

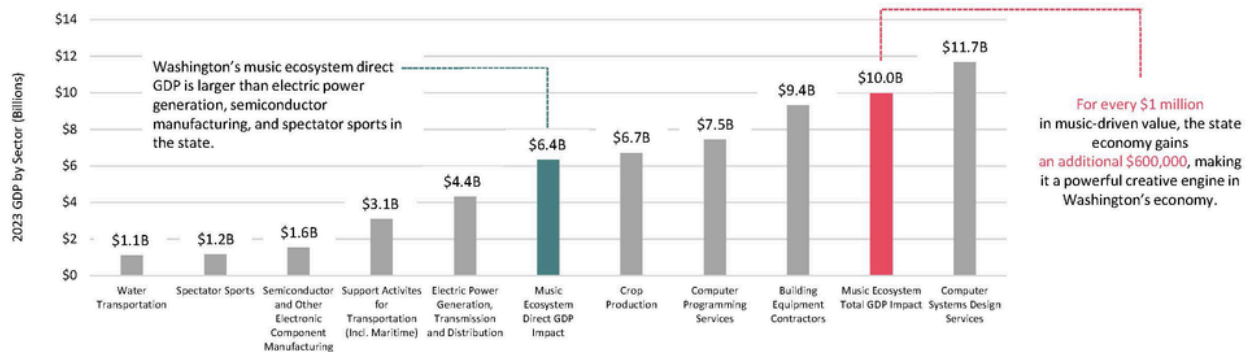


Washington State Music Census – Overview



WASHINGTON'S MUSIC ECOSYSTEM CONTRIBUTIONS TO GDP

Washington's music ecosystem generates more direct GDP than electric power, semiconductor manufacturing, or spectator sports—and that's before creating a powerful multiplier effect across the state economy.



Note: Music Ecosystem Direct GDP Impact reflects contributions associated with direct industry activity in NAICS 2382, 1110, 2211, 3344, and 7112. Music Ecosystem Total GDP Impact includes broader multiplier effects of this activity, including supply-chain purchases from other industries and household spending by employees. Comparable industries in the figure represent direct GDP associated with selected NAICS codes, provided as points of reference.

Source: IMPLAN, CVL Economics.

WASHINGTON'S MUSIC ECOSYSTEM

49,200
Ecosystem Jobs

\$2.8 Billion
Labor Income

3,867
Royalty Recipients*

28,858
Songwriters



LOCAL ARTIST COMMUNITIES



INFRASTRUCTURE & SUPPORT SERVICES



MUSIC CONSUMPTION

For every job in Washington's Music Ecosystem:

1.5
additional jobs are supported statewide

\$202,563
is contributed to Washington's GDP

\$24,465
in State and Local taxes are generated

\$47,050
in Federal taxes are generated

Direct Employment

Direct Labor Income

Direct Contribution to the State's GDP

Direct Economic Output

Seattle

11.1 K

\$827.3 M

\$1.84 B

\$2.86 B

King County

23.9 K

\$1.74B

\$3.97 B

\$6.07 B



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WA NIGHTLIFE MUSIC ASSOCIATION

Washington State Music Census – Artist Data



Musicians in Washington earn 29% of their income from music. 60.5% comes from non-music industry sources. Only 1.5% comes from grants.



While personal income has gone up 19% for solo artists, personal income for band members has gone down 9% since 2019.



Average Expenses have also gone up significantly. Up 67% for solo musicians and up 15% for members of a band and represent nearly half of an artist's income.



44% of musicians are considering relocation due to housing costs. Nearly 40% are considering leaving Washington all together.

Where are artists considering moving to?



1. Oregon 35%
2. Another Country 20%
3. California 19%
4. New York 18%
5. Illinois 18%
6. Texas 11%



97.8%
Washington State

Most performances are happening within the state of Washington.



46.6%
Other States

Top Tour Destinations:

- Oregon 75%
- Idaho 40%
- British Columbia Canada 29%

**that's not very far.*



17.7%
International



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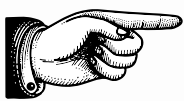
Washington State Music Census – Industry Professionals



Support roles like Admin Support, Music Media, and Live Music Production saw double-digit gains. While most roles saw wage growth growth, Retail & Manufacturing workers lost ground.

MUSIC WORKER AVERAGE ANNUAL INCOME BY INDUSTRY

Industry	2019	2023	2019 to 2023 Percent Change
Production	\$5,242	\$7,531	43.7%
Music Event Promoter	\$10,014	\$12,793	27.8%
Retail and Manufacturing	\$22,585	\$19,309	-14.5%
Admin Support	\$33,254	\$52,877	59.0%
Live Music Production	\$9,989	\$15,772	57.9%
Creative Services	\$8,523	\$11,701	37.3%
Distribution	\$36,792	\$54,516	48.2%
Music Education	\$12,719	\$19,024	49.6%
Music Media	\$15,015	\$24,269	61.6%
Live Music Venue	\$20,597	\$28,939	40.5%
Mixed Use Venue	\$10,349	\$13,303	28.5%
Festivals	\$4,792	\$11,012	129.8%

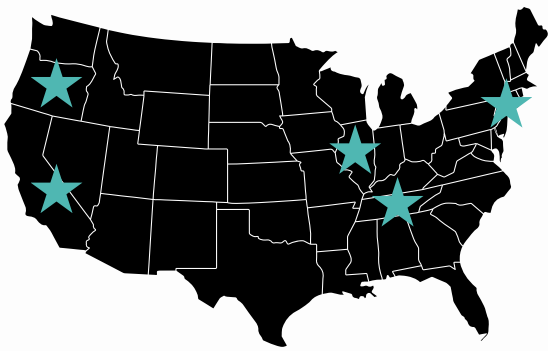


Over 32 % of music workers are considering relocation to further their careers. Nearly 33% are considering leaving the industry all together.

Where are music workers considering moving to?



- 1. California 35%
- 2. Another Country 23%
- 3. Oregon 19%
- 4. Tennessee 16%
- 5. New York 13%
- 6. Illinois 11%





Washington State Music Census – Live Music Venues



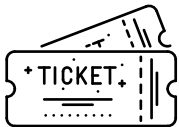
	FULL-TIME		PART-TIME		CONTRACT WORKERS	
Number of Workers	2019	2023	2019	2023	2019	2023
None	58.5%	47.2%	62.3%	52.8%	54.7%	43.4%
One to Five	30.2%	41.5%	20.8%	24.5%	22.6%	30.2%
Six to Ten	3.8%	3.8%	3.8%	3.8%	11.3%	9.4%
More than Ten	7.5%	7.5%	13.2%	18.9%	11.3%	17.0%
Average Number of Workers	5	5	13	14	12	14



86.7% of venue owners rent their spaces. The average monthly rent for dedicated music venues across the state is \$6,828 (and more than double that in high cost metropolitan areas!)



Small to mid-size spaces dominate Washington's Live Music Venues with the average capacity of 361.



The average ticket price went up 77% (from \$13 to \$23) since 2019

52.8% of venue owners make less than \$100k per year in revenue. Only 18.9% make a \$1 million or more per year.



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Washington State Music Census – Music Infrastructure



70.4% of Business Infrastructure & Support Services make less than \$25K in revenue per year.

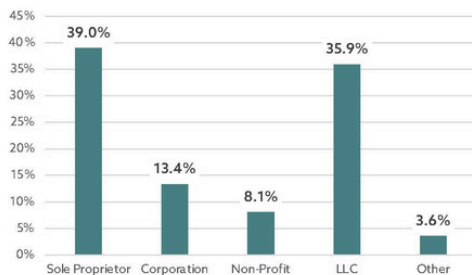
Infrastructure & Support Services businesses are increasingly relying on larger pools of contract labor. Use of contract workers has more than doubled since 2019.

SHARE OF EMPLOYMENT BY TYPE OF WORKER

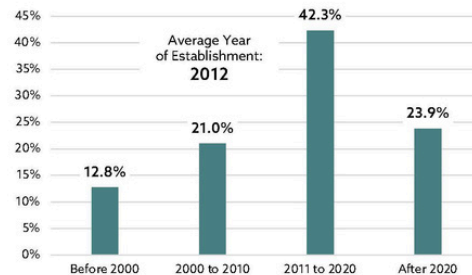
Number of Workers	FULL-TIME		PART-TIME		CONTRACT WORKERS	
	2019	2023	2019	2023	2019	2023
None	73.1%	67.8%	86.6%	83.4%	62.2%	54.8%
One to Five	25.1%	30.0%	12.0%	13.4%	29.3%	33.6%
Six to Ten	1.4%	1.1%	0.7%	1.4%	3.9%	3.9%
More than Ten	0.4%	1.1%	0.7%	1.8%	4.6%	7.8%
Average Number of Workers	0.8	0.9	0.7	0.9	25.0	58.6

Most Infrastructure & Support Services businesses are less than 15 Years old and operate as sole proprietors or LLCs – models that align with small, flexible, and often self-funded operations.

SHARE OF BUSINESS OWNERS BY OWNERSHIP TYPE



SHARE OF BUSINESS OWNERS BY YEAR OF ESTABLISHMENT



35% of music festivals expect to downsize



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