geography of Music Clientele

Local music industry operators bring in outside dollars.
HEALTH & WELLNESS SECTION

The Following Section Includes
All Respondents
Health Insurance Coverage

- Yes: 84%
- No, Recently Lost: 8%
- No, 2+ Years Without: 8%

79.5% in 2014
Health Insurance Coverage Provided by

- 84% Yes
- 8% No, Recently Lost

- 43% Current or former employer
- 17% Access through HAAM
- 16% I pay (me, family)
- 14% Family member, their employer
- 12% National, state or local government
- 4% Other

12.4% in 2014
Currently Receiving Health Services Through...

- "I have used HAAM in the past and remain grateful for the services they provide."
- "MusiCares."
- "I don't know how to get SIMS."
- "I used to. Need to re-apply."
- "Just applied to HAAM."
- "Musician Treatment Foundation of Austin Texas Inc."

Chart showing:
- HAAM: 18%
- SIMS Foundation: 7%
- Other: 3%
"I've tried applying and was denied because audio engineers do not qualify."

"I'm not qualified since I'm not a musician, but a music industry worker."

"HAAM limited to Travis county."

Reasons Support or Health Services Have Not Been Sought (through HAAM or SIMS)

- Not sure if my music work qualified me: 44%
- I wasn't aware of these organizations: 29%
- I've not had a need for these services: 15%
- My earnings disqualify me: 13%
- I was previously a member but let it lapse: 10%

Responses from just those who indicated they don't have health coverage.
Where Uninsured Go When Sick or Need Healthcare

- 58% of uninsured respondents say they've gone to an urgent care provider.
- 35% say they've gone to an emergency department (hospital).
- 26% say they've gone to a community health center.
- 22% say they've gone to a primary care provider.

Quotes:

- “The emporium of crossed fingers.”
- “Haven’t been sick enough to need professional attention in the last year.”
- “Been lucky so far.”
- “Nowhere. Can’t afford it.”
"I have hearing health needs that are not covered."

"Arthritis in my hands make it difficult to drum."

"I've never had substance use issues but dealing with depression is an ongoing challenge."

"I struggle with maintaining a healthy quality of life vs working long days that don’t fit into the 9 to 5 model."

"Covid has caused a lot of mental and financial struggles."

### Health and Wellness Concerns

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental Health or Substance Use</td>
<td>35%</td>
</tr>
<tr>
<td>Physical Health</td>
<td>29%</td>
</tr>
<tr>
<td>Uncovered Dental or Vision Needs</td>
<td>29%</td>
</tr>
<tr>
<td>Intellectual, Development Disability</td>
<td>3%</td>
</tr>
</tbody>
</table>
Expenses Currently Struggling to Afford

- Rent, Mortg: 38%
- Dental, Vision Ins: 28%
- Health Care: 21%
- Health Ins: 21%
- Nutritious Food: 17%
- Transpo: 16%
- Rx drugs: 12%
- Child, Elder Care: 7%

“When tried to get a loan to buy a house but was not eligible.”

“Rent is going up & that’s stressful.”

“With rare exception, it’s been a decades long grind in Austin.”

“I keep a day job to avoid financial struggles.”

“No, but barely making any extra money.”
“PPP and SBA loans.”

“I got those couple of checks from the national government, and I got checks from the city of Austin for being a musician in need. Thanks Austin!”

“Living expense assistance from HOMEAustinOrg.”

“Retail businesses were excluded from qualifying for CoA - only venues, bars and restaurants. A big oversight.”

“Austin’s musician relief grant.”

“Rental assistance.”
COVID Relief was First-Ever Government Support, as a Music Professional

Reflects how rarely music people have been able to access the social safety net.
HOUSING SECTION

The Following Section Includes
All Respondents
Current Housing

- 60% Renters
- 47% Homeowners
- 3% My housing is stable but I don't help pay
- 1% No permanent or stable housing

- "Living with my parents."
- "Rent is going up and I keep getting pushed farther out of Austin."
- "I'm squatting the end of a friend's lease, till I find a place or go."
- "I was able to purchase a small "affordable" studio condo through a city program. However, the mortgage, HOA and other bills are more than 50% of my income."
- "I'm in an affordable housing unit."
- "I am near the poverty line and have to rely on a family member for rent."
- "I live in a travel trailer."
- "This city is too expensive for me."
Housing Comparison (2014 to 2022)

Ownership is slightly up.
Changes in Housing Over Past Two Years

- 44% of respondents reported their housing costs have gone up.
- 33% reported no changes in housing costs.
- 17% have moved once locally.
- 15% reported housing costs caused their move.
- 14% moved more than one local move.
- 8% moved here from elsewhere.

Quotes:
- “Now it is too expensive to live in Bastrop.”
- “Property Taxes + Electricity.”
- “I can’t afford to move!”
- “I work and play music in Austin but can’t afford to live there.”
- “TAXES.”
- “Housing is the main issue.”
- “Rent went up $200 per month.”
- “I moved to Austin last June and in 1 year my rent went up over 30%.”
- “I have relocated 9 times since arriving in Austin in 1999. Affordability was a major factor in most of those moves.”

Not good.
DIVERSITY, EQUITY, INCLUSION

The Following Section Includes
All Respondents
Diversity, Equity and Inclusion Adjective Pairs

- Hostile / Friendly
- Homogenous / Diverse
- Disrespectful / Respectful
- Homophobic / Non-Homophobic
- Racist / Inclusive
- Sexist / Non-Sexist
- Ageist / Non-Ageist
- Elitist / Non-Elitist
- Competitive / Cooperative
- Uncomfortable / Safe
- Contentious / Collegial
- Individualistic / Collaborative
- Unsupportive / Supportive
- Unwelcoming / Welcoming
- Uncomfortable / Safe
Diversity, Equity and Inclusion – Overall Results

Diversity Equity and Inclusion Questions (2022 All Respondents)

1. Hostile / Friendly 19%

2. Homogenous / Diverse 46%

3. Racist / Inclusive 24%

4. Disrespectful / Respectful 29%

5. Competitive / Cooperative 51%

6. Contentious / Collegial 32%

7. Sexist / Non-Sexist 54%

8. Individualistic / Collaborative 40%

9. Homophobic / Non-Homophobic 16%

10. Unsupportive / Supportive 28%

11. Ageist / Non-Ageist 52%

12. Unwelcoming / Welcoming 27%

13. Elitist / Non-Elitist 59%

14. Uncomfortable / Safe 25%

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DEI: Example of sub-sectors* that vary significantly from Overall

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>Very Elitist</th>
<th>Somewhat Elitist</th>
<th>Somewhat Non-Elitist</th>
<th>Very Non-Elitist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>59%</td>
<td></td>
<td></td>
<td>21%</td>
</tr>
<tr>
<td>Venues / Presenters</td>
<td>52%</td>
<td></td>
<td></td>
<td>35%</td>
</tr>
<tr>
<td>65+ Years</td>
<td>31%</td>
<td></td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>6-10 Years Experience</td>
<td>76%</td>
<td></td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>BIPOC</td>
<td>70%</td>
<td></td>
<td></td>
<td>13%</td>
</tr>
<tr>
<td>No Health Insurance</td>
<td>76%</td>
<td></td>
<td></td>
<td>9%</td>
</tr>
</tbody>
</table>

* Sub-sectors not included differed less than 10% from Overall score
DEI: Example of sub-sectors* that vary significantly from Overall

"Is the Austin Music Scene SEXIST or NON-SEXIST?"

- **Overall**: 54% Very Sexist, 24% Somewhat Sexist, 31% Somewhat Non-Sexist, 14% Very Non-Sexist
- **Creatives**: 37% Very Sexist, 40% Somewhat Sexist, 13% Somewhat Non-Sexist, 11% Very Non-Sexist
- **Venues / Presenters**: 23% Very Sexist, 60% Somewhat Sexist, 14% Somewhat Non-Sexist, 11% Very Non-Sexist
- **Industry**: 38% Very Sexist, 60% Somewhat Sexist, 14% Somewhat Non-Sexist, 11% Very Non-Sexist
- **Male**: 43% Very Sexist, 31% Somewhat Sexist, 14% Somewhat Non-Sexist, 11% Very Non-Sexist
- **Female**: 72% Very Sexist, 14% Somewhat Sexist, 14% Somewhat Non-Sexist, 11% Very Non-Sexist
- **65+ Years**: 17% Very Sexist, 46% Somewhat Sexist, 14% Somewhat Non-Sexist, 11% Very Non-Sexist
- **6-10 Years Experience**: 74% Very Sexist, 11% Somewhat Sexist, 13% Somewhat Non-Sexist, 13% Very Non-Sexist
- **Queer**: 74% Very Sexist, 11% Somewhat Sexist, 13% Somewhat Non-Sexist, 13% Very Non-Sexist
- **BIPOC**: 64% Very Sexist, 13% Somewhat Sexist, 13% Somewhat Non-Sexist, 13% Very Non-Sexist

* Sub-sectors not included differed less than 10% from Overall score
COMMENTS

The Following Section Includes
All Respondents
Sample of Comments: Role of Non-Profits

“HAAM and Simms are life savers and should be given more funding to provide more service to Austin area musicians. Countless musician friends use their services and would not have any other resources if it weren’t for them.”

“Austin Symphony and Austin Opera both employ me. Austin Creative Alliance helped to get our own nonprofit off the ground.”

“Some grants during Covid, HAAM & SIMS have been essential the past decade, radio play via KUTX & KOOP.”

“I used HAAM years ago and it was wonderful. I would be happy to pay a little more tax to make sure social lifelines are well-supported in the community.”

“Austin Music Foundation. Helped with figuring out what to focus on at the beginning.”

“None. I tried working with some of them. They are part of the problem. They all have their little crowd of worshipers they focus on and ignore if you’re not in that mix.”

“None. With as many music related nonprofits we have here, we are still a complete shit-show of a music scene, and the nonprofits are part of the problem.”

“Most non-profit organizations that I encounter are largely only concerned with raising more funds and staying afloat.”

“None.”

“DAWA has been a lifesaver.”

“Austin Jazz Society raised funds to supplement the income of unemployed Austin jazz musicians during the pandemic.”

“I am a founder of a nonprofit that provides meaningful, compensated work for local musicians so my whole life exists at the intersection of music and nonprofits. The Recording Academy Texas Chapter has been instrumental in building my community; MusiCares assisted our family during an unexpected crisis.”

“They have not, yet I have played benefits for many for free over the last few decades.”

“Very supportive, but it’s hard to get actual paying gigs.”

“Without HAAM and SIMS, I would not be alive. Much less thriving.”
Sample of Comments: Common Goal for the music scene?

“I think the Austin music scene has been pretty elitist for a long time. It used to really piss me off. Granted, certainly not everybody participates in that, and I have had the fortune to work with many wonderful people who have been very kind, encouraging, and helpful. I guess the common goal would be to foster that sense of community. I think it’s there, and Austin is a special place in that way, but it could be better, stronger.”

“Yes, several could be accomplished if we worked together. Hopefully this data will help identify opportunities without all the damn emotions attached.”

“Equality over equity. BE THE BEST! If you are NOT the best, you aren’t a victim. The Music business is hard and unfair and should be.”

“Nope, Austin music scene has become crabs in a bucket mentality.”

“I have always felt the Austin music community is the most cooperative of any music city in the US. I am grateful there is consistent messaging towards that end, especially from our music nonprofits. However, there is still much room for improvement. I would like to think there are common goals of supporting artists and musicians and eliminating racism, homophobia, and misogyny in our community.”

“Yes, there can be. We have to cut through the noise. Hopefully this initiative will help provide some clear choices to what those goals should be. Thank you for doing this.”

“Yes, if we had different leadership in the community. Current ones just drum up conflict.”

“Nope, Austin music scene has become crabs in a bucket mentality.”

“NYC and LA are considered cultural capitals of the world despite their unaffordability, but they show it is possible for music scenes to thrive in those environments. We can’t look back to the way things were, we need to adopt a big city music culture.”

“Yes, if we had different leadership in the community. Current ones just drum up conflict.”

“When you have to work 24/7 to pay rent, gigs and recording music get pushed to the back burner.”

“Live music venues need the city’s protection and support.”
Sample of Comments: “What question do you wish we’d asked?”

"What genre of music do I compose and promote? So often, the Austin music scene doesn't include enough "art music," also called "classical" or "serious" music. The Austin Symphony and the "pop music" communities don't often mingle."

"Where do the City's regulations and ACE's involvement aid or hinder the overall event planning process?"

"Are you getting support from local media and radio??"

"What is the city doing to support music ecosystem. They are doing NOTHING. A busking program is not helping anyone."

"What is your single biggest concern about the state of the Austin music ecosystem? Answer: the utter decimation of the professional songwriting community that has happened here in the last five or so years."

"How can we make Austin the Live Music Capital of the World instead of the Free Music Capital of the World?"

"Would you be interested in advocating for the music industry in Austin?"

"I wish y'all would have asked how much of income goes towards rent so y'all could gauge just how dire the situation has become."

"I'm glad you did not ask about income. We've been in a pandemic for 2 1/2 years."

"The amount of cynicism rolling around. I would like to know how much that impacts the music industry, and how much of it comes from the music industry. I understand the "don't move to Austin" movement, but it seems exhausting, and I think it's harmfully ineffective."

"How is Austin preparing future musicians?"

"Why I'm involved in music? Too often, the "industry" part of "music industry" is overvalued at the expense of the artistic/emotional/psychological/spiritual side of this culture."

"What is your ideal Austin music community?"
Strategic, community-driven solutions to measure and grow your music ecosystem.

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