

2015

Musicians' Association of Seattle,
Local 76-493, American Federation of
Musicians

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[SEATTLE'S WORKING MUSICIANS]

The Economic Impact of the Music Industry, Working Conditions of Club Musicians, and How Seattle Can Support Independent Musicians. Report prepared for the Fair Trade Music Project of the Musicians' Association of Seattle.

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EXECUTIVE SUMMARY

This study examines the overall impact of the music industry on the Seattle economy, the role of working musicians in the music industry, and the challenges and uncertainties faced by working musicians as they pursue their craft. Many cities in the past 10 years (Seattle included) have undertaken economic impact analyses to understand the role of music in broader economies. However, these studies tend to underestimate the importance of working musicians within the larger music industry. None have specifically examined the working conditions of musicians in their cities. This study combines an analysis of the broader economy of the music industry with a focus on the experiences of musicians themselves, the engines that power the larger music industry.

The music industry in Seattle is a vibrant and important part of the local economy. Using available government sources, this study estimates that 16,607 people are directly employed in the music industry in Seattle, creating a total of \$1.8 billion in direct economic output. The circulation of this economic output throughout the economy is indirectly responsible for another 14,053 jobs. Using established economic impact multipliers, this project estimates that the music industry in Seattle is responsible for more than \$4.3 billion in total economic output and supports an astonishing 30,660 jobs. If the Seattle music industry were a city, it would have a GDP larger than the Mt. Vernon/Anacortes metropolitan area.

Despite substantial growth in the music industry in the past 7 years, workers' incomes have remained stagnant or declined. The music industry in Seattle has continued to grow since the most recent economic impact analysis was undertaken in 2008. We have added approximately 5,452 music-related jobs, \$600 million in direct economic output, and \$1.7 billion in total economic impact, for an overall growth of about 50% in 7 years. However, the income of typical workers in the music industry has not kept pace with the overall increase. Payroll has increased only 12% in the same time period, and payroll per employee has decreased by 25%. Workers are not sharing in the music industry's growth.

Working musicians themselves frequently do not benefit from the economic output they produce for the region. Our survey of 124 working musicians found that although many earn a large percentage of their income directly from their work in music, they are subject to mistreatment in their working lives, uncertainty about the kinds of work agreements they make, and overall poor compensation. A typical working musician earns more than half of their income through music, but earns only about \$15,000 per year in music-related income.

The size and impact of the music industry in the city are indicative of an industry that is strong, growing, and vital to the continued economic success of the region. **Working musicians are the engines that power the broader industry.** Without a strong support system for working musicians and protection for a musician's rights on the job, a vital and vibrant Seattle music industry will falter.

INTRODUCTION

Working musicians are the heart and soul of a vibrant and growing Seattle music industry, but previous attempts to understand the extent of the economic impact of the music industry have not taken the working conditions and experiences of musicians into account. This report remedies this and investigates the working conditions and experiences of these musicians. The purpose of the report is three-fold. First, by updating an earlier economic impact study on Seattle's music industry, we demonstrate that the Seattle music industry continues to grow and remains an important contributor to larger regional economic prosperity. Second, by investigating the current working conditions of musicians in Seattle, we demonstrate that working musicians are not sharing in the economic growth produced by the larger industry and face considerable mistreatment on the job. Third, we suggest three common sense policy reforms that would improve the working conditions of local musicians and help ensure that the Seattle music industry remains a regional economic driver in the coming years.

In the first section, the report uses traditional government data sources to define the scope of the music industry and estimate the number of people employed in music in Seattle. It continues by analyzing the extent of the economic relationships that are produced as a result of their commitment to their craft, using economic impact analysis methods to estimate the overall effect of music industry employment on the regional economy. Overall, we estimate that 16,607 people are directly employed in the music industry in Seattle, creating a total of \$1.8 billion in direct economic output. The circulation of this economic output throughout the economy is indirectly responsible for another 14,053 jobs. Using established economic impact multipliers, this project estimates that the music industry in Seattle is responsible for more than \$4.3 billion in total economic output and supports an astonishing 30,660 jobs.

Because traditional government data sources are insufficient for understanding the economic conditions, we augment these findings with interview data from our survey of working musicians. Our survey of 124 working musicians found that although many earn a large percentage of their income directly from their work in music, they are subject to mistreatment in their working lives, uncertainty about the kinds of work agreements they make, and overall poor compensation. A typical working musician earns more than half of their income through music, but earns only about \$15,000 per year in music-related income.

The report concludes with three policy prescriptions to help protect the working musicians who contribute so much to the regional economy. We call on policymakers to reform the admissions tax, curtail the use of blackout day clauses, and encourage the use of written agreements in the music industry. These common sense reforms would help protect musicians from the abuse that is common in the industry.

MUSIC INDUSTRY BUSINESSES AND EMPLOYMENTⁱ

The scope and breadth of the music industry is expansive. It ranges from firms that are obviously intimately connected to the production of music (such as the bands that comprise the “Seattle Sound”) to those that are less apparent but still integral to the production of music (such as stereo installation contractors). As others have discussed, the diversity of the industry makes it difficult to neatly define.ⁱⁱ In this section, the extent of Seattle’s music industry is explored and the following questions answered:

- 1) What businesses are involved in Seattle’s music industry?
- 2) How many people are directly employed in Seattle’s music industry?
- 3) How many people work independently in Seattle’s music industry?

Using official industrial classifications such as the North American Industry Classification System (NAICS) and traditional government data sources such as the County Business Patterns Survey, this study has compiled a comprehensive count of businesses and employees that comprise the music industry in Seattle.

What kinds of businesses are in the music industry?

Musicians practice their art in a wide-ranging community that produces numerous economic relationships. The production, distribution, and consumption of music require wide range of occupations and business types. In order for musicians to practice their art, they use various ‘tools of the trade’ – everything from instruments to amplifiers to sheet music – which all require manufacture, wholesale, retail, repair, and installation. In order to distribute their work, musicians work with live music venues, record labels and producers, promoters and agents, and radio broadcasters. Consumers of music require distinct equipment such as live audio equipment, personal electronics, and car stereos, which also require manufacture, retail, repair, and installation. In this complex web of economic relationships, working musicians are at the center: musicians themselves drive the auxiliary industries that support the creation and distribution of music. For a comprehensive list of the types of businesses that are involved in the music industry, see Appendix Table 1.

What are the relationships between music industry businesses?

Figure 1, below, illustrates the flow of industrial relationships comprising the music industry. Using this diagram, it is possible to trace the way that music flows from musicians to music consumers, whether it travels via live performance, physical recordings, broadcast, or streaming services. The goods, materials, and services necessary for music to be produced and consumed are represented in green. This study analyzed each of these streams in turn to determine the total number of firms and employees involved in the music industry in Seattle.

From Tips to Tunes: How Musicians Stimulate the Economy

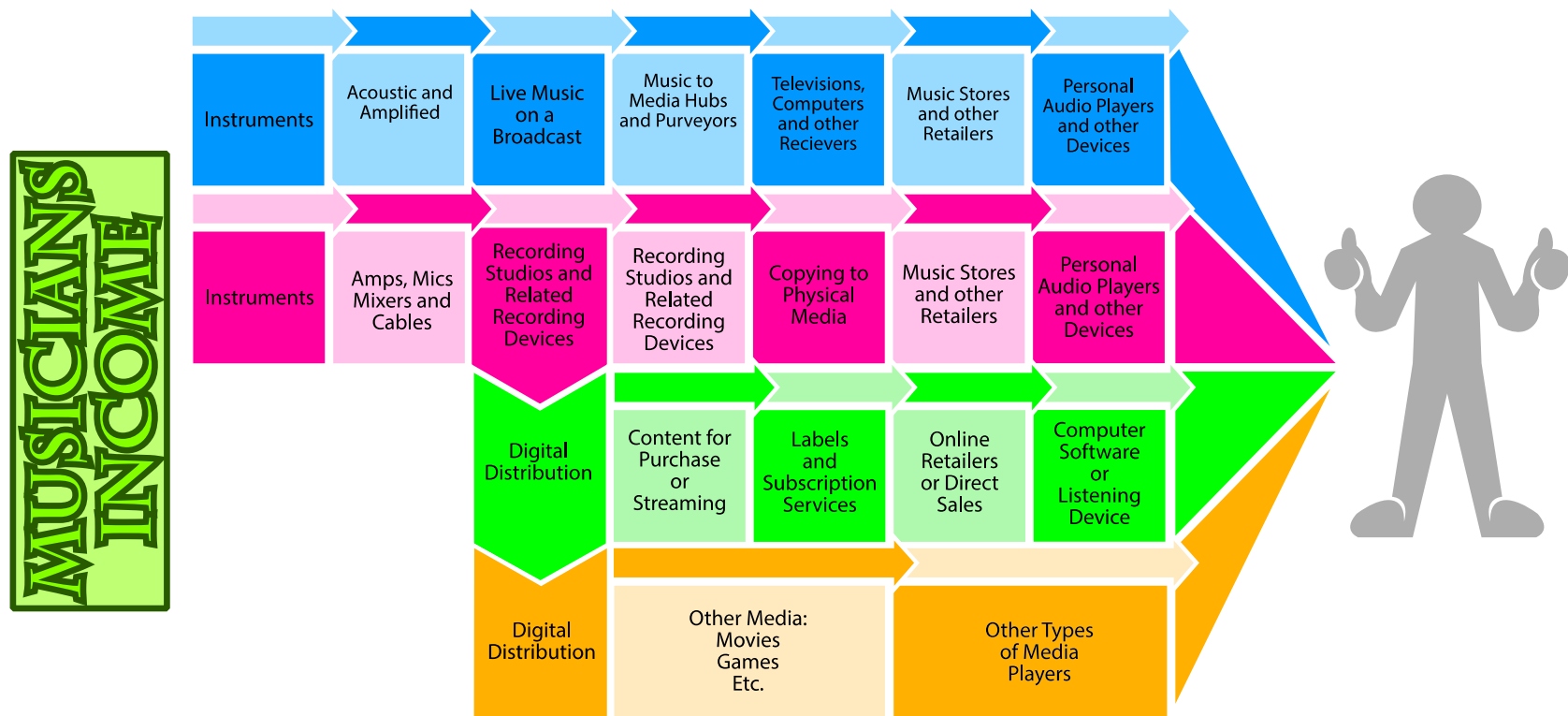


Figure 1: Music Revenue Streams, by Nate Omdal

How many people work in the music industry in Seattle?

In the Seattle Metropolitan Statistical Area (MSA), the music industry directly employs 14,303 people. Another 2,304 independent contractors throughout King County are engaged primarily in music industry work. The local music industry supports a total of approximately 16,607 jobs. These jobs are distributed widely across the types of businesses that comprise the music industry, but are concentrated in the information, arts & entertainment, accommodation & food service, and education industries.

These employment figures were estimated using available government datasets from 2012, including the Census County Business Patterns Survey (CBP) and the Non-Employer Statistics Dataset (NES).ⁱⁱⁱ The unique breadth and informality of the music industry causes methodological problems for estimating music employment. For instance, the music industry is in fact comprised of many firms spread throughout other industrial classifications, which necessitates a series of decisions and estimates to produce a final figure. Self-employed musicians are notoriously difficult to count because of the informal nature of their compensation and certain minimum requirements for inclusion in available government data sources. Because of these methodological challenges, the figures below almost certainly represent an undercount of actual working musicians, especially those who are engaged in more casual employment. For more information about how these employment estimates were produced, please see Appendix A: Methodology for Determining Music Industry Employment. The chart below indicates that self-employed workers are spread over multiple categories, while formal employees are distributed more precisely. This is a result of the particular aggregation of the NES across multiple NAICS codes. For information on the method for estimating this distribution, see Appendix A, Continued: Methodology for Counting Independent Contractors.

Table 1: Employment in the Music Industry, by Business Type^{iv}

Business Type	Formal Employees	Self-Employed
Installation (Includes Sound Equipment Installation)	218	6
Photographic & Equipment Manufacturing	-	1
Audio & Video Equipment Manufacturing	-	
Other Electronic Component Manufacturing	-	9
Pre-Recorded Compact Disc, Tape, Record Manufacturing	-	
Manufacturing (Includes Mass Reproducing Tapes & CDs)	-	
Musical Instrument Manufacturing	171	59
Miscellaneous Manufacturing	14	
Household Appliances & Consumer Electronics Wholesalers	65	
Other Electronic Parts & Equipment Wholesalers	116	2
Wholesaling (Includes Musical Instruments & Recording)	104	50
Wholesaling (Includes Sheet Music)	1	-

Business Type	Formal Employees	Self-Employed
Automotive Parts & Accessories Stores	309	5
Retailing (Includes Music Stores)	2,668	86
Musical Instruments & Supplies Retail Stores	554	30
Used Retailing (Includes Used CD/Record Stores)	33	2
Internet Retailing (Audio & Video Content Downloading)	20	2
Used Household & Office Goods Moving	78	2
Video Production (Includes Music Videos)	585	
Video Post-Production (Includes Sound Dubbing)	77	259
Other Motion Picture & Video Industries	8	
Record Production	-	
Integrated Record Production/Distribution	-	
Music Publishing	-	244
Sound Recording Studios	-	
Other Sound Recording Industries	229	
Radio Networks	-	
Radio Stations	978	122
Data Processing, Hosting, & Related Services	166	6
Lessors Of Nonresidential Buildings	2	3
Equipment Rental (Includes Instruments)	133	8
Equipment Rental (Includes Sound Equipment)	89	4
Other Scientific & Technical Consulting Services	6	12
Media Representatives	-	43
All Other Travel Arrangement & Reservation Services	-	8
All Other Support Services	9	1
Colleges, Universities, & Professional Schools	280	
Art, Drama, & Music Schools	1,073	108
Theater Companies	204	
Dance Companies	-	
Musical Groups & Artists	675	474
Circuses	-	
Festival (With Facilities) Promoters	811	
Festival (Without Facilities) Promoters	-	158
Agents & Managers For Artists, Athletes, Entertainers	-	5
Independent Artists, Writers, & Performers	20	370
All Other Amusement & Recreation Industries	383	19
Drinking Places	4,177	38
Consumer Electronics Repair & Maintenance	-	105
Repair Shops (Includes Musical Instruments)	45	62
Total	14,303	2,304

Putting music industry employment in perspective

The number of workers supported directly by the music industry is a surprisingly large portion of the Seattle workforce. About 1 of every 100 workers in Seattle does a job directly related to the music industry. The music industry employs more people than agriculture, forestry and fishing, utilities, and mining and oil and gas extraction industries combined. In 2013, there were 1,557,607 workers in the Seattle labor force, of whom 77,896 were unemployed.^v If the music industry in the city were to collapse, and all 16,607 workers lost their jobs, the unemployment rate would increase more than 1 percentage point, going from 5.0% to 6.1%.

MUSIC INDUSTRY ECONOMIC IMPACT

Direct employment is only one measure of the impact of the music industry. In addition to employing 16,607 people, the music industry creates economic output through sales, purchases, and other economic relationships. This output circulates throughout the economy to produce growth.

State economists have developed standardized multipliers to estimate the ripple effects of marginal increases to employment and economic output on the larger economy.^{vi} These “input-output (I-O) models” estimate the indirect and induced impacts of economic output, such as that produced by music industry employment. Indirect impacts result from the recirculation of resources within the business community, and induced impacts result from the re-spending of income by the household sector. This study utilizes an inflation-adjusted version of the 2007 input-output model produced by Washington State economists to estimate the effects of music industry employment throughout the broader economy.^{vii} The employment figures discussed above were used as the basis for calculating these economic impacts.

Direct, indirect, and induced impacts of Seattle’s music industry

According to these economic models, the music industry in Seattle directly supports 16,607 jobs, which support a direct economic output of \$1.8 billion. When indirect and induced effects are considered, the music industry is responsible for a total of 30,660 jobs, \$1.4 billion in labor income, and a total of \$4.3 billion in economic output. To review the direct economic impact of music employment by industry, see Appendix Table 2.

The total impact on the economy is remarkable. If the Seattle music industry were a city, it would have a larger economy than Missoula, Montana (\$4.1 billion

GDP), Mt. Vernon/Anacortes, Washington (\$4.1 billion GDP), Ocean City, New Jersey (\$3.7 billion GDP), Prescott, Arizona (\$3.7 billion GDP), Yuma, Arizona (\$4.2 billion GDP), and Pueblo, Colorado (\$3.7 billion GDP). It would be twice the size of Walla Walla, Washington (\$2.0 billion GDP), and just a hair smaller than Redding, California (\$4.3 billion GDP).^{viii}

What does \$1 dropped in a busker's guitar case mean for the local economy?

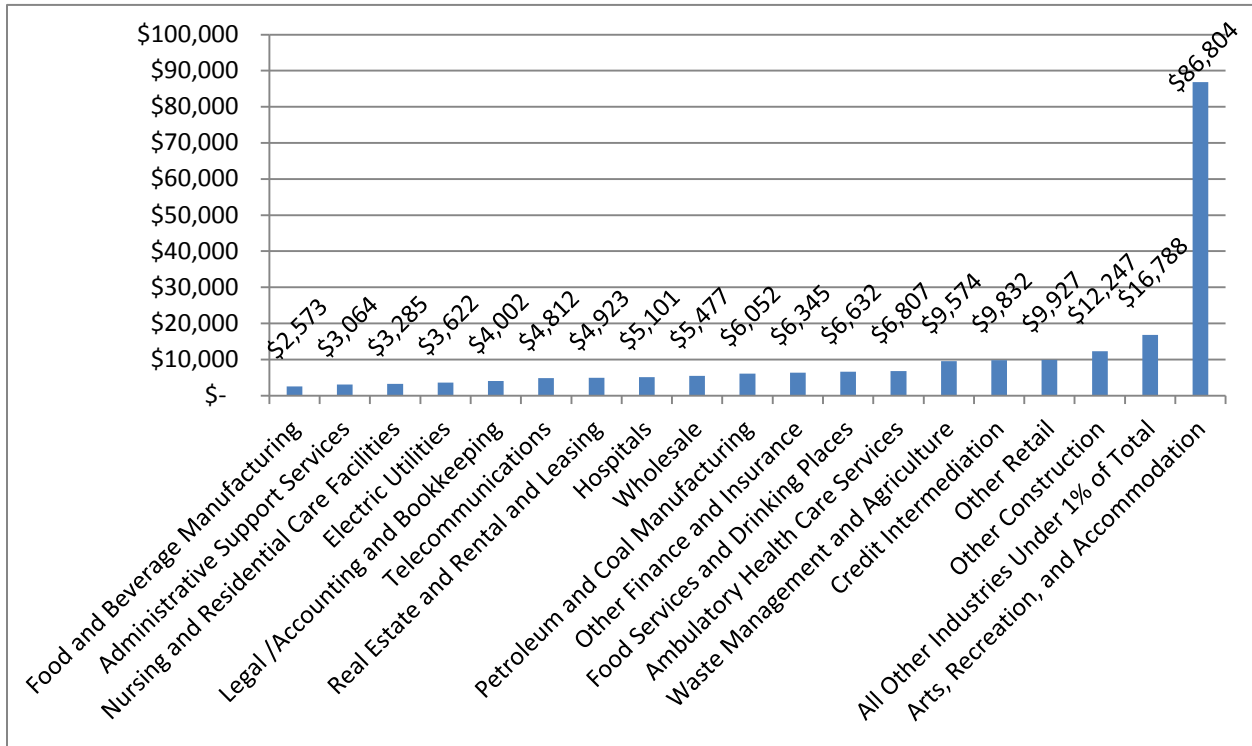
By supporting musicians, consumers and policymakers support economic activity across multiple dimensions. Imagine, for instance, that you walk by a group busking on a Saturday morning near the Pike Place Market. Inspired by the music, you drop \$1 into their guitar case. What does this dollar do?

First, that dollar supports the artists. They are able to put food on their table and pay their rent. They go out for dinner, or listen to music in a local bar. They buy necessities like toiletries and clothes. According to the input-output model produced by the State of Washington, one job in the arts and recreation industry produces \$66,838 in labor income as a result of the circulation of the money throughout the economy, eventually supporting 1.7 jobs in total.^{ix}

The dollar also filters throughout the music industry itself. Just one job in the Arts & Recreation industry creates nearly \$87,000 in economic output in that industry, of which approximately \$80,000 is a direct result of that employment. (The remaining \$7,000 is a result of indirect output and output that was induced by that initial employment). The artist might buy guitar strings or send a guitar in for repair, supporting a music shop's retail or repair employees. The materials needed to perform on the street must be sourced, manufactured, and sold: supporting a single busking job would ultimately produce about \$5,500 in economic output for music-related wholesale merchants and \$10,000 for music-related retail stores.

The dollar doesn't stop there. It also circulates through non-music support industries, rippling through industries as varied as air transportation and architectural, technical, and computing services. Your support for a busker will produce economic activity in telecommunications, utilities, real estate leasing, hospitals, and administrative support services. All told, supporting a single busker creates just under \$208,000 in total economic output.

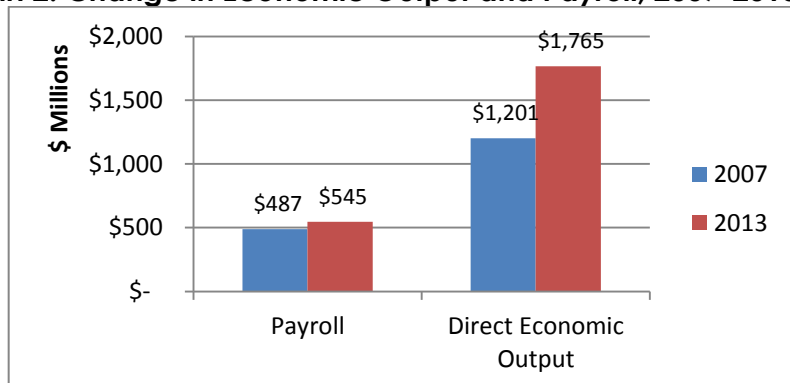
Chart 1: Economic Output from One Busking Job



THE GROWING MUSIC INDUSTRY: WORKERS ARE NOT SHARING THE GROWTH

The music industry in Seattle has grown rapidly since the most recent economic impact analysis was undertaken in 2008.^x We have added approximately 5,452 music-related jobs, \$600 million in direct economic output, and \$1.7 billion in total economic impact. The music industry has increased by about 50% since the last study was undertaken. However, the income of typical workers in the music industry has not kept pace with the overall increase: payroll has increased only 12% in the same time period.^{xi} Workers are not sharing in the larger industry's growth.

Chart 2: Change in Economic Output and Payroll, 2007-2013



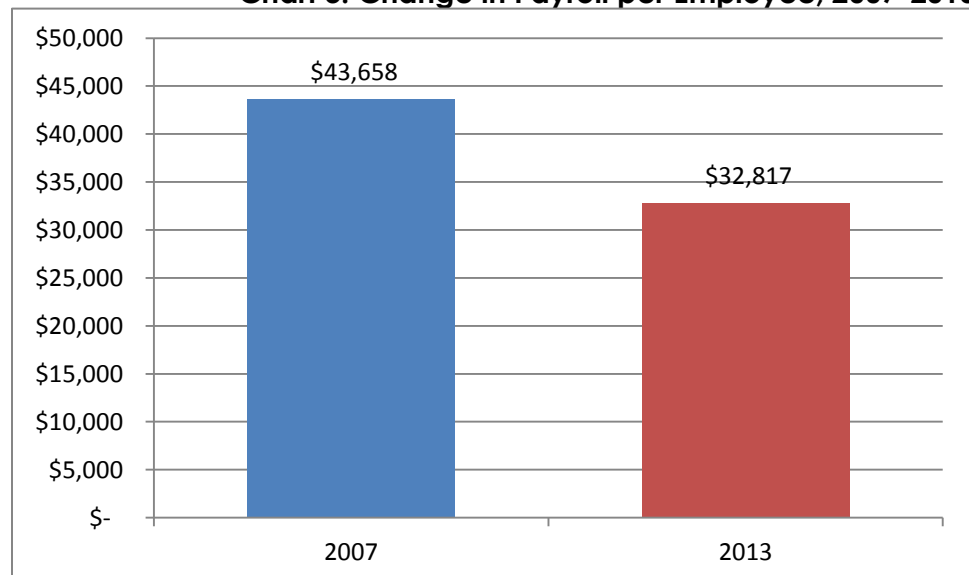
Although the total payroll of the music industry in Seattle in 2013 has increased by about 12% and now exceeds \$545 million, workers themselves have not experienced increases to their per capita income. Per employee, payroll in the Seattle music industry is approximately \$32,872 annually. This is about half as much as the median income of Seattle, which was \$65,677 in 2012.^{xii} Formal employees earn slightly more (\$33,122) than their self-employed counterparts (\$31,325). Self-employed music industry workers also pay employer as well as employee payroll taxes, which further decreases their average pay relative to formal workers. For a detailed account of payroll and receipts by business type, see Appendix Table 4; for a detailed account of the receipts of independent contractors, see Appendix Table 5.

Table 2: Annual Payroll and Per-Worker Payroll

	Annual Payroll (\$s)	Average Annual Pay Per Worker (\$s)
Formal Employees	473,695,051	33,122
Self-Employed	72,176,377	31,325
Total	545,871,428	32,872

This per capita payroll expenditure has decreased dramatically since 2007. In 2007, music industry businesses spent approximately \$43,658 per employee on payroll. Even though the music industry sales increased dramatically from 2007 to 2013, spending per employee dropped dramatically. In 2013, businesses spent an average of \$32,817 in payroll per employee. This is a 24.8% decrease in payroll spending per employee.

Chart 3: Change in Payroll per Employee, 2007-2013



Though there has been substantial growth in economic output in the music industry since 2007, workers are receiving a declining share of that output. Although economic growth in the industry has continued, there are limits to the amount of growth possible without concurrent growth in income to workers, since workers themselves drive much of the indirect and induced impact of economic output. In the sections that follow, the experiences of working musicians themselves are documented and analyzed, shedding light on the current working conditions in the music industry.

SURVEY OF WORKING MUSICIANS: THE ENGINES OF THE MUSIC INDUSTRY

While the figures above track the employment of workers in music-related industries, such as stereo installation and festival promotion, government data sources are inadequate for understanding the day-to-day employment situation of most working musicians. Most working musicians are neither directly employed by an establishment that would report to the federal government nor are they likely to meet criteria for inclusion in self-employment data sources collected and maintained by the federal government. Moreover, often the only work offered to musicians is informal or “under-the-table.”

To understand the scope of musician employment and compensation, we conducted a survey of working musicians. We surveyed 124 musicians about their sources of paid employment, the forms of compensation to which they have access, and the issues they face as a working musician in Seattle. For more information about the survey methodology and topline questions, please see Appendix C: Survey Methodology. We found that, perhaps contrary to popular opinion, it is possible to make a living as a working musician in Seattle, although for most it remains difficult to bring in income commensurate with the value which they provide to the community. Most working musicians make a majority of their income through music-related work. We also found, however, that musicians face irregular employment and financial mistreatment in their work, and they are frequently inadequately compensated for their work as musicians.

The original gig economy: What jobs do working musicians do in Seattle?

An individual musician in Seattle is likely to earn their music-related income through multiple sources, typically classified as an independent contractor or a self-employed worker and earning money through tips or a share of receipts taken at the door to a club.^{xiii} Musicians earn income by working jobs across the spectrum of the wide-ranging music industry, from giving live performances to offering music education.

Many scholars and policymakers have turned their attention to the so-called “gig economy” in recent years, as the increasing prevalence of classifying

employees as independent contractors has disrupted certain traditional employment relationships in industries such as trucking, taxis, and education. Musician employment has traditionally been through gigs, making them the original members of the gig economy. In the recent past, however, musicians often were considered employees of clubs, allowing them to collectively bargain contracts to guarantee minimum standards. Increasingly, however, musicians have been treated as independent contractors, or as employees of their bandleaders rather than of the clubs in which they perform. This prevents them from being able to collectively bargain contracts that protect minimum standards. As a result, musicians have faced increasing precarity in employment as they negotiate the terms of the many gigs they seek out in order to make a living.

Musicians find gigs in many different types of venues doing many different forms of music-related work. Table 3 details the types of gigs that are common among musicians in our survey. Among these many venues, however, certain sources of music-related work are more common and more central to music work. Musicians in Seattle are most likely to find work performing in clubs, restaurants, and bars: 83% of our survey respondents reported that they had earned money through these venues in the last year. Performances at other venues – such as private events or church services – are slightly less common (about one quarter to one half of survey respondents reported these forms of income) but still prevalent. Many report that playing gigs at weddings are particularly lucrative and an important supplement to more regular club music gigs.

Table 3: Common Sources of Income for Musicians in Seattle? ^{xiv}

Sources of Income	Number of Respondents	Percentage of Respondents
Gigs - at music clubs, restaurants, bars	103	84.0%
Gigs - at weddings and/or other casual events	67	54.0%
Education - private lessons	60	48.3%
Recording - in-studio performance	60	48.3%
Festivals	56	45.1%
Concerts - orchestra, theatre, etc.	35	28.2%
Royalties/ASCAP/BMI	35	28.2%
Gigs - at Churches	31	25.0%
Composing/Arranging music	28	22.6%
Education - institutions	25	20.1%
Recording - post production	24	19.3%
Busking	21	16.9%
Music promotion, talent agent, booking agent	14	11.2%
Radio	6	4.8%
Music shops - retail	5	4.0%
Instrument Repair	5	4.0%
Music librarian	1	<1%

WILLIAM CHARNEY GUITARIST

“It's not easy being a club musician in Seattle, no matter what genre or type of music you play. We are the working-stiff musicians. We are the ones exploited by club owners and promoters who want a great show, but who don't want to pay the piper.

We routinely play three or four-hour gigs and only get paid what the club makes from the admission of patrons at the door, or even less sometimes. The current way we are paid for our work makes our lives and our careers unsustainable. To us, one show means hours of preparation time, rehearsal time, equipment purchase or rental, travel time back and forth from the gig, parking, demo taping and much more. We get exploited for the love of the music.”

In addition to live performances, musicians earn income through education, recording, and other music-related industry work. About half of the respondents offered private music lessons in addition to performing. Musicians in Seattle –again, nearly half of our survey respondents – also frequently work in recording, doing both in-studio performance and post-production work. About 28% earn money through composition or through royalties, though the amount of money earned through these forms of compensation is small, averaging about \$2,100 per year. Other related gigs, such as music-related retail jobs, radio, and instrument repair, are much less common among self-defined working musicians.

Live performances are the most important component of most working musicians' income streams. From clubs, to weddings, to festivals, musicians reported spending more time performing than on activities like giving lessons and doing studio work. Working conditions at clubs, restaurants, and bars are therefore central to the health of the music industry.

How do musicians earn a living?

According to our survey, a typical working musician relies heavily on music-related employment for income, but earns barely more than a poverty-level wage. As one respondent to our survey noted, there is a false “perception that music is a hobby, and we're lucky when we make money.” Our survey showed that this perception is misleading. Musicians work hard at their craft, earn a majority of their income through music-related employment, and yet continuously struggle to turn their art into a paycheck. We learned through our survey that musicians are not hobbyists: they rely on their music-related income streams for a majority of their living. We also learned, however, that musicians struggle with poverty-level compensation in their music-related employment.

The median music-related income for working musicians in our survey was \$15,000 per year, which falls below the federal poverty guideline for a family of two. Even the highest paid musicians make substantially less money than the Seattle median income, which was \$65,677 in 2012. The range of income possible in musician work, however, was very large: the lowest paid musician earned

about \$200 from music work, while the highest paid musician reported \$150,000 in music-related income.

Table 4:
Music-Related Annual Income

Percentile	Income
25 th Percentile	\$2,000
50 th Percentile	\$15,000
75 th Percentile	\$31,500
90 th Percentile	\$45,000

Musicians reported earning a substantial portion of their total income from music-related employment. Only 29.3% of respondents reported earning less than 10% of their income from music-related sources, while 34.9% reported earning more than 90% of their income through music. Approximately half of musicians reported earning more than 60% of their income from their work in the music industry. Based on these results, we conclude that a typical working musician earns most of their income through music-related employment, but earns a poverty-level wage in that employment.

Working conditions in club gigs, weddings, and other performances

Musicians earn a substantial portion of their annual income in live performances, mostly in clubs, restaurants, and bars. Working conditions in clubs and restaurants vary widely, however, and musicians are frequently subject to uncertainty, risk, and outright mistreatment as they seek out and negotiate performance gigs.

Variable forms of compensation

We found that musicians rely on a wide variety of compensation schemes for their paid work in performance. A large majority (76.4%) report earning a per-gig fee, which musicians tend to prefer. Other regular forms of compensation were less common: 39% reported being paid per-hour and 13% per week/season (a payment structure common among established symphony orchestra musicians). Variable compensations structures were extremely common in the industry. Many musicians are paid a percentage of the door receipts (35.7%), and some are only offered food or drink stipends (16.2%). Another 40.6% of respondents at least occasionally play for tips.^{xv}

These variable compensation schemes make it difficult for musicians to rely on consistent income from their music employment. The variety in take-home pay from door receipts after a club gig was extreme: the most common amount bands took home from the door was between 75-90%. However, a few reported receiving as little as 3% of the door. As respondent put it – “50 people show up at \$5 per ticket. We typically see about \$15 of that.” When bands are compensated as a percentage of a restaurant's food or drink sales, these percentages are much lower, averaging about 10%.

Different types of gigs offer varying rates. For example, a typical club music gig paid between \$10 and \$50 per hour, while a typical wedding gig paid more

than \$75 per hour. On the low end of the spectrum, 28% of musicians reported earning less than \$10/hour for a club gig. On the high end of the spectrum, 27% of respondents stated that they earned more than \$100 per hour for a typical wedding gig. The average busker earned a wage comparable to a club musician, while church gigs tended to pay somewhere between a club gig and a wedding gig.

Expenses and uncompensated time

As independent working musicians, musicians are responsible for a wide range of expenses and uncompensated administrative activities. Many musicians in our survey discussed the high expenses associated with being a working musician, noting that they are responsible for purchasing and maintaining their equipment, rehearsal space, and independent promotion activities. One respondent even noted that the past year had resulted in a net loss of \$7,500 in music-related income because of high expenses.

When working a club gig, musicians are frequently charged for additional expenses associated with the performance, such as stage audio equipment, ticket-taker positions, and event promotion. At times, these expenses are deducted without prior agreement: 31.4% of survey respondents reported that venues deducted expenses from their pay without discussing the deductions in advance. Another 19.4% reported that city-levied admissions tax was deducted from their share of the door.

While hourly fees for a gig may be on par with hourly wages in the city, it is important to remember that the hours spent playing represent only a fraction of the work that goes into the gig. The hourly rate for these gigs does not include travel time, rehearsal time, or time associated with other administrative or creative tasks needed for live performance. In addition, musician expenses are relatively high

KENNY DARLING

GUITARIST

After band and venue expenses are taken out of the share that we as musicians earn for a performance, there's not a lot left. As a rock band in the city, we have to rent rehearsal space in order to practice and avoid running afoul of noise restrictions. Earning that back every month is a constant struggle. When we do book a gig, the venue owners want us to load in our equipment several hours before we play – after we've loaded in our equipment, we obviously can't use it to do other work, and we're stuck in place. But they never pay us for that time.

JOSH RAWLINGS

KEYBOARDIST

Festivals pay so little, and they claim that you'll make up the lost income because of exposure and merchandise sales. Then they turn around and limit the amount you can play before and after the festival. In reality, we would rather be able to get exposure by taking advantage of more opportunities to play.

The argument for blackout dates is that by limiting an artist's performance dates, you increase demand for that performance. But for small or mid-level bands, playing other gigs probably doesn't have a huge impact on the festival.

compared with other professions. In addition to buying and maintaining musical equipment, bands often must rent practice space and produce their own promotional materials in order to book gigs.

Mistreatment in the music industry

In our survey of working musicians in Seattle, we found that certain forms of mistreatment were very common in the music industry. For instance, 65.7% of respondents reported receiving less for a job than previously agreed, and 44.4% were paid for fewer hours than they had worked. Unclear agreements and broken agreements were common in the industry. Musicians reported that various deductions – such as deductions for admissions tax (19.4%) or other services (31.4%) – were taken out of their portion of the revenue without prior agreement, and more than 68% of respondents had seen a job cancelled at the last minute, leaving them without time to make other arrangements for work.

These difficulties suggest that as independent contractors, working musicians are subject to uncertainty in their employment and unwanted variability in working conditions.

Table 5: Challenges Identified by Working Musicians

	Number of Respondents	Percentage of Respondents
I was paid less for a job than previously agreed	71	65.7%
I was paid for fewer hours than I actually worked	48	44.4%
I was not provided with receipts showing amount collected at the door	66	61.1%
A job was cancelled last minute	74	68.5%
Admissions tax was deducted from my share of the door	21	19.4%
The venue took deductions from my payment without prior agreement	34	31.4%

Blackout days and difficulties negotiating individual contracts

Musicians are also subject to a variety of industry practices that increase their vulnerability and lessen the control they have over the conditions of their work. For musicians who perform in festivals, an increasing problem is the widespread practice of requiring blackout days before and after a festival appearance. These blackout dates sometimes restrict a band's local appearances for a full 4 months of the year, which is a stringent requirement for a small or midsize local band. According to Birch Pereira, leader of Theoretics, "When my band was offered \$150 to play a local festival, they asked for a blackout period for gigs within 100 miles that went from 90 days before our performance to 60 days after our performance. I had to invent a new band just to play some fun festivals! I ended up losing about \$1,500 in income to play a \$150 festival gig." These blackout date requirements and other non-compete contract clauses are hindering the ability of musicians to make a living.

SUPPORT WORKING MUSICIANS: POLICIES THAT WILL HELP MUSICIANS PROSPER

Working musicians are central engines of a large, diverse, and economically significant regional music industry. In spite of this, however, they are frequently subject to uncertainty and mistreated by the venues where they earn a majority of their income.

To support working musicians, we are calling for the following reforms.

REFORM THE ADMISSION TAX

The city of Seattle charges an admissions tax of 5% on the ticket price or cover charge that patrons pay to enter events within the city. It brings in around \$8 million annually.^{xvi} The tax was originally designed to produce revenue from large entertainment venues and attractions in order to support a local Arts Fund. Specific exemptions were enacted to exempt small music venues from collecting the tax on cover charges. If a venue puts on 3 performances a week with a minimum of 21 individual performances, and holds fewer than 1,000 seats, it is eligible to apply for an exemption from collecting the tax.

In 2013 and 2014, however, only 6 small music venues applied for and received an exemption from the admissions tax.^{xvii} Music venues that have not applied for an exemption, but that would likely be qualified for such an exemption, contribute approximately \$650,000 in admissions tax revenue annually. As our survey indicates, many small clubs deduct admissions tax from a musician's fee, meaning the tax burden tends to fall on the working musicians rather than the club or the patrons. This is contrary to the original purpose of the tax, which was designed to exempt music venues altogether.

The city of Seattle should reform the way it collects and enforces the admissions tax by doing the following:

- **Require transparency and accountability.** The City should enforce the collection of admissions tax from clubs who are not qualified for exemption. Additionally, clubs that collect admissions tax and deduct this tax from musicians' pay should be required to provide receipts outlining the number of people who attended the show and the total amount collected at the door. Without this requirement, the informal system of tax collection allows for the mistreatment of musicians.
- **Revise and simplify exemption criteria for small clubs.** City officials should consider re-writing the exemption criteria so that it includes more small clubs and mid-sized clubs that musicians rely on for regular income. These clubs are vital to the health of the music industry in the city, and they should not be burdened with extensive tax collection requirements that were originally meant for large entertainment venues. A starting place would be to decrease the number of seats that trigger a required payment from 1,000 to 500, to automatically exempt small and mid-sized clubs that employ many musicians. The number of music acts per week should be decreased from 3 to 2, and the complicated policy of determining the minimum number of musicians involved in performances should be jettisoned. In addition, the exemption application process should be simplified to decrease the paper work burden on small clubs. Making these small alterations to policy will ensure that the admissions tax is no longer a burden on small music clubs and musicians.
- **Educate small music venues about applying for exemption from the tax.** Our public records request indicated that many qualified clubs are not applying for an exemption from collecting admissions tax. The city should conduct an outreach campaign to educate these clubs about their eligibility for the exemption, and encourage them to apply.

LIMIT OR ELIMINATE BLACK-OUT DATES AND NON-COMPETE CLAUSES

The increasing prevalence of contracts that require blackout dates should be limited or eliminated for local musicians who earn their living playing live music. These contract clauses are overly burdensome. Local musicians should not be required to give up potential gigs due to non-compete clauses or blackout days that are common contract requirements among festival promoters.

PROMOTE STANDARD, WRITTEN AGREEMENTS BETWEEN MUSICIANS AND MUSIC CLUBS

Music venues and festivals should be encouraged to use standard agreements outlining the scope of work, deductions, and pay for performances, such as the agreements used by Fair Trade Music Seattle's partners. These agreements will promote clarity and accountability within the club music industry, and help ensure musicians receive fair treatment in their music work.

Written performance agreements should include performance specifics (date, time, length and number of sets), shared responsibility for promotional efforts,

transparency and accountability on income and expenses, terms for merchandising rights, agreement on an appropriate cancellation policy, and method and timing of payment. Venues should also agree to provide quality sound equipment with a competent sound tech or reach agreement with musicians to provide their own sound equipment and tech. Venues should also agree to provide written verification of ticket sales and/or income at the door or agree with musicians to be responsible for collecting receipts at the door. Finally, these agreements should include a provision to work with musicians and Fair Trade Music to resolve any disputes that arise regarding the terms of the agreement.

By advocating written agreements and accountability within the industry, musicians will be able to rely on fair treatment and standard working conditions, which will allow them to focus on their craft.

CONCLUSION

The music industry in Seattle is a large and vital part of the local economy. All told, it supports over 30,000 jobs and produces an economic output of more than \$4.3 billion. If the Seattle music industry were a city, it would have a GDP larger than the entire Mt. Vernon/Anacortes metropolitan area.

Despite the importance of the Seattle music industry to the larger economy, the engines of the music industry – working musicians – frequently do not share in the prosperity. According to our survey of working musicians, musicians earned an average of just \$21,000 for their music-related work, despite spending most of their working lives in music-related employment. Mistreatment in the club, restaurant, and bar performance scene was rampant, and musicians reported a great deal of variability in compensation schemes and rates.

A few small reforms would have a major effect on the well being of working musicians. The city of Seattle should consider reforms to the Admissions tax, limits to non-compete clauses, and encouraging the use of written agreements between musicians and clubs. These changes would increase the well being of working musicians across the city.

Appendix A: Methodology for Determining Music Industry Employment

This study took a broad view of the music industry in order to determine the overall impact of musician work on the economy. It tracked manufacture, wholesale, retail, repair, installation, video production and sound editing, music production and distribution, radio, data processing, scientific and technical consulting, promotion and support, education, live performance, festivals, and recreation in addition to tracking independent musicians themselves. This study used the 2012 County Business Patterns and the 2012 Non-Employer Statistics datasets from the U.S. Census to track the number of establishments and annual payroll of businesses and independent contractors primarily engaged in music industry activities.^{xviii}

The study defined music-related industrial classifications through a four-step process. First, we reviewed previous economic impact studies on local music industries from Chicago, Austin, Nashville, and Seattle. Second, we cross-referenced these studies to identify the industrial classifications that were used to denote music industry relation across these studies. Following the creation of this preliminary list, we held a series of discussions with local musicians about the nature of the music industry, focusing on the types of industries that were important to the smooth functioning of the industry and may have been missed in early definitional projects. Finally, we reviewed NAICS classification descriptions to capture classification changes between the 2007 and 2013 censuses and compiled the final list of music-related industry codes, outlined in Table 1, below.

Some of these classificatory codes fell entirely within the music industry, while others included businesses that were not related to the music industry. For example, NAICS code 238210 tracks electrical contractors and other wiring installation contractors. Businesses within this classification range from airport runway lighting contractors (not related to the music industry) to audio equipment installation contractors (related to the music industry). In contrast, NAICS code 339992 tracks musical instrument manufacturers, all of which are clearly related to the music industry. Additionally, it was important to include key employers of musicians, such as the Seattle Symphony and the Seattle Opera, whose employees are somewhat oddly located in either the Independent Artists, Writers & Performers (711510) category or the Theater Companies (711110) category. Since these two categories include workers who are involved in arts-related fields that do not qualify as music-related, additional estimates were necessary to identify Symphony and Opera employees. A key methodological challenge was determining how to allocate employment and payroll numbers to music-specific businesses without access to detailed information about the specific businesses themselves.

To accomplish this, this study began by distinguishing between “core” music industry employment – businesses engaged in musical instrument manufacture, radio broadcasting, and record production or distribution, for example – and peripheral music industry employment. Core music industrial classifications were present across all economic impact studies and included few if any non-music-related establishments. Core industries included radio broadcasting, record production, and musical instrument manufacturing, among others. Peripheral music industrial classifications were present in

some (but not all) previous studies and contained many non-music-related establishments. Peripheral music industry employment was allocated using percentage estimates that were developed by Beyers, Fowler, and Andreoli (2008), who used detailed, firm-specific data to establish the percentage of firms that were engaged in music-industry work in each industry. Core industries were included at 100%. The table below outlines the industries included in the study, as well as the percentage of firms that were considered music-related.

Appendix A, Table 1: Music Industry Classification – NAICS Codes Included in Study

NAICS	Detailed Description	Pct. Music-Related
238210	Electrical Contractors and Other Wiring Installation	2.0%
333316	Photographic & Photocopying Equipment Manufacturing	17.7%
334310	Audio & Video Equipment Manufacturing	34.0%
334419	Other Electronic Component Manufacturing	11.1%
334613	Pre-Recorded Compact Disc, Tape, Record Manufacturing	23.8%
334614	Manufacturing (Includes Mass Reproducing Tapes & CDs)	100.0%
339992	Musical Instrument Manufacturing	100.0%
339999	Miscellaneous Manufacturing	6.5%
423620	Household Appliances, Electric Housewares, & Consumer Electronics Wholesalers	13.6%
423690	Other Electronic Parts & Equipment Merchant Wholesalers	2.5%
423990	Wholesaling (Includes Musical Instruments, Music Recording)	12.7%
424990	Wholesaling (Includes Sheet Music)	0.1%
441310	Automotive Parts & Accessories Stores	9.4%
443142	Retailing (Includes Music Stores)	71.3%
451140	Musical Instruments & Supplies Retail Stores	100.0%
453310	Used Retailing (Includes Used CD/Record Stores)	0.9%
454111	Internet Retailing (Includes Audio & Video Content Downloading)	0.4%
484210	Used Household & Office Goods Moving	3.9%
512110	Video Production (Includes Music Videos)	69.5%
512191	Video Post-Production (Includes Sound Dubbing)	27.3%
512199	Other Motion Picture & Video Industries	84.8%
512210	Record Production	100.0%
512220	Integrated Record Production/Distribution	100.0%
512230	Music Publishing	100.0%
512240	Sound Recording Studios	100.0%
512290	Other Sound Recording Industries	100.0%
515111	Radio Networks	100.0%
515112	Radio Stations	100.0%
518210	Data Processing, Hosting, & Related Services	1.6%
531120	Lessors Of Nonresidential Buildings (Arenas, Concert Halls, &	0.1%

NAICS	Detailed Description	Pct. Music-Related
	Auditoriums)	
532299	Equipment Rental (Includes Instruments)	26.8%
532490	Equipment Rental (Includes Sound Equipment)	7.8%
541690	Other Scientific & Technical Consulting Services	0.4%
541840	Media Representatives	24.5%
541910	Marketing Research & Public Opinion Polling	0.0%
561311	Employment Placement Agencies	0.4%
561599	All Other Travel Arrangement & Reservation Services	10.4%
561990	All Other Support Services	0.4%
611310	Colleges, Universities, & Professional Schools	2.2%
611610	Art, Drama, & Music Schools	69.0%
711110	Theater Companies	10.7%
711120	Dance Companies	100.0%
711130	Musical Groups & Artists	100.0%
711190	Circuses	73.8%
711310	Festival (With Facilities) Promoters	56.2%
711320	Festival (Without Facilities) Promoters	20.0%
711410	Agents & Managers For Artists, Athletes, Entertainers	2.2%
711510	Independent Artists, Writers, & Performers	4.5%
713990	All Other Amusement & Recreation Industries	13.5%
722410	Drinking Places	87.2%
811211	Consumer Electronics Repair & Maintenance	46.8%
811490	Repair Shops (Includes Musical Instruments)	6.1%

Appendix A, Continued: Methodology for Counting Independent Contractors

Self-employed musicians and music-industry workers are a large, crucial and undercounted component of the music industry. Some estimates suggest that at least 20% of music industry workers are informal employees.^{xix} Despite the importance of informal workers to the industry, however, traditional economic impact studies about the music industry tend to undercount these workers in their analyses because existing government sources are insufficient for determining the extent of self-employment in the music industry.

This study looked to a variety of sources in order to estimate self-employment in the music industry in Seattle. In order to estimate the number of independent musicians, we analyzed the Nonemployer Statistics (NES) Dataset produced by the U.S. Census. This dataset compiles information on U.S. businesses with no paid employees or payroll each year, making it a good source of information for more established self-employed workers or independent contractors. This dataset proved crucial to estimating the total

number of independent contractors in Seattle, despite almost certainly underestimating the number of self-employed music industry workers. Because of various limitations to this dataset, we augmented our understanding of independent working musicians with our own survey of 124 working musicians in Seattle, which is explained in detail in the section titled “Working Musicians - The Engines of the Music Industry” and “Appendix C: Survey Methodology.” In this section, we describe the methods used to analyze the NES dataset and determine our estimate for the number of independent music industry workers, which was used to estimate the broader economic impact of the industry.

The NES dataset reports data on the county level for 450 NAICS codes, which is a much smaller number of classifications than the larger CBP dataset. This produced a series of methodological challenges for the study. Because the classifications are less granular than the larger CBP survey, it was more difficult to isolate music-industry work from other industrial work. This study used a series of estimates to identify music-industry independent contractors. First, using the CBP dataset, we found the ratio of employees and payroll for the music-industry-related NAICS codes to the larger categories included in the NES dataset. The NES figures were reduced based on those ratios. Then, we applied the same percentages denoting music-industry employment to the resulting figures as described above. This two-step process introduced uncertainty into the analysis, but the importance of independent workers to the industry made the effort necessary to produce a comprehensive view of music work. The resulting figure – 2,304 – was in line with previous studies on the Seattle music industry.

Despite the importance of estimating self-employment in the music industry, it is important to acknowledge some of the limitations of the data we used. Government sponsored data sources on self-employed musicians are inadequate for a number of reasons. First, in order to be included in the NES dataset, an independent contractor must report a minimum of \$1,000. Not only is the \$1,000 cut off somewhat large for certain sections of the musician market, but also there is a high likelihood that most independent music work is not reported. Tax law does not require venues to report payments of less than \$600 annually to individual musicians. In practice, this means that few musicians meet this reporting threshold, and are therefore likely to underreport their independent income. These reporting thresholds suggest substantial undercounting of independent musician income. For these reasons, the number of self-employed working musicians is likely to be underestimated here.

Appendix B: Economic Impact Model Methodology

This study used an Input-Output (I-O) model to estimate the broad economic effects of music-industry employment throughout the regional economy. This type of model relies on cross-sectional measures of trade relationships between firms, measures that record the flow of inputs into firms (from where do firms/industries source their raw material/inputs?) and the flow of outputs from firms (where do firms/industries sell their products/outputs?).

Washington State in particular has a robust history of producing detailed estimates of the inter-relationships between industries. Using regular surveys of Washington State businesses, the Office of Financial Management, produces regular estimations of the Washington State I-O model. Beginning in 1963, Washington has estimated these models regularly. The most recent model was produced for the year 2007, and was updated to adjust for inflation in 2013. This effort produced a detailed industrial table outlining the system of multipliers that can be used to estimate final demand for each marginal increase in inputs. These multipliers are linked through the channels of purchase in every industry to the production of output for final demand. This study used these multipliers to estimate the direct, indirect, and induced effects of the music industry on the broader regional economy.

There are some important limitations to I-O models. The use of fixed coefficients, for example, assumes that each additional dollar of increased demand produces the same impact as the previous dollar. In addition, wages and prices are fixed in the model, and do not vary with increased demand. Finally, the model does not account for fundamental changes to economic relationships, and can only account for increased sales, which means that major system-wide disruptions are poorly estimated using these models. That said, however, I-O models are detailed and robust estimates of economic relationships, and Washington State's consistent historical estimates of these models make it a particularly good model for understanding the effects of additional economic production in one industry on the broader Seattle economy.

Appendix B, Table 1: Washington State 2007 I-O Multiplier Table

Industry	Total Jobs ^{xx}	Total Employment ^{xxi}	Total Output ^{xxii}	Total Labor Income ^{xxiii}
Crop Production	17.71	1.55	1.94	0.63
Animal Production	15.29	2.14	2.26	0.66
Forestry and Logging	9.87	3.10	2.07	0.50
Fishing, Hunting, and Trapping	8.59	2.82	1.97	0.58
Mining	10.85	2.15	1.92	0.49
Electric Utilities	7.08	4.45	1.96	0.60
Gas Utilities	3.27	6.11	1.44	0.19
Other Utilities	12.06	2.59	2.11	0.66
Highway, Street, and Bridge Construction	10.08	2.88	1.97	0.56
Other Construction	10.89	2.58	1.97	0.54
Food, Beverage and Tobacco Manufacturing	6.64	3.46	1.77	0.32
Textiles and Apparel Mills	10.57	2.10	1.82	0.46
Wood Product Manufacturing	10.05	3.14	2.21	0.49
Paper Manufacturing	5.85	3.90	1.77	0.35
Printing and Related Activities	12.23	1.98	1.91	0.58
Petroleum and Coal Products Manufacturing	0.58	6.80	1.09	0.04
Chemical Manufacturing	5.84	3.11	1.62	0.41
Nonmetallic Mineral Products Manufacturing	6.34	2.36	1.59	0.33
Primary Metal Manufacturing	6.63	3.88	1.81	0.36
Fabricated Metals Manufacturing	9.36	2.30	1.80	0.46
Machinery Manufacturing	7.62	3.28	1.84	0.41
Computer and Electronic Product Manufacturing	8.56	3.73	1.98	0.53
Electrical Equipment Manufacturing	6.29	2.92	1.66	0.36
Aircraft and Parts Manufacturing	5.17	2.67	1.45	0.36
Ship and Boat Building	9.51	2.88	1.91	0.58
Other Transportation Equipment Manufacturing	5.50	2.75	1.54	0.29
Furniture Product Manufacturing	11.39	1.92	1.84	0.51
Other Manufacturing	9.76	2.28	1.85	0.47
Wholesale	9.56	2.17	1.73	0.55
Non-Store Retail	13.69	1.60	1.74	0.49
Other Retail	17.54	1.48	1.81	0.65
Air Transportation	5.71	2.75	1.65	0.32
Water Transportation	8.59	3.24	1.93	0.49
Truck Transportation	13.04	2.08	2.06	0.63

Source: Beyers and Lin (2007) "[2007 Washington Input-Output Study](#)." Office of Financial Management.

Appendix C: Survey Methodology

The survey of working musicians in the Seattle Metropolitan area was conducted over the course of 6 months. A team including musician leaders in Fair Trade Music Project, working musicians, union organizers, and researchers collaboratively prepared an original survey instrument. In the end, 124 working musicians in the Seattle metropolitan area responded to the 19-question survey. Over 4 months, our recruitment team fielded its online survey through direct contacts with individual musicians using various social media strategies, including Facebook and Twitter, and direct e-mail listservs. Additional paper surveys were completed in meetings of the Fair Trade Music Project. The vast majority of survey respondents took the survey online, through a URL established using Constantcontact.com.

Our Respondents:

For this project, we surveyed self-described working musicians about a variety of different forms of employment in the broader music economy. We focused on working musicians because these workers are ill captured by traditional data sources and yet form the engine of the music economy.

Developing the Survey Instrument:

The survey was developed in collaboration with musician activists, researchers, and union staff. A draft survey was distributed in meetings of the Fair Trade Music to receive feedback from working musicians about the length, question quality, and content, and revised taking this feedback into account.

Survey Questions:

Q1. What genre(s) of music do you play?

Respondents were encouraged to check as many as applied. Ratios do not sum to 100%.

	Number of Response(s)	Response Ratio
Rock	65	52.8%
Pop	49	39.8%
Hip Hop	21	17.0%
R&B	49	39.8%
Electronica/Dance	14	11.3%
Country/Folk	32	26.0%
Jazz/Blues	77	62.6%
Classical	28	22.7%
Singer/Songwriter	57	46.3%
Other	33	26.8%
Total	124	

Q2. What were the sources of your music-related income last year?

Respondents were encouraged to check as many as applied. Ratios do not sum to 100%.

	Number of Response(s)	Response Ratio
Gigs - at music clubs, restaurants, bars	103	83.0%
Gigs - at weddings and/or other casual events	67	54.0%
Gigs - at Churches	31	25.0%
Concerts - orchestra, theatre, etc.	35	28.2%
Festivals	56	45.1%
Busking	21	16.9%
Education - private lessons	60	48.3%
Education - institutions	25	20.1%
Recording - in-studio performance	60	48.3%
Recording - post production	24	19.3%
Music shops - retail	5	4.0%
Instrument Repair	5	4.0%
Musical Instrument Manufacturing	1	<1%
Radio	6	4.8%
Music librarian	1	<1%
Music promotion, talent agent, booking agent	14	11.2%
Other	17	13.7%
Total	124	N/A

Q3. What was your Typical Fee for the following types of musical performance work?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option. Respondents were encouraged to check as many as applied. Ratios do not sum to 100%.

	< \$10/hr	\$10-25/hr	\$25-50/hr	\$50-75/hr	\$75-100	More than \$100
Gigs - at music clubs, restaurants, bars	30 28%	26 24%	31 28%	9 8%	5 5%	8 7%
Gigs - at weddings and/or other casual events	4 5%	12 15%	7 9%	17 22%	18 23%	21 27%
Gigs - at churches	8 17%	6 13%	15 33%	7 15%	5 11%	5 11%
Concerts - orchestra, theatre, etc.	5 11%	5 11%	10 23%	8 18%	4 9%	12 27%
Festivals	12 18%	8 12%	9 14%	7 11%	13 20%	16 25%
Busking	12 35%	16 47%	5 15%	1 3%	0 0%	0 0%
Recording - in-studio performance	5 8%	3 5%	12 18%	15 23%	18 28%	12 18%
Recording - post-production	8 23%	2 6%	10 29%	4 11%	6 17%	5 14%

Q4. What is the approximate number of hours you spent performing in past month?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	< 5	5-10	10-20	20-30	30-40	> 40
Gigs - at music clubs, restaurants, bars	32 30%	28 26%	25 23%	12 11%	6 6%	4 4%
Gigs - at weddings and/or other casual events	30 43%	21 30%	11 16%	3 4%	2 3%	2 3%
Gigs - at churches	23 56%	10 24%	6 15%	0 0%	1 2%	1 2%
Concerts - orchestra, theatre, etc.	26 58%	9 20%	3 7%	3 7%	2 4%	2 4%
Festivals	31 50%	21 34%	5 8%	3 5%	0 0%	2 3%
Busking	21 72%	6 21%	1 3%	0 0%	0 0%	1 3%
Recording - in-studio performance	28 50%	10 18%	12 21%	2 4%	0 0%	4 7%
Recording - post-production	17 45%	8 21%	4 11%	4 11%	0 0%	5 13%

Q5. What was your typical fee for the following types of musical performance work?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	<\$10/hr	\$10-25/hr	\$25-50/hr	\$50-75/hr	\$75-100/hr	>\$100/hr
Education - private lessons	2 3%	4 5%	26 35%	38 51%	4 5%	0 0%
Education - institutions	3 8%	4 11%	13 35%	9 24%	6 16%	2 5%
Music Shops - retail	5 38%	6 46%	1 8%	0 0%	1 8%	0 0%
Instrument Repair	3 25%	5 42%	3 25%	1 8%	0 0%	0 0%
Musical Instrument Manufacturing	5 63%	2 25%	0 0%	1 13%	0 0%	0 0%
Radio	8 62%	5 38%	0 0%	0 0%	0 0%	0 0%
Music Librarian	6 60%	4 40%	0 0%	0 0%	0 0%	0 0%
Music Promotion, talent agent, booking agent	8 38%	6 29%	3 14%	1 5%	0 0%	3 14%
Other	5 33%	2 13%	6 40%	1 7%	0 0%	1 7%

Q6. What is the approximate number of hours you spent performing in past month?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	< 5	5-10	10-20	20-30	30-40	> 40
Education - private lessons	27 37%	13 18%	14 19%	6 8%	7 10%	6 8%
Education - institutions	16 50%	4 13%	6 19%	1 3%	2 6%	3 9%
Music Shops - retail	11 73%	0 0%	0 0%	0 0%	1 7%	3 20%
Instrument Repair	11 69%	2 13%	1 6%	0 0%	1 6%	1 6%
Musical Instrument Manufacturing	10 83%	0 0%	2 17%	0 0%	0 0%	0 0%
Radio	14 78%	1 6%	1 6%	1 6%	1 6%	0 0%
Music Librarian	11 92%	1 8%	0 0%	0 0%	0 0%	0 0%
Music Promotion, talent agent, booking agent	13 50%	4 15%	3 12%	0 0%	3 12%	3 12%
Other	8 42%	1 5%	3 16%	2 11%	1 5%	4 21%

Q7. Do you annually earn income by composing or arranging music? If so, how much?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 65.

Q8. Do you annually earn income by working as a sheet music copyist? If so, how much?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 48.

Q9. Do you annually earn income by receiving royalties (BMI/ASCAP, digital streaming, etc.)? If so, how much?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 65.

Q10. Do you annually earn income by licensing music? If so, how much?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 59.

Q11. Do you annually earn income by selling merchandise? If so, how much?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 59.

Q12. How much money did you make from all music-related work last year?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 102.

Q13. What percentage of your total income is music-related?

	Number of Response(s)	Response Ratio
< 10%	37	29.30%
10-20%	12	9.50%
20-30%	3	2.30%
30-40%	6	4.70%
40-50%	6	4.70%
50-60%	2	1.50%
60-70%	2	1.50%
70-80%	7	5.50%
80-90%	3	2.30%
90-100%	44	34.90%
No Responses	2	1.50%
Total	124	100%

Q14. How are you typically compensated for your music-related work?

Respondents were encouraged to check as many as applied. Ratios do not sum to 100%.

	Number of Response(s)	Response Ratio
Per-hour fee	48	39.0%
Per-gig fee	94	76.4%
Per-week, month or season	16	13.0%
Per service	37	30.0%
% of door	44	35.7%
% of food/bar sales	20	16.2%
Food and or drinks stipend	30	24.3%
Tip jar	50	40.6%
Royalties	22	17.8%
Other	5	4.0%
Total	123	N/A

Q15. If you are compensated by a percentage of the door, what is a typical rate?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 63.

Q16. If you are compensated by a percentage of the food and beverage sales, what is a typical rate?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 49.

Q17. If you could change one thing about working conditions in the music industry, what would it be?

Answers provided freeform. Cannot display due to confidentiality.

Total responses: 91.

Q18. Which of the following has happened to you in your music-related employment?

Respondents were encouraged to check as many as applied. Ratios do not sum to 100%.

	Number of Response(s)	Response Ratio
I was paid less for a job than previously agreed	71	65.7%
I was paid for fewer hours than I actually worked	48	44.4%
I was not provided with receipts that showed the amount collected at the door	66	61.1%
A job was cancelled last minute	74	68.5%
Admissions tax was deducted from my share of the door	21	19.4%
Venue took deductions from my payment without prior agreement	34	31.4%
Other	11	10.1%
Total	108	N/A

Q19. Demographic information (optional)

Answers provided freeform. Cannot display due to confidentiality.

	Total responses
Age	111
City of Residence	111
Gender	111
Neighborhood	88
Race/Ethnicity	95

Appendix Table 1: Music Industry Businesses

Industry	Type of Music-Related Business	
Construction	Audio equipment installation contractors	
Manufacturing	Cases, musical instrument, manufacturing	Sheet music commercial printing
	Music books printing or printing and binding	Sheet music screen printing
	Photographic & photocopying equipment	Audio and video equipment
	Pre-recorded compact disc, tape, & record	Other electronic components
	Miscellaneous manufacturing	Mass reproducing tapes & CDs
	Musical instrument	
Wholesale	Electric housewares & consumer electronics	Sheet music
	Musical instruments & music recording	Electronic parts & equipment
Retail	Automotive parts and accessories stores (includes retailing of car audio systems)	
	Electronics retailing (includes music stores and retailing of home audio systems)	
	Used household and office goods moving (includes road & equipment crew)	
	Audio & video content downloading	Used CD & record stores
	Musical instruments and supplies retail stores	
Information	Video production (includes music videos)	Sound recording studios
	Video post-production (sound dubbing)	Other sound recording industries
	Other motion pictures and video industries	Radio networks
	Record production	Radio stations
	Integrated record production/distribution	Data processing & hosting
	Music publishing	Archives (includes music archives)
Real Estate, Rental and Leasing	Lessors of nonresidential buildings (includes arenas, concert halls, & auditoriums)	
	Other consumer goods rental (includes musical instruments)	
	Commercial and industrial equipment rental (includes sound equipment)	
Professional, Scientific, and Technical Services	Other scientific and technical consulting services	
	Media representatives	
	Marketing research and public opinion polling	
Administrative and Support Services	Employment placement agencies	
	All other travel arrangement and reservation services	
	All other support services	
Educational Services	Colleges, universities, and professional schools	
	Art, drama, and music schools	
Arts, Entertainment, and Recreation	Festival (with facilities) promoters	Theater companies
	Festival (without facilities) promoters	Dance companies
	Agents and managers for entertainers	Musical groups and artists
	Independent artists, writers, and performers	Circuses
	All other amusement and recreation industries	
Accommodation and Food Services	Drinking places	
Repair and Maintenance	Consumer electronics repair and maintenance	
	Repair shops (includes musical instruments)	

Appendix Table 2: Direct Economic Impact of the Music Industry, by Industry

Industry	Output (\$millions)	Employment
1. Crop Production	-	-
2. Animal Production	-	-
3. Forestry and Logging	-	-
4. Fishing, Hunting, and Trapping	-	-
5. Mining	-	-
6. Electric Utilities	-	-
7. Gas Utilities	-	-
8. Other Utilities	-	-
9. Highway, Street, and Bridge Construction	-	-
10. Other Construction	53.177	224
11. Food, Beverage and Tobacco Manufacturing	-	-
12. Textiles and Apparel Mills	-	-
13. Wood Product Manufacturing	-	-
14. Paper Manufacturing	-	-
15. Printing and Related Activities	-	-
16. Petroleum and Coal Products Manufacturing	-	-
17. Chemical Manufacturing	-	-
18. Nonmetallic Mineral Products Manufacturing	-	-
19. Primary Metal Manufacturing	-	-
20. Fabricated Metals Manufacturing	-	-
21. Machinery Manufacturing	0.431	1
22. Computer and Electronic Product Manufacturing	3.926	9
23. Electrical Equipment Manufacturing	-	-
24. Aircraft and Parts Manufacturing	-	-
25. Ship and Boat Building	-	-
26. Other Transportation Equipment Manufacturing	-	-
27. Furniture Product Manufacturing	-	-
28. Other Manufacturing	56.939	244
29. Wholesale	76.673	338
30. Non-Store Retail	2.585	22
31 Other Retail	312.015	3,687
32. Air Transportation	-	-
33. Water Transportation	-	-
34. Truck Transportation	12.717	80
35. Other Transportation/Postal Offices	-	-
36. Support Activities for Storage, Transportation and Warehousing	-	-
37. Software Publishers & Data Processing & related services	95.269	172
38. Telecommunications	-	-
39. Other Information	475.912	2,503
40. Credit Intermediation and Related Activities	-	-
41. Other Finance and Insurance	-	-

Industry	Output (\$millions)	Employment
42. Real Estate and Rental and Leasing	23.022	239
43. Legal /Accounting and Bookkeeping /Management Services	5.077	55
44. Architectural, Engineering, and Computing Services	2.157	15
45. Educational Services	103.704	1,461
46. Ambulatory Health Care Services	-	-
47. Hospitals	-	-
48. Nursing and Residential Care Facilities, Social Assistance	-	-
49. Arts, Recreation, and Accommodation	250.573	3,121
50. Food Services and Drinking Places	267.099	4,215
51. Administrative/Employment Support Services	0.452	9
52. Waste Management/Other, and Agriculture Services	23.504	212
Total	1,765.231	16,607

Appendix Table 3: Indirect and Induced Impact of the Music Industry, by Industry

Industry	Output (\$millions)	Employment	Labor Income (\$millions)
1. Crop Production	7.422	68	2.357
2. Animal Production	2.496	16	0.765
3. Forestry and Logging	2.562	7	0.470
4. Fishing, Hunting, and Trapping	9.817	24	2.851
5. Mining	2.687	11	0.559
6. Electric Utilities	66.351	95	21.342
7. Gas Utilities	16.525	10	1.179
8. Other Utilities	13.527	49	3.688
9. Highway, Street, and Bridge Construction	1.545	4	0.366
10. Other Construction	218.771	793	51.154
11. Food, Beverage and Tobacco Manufacturing	77.802	118	6.543
12. Textiles and Apparel Mills	3.189	14	0.619
13. Wood Product Manufacturing	8.754	25	1.428
14. Paper Manufacturing	9.892	13	1.260
15. Printing and Related Activities	13.260	75	4.070
16. Petroleum and Coal Products Manufacturing	124.629	8	1.442
17. Chemical Manufacturing	2.229	3	0.426
18. Nonmetallic Mineral Products Manufacturing	11.023	27	1.703
19. Primary Metal Manufacturing	0.437	1	0.062
20. Fabricated Metals Manufacturing	4.544	16	0.967
21. Machinery Manufacturing	3.645	8	0.552
22. Computer and Electronic Product Manufacturing	5.249	15	1.556
23. Electrical Equipment Manufacturing	0.463	1	0.073
24. Aircraft and Parts Manufacturing	0.067	0	0.014
25. Ship and Boat Building	0.556	2	0.162
26. Other Transportation Equipment Manufacturing	1.209	2	0.141
27. Furniture Product Manufacturing	2.047	11	0.540
28. Other Manufacturing	59.248	200	11.100
29. Wholesale	208.104	912	72.726
30. Non-Store Retail	8.876	68	2.337
31. Other Retail	530.859	5645	215.196
32. Air Transportation	27.507	45	3.928
33. Water Transportation	9.789	22	2.058
34. Truck Transportation	41.789	229	13.215
35. Other Transportation/Postal Offices	38.653	208	15.556
36. Support Activities for Storage, Transportation and Warehousing	20.111	100	7.373
37. Software Publishers & Data Processing & related services	110.618	211	38.108
38. Telecommunications	106.327	190	17.573
39. Other Information	531.425	2546	236.127
40. Credit Intermediation and Related Activities	203.784	367	36.713

Industry	Output (\$millions)	Employment	Labor Income (\$millions)
41. Other Finance and Insurance	128.825	613	40.590
42. Real Estate and Rental and Leasing	119.134	1159	23.790
43. Legal /Accounting and Bookkeeping /Management Services	65.639	635	52.265
44. Architectural, Engineering, and Computing Services	28.948	189	16.225
45. Educational Services	134.159	1632	45.339
46. Ambulatory Health Care Services	151.297	1087	78.218
47. Hospitals	114.129	561	42.656
48. Nursing and Residential Care Facilities, Social Assistance	73.495	1092	33.420
49. Arts, Recreation, and Accommodation	331.488	3740	108.785
50. Food Services and Drinking Places	399.480	5264	121.073
51. Administrative/Employment Support Services	50.890	949	35.951
52. Waste Management/Other, and Agriculture Services	202.425	1577	65.641
Total	4,307.698	30,660	1,442.251

Appendix Table 4: Formal Employment and Annual Payroll

NAICS	Business Type	Formal Employee Payroll	Payroll per Employee	Employee Estimate
238210	Installation (Includes Sound Equipment Installation)	14,007,161	64,171	218
333316	Photographic & Equipment Manufacturing	-	-	-
334310	Audio & Video Equipment Manufacturing	-	-	-
334419	Other Electronic Component Manufacturing	-	-	-
334613	Pre-Recorded Compact Disc, Tape, Record Manufacturing	-	-	-
334614	Manufacturing (Includes Mass Reproducing Tapes & CDs)	-	-	-
339992	Musical Instrument Manufacturing	6,487,000	37,936	171
339999	Miscellaneous Manufacturing	705,561	51,462	14
423620	Household Appliances & Consumer Electronics Wholesalers	3,591,859	55,418	65
423690	Other Electronic Parts & Equipment Wholesalers	12,250,040	105,449	116
423990	Wholesaling (Includes Musical Instruments & Recording)	6,071,128	58,162	104
424990	Wholesaling (Includes Sheet Music)	61,173	61,195	1
441310	Automotive Parts & Accessories Stores	9,367,143	30,299	309
443142	Retailing (Includes Music Stores)	90,186,900	33,806	2,668
451140	Musical Instruments & Supplies Retail Stores	15,183,000	27,406	554
453310	Used Retailing (Includes Used CD/Record Stores)	718,175	21,602	33
454111	Internet Retailing (Audio & Video Content Downloading)	1,354,878	67,472	20
484210	Used Household & Office Goods Moving	2,744,943	35,281	78
512110	Video Production (Includes Music Videos)	29,177,471	49,910	585
512191	Video Post-Production (Includes Sound Dubbing)	4,103,723	52,982	77
512199	Other Motion Picture & Video Industries	289,202	34,100	8
512210	Record Production	1,012,000	-	-
512220	Integrated Record Production/Distribution	-	-	-
512230	Music Publishing	-	-	-
512240	Sound Recording Studios	3,886,000	-	-
512290	Other Sound Recording Industries	17,227,000	75,227	229
515111	Radio Networks	-	-	-
515112	Radio Stations	54,535,000	55,762	978
518210	Data Processing, Hosting, & Related Services	19,315,383	116,267	166
531120	Lessors Of Nonresidential Buildings	148,094	63,860	2
532299	Equipment Rental (Includes Instruments)	4,645,444	35,036	133
532490	Equipment Rental (Includes Sound Equipment)	4,539,340	51,171	89
541690	Other Scientific & Technical Consulting Services	514,535	87,727	6
541840	Media Representatives	6,667,267	-	-
541910	Marketing Research & Public Opinion Polling	-	-	-
561311	Employment Placement Agencies	-	-	-
561599	All Other Travel Arrangement & Reservation Services	-	-	-
561990	All Other Support Services	666,500	74,701	9

NAICS	Business Type	Formal Employee Payroll	Payroll per Employee	Employee Estimate
611310	Colleges, Universities, & Professional Schools	8,064,059	28,780	280
611610	Art, Drama, & Music Schools	17,393,720	16,206	1,073
711110	Theater Companies	4,876,986	23,955	204
711120	Dance Companies	-	-	-
711130	Musical Groups & Artists	21,007,000	31,121	675
711190	Circuses	100,344		-
711310	Festival (With Facilities) Promoters	14,656,517	18,073	811
711320	Festival (Without Facilities) Promoters	3,580,600		-
711410	Agents & Managers For Artists, Athletes, Entertainers	128,404		-
711510	Independent Artists, Writers, & Performers	1,120,592	55,072	20
713990	All Other Amusement & Recreation Industries	7,649,746	19,991	383
722410	Drinking Places	79,794,462	19,103	4,177
811211	Consumer Electronics Repair & Maintenance	4,113,323		-
811490	Repair Shops (Includes Musical Instruments)	1,753,377	38,935	45
Total		473,695,051		14,303

Appendix Table 5: Self-Employment and Annual Receipts by Industry

NAICS	Business Type	Annual Formal Employee Payroll	Payroll per Employee	Self-Employed Estimate
238210	Installation (Includes Sound Equipment Installation)	263,734	43,436	6
333316	Photographic & Equipment Manufacturing	69,016	69,016	1
334310	Audio & Video Equipment Manufacturing	427,015	47,795	9
334419	Other Electronic Component Manufacturing			
334613	Pre-Recorded Compact Disc, Tape, Record Manufacturing			
334614	Manufacturing (Includes Mass Reproducing Tapes & CDs)			
339992	Musical Instrument Manufacturing	2,172,905	36,995	59
339999	Miscellaneous Manufacturing			
423620	Household Appliances & Consumer Electronics Wholesalers	254,763	136,000	2
423690	Other Electronic Parts & Equipment Wholesalers			
423990	Wholesaling (Includes Musical Instruments & Recording)	5,060,315	101,545	50
424990	Wholesaling (Includes Sheet Music)	-	-	-
441310	Automotive Parts & Accessories Stores	291,496	53,353	5
443142	Retailing (Includes Music Stores)	4,459,788	52,158	86
451140	Musical Instruments & Supplies Retail Stores	1,754,000	58,467	30
453310	Used Retailing (Includes Used CD/Record Stores)	79,972	32,713	2
454111	Internet Retailing (Audio & Video Content Downloading)	96,588	59,461	2
484210	Used Household & Office Goods Moving	126,606	68,241	2
512110	Video Production (Includes Music Videos)	8,409,105	32,496	259
512191	Video Post-Production (Includes Sound Dubbing)			
512199	Other Motion Picture & Video Industries			
512210	Record Production	6,229,000	25,529	244
512220	Integrated Record Production/Distribution			
512230	Music Publishing			
512240	Sound Recording Studios			
512290	Other Sound Recording Industries			
515111	Radio Networks	3,875,000	31,762	122
515112	Radio Stations			
518210	Data Processing, Hosting, & Related Services	410,673	54,659	6
531120	Lessors Of Nonresidential Buildings	602,787	141,036	3
532299	Equipment Rental (Includes Instruments)	639,088	54,649	8
532490	Equipment Rental (Includes Sound Equipment)	2,108,368	49,150	4
541690	Other Scientific & Technical Consulting Services	410,673	54,659	12
541840	Media Representatives	602,787	141,036	43
541910	Marketing Research & Public Opinion Polling	-	-	-
561311	Employment Placement Agencies	-	-	-
561599	All Other Travel Arrangement & Reservation Services	383,453	47,543	8

NAICS	Business Type	Annual Formal Employee Payroll	Payroll per Employee	Self-Employed Estimate
561990	All Other Support Services	28,773	28,773	1
611310	Colleges, Universities, & Professional Schools	1,690,002	15,699	108
611610	Art, Drama, & Music Schools			-
711110	Theater Companies	9,740,424	20,534	474
711120	Dance Companies			
711130	Musical Groups & Artists			
711190	Circuses			
711310	Festival (With Facilities) Promoters	6,801,079	42,911	158
711320	Festival (Without Facilities) Promoters			
711410	Agents & Managers For Artists, Athletes, Entertainers	200,860	37,727	5
711510	Independent Artists, Writers, & Performers	7,705,505	20,798	370
713990	All Other Amusement & Recreation Industries	601,021	30,972	19
722410	Drinking Places	1,613,815	42,068	38
811211	Consumer Electronics Repair & Maintenance	3,329,855	31,781	105
811490	Repair Shops (Includes Musical Instruments)	1,965,425	31,454	62
Total		72,176,377		2,304

About the Author:

Megan Brown is a labor geographer currently completing her PhD in geography at the University of Washington. She holds an MPP from Johns Hopkins University and a BA from Wesleyan University. She has been active in the labor movement and progressive activism for more than 10 years, and is a current member of UAW 4121.

This report would not have been possible without the contributions of many working musicians active in the Fair Trade Music campaign who took the time to thoughtfully direct the research and respond to survey questions. Special thanks to Paul Bigman, Nate Omdal, Ed Rodriguez, and Motter Snell for their thoughtful comments and suggestions.

Endnotes

ⁱ For information on how we determined the size and scope of the musician industry in Seattle, see the methodology section in Appendix A.

ⁱⁱ William Beyers, Christopher Fowler, and Derik Andreoli, "The Economic Impact of Music in Seattle and King County: A Report for the Mayor's Office of Film & Music." (Seattle, WA: Mayor's Office of Film & Music, 2008), www.seattle.gov/Documents/Department/FilmAndMusic/Seattle_Music_EIS_2008.pdf; Lawrence Rothfield et al., "Chicago, Music City: A Report on the Music Industry in Chicago" (Chicago, IL: The Chicago Music Commission, 2006),

<https://culturalpolicy.uchicago.edu/sites/culturalpolicy.uchicago.edu/files/CMCFullReport.pdf>; Garrett Harper and Chris Cotton, "Nashville Music Industry: Impact, Contribution and Cluster Analysis" (Nashville, TN: Music City Music Council, 2013), <http://www.nashvillechamber.com/docs/default-source/research-center-studies/nashville-music-industry-study.pdf>; TXP, Inc., "The Economic Impact of the Creative Sector in Austin - 2012 Update" (Austin, TX: City of Austin, 2012),

https://austintexas.gov/sites/default/files/files/creative_sector_impact2012.pdf.

ⁱⁱⁱ U.S. Census Bureau. (2012). Seattle-Tacoma-Bellevue, Washington Metro Area -- Geography Area Series: County Business Patterns. [table]. 2012 Business Patterns. Retrieved from U.S. Census Bureau website <http://www.census.gov>; U.S. Census Bureau. (2012). Seattle-Tacoma-Bellevue, Washington Metro Area -- Geography Area Series: Nonemployer Statistics. [table]. Retrieved from U.S. Census Bureau website <http://www.census.gov>.

^{iv} For information on the methodology used to produce these estimates, see Appendix A, pg. 22.

^v Bruce Nimmo et al., "Labor Market and Economic Report" (Washington State: Washington State Employment Security Department, 2015), <https://fortress.wa.gov/esd/employmentdata/docs/economic-reports/labor-market-and-economic-report-2014.pdf>.

^{vi} William Beyers and Marc Baldwin, "The 2007 Washington Input-Output Model" (Seattle, WA: Washington Office of Financial Management, 2010), www.ofm.wa.gov/economy/io/2007/default.asp.

^{vii} Beyers, William and Baldwin, Marc. (2010). "The 2007 Washington Input-Output model." Office of Financial Management. Accessed online at www.ofm.wa.gov/economy/io/2007/default.asp on August 14, 2015.

^{viii} All GDP figures in "Economic Growth Widespread Across Metropolitan Areas in 2012" (2013) Bureau of Economic Analysis. Accessed online http://www.bea.gov/newsreleases/regional/gdp_metro/2013/pdf/gdp_metro0913.pdf on August 6, 2015.

^{ix} For more information about the methodology behind these input-output economic impact figures, see Appendix B, pg. 25.

^x Compare with Beyers, Fowler, and Andreoli, "The Economic Impact of Music in Seattle and King County: A Report for the Mayor's Office of Film & Music."

^{xi} For information on how payroll figures were determined, see Appendix A, pg. 21.

^{xii} Ben Miller, "Median Income in Seattle Area Was \$65,677 in 2012," *Puget Sound Business Journal*, September 20, 2013, <http://www.bizjournals.com/seattle/blog/2013/09/median-income-in-seattle-area-was.html>.

^{xiii} While this is not surprising, it does have implications for larger methodological concerns regarding the use of traditional data sources for determining employment, since these data sources typically only count work that is done as one's "primary" form of employment.

^{xiv} The percentages reported below will not sum to 100% because survey respondents were given the opportunity to select multiple sources of income and compensation schemes.

^{xv} Respondents were asked to select as many compensation forms as applicable. Percentages will therefore not sum to 100.

^{xvi} Figures based on admissions tax information provided by the Seattle Department of Finance and Administrative Services in response to a public records request.

^{xvii} Ibid.

^{xviii} Note: the Non-Employer Statistics dataset is not adequate for describing the extent of independent contractors involved in music industry employment. It almost certainly undercounts the number of self-employed musicians and music industry workers in the Seattle economy. Because of these drawbacks, the study augmented our understanding of the music industry through a survey of working musicians, which is discussed in detail below.

^{xix} Beyers, Fowler, and Andreoli, "The Economic Impact of Music in Seattle and King County: A Report for the Mayor's Office of Film & Music."

^{xx} Per \$1 million in direct output.

^{xxi} Per direct job.

^{xxii} Per \$1 of final demand.

^{xxiii} Per \$1 of final demand.