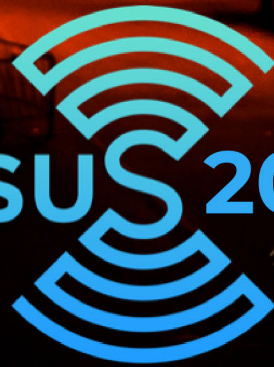




GREATER AUSTIN
MUSIC CENSUS 2022



SUMMARY REPORT
February 2023



Introduction

The 2022 Greater Austin Music Census is a community-led initiative to gain a better understanding of the current needs of the Austin-area music ecosystem. This marks the first time in almost a decade (since 2014) that the region will have new data that captures key information about the greater Austin music economy and helps the city and community to make more informed, data-driven decisions to support the music ecosystem.

The 2022 census was administered by Sound Music Cities a leading Austin-based provider of music ecosystem studies and music census work, in conjunction with the Office of Mayor Steve Adler, KUTX, EQ Austin, Juice Consulting, and over 50 local partners.

The 2022 Greater Austin Music Census was announced May 16, 2022, the online survey collected responses from July 15-September 12, 2022, and received 2260 responses with a 71% completion rate (industry standard is 42%). This new census provides a continuity of data from the 2014 census that offers directional shifts.

This summary report for the public has been prepared by Sound Music Cities and includes key findings and recommendations to guide immediate and longer-term strategies for the music community, municipal partners, and civic partners. Two appendices showcase responses: a data deck as well as a DEI data deep dive. The organizers are working with the City of Austin to make the entire dataset available for further analysis through their open data portal. We are working to make the data as accessible and friendly as possible to everyone in the music community.

The 2014 Inaugural Austin Music Census collected 3968 responses with a 66% completion rate. A range of factors likely explain fewer responses in 2022 including:

- Survey fatigue (pandemic)
- Shrinking music industry services post-pandemic
- Pandemic impacts overall
- Inaugural survey in any community enjoys strong participation.

Notably, in 2022 there is more diversity in respondents which likely reflects the good work of the community partners.

INTRODUCTION TO A MUSIC CENSUS

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

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

A Community Effort

In a significant shift from the 2014 survey, the 2022 study was sourced and promoted by the community and made possible by hours of community input. This study took a grassroots approach that engaged local partners who hold the relationships with music people and the structure reflects that:

- **Lead Partners** composed of a mix of city government, expert consultants, and community organizations offered leadership to the entire census.
- **Community Engagement Partners** served as the primary means of outreach to music people and these organizations were instrumental in shaping the census itself.

With the guidance of the community, the 2022 survey updated demographic questions to include more diversity, equity, and inclusion elements and removed questions from the 2014 survey that aimed to quantify the income of music people in a way that turned off many respondents. This approach garnered more trust and ownership by the community itself. We greatly appreciate the time and passion that so many people brought to this work from every sector of the Greater Austin music ecosystem.

This project was made possible by the generous support of many individuals and organizations.

We especially thank the Lead Partners:

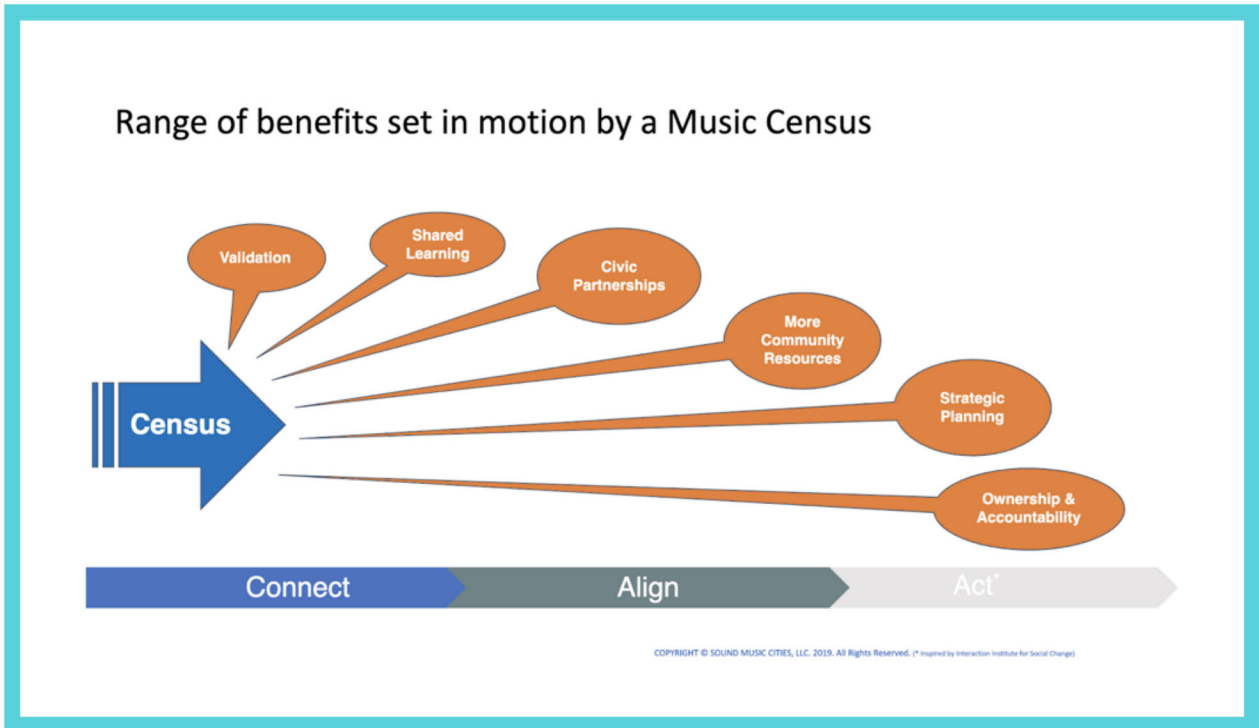
The Office of Mayor Steve Adler | EQ Austin | KUTX | Juice Consulting

We thank our amazing Community Engagement Partners:

AGNI Foundation for the Arts	Girl Gang
ANTRA	Girls Rock Austin
School of Indian Classical Music	Health Alliance for Austin Musicians
Austin Asian Impact	House of Songs
Austin Asian Music	Housing Opportunities for Musicians and Entertainers
Austin Community College / Music Business Performance & Technology	Indian Fine Arts Inc
Austin Creative Alliance	Khush Entertainment
Austin Dance India	KOOP Radio
Austin Economic Development Corporation	KXAN
Austin Latino Music	Latin Music Coalition Austin
Austin Latino Music Association	Mosaic Sound Collective
Austin Music Foundation	Music Venue Alliance Austin
Austin Persian Foundation	Recording Academy Texas Chapter
Austin Tejano Music Coalition	Red River Cultural District
Austin Texas Musicians,	School of Indian Percussion & Music
Austin Worldbeat Alliance	Shelley's Music Studio
Black Fret (now Sonic Guild)	SIMS Foundation
BMI	SXSW
C3 Presents	Texas Music Office
Carnival Beats Soul	The Breaks
City of Austin Economic Development Department	The Long Center
DESTRUX10N PRODUX10NZ	Thoughts in Order Counseling and Consulting,
Do512	Urbainan Entertainment
Fiesta Austin	Urban Artist Alliance
Flamenco India	Urban Music Fest

Data & Insights

The Census is a robust dataset that can be referenced in the days, months, and years to come, fostering a more evidence-based discipline to the planning stages for action in the music ecosystem.



Because this study was community-led, the results belong to the community. Instead of furnishing a top-down analysis in a voluminous report, this summary report offers key takeaways and insights as a starting point and a way to inspire curiosity and to encourage deeper engagement. This dataset is not meant to offer quick fixes, rather it provides a current state understanding from which to identify challenges and co-create solutions. Data and insights are plentiful given the number and depth of quality responses this community has shared.

As noted earlier, this summary report for the public has been prepared by Sound Music Cities and includes several initial insights to guide immediate and longer-term strategies for the music community, municipal partners, and civic partners. A data deck showcasing responses is also available as an appendix to this summary report, and the organizers are working with the City of Austin to make the entire dataset is available for further analysis through the City's open data portal.

In the next section, we offer a snapshot of the the greater Austin music ecosystem as well as key insights to spotlight as a starting place. This summary report is an invitation to dive into the breadth and diversity of topics about which the Census provides data, and we welcome more in-depth statistical analysis in 2023 (such as a hackathon, regressions, etc.) across the community.

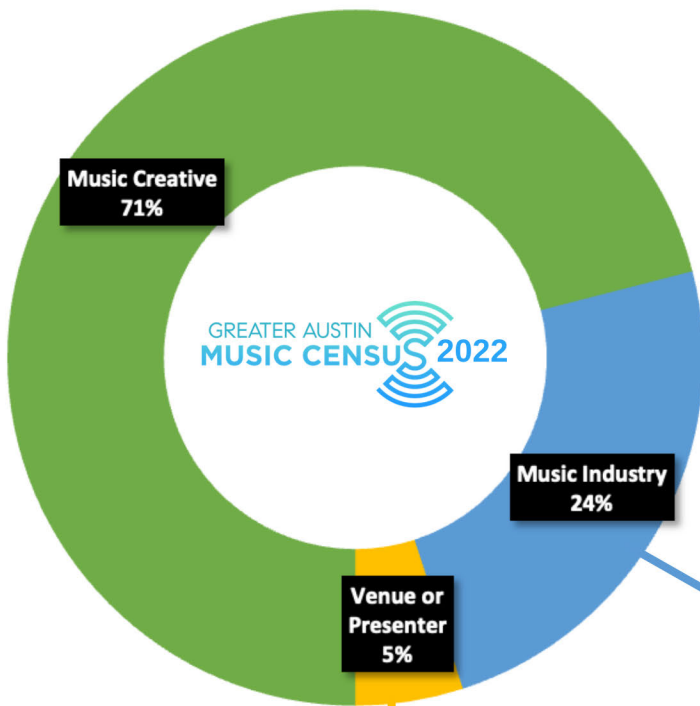
Greater Austin Music Ecosystem Composition by Role

Music creatives in Austin's ecosystem are increasing while industry is shrinking

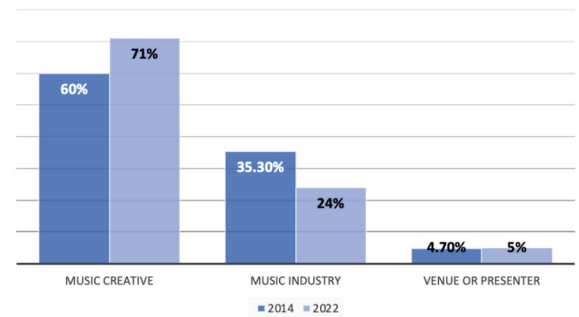
What types of people did the 2022 Austin Music Census survey?

Data was gathered from an online survey of residents 18 years or older who are living in the greater Austin metro area (Travis, Hays, Williamson, Bastrop, and Caldwell counties) who participate professionally or semi-professionally in a vast range of sectors all connected to music. This includes part-time work, rarely paid or volunteer work, and work that is more administrative than creative. Music creatives (musicians, bands, songwriters, engineers, teachers, producers and more) are the largest group, but it also includes dozens of other roles such as artist managers, agents, studio operators, equipment and music retailers, manufacturers, event producers, presenters, music support services, anyone employed in a space that presents music, and many more.

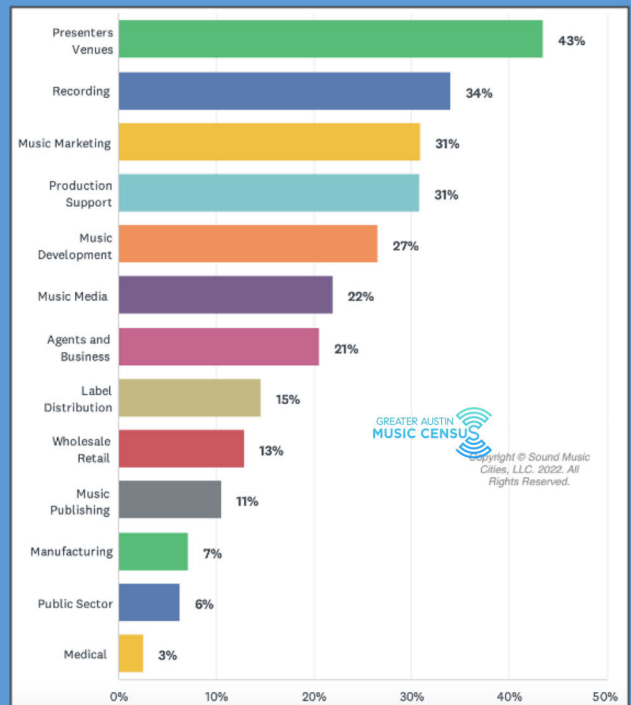
2022 Greater Austin Music Census Respondents



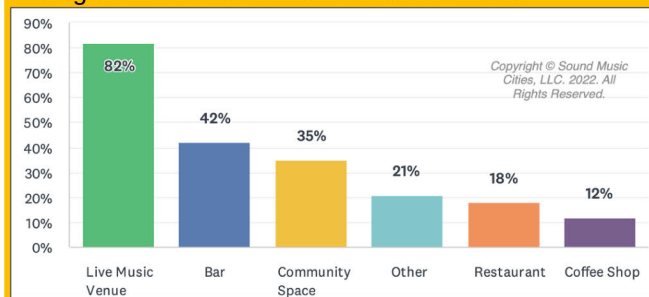
GREATER AUSTIN MUSIC CENSUS 2022 Respondents Compared to 2014 Respondents



Music Industry decreased overall since 2014, but presents a diversified and highly skilled local industry



Venues types are diversifying— while live music venues are the dominant type, community space has grown from 6% in 2014 to 35% in 2022



Greater Austin Music Ecosystem by Demographic

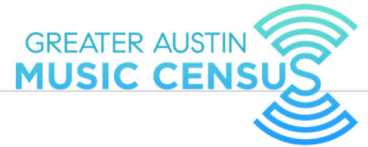
Respondents overall are predominantly male, white, heterosexual, and 25-54 years old

Notable Trends:

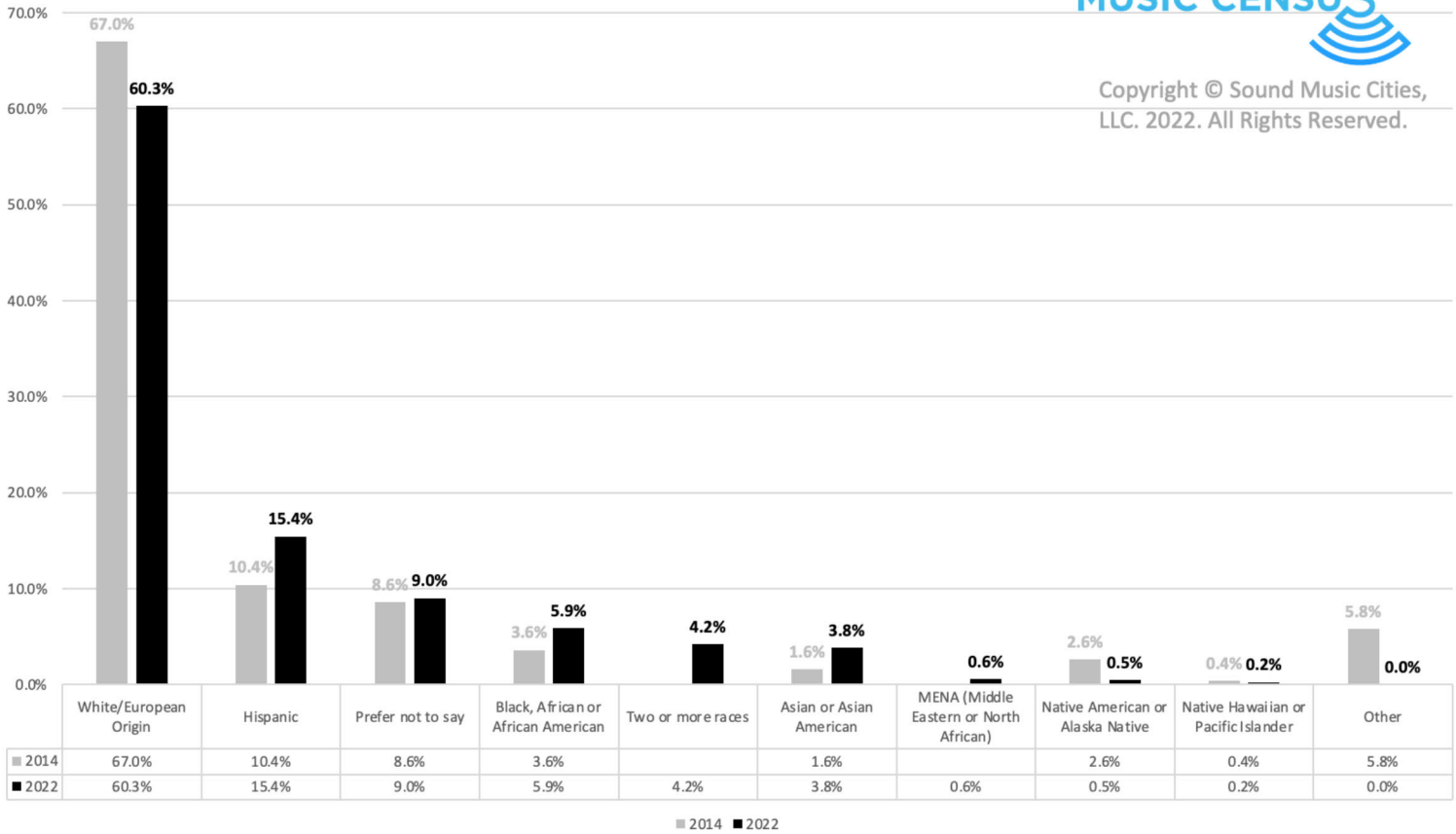
- People who identify as Black, Indigenous, and People Of Color (BIPOC) are increasing while those who identify as White/European are decreasing

Race and Hispanic Ethnicity (Aggregated)

Austin Music Census (2014 vs 2022)

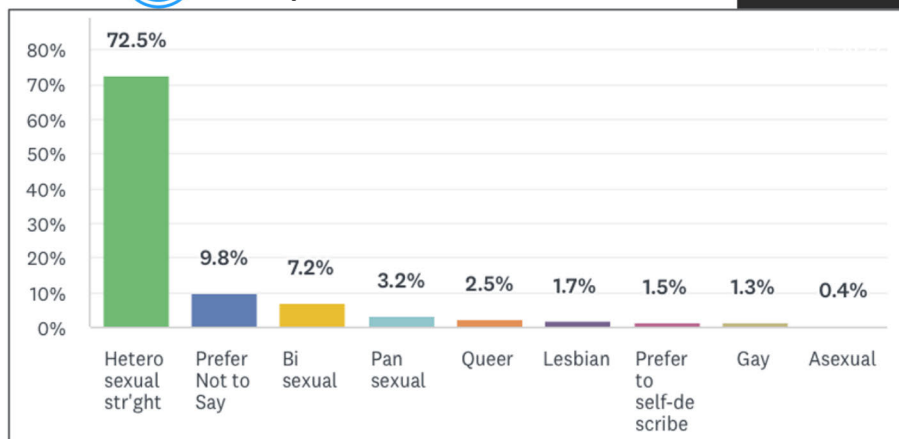


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Respondent Sexual Orientation

Updated in 2022

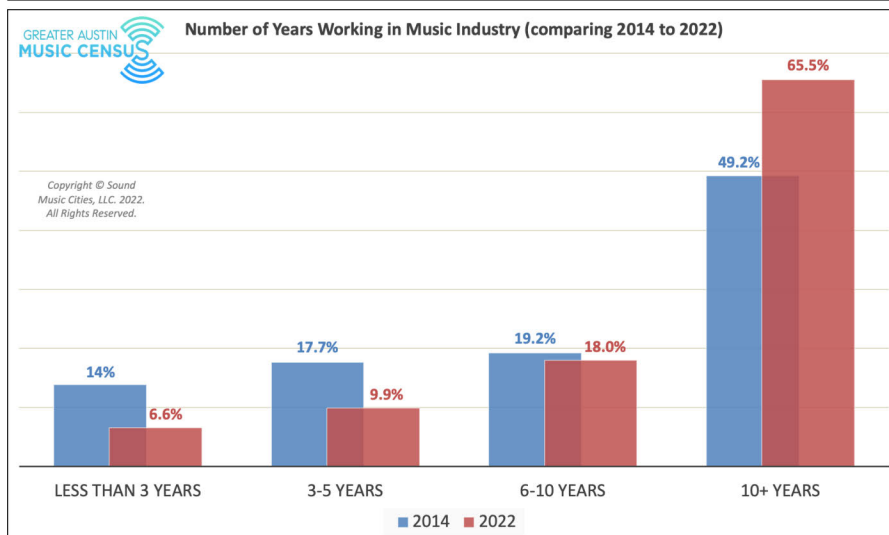
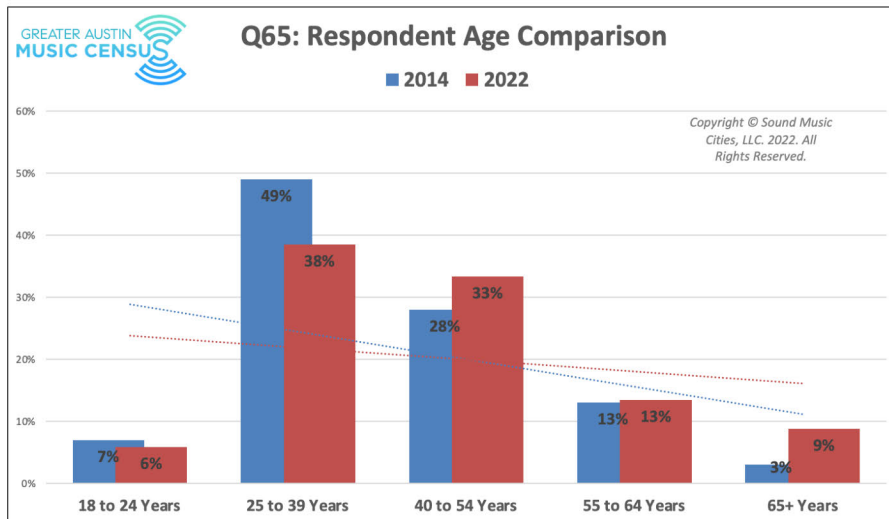
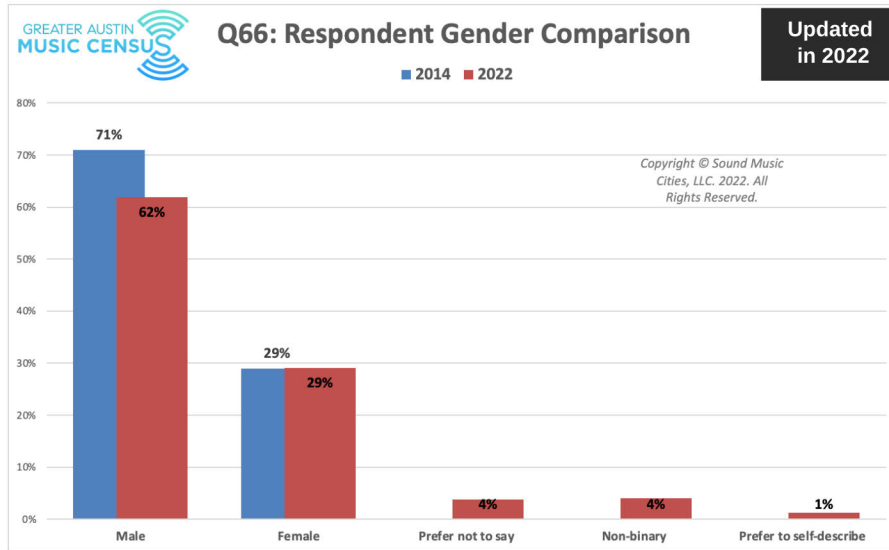


Greater Austin Music Ecosystem by Demographic

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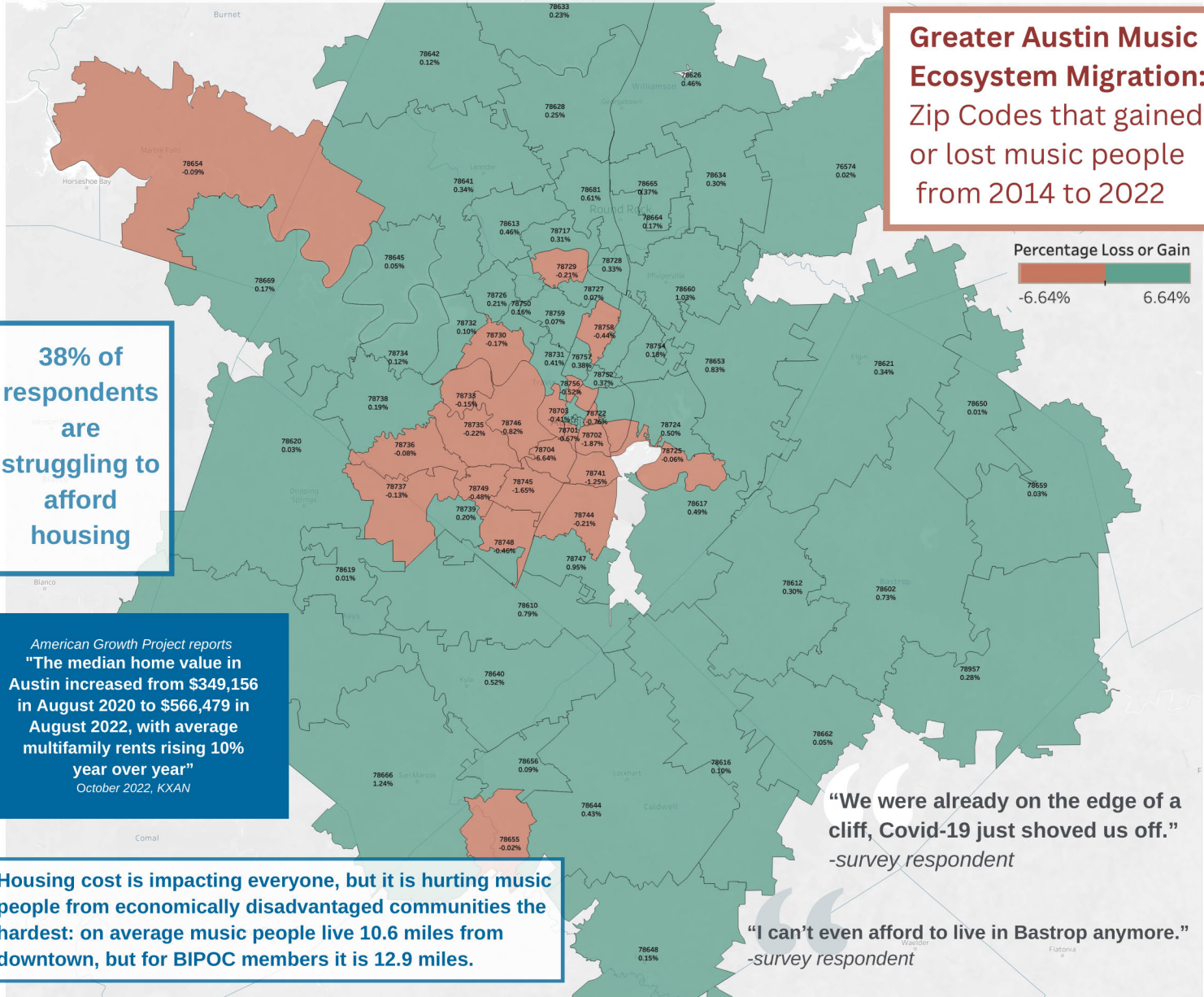
Notable Trends:

- Music people who identify as male is dropping, while females held steady
- Fewer younger people are entering the industry, shrinking the industry overall



The Impact of Housing Costs

Housing costs are both shrinking the ecosystem and pushing it outside Austin. Music people are moving further from central Austin zip codes. We've known just how financially vulnerable our ecosystem was for some time now, especially since 2014. New data reveal 89% of music census respondents are planning to continue their music work in the next 3 years, but only 64% say they will continue to live in the greater Austin region during this time, indicating that a third of the ecosystem is considering not just moving further from central Austin, but out of the metro area completely.



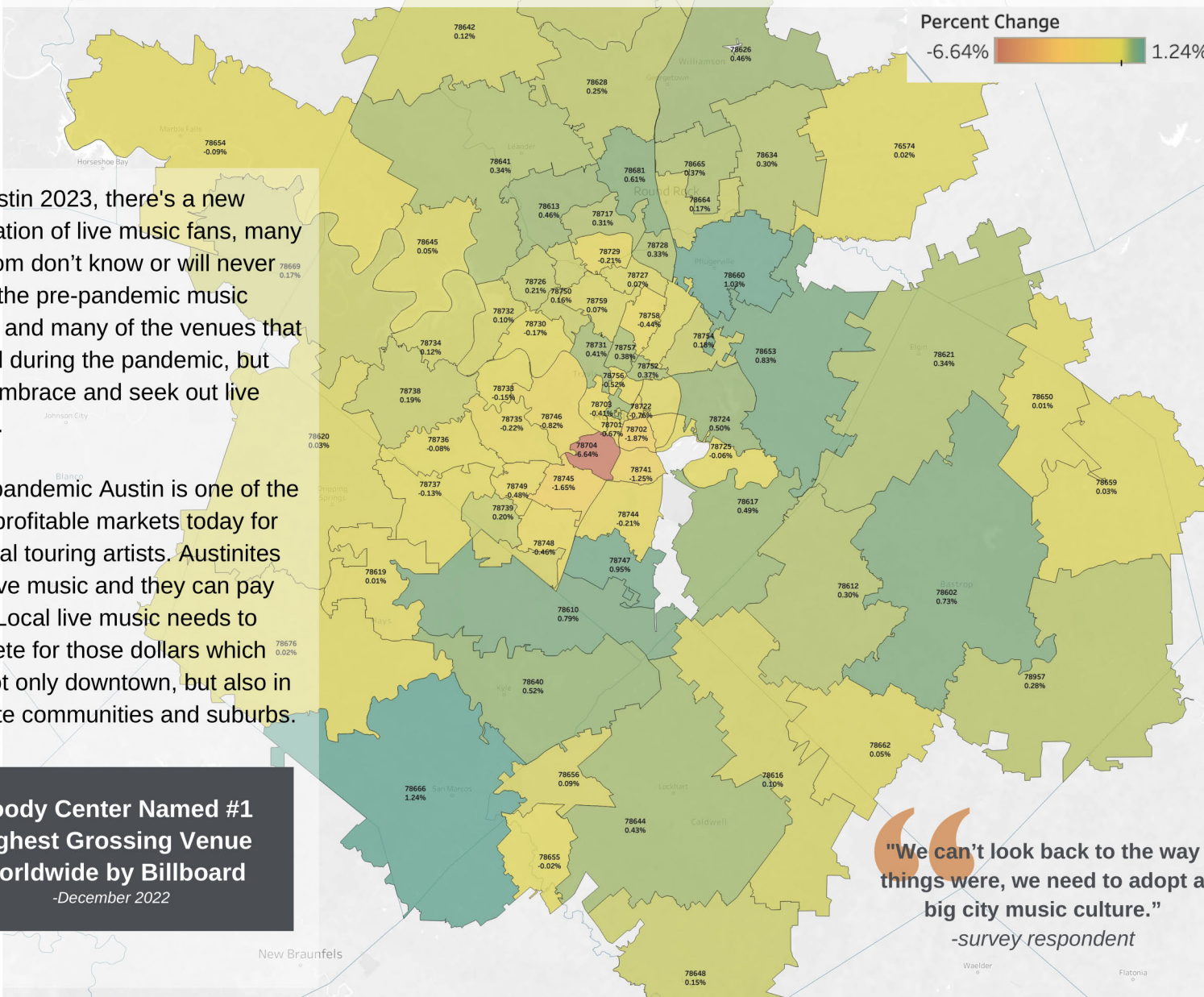
OPPORTUNITY:

This need is not unique to the music ecosystem, however, the pervasiveness of the threat and our specific industry's structural sensitivities need to be represented as loudly and urgently as possible

- **Policy, advocacy, and funding** - actively be at the table for any local, state or national policy and funding for affordable housing
- **Grants and funding** - provide moving, housing, cost of living assistance and support
- **Seek out creative solutions that engage homeowners and community** in housing the artists who make this community great. Music cooperatives, tap private sector, hackathons, etc.

Beyond Austin's Urban Core

While still anchored downtown, the post-pandemic Austin music ecosystem is expanding into satellite communities beyond downtown. No longer contained by Austin's city limits, it's become the Greater Austin Music Ecosystem. The fastest growing zip codes for music people are in San Marcos, Pflugerville, Manor, Buda, Bastrop, Round Rock and Kyle.



In Austin 2023, there's a new population of live music fans, many of whom don't know or will never know the pre-pandemic music scene and many of the venues that closed during the pandemic, but who embrace and seek out live music.

Post-pandemic Austin is one of the most profitable markets today for national touring artists. Austinites love live music and they can pay for it. Local live music needs to compete for those dollars which are not only downtown, but also in satellite communities and suburbs.

Moody Center Named #1 Highest Grossing Venue Worldwide by Billboard
-December 2022

"We can't look back to the way things were, we need to adopt a big city music culture."
-survey respondent

OPPORTUNITY:

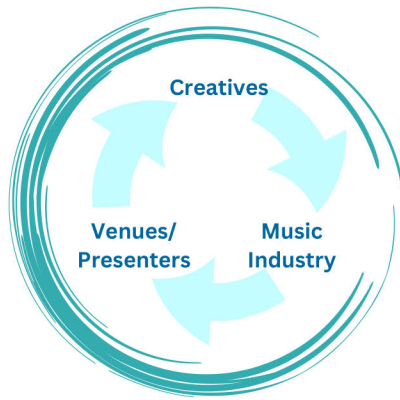
The expansion offers new opportunities for strategic audience development across a broader geography that's still close at hand.

- o Actively introduce and promote local live music venues/artists across Greater Austin (passport model for urban core and satellite communities, etc.)
- o Support local live music sub-sector (venues, presenters, and creatives) in re-establishing their audience post-pandemic, so they can more effectively compete for local live music dollars across the entire Greater Austin area
- o Think creatively about how to reach the new cross-section of Austinites who seek live music
- o Think creatively about how to increase access to and awareness of local live music



Local Ecosystem is Strong

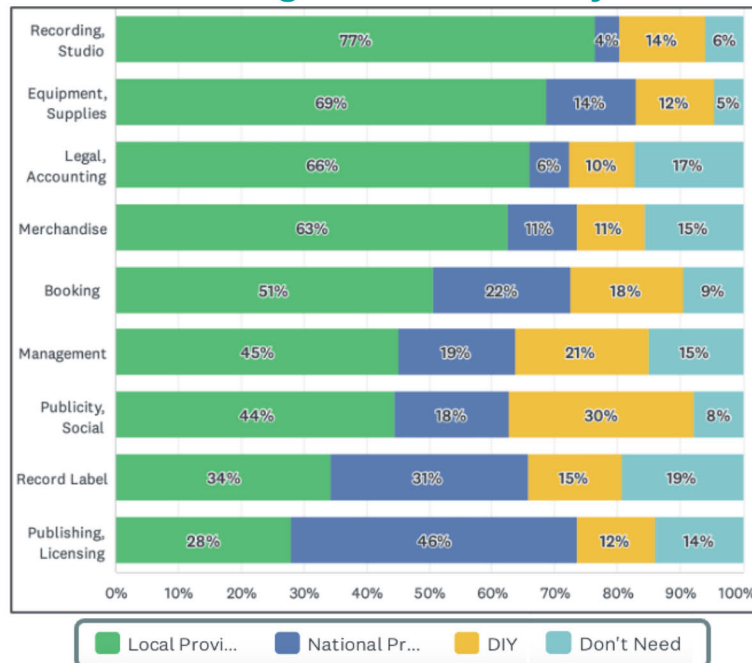
Local ecosystem is interdependent, comprehensive, and synergistically strong. Austin music people like to work with Austin music people and there's a diversified and highly skilled industry locally.



Mutually beneficial relationships between venues, musicians, local industry services are on the rise. Local live music venues and performers appear increasingly aligned in their interests (curation, community building, profit-sharing):

- 54% of gigs pay a base guarantee (musicians key earnings come from 1-3 paid gigs/month - a base guarantee helps.)
- Average annual spend for creatives is \$10,500 and 60% of that is spent locally (\$6,300)
- Creatives go local for industry services

Where creatives go for music industry services



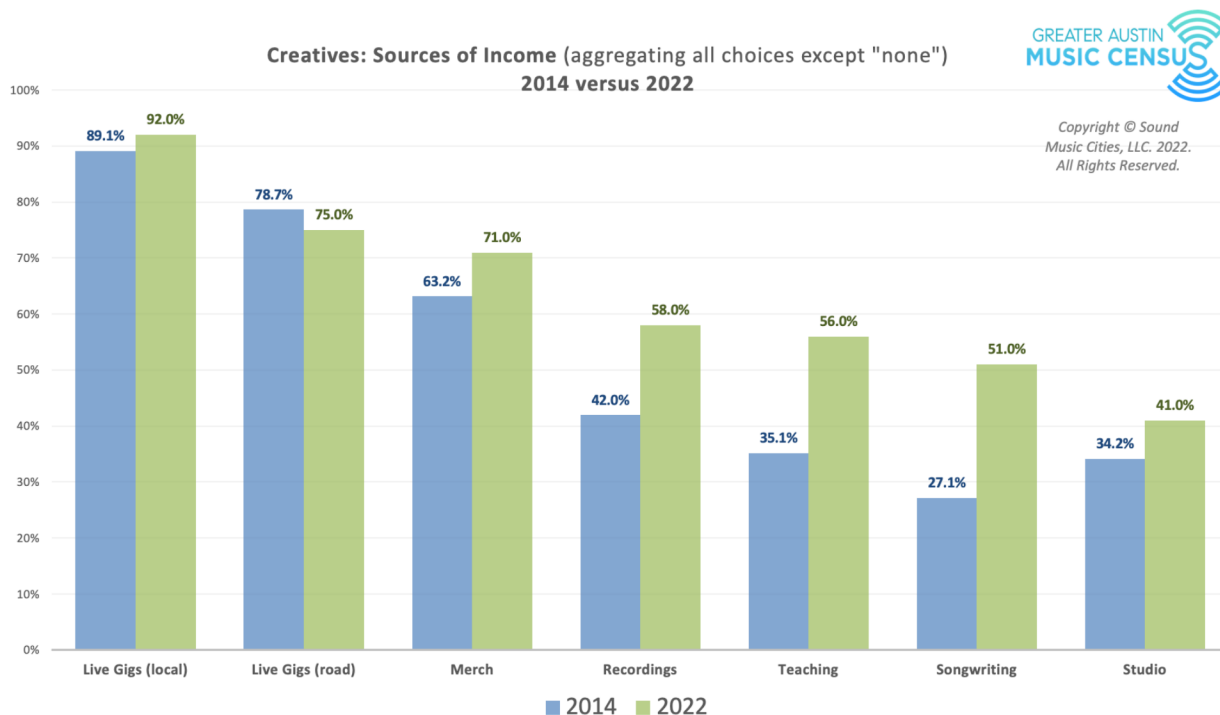
OPPORTUNITY:

- **Music community networking** - Ecosystem needs places to meet and collaborate. Music people desire and need more community networks
- **Grants desired** - Music people seek grants to support their creative process and are confident in their skills with grant application process
 - Note: Only 17% of venues are non-profits and most support funding requires non-profit status
- **Business model innovation** Greater Austin Music Ecosystem is ripe for innovation -- all the components are here to prototype new business mechanisms that could become nationally replicated
 - For example: Music Industry/Royalty programs seen as not worth it; overhaul this outdated model to become both accessible and worthwhile

Nurturing Our Austin Music Creatives

While incomes are diversifying and improving for Austin's music creatives, they are largely independent, self-employed, and self-taught artists who would benefit from revenue development and networks. Non-profits are supporting many of their needs, especially health, and artists desire grants.

- 52% of music people operate primarily as freelancers
- 38% of music people supplement their income with work outside of creative industry
- Music is largely experienced-based learning and training (77%)
- 84% musicians seek more grants for financial support
- Social Media is the primary networking channel for the community
- Non-profits/Foundations/Underwriting: impressive support in Austin, buys time for the creative process
- 84% have health insurance, up 5% since 2014 thanks to access through HAAM



OPPORTUNITY:

- Music incubators can curate and nurture talent with more structure
- Structured mentorships/apprenticeship (grant opportunity)
 - 34% already engaged in mentorships and want to do more
- Key training areas: Marketing, promotion, business of music
- Create a central hub of key grants available to Austin musicians
- Develop more sophisticated revenue develop programs and initiatives
- Invest in non-profits making difference and support the expansion of non-profit service area beyond Austin/Travis County
- Collaboration with ACC Music Business, Performance & Technology

DEI Measures (new in 2022) Show Attitudes & Perceptions

The Diversity, Equity, and Inclusion section of the Census measured sentiment on 14 different adjective pairs. The community is more positive than negative about most adjectives. Below are 8 areas where one side of the adjective pair was significantly more negative (5) or positive (3).

Negative:

Elitist

Competitive

Ageist

Homogenous

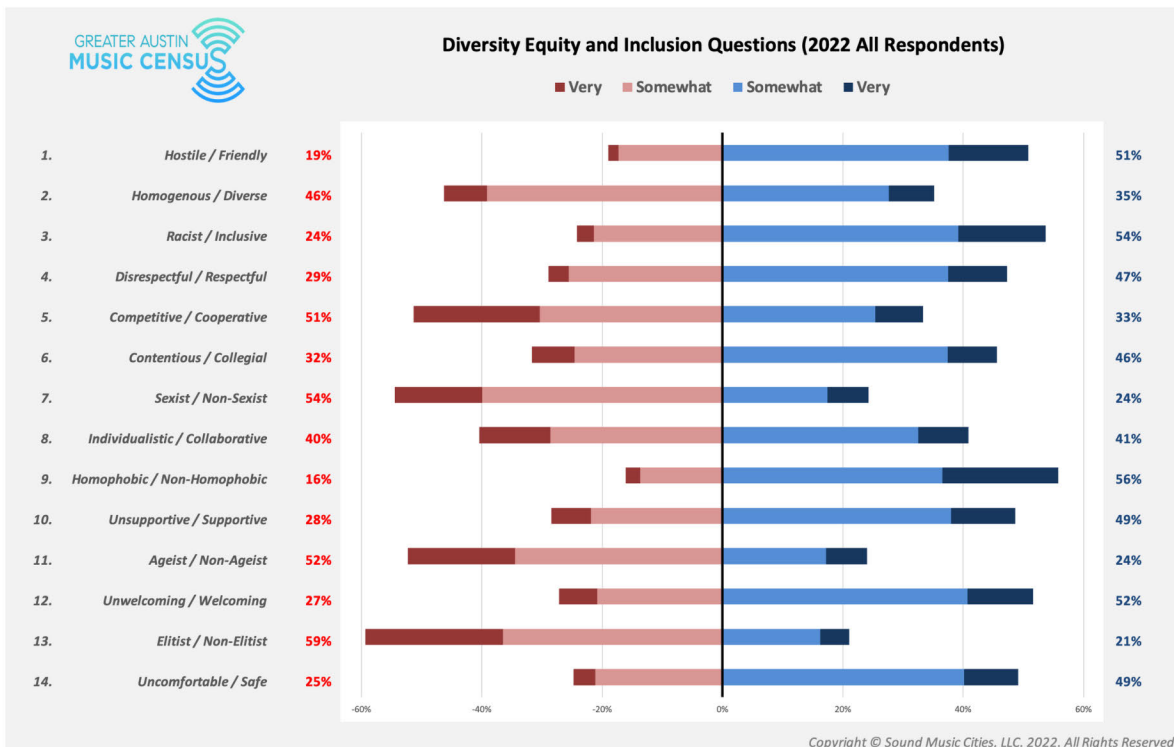
Sexist

Positive:

Non-Homophobic

Inclusive

Friendly



Digging further into sub-groups, especially those whose identities have experienced discrimination, are a racial minority, or have been marginalized, revealed strongly negative scores for various adjectives. For example, women scored Homophobic as negatively as did the queer community, and conversely the queer community scored Sexist as negatively as did women.

In addition to race, gender, and sexual orientation, those experiencing ageism and economic hardship widen our understanding of the frictions that challenge our creative community's values and potential.

OPPORTUNITY:

- These results provide a path for our community to acknowledge bias in our midst, with renewed courage to understand and empathize with each other in this increasingly diverse community
- Diversity is an essential component of creative industries, so bias (perceived or real) in any of these areas will weaken the music ecosystem. The community would benefit from tapping into the expertise of community organizations and DEI/social sector research to facilitate community conversations, workshops, etc.

Going Forward

This Summary Report and appendices are the beginning. Going forward, we hope the community will embrace and work with this new dataset to develop ways forward that will continue to strengthen and build the greater Austin music ecosystem.

There are many potential uses of this data set including:

- Foster greater understanding /empathy (within and externally)
- Sharpen and clarify the focus of public and private initiatives
- Identify needs and gaps (training, regulations, health needs, etc.)
- Bring to light differing perspectives from different communities and sub-groups
- See directional shifts relative to the 2014 Census (where possible)
- Provide market research to organizations for new service opportunities
- Provide reference point for future research, trends, performance

We are grateful for the opportunity to work with the greater Austin music people on developing this census and data set and look forward to seeing good things emerging from this community effort and data collected and shared.

In closing, we want to give a shout out of thanks to Peter Schwarz of Sound Music Cities who led the survey design and analysis, offering countless hours of expert work and deep empathy for this specific music community to which he belongs.