

MUSIC IN WASHINGTON

ECONOMIC IMPACT, TRENDS, AND OPPORTUNITIES



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INTRODUCTION

The Washington Nightlife & Music Association (WANMA) design and implementation of the inaugural Washington State Music Census provides foundational insights into the economic contributions, workforce characteristics, and needs of the state’s music composition, production, and performance ecosystem. This Census represents the most comprehensive attempt to date to measure how music operates as both a cultural force and an economic engine in Washington.

By combining quantitative analysis with lived experiences from musicians, business owners, and industry workers, the Census paints a detailed picture of a sector that generates billions in GDP, sustains tens of thousands of jobs, and shapes the identity of communities statewide. At the same time, it surfaces urgent challenges—housing affordability, income instability, and gaps in equity and representation—that threaten the sustainability of Washington’s music economy.

These findings establish a critical evidence base for policymakers, industry leaders, and community stakeholders to act. They underscore that supporting music is not only a matter of cultural preservation but also a strategic investment in economic development, workforce vitality, and Washington’s global competitiveness.

CVL Economics
October 2025

EXECUTIVE SUMMARY

WASHINGTON'S SOUND ECONOMICS

WASHINGTON'S MUSIC ECOSYSTEM REPRESENTS A SIGNIFICANT ECONOMIC FORCE, NOT MERELY A CULTURAL AMENITY. KEY FINDINGS REVEAL:

Music is more than entertainment in Washington—it's one of our state's most powerful economic and cultural engines. The inaugural Washington Music Census brings together voices from 742 musicians, 255 business owners, and 586 industry workers alongside hard economic data to capture the full scope of our music ecosystem: a sector that sustains tens of thousands of jobs, shapes community identity, and drives growth from Seattle to Spokane.

Economic Impact

The music industry directly employs 49,200 people and supports 74,700 jobs when multiplier effects are included. It generates \$6.37 billion in direct GDP and nearly \$10 billion total—outpacing industries like electric power, semiconductors, and spectator sports. For every music job created, another 1.5 follow elsewhere in the economy. Every \$1 million in output spins off another \$600,000, and fiscal returns are significant: \$2.32 billion in local, state, and federal tax revenue each year.

Statewide Reach

While Seattle and King County anchor the industry—together generating more than \$6 billion in GDP—Washington's music scene is truly statewide. Instrument makers in Spokane, symphonies in Yakima, and festivals in Bellingham show that music fuels both local culture and local economies in every corner of the state.



Business Growth & Audience Demand

Despite pandemic-era shocks, music businesses are rebounding. Between 2019 and 2023, revenues rose 7% for infrastructure firms and 25% for live venues, with more venues crossing the \$1 million revenue mark. Payrolls climbed 30%, and mixed-use establishments now dedicate over a quarter of their hours to music. Audiences are responding: the average number of shows per venue doubled, and ticket prices nearly doubled too—from \$13 to \$24—without slowing demand. Still, this growth has been hard-fought against rising expenses, which continue to squeeze margins and make stability harder to achieve in the day-to-day realities of running a music business.

Workforce Pressures

Behind the growth lies fragility. 40% of musicians and workers say they may leave Washington due to housing costs, while half expect to move within the state to find affordability. Cost-of-living pressures are real—prices run 9% above the national average and housing is 25% higher. Musicians' incomes remain modest (\$13,100 for solo artists; \$17,300 for band members) even as their expenses rise. Industry workers now earn over half their income from music, up from 43% in 2019, showing deeper professionalization but also greater exposure to financial volatility. Rising costs—whether for housing, equipment, or everyday living—are straining both artists and workers, threatening long-term retention and stability.

Festivals, Touring & Diversity

Festivals remain vital cultural and tourism draws, but 35% of producers expect to scale back, citing rising costs and regulations. Nearly 1 in 5 venues now book most shows through out-of-state promoters, reinforcing Washington's place on the national touring map while raising concerns about keeping revenue local. At the same time, the industry continues to skew male (70%) and white (79%), with women owning just 25–29% of businesses—a call to action for more inclusive pipelines into leadership and ownership.



Policy Priorities

The Census makes one message clear: growth alone is not enough. Without smart, targeted policies, rising costs will continue to erode the gains music businesses and workers are fighting to achieve. Washington has the chance to turn this moment into a long-term strategy for stability and growth. That means:

- Investing in workforce stability—through affordable housing, healthcare access, and income stabilization tools like a Creative Income Stability Fund—so artists and workers can afford to stay and build careers here.
- Strengthening business infrastructure with grants, tax incentives, and technical support that allow small venues, studios, and labels to reinvest in programming and weather volatility.
- Protecting cultural space—rehearsal rooms, community venues, and creative hubs that are the backbone of local scenes—from displacement and rising rents.
- Integrating music into tourism and economic development, treating festivals, venues, and regional talent as anchors of Washington’s visitor economy.
- Expanding equity and inclusion, building more diverse ownership and leadership pipelines to ensure all communities share in music’s economic and cultural benefits.

This is not just cultural policy—it’s economic policy. By acting now, Washington can secure music as a competitive advantage: a sector that attracts talent, generates revenue, and keeps our communities vibrant for generations to come.

Conclusion

Washington’s music industry is both a heartbeat and an economic powerhouse. It fills our neighborhoods with life, draws visitors from around the world, and provides thousands of good jobs. But its future is not guaranteed. With smart, people-centered policies and sustained investment, Washington can keep music not only alive, but thriving—for the benefit of every community, every worker, and every stage in our state.



ECONOMIC ANALYSIS

KEY TERMS

ECONOMIC IMPACT



Direct Impact

The core music industry comprises three foundational components of the broader music ecosystem: local artist communities, infrastructure and support services, and music consumption. Direct economic output from the music sector includes revenues generated by these components, encompassing both consumer-facing sales and business-to-business transactions—such as expenditures by artists and record labels on production services, live performance venues, and other operational needs.



Indirect Impact

The economic influence of the music industry extends beyond its core components through its demand for goods and services from other sectors in Washington. Businesses and professionals within the music ecosystem rely on a wide network of external suppliers. For example, talent managers and record labels engage legal services for contract negotiations; bands may hire accountants and consultants; and venues regularly contract electricians, carpenters, and other trades to maintain facilities. These inter-industry transactions generate indirect economic activity, supporting jobs, income, and output across a diverse range of supporting sectors.



Induced Impact

Employees within both the core music industry and its supplier network spend their earnings locally, contributing to additional economic activity throughout the state. This spending drives the third category of economic impact—induced impact—by supporting jobs in retail, hospitality, healthcare, and other consumer-facing sectors. In this way, the wages earned through direct and indirect music industry employment circulate through the broader economy, amplifying the industry's overall contribution to Washington's economic health.

KEY TERMS

MUSIC BUSINESS INDUSTRIES

Production: Businesses specializing in studio recording, engineering, and audio mixing.

Live Music Venue: Dedicated ticketed spaces like concert halls that regularly host live performances.

Mixed-Use Music Venue: Bars, restaurants, hotels, and cafés that offer consistent live music programming alongside other services.

Music Festivals: Temporary multi-performance events produced in a specific location over a defined period.

Music Event Promoter: Producers of concerts or events held in venues they do not own or lease, often across multiple locations.

Instruments, Gear, or Manufactured Goods: Businesses involved in retail, repair, or manufacturing of musical equipment, media formats, and gear.

Administrative or Professional Services: Support services including booking, management, accounting, PR, and legal for music professionals and businesses.

Live Music Production: Technical and logistical support for events, including transportation, equipment setup, and on-site production roles.

Creative Services: Providers of design, photography, and branded merchandise such as CDs, apparel, and accessories.

Distribution: Entities focused on getting music to listeners through record labels, licensing, and digital streaming platforms (DSPs).

Music Education: Providers of private lessons, music schools, or camps focused on skillbuilding and music training.

Music Media: Outlets covering or broadcasting music through radio, podcasts, or television.

WASHINGTON STATE

MUSIC ECOSYSTEM

ECOSYSTEM ANALYSIS

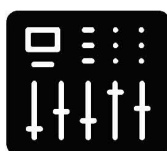
WASHINGTON STATE MUSIC ECOSYSTEM

The music ecosystem is composed of elements that are deeply embedded in hyper-local communities—such as neighborhood venues, local talent, and grassroots organizations—while also being shaped by global trends, technological shifts, and macroeconomic forces that influence everything from streaming revenues to international touring.



LOCAL ARTIST COMMUNITIES

Musicians | Local Live Performance Venues
Rehearsal and Collaboration Space | Music Education
Government and Regulatory Support



INFRASTRUCTURE & SUPPORT SERVICES

Engineers | Digital Music Services | Finance
Media | Physical Manufacturing | Aggregators
Record Labels | Music Publishing
Performing Rights Organizations
Managers and Promoters | Major Concert Arenas



MUSIC CONSUMPTION

Touring | Digital Downloads | On-Demand Streaming
Terrestrial Radio Broadcasting | Physical Retail
Film and Television

ECOSYSTEM ANALYSIS

WASHINGTON'S MUSIC ECOSYSTEM

49,200

Ecosystem Jobs

\$2.8 Billion

Labor Income

3,867

Royalty Recipients *

28,858

Songwriters

* SAG-AFTRA/Sound Exchange



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

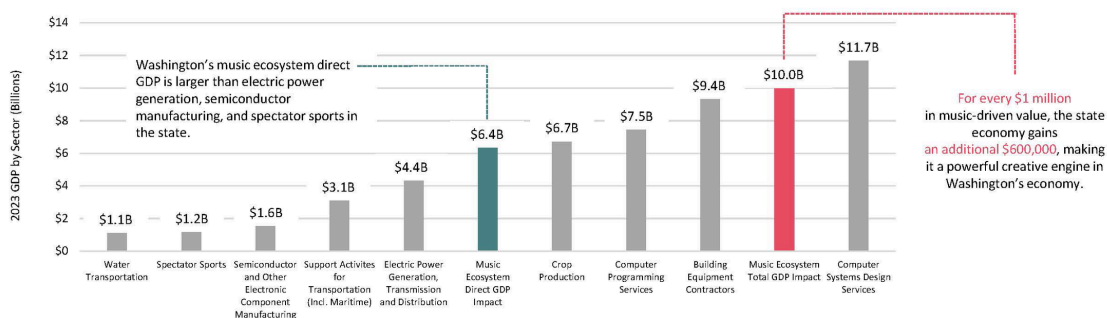
WASHINGTON STATE

AN ECONOMIC POWERHOUSE

ECOSYSTEM ANALYSIS

WASHINGTON'S MUSIC ECOSYSTEM CONTRIBUTIONS TO GDP

Washington's music ecosystem generates more direct GDP than electric power, semiconductors, 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.

ECONOMIC IMPACT

WASHINGTON STATE

The music industry is an **ENGINE** for Washington State's economy.



49,200
Direct Jobs
Supported

74,700
Total Jobs
Supported



\$2.8B
Direct Labor
Income

\$4.8B
Total Labor
Income



\$6.3B
Ecosystem Direct
Contribution to GDP

\$9.9B
Total Contribution to
GDP



\$427M
Local Tax

\$777M
State Tax


\$1.1B
Federal Tax

Source: IMPLAN, CVL Economics.

ECONOMIC IMPACT


REGIONAL

ECONOMIC IMPACT KING COUNTY

	EMPLOYMENT	LABOR INCOME	CONTRIBUTION TO GDP	ECONOMIC OUTPUT*
Direct	23.9 Thousand	\$1.74 Billion	\$3.97 Billion	\$6.07 Billion
Indirect	9.1 Thousand	\$1.03 Billion	\$1.77 Billion	\$2.94 Billion
Induced	2.2 Thousand	\$168.9 Million	\$340.2 Million	\$495.5 Million
Total	35.2 Thousand	\$2.94 Billion	\$6.08 Billion	\$9.51 Billion

* Economic output is defined as contributions to GDP plus intermediate inputs
Source: IMPLAN, CVL Economics.

ECONOMIC IMPACT SEATTLE

	EMPLOYMENT	LABOR INCOME	CONTRIBUTION TO GDP	ECONOMIC OUTPUT*
Direct	11.1 Thousand	\$827.3 Million	\$1.84 Billion	\$2.86 Billion
Indirect	4.9 Thousand	\$629.5 Million	\$1.09 Billion	\$1.87 Billion
Induced	1.1 Thousand	\$87.9 Million	\$166.3 Million	\$243.1 Million
Total	17.1 Thousand	\$1.54 Billion	\$3.10 Billion	\$4.97 Billion

* Economic output is defined as contributions to GDP plus intermediate inputs
Source: IMPLAN, CVL Economics.

WASHINGTON STATE MUSIC CENUS



742

Musicians



255

Business Owners



586

Music Industry Workers

Note: Musicians, Owners, and Workers do not sum to 1,205
since respondents can select multiple types of work statuses.

MUSICIAN DATA



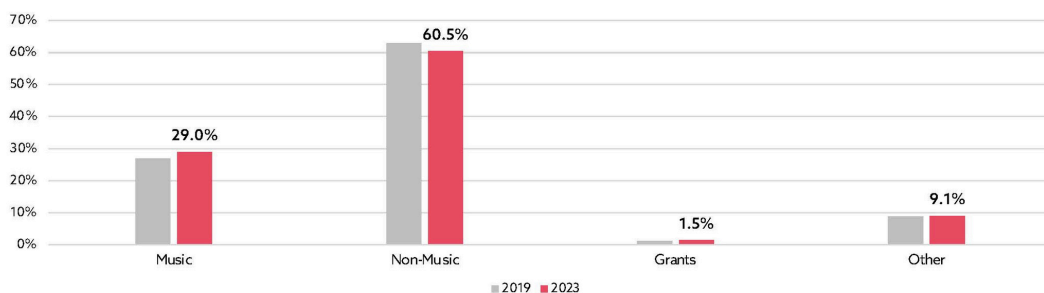
MUSICIAN DATA

MUSICIANS

SOURCES OF INCOME

Between 2019 and 2023, the share of income music workers earned from music-related activities grew slightly—from 26.9% to 29.0%—while reliance on non-music work declined from 63.0% to 60.5%.

SHARE OF TOTAL INCOME FOR MUSICIANS BY SOURCE
2019 vs. 2023

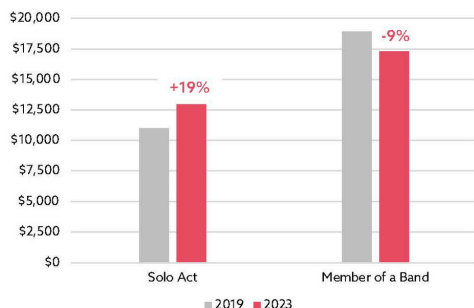


MUSICIANS

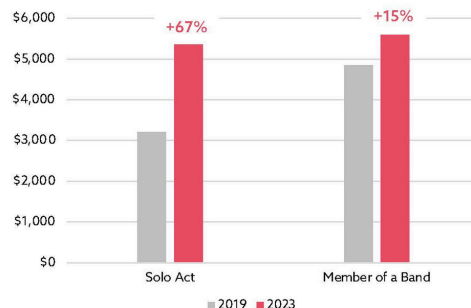
INCOME AND EXPENSES

Inflation has driven costs up considerably for musicians, especially solo acts.

AVERAGE PERSONAL INCOME FOR MUSICIANS BY TYPE
2019 vs. 2023



AVERAGE EXPENSES FOR MUSICIANS
2019 vs. 2023

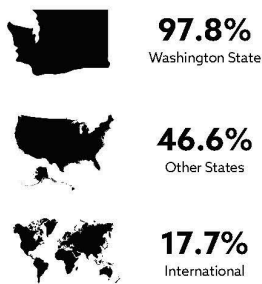


MUSICIANS

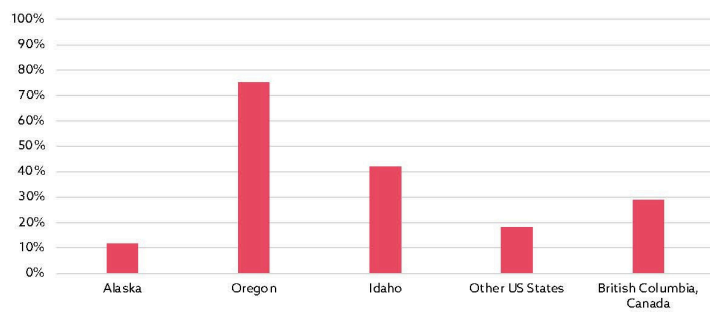
PERFORMANCE LOCATIONS

Nearly Half of Musicians Have Performed Outside Washington. Oregon Tops Out-of-State Gigs.

SHARE OF MUSICIANS BY PERFORMANCE LOCATION



PERFORMANCE LOCATIONS BY SHARE OF MUSICIANS WHO PERFORM OUT OF STATE

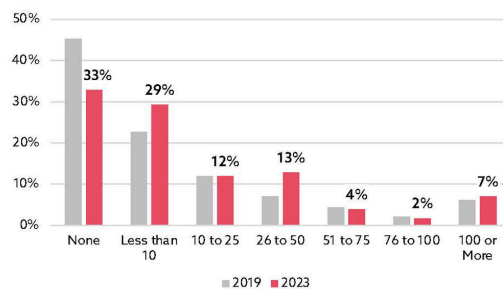


MUSICIANS

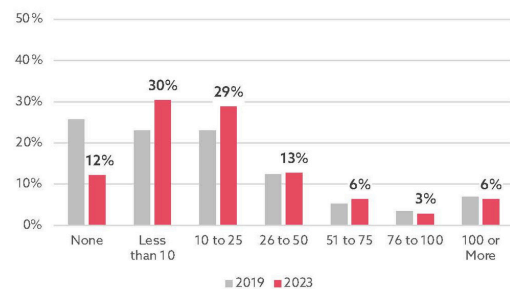
PERFORMANCE FREQUENCY

Both solo artists and band members are performing more often. Fewer musicians are going a full year without a performance in 2023 compared to 2019.

SHARE OF SOLO ARTISTS BY NUMBER OF PERFORMANCES



SHARE OF BANDS BY NUMBER OF PERFORMANCES



BUSINESS OWNERS

INFRASTRUCTURE AND SUPPORT



BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT
SERVICES BUSINESSES

BUSINESS OWNERS

INFRASTRUCTURE SUPPORT SERVICES BUSINESSES

BUSINESS OWNERS

SAMPLE DISTRIBUTION

Diverse distribution of business owner responses across various sectors



255

Business Owners

Business Sector	Sample (n)
Production	65
Music Event Promoter	56
Retail and Manufacturing	17
Admin Support	50
Live Music Production	24
Creative Services	43
Distribution	29
Music Education	44
Music Media	30
Live Music Venue	28
Mixed-Use Venue	27
Festivals	20

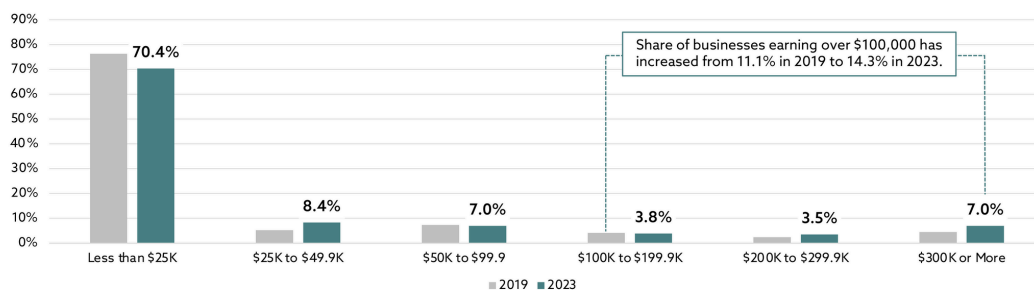
Note: Unique respondents can select multiple types of sectors that they can work in.

BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT SERVICES

REVENUE

Annual revenue is up 7.2% between 2019 and 2023. Most Infrastructure & Support Services businesses still earn under \$25K/year, though that share is shrinking. More businesses are breaking into higher revenue tiers.

SHARE OF BUSINESS REVENUE 2019 vs. 2023



BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT SERVICES

EMPLOYMENT STATISTICS

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

	FULL-TIME		PART-TIME		CONTRACT WORKERS	
Number of 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

BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT SERVICES

PAYROLL STATISTICS

Full-time and part-time pay has grown significantly since 2019. Despite growth, business payrolls across all types of workers remains mostly below \$10,000.

PAYROLL DISTRIBUTION BY TYPE OF WORKER

	FULL-TIME		PART-TIME		CONTRACT WORKERS	
Payroll Distribution	2019	2023	2019	2023	2019	2023
Less than \$10,000	88.4%	83.7%	88.4%	84.1%	92.0%	90.2%
\$10,000 to \$49,999	3.6%	8.0%	7.6%	9.4%	6.9%	7.2%
\$50,000 to \$99,999	1.8%	1.4%	1.4%	3.6%	0.4%	1.4%
\$100,000 or More	6.2%	6.9%	2.5%	2.9%	0.7%	1.1%
Average	\$44,087	\$61,281	\$9,805	\$16,482	\$4,404	\$6,255

BUSINESS OWNERS

PERFORMANCE VENUES



BUSINESS OWNERS: LIVE PERFORMANCE
VENUE BUSINESSES

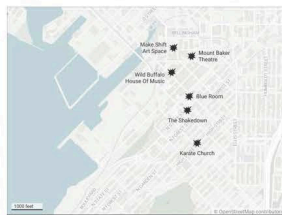
BUSINESS OWNERS

PERFORMANCE VENUES

ECOSYSTEM ANALYSIS

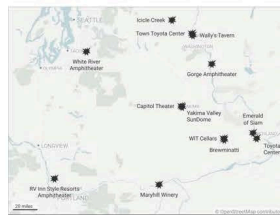
A SNAPSHOT OF WASHINGTON'S LIVE MUSIC VENUES

North Washington



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Central Washington



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Eastern Washington



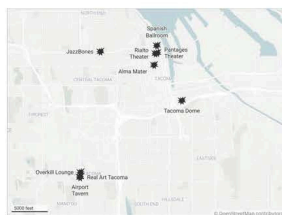
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Olympia



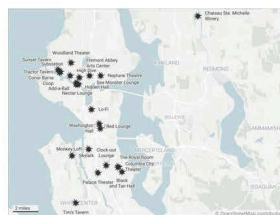
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Tacoma



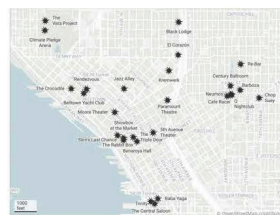
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Greater Seattle



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Downtown Seattle



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"Running a music venue in this post-pandemic environment is hard. We're dealing with increased expenses across the board, while people are going out less. On top of that, there are fewer up & coming artists—especially local ones—who can sell out our room. We have to rely heavily on legacy acts and nationally touring artists. It's a tough balance, but supporting our local scene is essential for the health of our community. I started this business because I love live music and I want to see it thrive in Bellingham and throughout our state. People need live music experiences. In my opinion, it's an essential part of being happy."

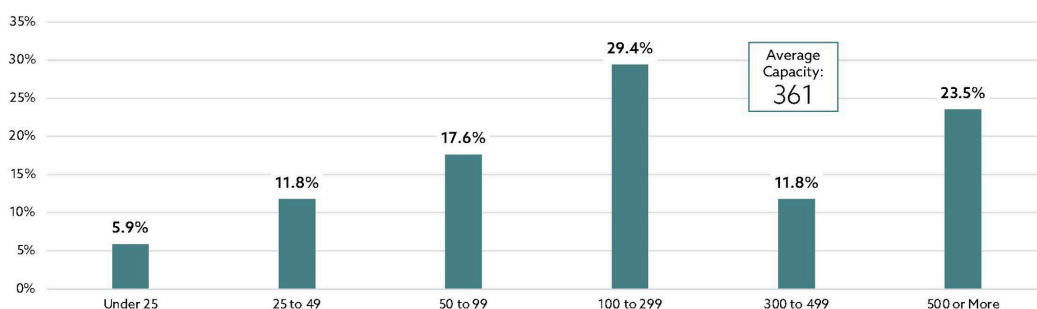
-Craig Jewell, Owner, Wild Buffalo

BUSINESS OWNERS: LIVE PERFORMANCE VENUES

AUDIENCE CAPACITY

Small to mid-sized venues dominate Washington's live performance landscape. Audience scale varies widely—35% of venues seat 300 or more people.

SHARE OF LIVE PERFORMANCE VENUES BY CAPACITY

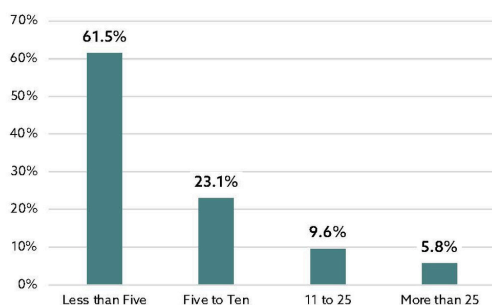


BUSINESS OWNERS: LIVE PERFORMANCE VENUES

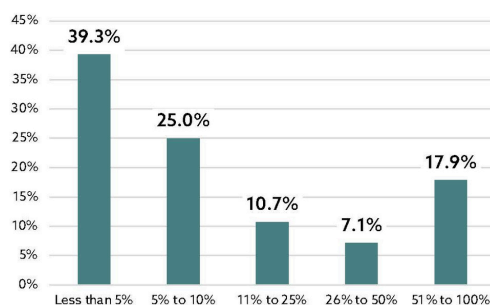
OUT-OF-STATE ACTS AND PROMOTERS

Roughly 1 in 5 venues book over half their shows from out-of-state promoters.

SHARE OF PERFORMANCES THAT ARE FROM OUT-OF-STATE



SHARE OF SHOWS BOOKED BY OUT-OF-STATE PROMOTERS



BUSINESS OWNERS: LIVE PERFORMANCE VENUES

EMPLOYMENT STATISTICS

Businesses are employing more workers across the board. More businesses have 1-5 full-time workers (up from 30.2% to 41.5%). Big jump in businesses with more than 10 part-time workers.

SHARE OF EMPLOYMENT BY TYPE OF WORKER

Number of Workers	FULL-TIME		PART-TIME		CONTRACT 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

BUSINESS OWNERS: LIVE PERFORMANCE VENUES

PAYROLL STATISTICS

Significant rise in average fulltime payroll: \$171K → \$224K (30%+ increase). Part-Time and Contract compensation growth is slower.

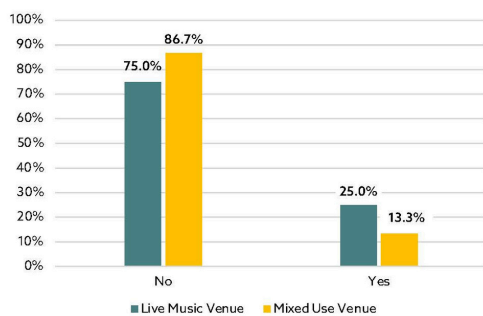
PAYROLL DISTRIBUTION BY TYPE OF WORKER

Payroll Distribution	FULL-TIME		PART-TIME		CONTRACT WORKERS	
	2019	2023	2019	2023	2019	2023
Less than \$10,000	74.1%	64.8%	75.9%	70.4%	83.3%	79.6%
\$10,000 to \$49,999	3.7%	7.4%	11.1%	11.1%	7.4%	11.1%
\$50,000 to \$99,999	3.7%	5.6%	1.9%	5.6%	0.0%	0.0%
\$100,000 or More	18.5%	22.2%	11.1%	13.0%	9.3%	9.3%
Average	\$171,474	\$223,644	\$41,240	\$51,106	\$27,638	\$31,481

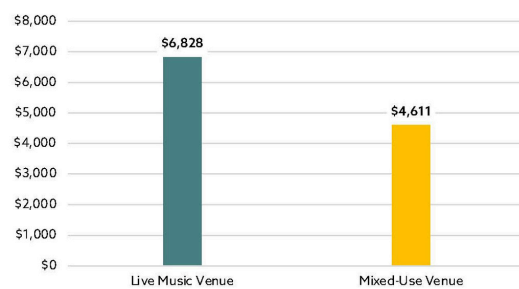
BUSINESS OWNERS: LIVE PERFORMANCE VENUES COMMERCIAL REAL ESTATE

Monthly rent averages \$5,800. Ownership is rare among mixed-use venues.

SHARE OF BUSINESS OWNERS WHO OWN THE PROPERTY



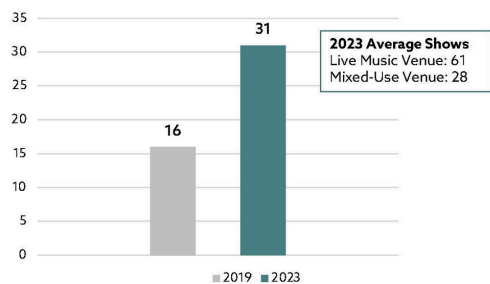
AVERAGE MONTHLY RENT BY TYPE OF PERFORMANCE VENUE



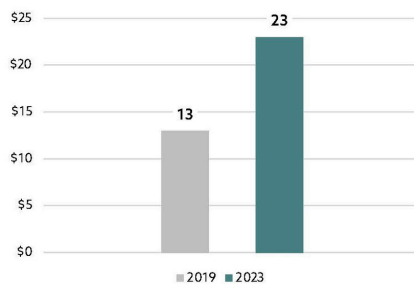
BUSINESS OWNERS: LIVE PERFORMANCE VENUES SHOWS AND TICKET PRICES

Live performance activity is up—average shows per venue rose from 16 to 31. Audiences are paying nearly twice as much for live performances.

AVERAGE ANNUAL NUMBER OF SHOWS
2019 vs. 2023



AVERAGE TICKET PRICE
2019 vs. 2023

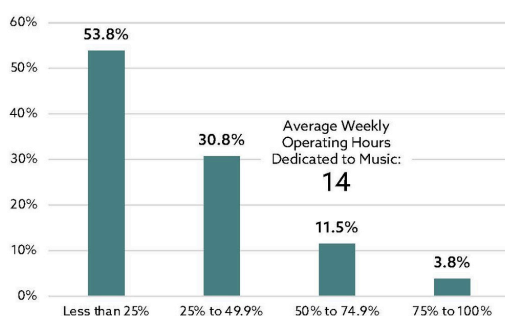


BUSINESS OWNERS: LIVE PERFORMANCE VENUES

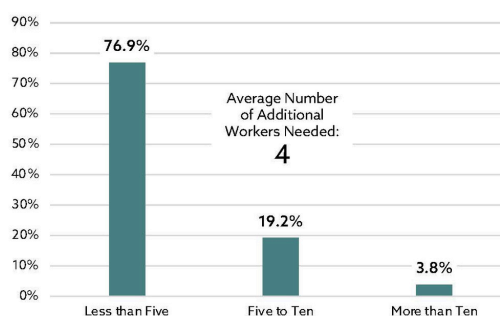
MIXED-USE VENUE OPERATING HOURS

Music programming makes up 27% of mixed-use venue operating hours.

WEEKLY OPERATING HOURS DEDICATED TO MUSIC



WORKERS NEEDED DURING MUSIC PROGRAMMING HOURS

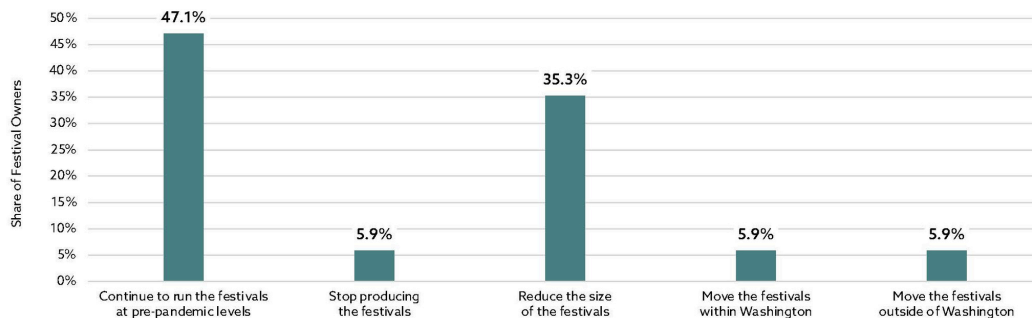


BUSINESS OWNERS: LIVE PERFORMANCE VENUES

MUSIC FESTIVAL OUTLOOK

Festival activity remains stable, but 35% of owners expect to downsize.

EXPECTATIONS FOR MUSIC FESTIVAL PRODUCTION IN WASHINGTON IN THE NEXT ONE TO FIVE YEARS



WORKERS AND CREW

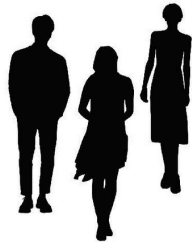


MUSIC INDUSTRY WORKERS

WORKERS

SAMPLE DISTRIBUTION

Strong representation of music workers in production, live music venues, administrative services, and live music production



586

Music Industry Workers

Business Type	Sample (n)
Production	250
Music Event Promoter	95
Retail and Manufacturing	39
Admin Support	169
Live Music Production	152
Creative Services	130
Distribution	53
Music Education	94
Music Media	117
Live Music Venue	200
Mixed Use Venue	108
Festivals	166

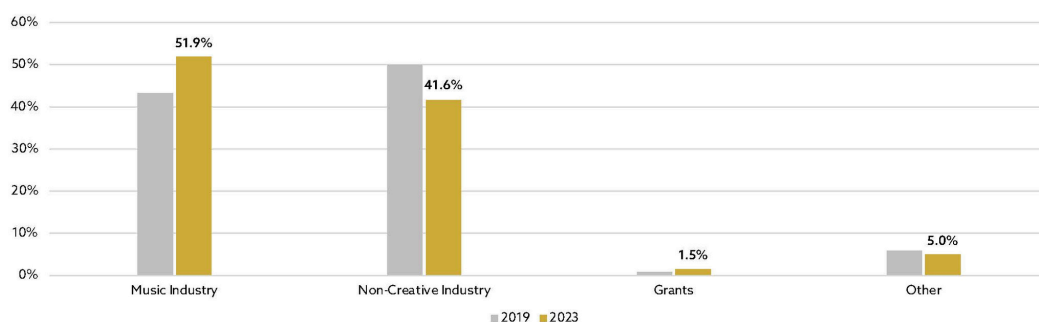
Note: Unique respondents can select multiple types of sectors that they can work in.

WORKERS

SOURCES OF INCOME

Music industry income now makes up over half of total income for music workers (up from 43.3% to 51.9%).

SHARE OF TOTAL INCOME FOR WORKERS BY SOURCE




WORKERS

INCOME

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%



MUSIC INDUSTRY RETENTION

MUSIC INDUSTRY RETENTION

Washington's music industry is a powerful economic and cultural driver, but without intentional retention efforts, we risk losing the very artists and workers who sustain it. Rising costs of living, irregular income, and limited long-term career pathways are pushing talent out of the state—or out of the industry entirely. By investing in stability, workforce development, and supportive infrastructure, Washington can ensure that musicians, venue staff, sound engineers, promoters, and other industry professionals not only get their start here but are able to build lasting careers that strengthen our communities and fuel the state's creative economy.



"I've spent over eight years in Washington music—managing breakthrough artists, producing festivals and workshops, and talent buying more shows than I can count.

Yet our industry keeps people small instead of building national and global stars.

I had to leave for Los Angeles just to get my artist the support he deserved, only making the Amazon Music connection once I left.

If Washington wants to stop losing talent, we need to invest in real infrastructure—industry hubs, diverse media, and funding that values music as a true economic engine."

--Ryker, Artist Management, directINFLUX

WORKER RETENTION

WORKERS

CAREER OUTLOOK

Career uncertainty persists—1 in 3 workers may relocate or step back. In-state moves are unlikely, but out-of-state relocation is a real consideration.

OVER THE NEXT ONE TO FIVE YEARS, WHAT IS THE LIKELIHOOD OF...

Leaving Washington to further your career?



Moving to a different location within Washington to further your career?



Suspending your professional musical endeavors altogether?



■ Impossible ■ Unlikely ■ Neutral ■ Moderately Possible ■ Most Likely

32.9% of workers think its possible or likely they will suspend their music industry careers altogether

Over 32% of workers say its possible or likely they will leave Washington to further their music careers

WORKERS

HOUSING OUTLOOK

High housing costs may push workers out of their neighborhood or even the state altogether.

OVER THE NEXT ONE TO FIVE YEARS, WHAT IS THE LIKELIHOOD OF...

Leaving Washington due to housing costs?



Moving to a different location within Washington due to housing costs?



■ Impossible ■ Unlikely ■ Neutral ■ Moderately Possible ■ Most Likely

Roughly half of music industry workers say they will move in Washington due to housing costs

Just under 40% of workers say they may have to leave Washington due to housing costs

MUSICIAN RETENTION

MUSICIANS

CAREER OUTLOOK

Over 70% of musicians say they're unlikely to suspend their music careers – yet some are exploring opportunities elsewhere in Washington and abroad to advance their work.

OVER THE NEXT ONE TO FIVE YEARS, WHAT IS THE LIKELIHOOD OF...

Leaving Washington to further your career?



Moving to a different location within Washington to further your career?



Suspending your professional musical endeavors altogether?



■ Impossible ■ Unlikely ■ Neutral ■ Moderately Possible ■ Most Likely

Most musicians plan to stay the course, but 1 in 4 may step away

1 in 3 musicians may leave the state to further their careers

MUSICIANS

HOUSING OUTLOOK

While 1 in 3 musicians might relocate to advance their careers, an even larger share (40%) of musicians said they might move due to high costs of housing.

OVER THE NEXT ONE TO FIVE YEARS, WHAT IS THE LIKELIHOOD OF...

Leaving Washington due to housing costs?



Moving to a different location within Washington due to housing costs?



■ Impossible ■ Unlikely ■ Neutral ■ Moderately Possible ■ Most Likely

40% of musicians may leave Washington due to housing costs.

44% expect to relocate within the state for the same reason.

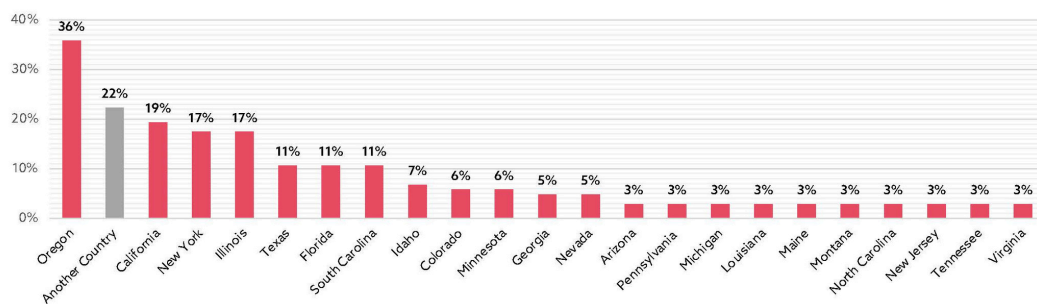
RELOCATION

MUSICIANS

DESIRABLE DESTINATIONS

Oregon is the top choice for potential relocation among musicians (35.9%). California (19.4%), New York (17.5%), and Illinois (17.5%) are the top domestic alternatives, pointing toward major music hubs.

SHARE OF MUSICIANS LIVING IN WASHINGTON WHO WOULD CONSIDER MOVING TO ...

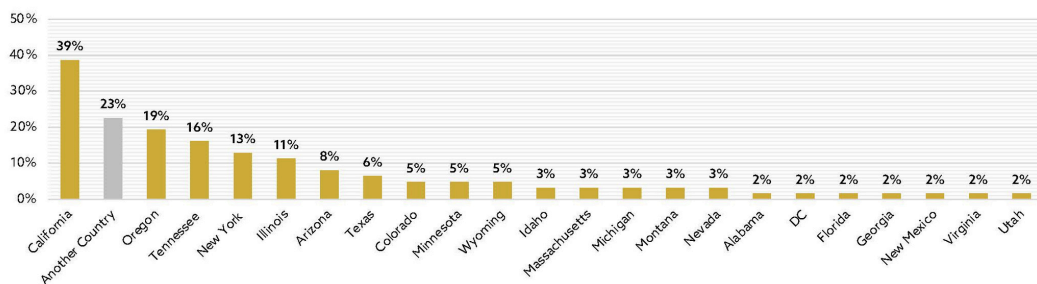


WORKERS

DESIRABLE DESTINATIONS

Workers weigh relocation to major creative hubs and/or more affordable regions. California (38.7%), Oregon (19.4%) and Tennessee (16.1%) lead among domestic alternatives.

SHARE OF WORKERS LIVING IN WASHINGTON WHO WOULD CONSIDER MOVING TO ...



POLICY FRAMEWORKS

NOW

YEAR 5+



CREATIVE INCOME STABILITY FUND

CREATIVE INCOME STABILITY FUND

Projected timeline 3-5 years

A PATHWAY TO ECONOMIC SECURITY FOR WASHINGTON'S MUSIC WORKFORCE

Challenge

Many artists and gig workers are classified as independent contractors (1099), which means they generally do not qualify for programs like unemployment insurance, family leave, or paid sick leave that protect traditional employees.

During COVID-19, federal programs such as Pandemic Unemployment Assistance (PUA) temporarily extended UI to self-employed and gig workers — but those protections ended in 2021 and were never made permanent. The result is that these workers remain vulnerable during seasonal slowdowns, with no safety net when gigs dry up and no access to medical or family leave protections.

Legislative Opportunity

The Creative Income Stability Fund would provide targeted financial support during low-work months for music workers who demonstrate a track record of professional engagement in the industry. Modeled after unemployment and creative income support initiatives in other regions, this program would bridge the gaps inherent in project-based and seasonal employment. It would allow music professionals to remain in the industry, plan their lives with more stability, and contribute to Washington's long-term cultural economy.

Implementation Roadmap

- Phase 1 (Year 1–2): Pilot Program
 - Define eligibility criteria.
 - Set up fund administration and processes.
 - Launch pilot in 1–2 regions with high concentrations of music workers.
- Phase 2 (Year 3–4): Evaluation & Expansion
 - Collect data on outcomes (industry retention, reduction of income insecurity, community impacts).
 - Expand to cover statewide participation.
- Phase 3 (Year 5+): Integration
 - Formalize the program as part of Washington's broader creative economy infrastructure.
 - Align with existing workforce, unemployment, or cultural investment statutes (e.g., RCW 50.04 for employment benefits definitions).

Learn from Other Jurisdictions

- Ireland has piloted a Basic Income for the Arts program, providing monthly stipends to creative workers.
- Quebec offers artist income support tied to demonstrated professional activity.
- New York City's Creatives Rebuild New York initiative tested guaranteed income for artists to stabilize the workforce.

These examples demonstrate the feasibility and positive outcomes of targeted income stability programs in creative sectors. Washington can adapt these lessons to the specific needs of its music industry workforce, ensuring the state remains a competitive hub for live music and cultural production.

CULTURAL INVESTMENT

STATEWIDE INVESTMENT/TOURISM

Projected timeline 0-3 years

The Challenge

Washington's cultural assets generate substantial economic activity, yet the absence of a coordinated statewide approach limits their full potential. Current admissions taxes and tourism promotion efforts are fragmented, creating inefficiencies and missed opportunities to build a truly unified cultural economy that benefits artists, venues, visitors, and local communities.

Legislative Opportunity

By aligning existing authorities under RCW 35.21.280 (city admissions taxes), RCW 36.38.010 (county admissions taxes), and RCW 67.28.1816 (lodging taxes), Washington has the tools to create a modern, stable cultural investment system. This framework could harmonize revenue collection, expand eligible uses, and direct funds toward high-impact initiatives such as festival grants, venue promotion, and statewide tourism campaigns.

A key step would be legislation authorizing a uniform Cultural Access admissions surcharge of 1–2% on event tickets. Removing exemptions for large professional sports facilities would ensure fairness across all cultural sectors. The resulting revenue would be directly tied to cultural participation, growing alongside the sector itself.

Learning from Other Jurisdictions

- Denver's Scientific and Cultural Facilities District (SCFD): Regional sales and use tax that distributes millions annually to cultural institutions across seven counties.
- United Kingdom's National Lottery Fund: A share of gaming revenues dedicated to arts and heritage projects, ensuring a stable and diversified funding base.
- France and Italy's Ticket Surcharges: Cultural levies on event admissions that directly reinvest in arts infrastructure and preservation.

These models demonstrate that broad-based, dedicated cultural revenues not only sustain local arts but also drive tourism and regional economic development. Washington can adapt these precedents into a uniquely local solution.

Implementation Roadmap

1. Legislative Authorization
 - Enact legislation creating a uniform admissions surcharge (1–2%) and harmonizing existing statutes.
 - Remove stadium exemptions to ensure equitable application.
2. Revenue Collection & Pooling
 - Standardize collection of surcharges at the state level.
 - Dedicate a portion of lodging tax revenues to cultural investment.
3. Governance & Oversight
 - Establish a Cultural Investment Board with representatives from state, county, and municipal levels.
 - Empower the board to direct funds toward strategic initiatives with measurable outcomes.
4. Pilot & Evaluation Phase
 - Launch regional pilots (e.g., festival funding, coordinated marketing) to test systems.
 - Gather outcome data on attendance, tourism revenue, and community participation.
5. Long-Term Sustainability
 - Build in periodic reviews to adjust surcharge rates and funding allocations.
 - Explore future revenue sources, such as digital ticketing surcharges, modeled on European precedents.



Conclusion

Washington has a rare opportunity to transform fragmented cultural funding into a unified, sustainable system that invests directly in its creative economy. By drawing on proven models from other regions and tailoring them to local needs, this framework can stabilize cultural funding, amplify tourism, and ensure that the state's artists and communities continue to thrive.

MUSIC SECTOR INVESTMENT WORKFORCE STRATEGY

MUSIC SECTOR INVESTMENT AND WORKFORCE STRATEGY

Projected timeline 1-3 years

BUILDING A SUSTAINABLE FUTURE FOR WASHINGTON'S MUSIC ECONOMY

Challenge

Washington's music sector generates significant cultural and economic value, but investment in workforce development and infrastructure has not kept pace with the industry's needs. Musicians, sound engineers, festival staff, and venue workers often lack access to professional development, technical training, and career pathways that exist in other industries. Without targeted investment, Washington risks losing talent to regions that provide clearer opportunities for career growth, stronger support systems, and better access to industry infrastructure.

Legislative Opportunity

A Music Sector Investment & Workforce Strategy would establish a comprehensive approach to building capacity across the music ecosystem. This includes expanding workforce training, funding music business infrastructure, and strengthening pathways for both emerging and mid-career professionals. By investing in music workers and businesses as part of Washington's broader economic development strategy, the state can create a more resilient, competitive, and equitable creative economy.

Implementation Roadmap

- Phase 1 (Year 1–2): Research & Pilot Programs
 - Map workforce gaps across music occupations, including technical roles and business management.
 - Launch pilot training programs in collaboration with educational institutions and music organizations.
 - Invest in small-scale infrastructure improvements (e.g., rehearsal spaces, mobile sound equipment).
- Phase 2 (Year 3–4): Expansion & Regional Equity
 - Scale successful workforce programs to serve multiple regions, with a focus on underrepresented communities.
 - Fund regional music hubs to provide training, incubation, and performance opportunities.
 - Support touring infrastructure to connect rural and urban markets.
- Phase 3 (Year 5+): Integration & Long-Term Growth
 - Integrate music sector workforce development into statewide economic planning.
 - Establish recurring investment mechanisms to sustain training and infrastructure programs.
 - Align with existing workforce development statutes, such as RCW 28C.18 (workforce training and education programs).

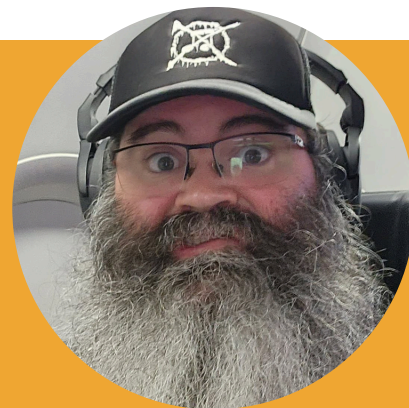
Learn from Other Jurisdictions

- Tennessee invests in music infrastructure as part of its economic development strategy, ensuring Nashville's global competitiveness.
- New Orleans has created workforce initiatives that train sound engineers and production staff for year-round employment.
- United Kingdom funds technical training and apprenticeships in the music industry to strengthen long-term career pathways.

By drawing on these models, Washington can ensure that its music workforce has the tools, training, and infrastructure necessary to thrive—keeping the state's cultural economy strong for decades to come.

I moved to Seattle in 2011 to pursue a career in music, working across radio, live production, and touring while also performing with my band Pound across the U.S. and Europe. Over the years, I've taken on roles as a booking agent, artist manager, talent buyer, and designer, giving me firsthand experience of both the creative and business sides of the industry. Through this, I've seen how difficult it is for artists and professionals to sustain careers here compared to other markets. High costs of living, limited networking opportunities, and a lack of industry infrastructure make it hard for musicians to grow, and many talented people leave the city to find opportunities elsewhere.

Seattle often celebrates its music history, but little is being done to invest in its present or future. Without stronger leadership, accessible career pathways, and a commitment to prioritizing the arts, the local community continues to shrink. Many who remain are doing their best against steep odds, but it feels unsustainable. I love Seattle and call it home, but the reality is that pursuing a long-term career in music here has often felt like being on a sinking ship—full of great moments, but ultimately heading under unless real investment and change occur.



—Ryan Schutte

LAUNCH PAD

LAUNCH PAD

Projected timeline 0-1 years

EMERGING ARTIST SUPPORT

Challenge

Emerging artists face a critical gap between training and sustainable careers. They often lack access to paid gigs, mentorship, and business skills. Without early opportunities, many talented artists leave the field or move out of state.

Legislative Opportunity

Launch a statewide Launchpad program that bridges this gap by:

- Funding paid residencies and mentorships for emerging artists.
- Providing micro-grants for professional development.
- Partnering with venues and festivals to guarantee performance slots.
- Embedding accessibility and all-ages requirements to expand reach.

Implementation Roadmap

1. Eligibility Design – Prioritize demonstrated creative output over income history.
2. Residencies & Mentorships – Provide 6–12 month residencies with stipends and mentorship.
3. Professional Development – Train cohorts in contracts, touring, finance, and wellness.
4. Performance Pipeline – Secure agreements with venues and festivals for emerging artist slots.
5. Evaluation – Track alumni careers, bookings, and retention in Washington

Learn from Other Jurisdictions

- Austin’s artist development funds pair grants with business training.
- Montreal supports residencies that combine mentorship with guaranteed festival slots.
- Visit Seattle partners with King County Creative and the City of Seattle for the Cloudbreak Music Festival which underwrites local performers during the festival.

REGIONAL EQUITY & MARKET ACCESS

REGIONAL EQUITY

Projected timeline 0-1 years

EXPANDING ACCESS AND OPPORTUNITY ACROSS THE STATE

Challenge

Washington's music economy is heavily concentrated in a few urban centers, leaving many regions without equitable access to investment, infrastructure, or workforce opportunities. Musicians and music workers in rural areas and smaller cities often face barriers such as limited performance venues, lack of touring infrastructure, and fewer opportunities for professional development. This imbalance restricts economic growth, limits community access to cultural experiences, and forces many talented workers to relocate to larger markets.

Legislative Opportunity

A Regional Equity Initiative would ensure that resources and opportunities reach music workers and audiences across the state. By investing in regional hubs, supporting local touring circuits, and expanding access to workforce training outside urban cores, Washington can create a more balanced cultural economy. This approach not only strengthens local communities but also builds a statewide network that benefits the entire music sector.

Implementation Roadmap

- Phase 1 (Year 1–2): Mapping & Pilot Hubs
 - Conduct a regional needs assessment to identify gaps in venues, workforce support, and music infrastructure.
 - Establish pilot hubs in key regions (e.g., Central and Eastern Washington, border towns, and college cities).
 - Support local festivals and events as anchor institutions for regional growth.
- Phase 2 (Year 3–4): Touring & Training Expansion
 - Develop regional touring circuits to connect artists with multiple communities.
 - Expand workforce training programs beyond urban centers, ensuring rural access to technical and business skills.
 - Provide targeted funding for small and mid-size venues in underserved areas.
- Phase 3 (Year 5+): Statewide Integration
 - Institutionalize regional equity as part of Washington's broader cultural policy framework.
 - Create recurring funding streams for regional initiatives through cultural grants or community investment models.
 - Align with statutes supporting statewide cultural development, such as RCW 43.46 (arts and cultural promotion).

Learn from Other Jurisdictions

- Oregon has invested in regional cultural hubs to connect rural and urban communities.
- Quebec supports touring subsidies that ensure artists can perform outside major cities.
- Australia has implemented regional touring networks that distribute cultural investment more equitably across the country.
- Austin and Seattle have implemented tour grants via Sonic Guild

By adopting a regional equity framework, Washington can build a truly statewide music economy—one that ensures artists and audiences everywhere benefit from the state's cultural vitality.

IN ACTION: SONIC GUILD

"Touring independently is a challenge, and this support helps ease the financial strain so we can stay centered on the music and the communities we're reaching. It allows us to cover essential costs like lodging, backline, and van rentals so we can focus on putting on a impactful show and creating meaningful connections while on tour. It also helps us connect with artists and audiences in vibrant global music hubs like NYC. These relationships are key—not just for inspiration, but for bringing artists back to Seattle to help grow and diversify our local scene, reflecting and supporting our Latinx and immigrant communities. We're truly grateful for this support."

Martin Selasco (Terror/Cactus)
Sonic Guild Tour Grant Recipient



TOUR SUPPORT IMPACT

\$36,000
GRANTS DISTRIBUTED

225+
TOUR DATES ACROSS US+EU

100+
MUSICIANS ON THE ROAD

CREATIVE INDUSTRY MODERNIZATION

CREATIVE INDUSTRY MODERNIZATION

Projected timeline 0-3 years

UPDATING WASHINGTON'S MUSIC SECTOR FOR A STRONGER FUTURE

Challenge

Washington's music industry operates within a regulatory and economic framework that has not kept pace with today's creative workforce. Outdated licensing, zoning, and permitting requirements often create barriers for small venues, festivals, and music entrepreneurs. At the same time, music workers lack consistent representation in broader workforce and economic development conversations, leaving their unique challenges under-addressed. Without targeted modernization, Washington risks losing ground to other states that are investing in more flexible, supportive cultural policies.

Legislative Opportunity

A Creative Industry Modernization & Advocacy initiative would update regulations to better reflect the realities of music and cultural work, while establishing dedicated advocacy mechanisms for ongoing policy alignment. This includes clarifying outdated statutes, streamlining processes for live music events, and ensuring fair labor standards for creative workers. By embedding advocacy into the policy framework, Washington can build a responsive system that evolves with the industry and secures the long-term health of its music ecosystem.

Implementation Roadmap

- Phase 1 (Year 1–2): Policy Review & Stakeholder Engagement
 - Conduct a regulatory audit to identify outdated or burdensome statutes.
 - Engage music workers, venues, festivals, and community organizations in identifying priorities.
 - Draft legislative language to address immediate barriers (e.g., venue safety, licensing, ticketing transparency).
- Phase 2 (Year 3–4): Pilot Reforms & Advocacy Structures
 - Implement pilot reforms in permitting and zoning to reduce costs and increase efficiency for businesses.
 - Establish a formal advocacy/advisory body to ensure ongoing alignment between policymakers and workers.
- Phase 3 (Year 5+): Long-Term Integration
 - Embed creative workforce considerations into broader economic development policies.
 - Institutionalize advocacy structures as part of Washington's cultural and economic policy framework.
 - Align reforms with existing labor and business statutes, such as RCW 49.12 (working conditions) and RCW 19.86 (consumer protection in ticketing).

Learn from Other Jurisdictions

- Austin, Texas has streamlined permitting for music venues and festivals to reduce administrative burdens.
- Toronto established a Music Advisory Board to ensure ongoing communication between policymakers and the industry.
- UK Music has advanced comprehensive policy reforms, including ticketing transparency and fair pay protections.

These models show how regulatory modernization and dedicated advocacy can strengthen the music economy. Washington has the opportunity to adapt these approaches to its unique creative landscape, ensuring its music sector remains vibrant and competitive.

AFFORDABLE HOUSING FOR CREATIVE WORKERS

AFFORDABLE HOUSING FOR CREATIVE WORKERS

Projected timeline 3-5 years

STABILIZING WASHINGTON'S MUSIC AND CULTURAL ECONOMY

Challenge

Washington's housing crisis has hit musicians and music workers especially hard. With incomes that fluctuate seasonally and project-to-project, many struggle to qualify for traditional leases or mortgages, despite contributing significantly to the state's cultural and economic landscape. Rising rents in music hubs and displacement from long-standing cultural districts have forced many creative workers to leave the industry—or the state altogether. This instability not only harms individual workers, but also weakens local music venues, festivals, and cultural infrastructure.

Legislative Opportunity

An Affordable Housing for Creative Workers initiative would adapt proven housing models to meet the unique needs of musicians and music industry professionals. By incorporating income averaging, flexible lease terms, and proximity to cultural districts, Washington could ensure that music workers have stable, affordable places to live while continuing to contribute to the creative economy. Such an initiative could be advanced through housing trust programs, zoning incentives, or integration with mixed-use developments that include rehearsal, performance, or community arts spaces.

Learn from Other Jurisdictions

- Minnesota has developed artist-specific housing projects that include rehearsal and gallery space.
- New York City has created affordable live/work housing for artists in partnership with nonprofits and developers.
- Berlin has integrated cultural worker housing into urban planning, protecting districts from displacement.

Washington can draw on these examples to design a housing framework that not only stabilizes the workforce but also strengthens the vibrancy of its music and cultural districts.

Implementation Roadmap

- Phase 1 (Year 1–2): Planning & Partnerships
 - Define “creative worker” eligibility criteria to include musicians, venue staff, sound engineers, festival workers, and other cultural professionals.
 - Partner with housing developers experienced in workforce or artist housing models.
 - Identify priority districts most at risk of losing music and cultural spaces.
- Phase 2 (Year 3–4): Pilot Projects
 - Develop mixed-income housing projects with units reserved for creative workers.
 - Include live-work spaces and shared cultural amenities to enhance community impact.
 - Use income-averaging and subsidy models to ensure affordability across varied earnings.
- Phase 3 (Year 5+): Statewide Expansion
 - Scale successful pilot projects to multiple regions, ensuring geographic equity.
 - Align with existing housing finance mechanisms and relevant statutes (e.g., RCW 43.185A for housing trust fund support).
 - Integrate with broader creative economy strategies to retain Washington’s music talent.

What could affordable housing for Creatives look like?



What could this look like for musicians with families???



CONCLUSION

The Washington State Music Census has provided the most comprehensive picture to date of the challenges and opportunities facing our state's music and nightlife economy. The findings make clear that while Washington is home to extraordinary talent, venues, and cultural assets, the sector continues to experience significant barriers to stability and growth—from affordability and workforce retention to regulatory hurdles and access to resources.

At the same time, the Census highlights a shared commitment across communities to preserve and strengthen Washington's role as a leader in music and culture. This data offers not only a roadmap for action but also an invitation: to policymakers, industry leaders, and community members alike, to invest in solutions that ensure music remains a thriving part of Washington's identity and economy. With coordinated effort, informed by this Census, Washington has the opportunity to set a national example for how music and nightlife can be recognized, supported, and sustained as essential parts of civic life.



APENDIX

METHODOLOGY


The Washington State Music Census was conducted by WANMA, the Washington State Department of Commerce, the City of Seattle Office of Economic Development, King County Creative, in partnership with CVL Economics. The survey was fielded from December 16, 2024, to February 28, 2025, and was available in both English and Spanish. Upon closing, the survey had collected 742 completed responses from musicians, 255 from business owners, and 586 from music industry workers.

ECONOMIC IMPACT

The foundational step in quantifying the economic impact of Washington State's music industry is the identification of the appropriate sectors that comprise the core—or "direct"—components of the industry.

Economic data are reported using the standardized North American Industry Classification System (NAICS), which allows for consistency and comparability across datasets. No single NAICS code wholly encapsulates the music industry. As a result, a curated list of relevant sectors must be assembled. Some are directly aligned, such as Record Production (2022 NAICS 512250) and Music Publishers (2022 NAICS 512230). Others—like Fine Arts Schools (2022 NAICS 611610) or Independent Artists, Writers, and Performers (2022 NAICS 711510)—are only partially relevant, since not all individuals within those sectors engage in music-related activity.

To address the limitations of prior economic impact studies of the music industry, CVL Economics employs a refined, ecosystem-based approach that uses NAICS codes as a foundation but incorporates additional filters to avoid over- or under-counting.



Rather than relying solely on narrowly defined sectors like Sound Recording Industries (2022 NAICS 512200), the analysis identifies core, supporting, and peripheral sectors and applies customized inclusion rates based on the proportion of music-specific activity within each.

This includes excluding non-music segments from broader industries such as Radio Stations (516110) through employment or revenue share adjustments and proportionally including relevant subcomponents of sectors like Colleges and Universities (611310) by isolating conservatory programs or related instructional staff. This calibrated approach enables more accurate economic multipliers and input-output modeling by aligning the scope of the analysis with the actual structure of the music ecosystem.

In addition to quantitative analysis, sector-level adjustments are informed by qualitative insights from industry stakeholders, particularly experts based in Los Angeles, CA. To maintain methodological consistency and avoid inflating indirect and induced impacts, the adjusted contribution rate is applied uniformly across all stages of the economic impact model.

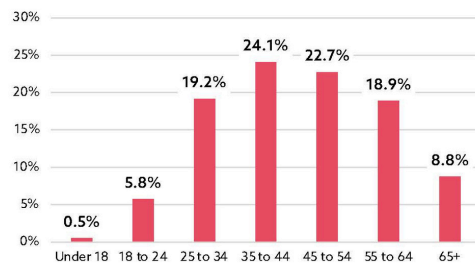
KEY DEMOGRAPHICS

MUSICIANS

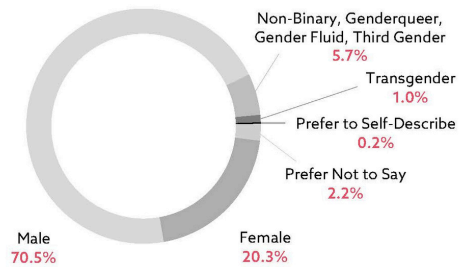
MUSICIANS DEMOGRAPHICS

Musicians are predominantly male and mid-career overall, though Washington skews slightly younger than the nationwide average (45 years old vs 48 years old).

AGE DISTRIBUTION FOR MUSICIANS



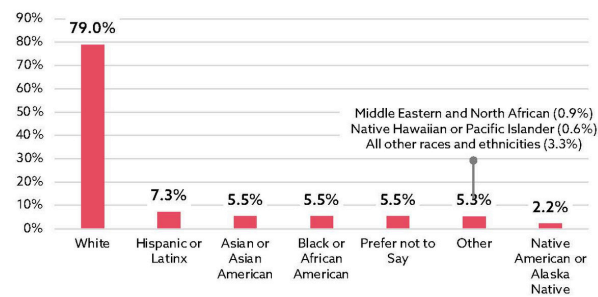
GENDER IDENTIFICATION



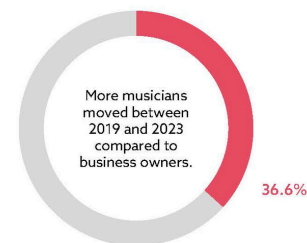
MUSICIANS DEMOGRAPHICS

Musician demographics skew whiter than Washington's general population. Hispanic/Latinx and Asian musicians are underrepresented while Native and Black musicians mirror state population share.

RACIAL AND ETHNIC DISTRIBUTION



SHARE OF MUSICIANS WHO HAVE
MOVED RESIDENCES | 2019-2023



KEY DEMOGRAPHICS

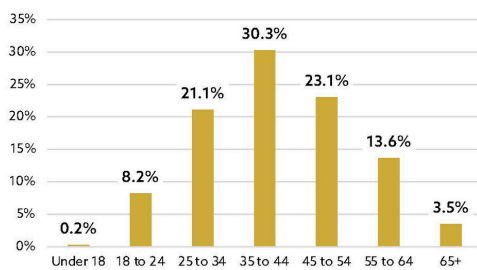
WORKERS

WORKERS

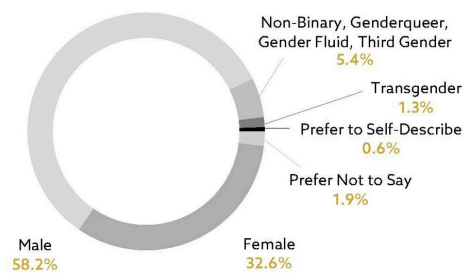
DEMOGRAPHICS

Roughly 60% of music industry workers are below the age of 45 (average age = 42). Men still make up the majority, but their share is lower than among musicians (70.5%) and production/distribution business owners (64.7%).

AGE DISTRIBUTION FOR WORKERS



GENDER IDENTIFICATION

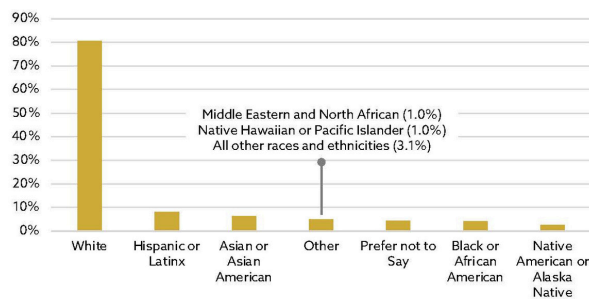


WORKERS

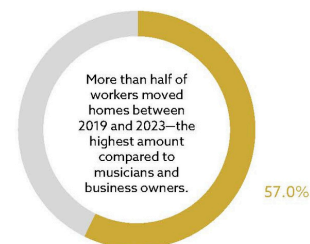
DEMOGRAPHICS

57% of music workers relocated between 2019 and 2023—more than any other group.

RACIAL AND ETHNIC DISTRIBUTION



SHARE OF WORKERS WHO HAVE MOVED RESIDENCES | 2019-2023



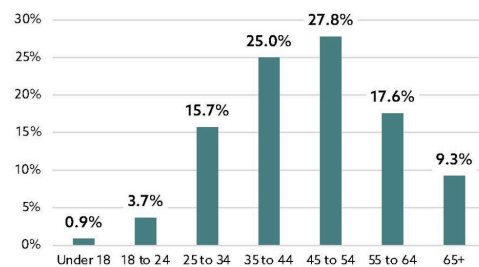
KEY DEMOGRAPHICS

BUSINESS OWNERS

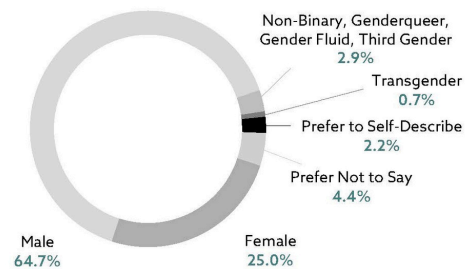
BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT SERVICES DEMOGRAPHICS

Only 25% of Infrastructure & Support Services business owners are women. Average age is 46, making owners in this sector older than the average U.S. entrepreneur (42).

AGE DISTRIBUTION



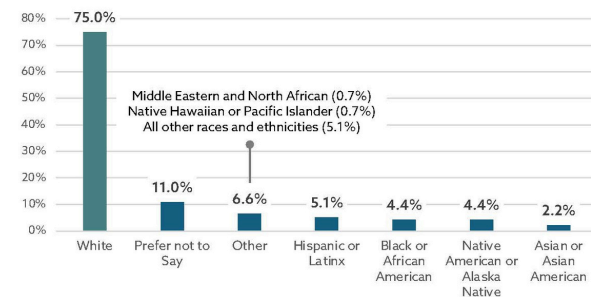
GENDER IDENTIFICATION



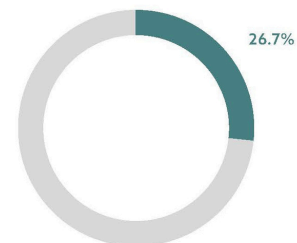
BUSINESS OWNERS: INFRASTRUCTURE & SUPPORT SERVICES DEMOGRAPHICS

White business owners make up 75% of the Infrastructure & Support Services sector. Only 5.1% of business owners identify as Hispanic/Latinx, 4.4% as Black or Native American, and 2.2% as Asian.

RACIAL AND ETHNIC DISTRIBUTION

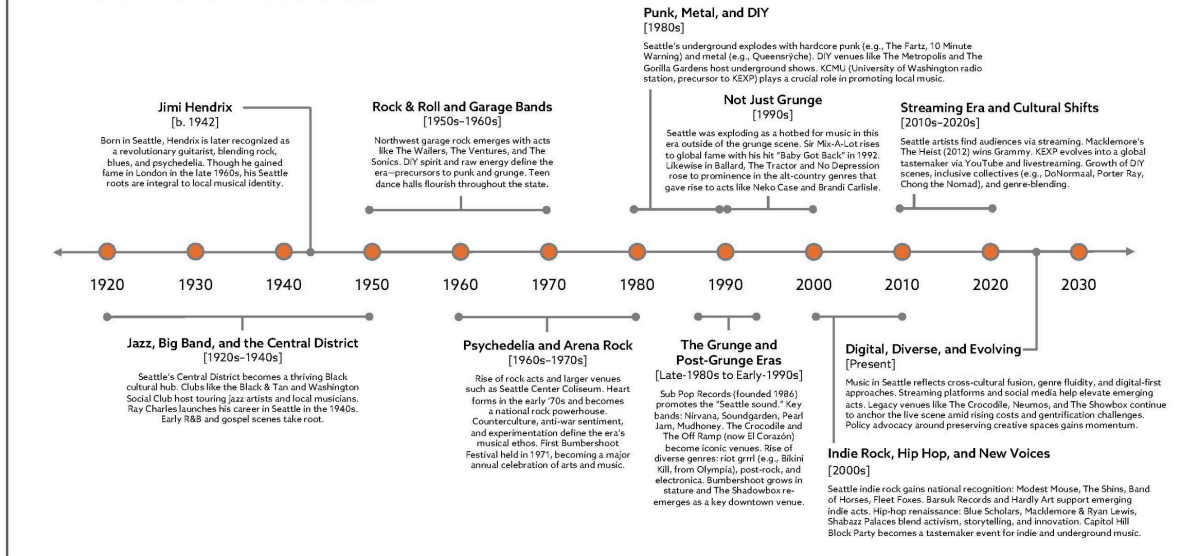


SHARE OF BUSINESS OWNERS WHO HAVE MOVED RESIDENCES | 2019-2023

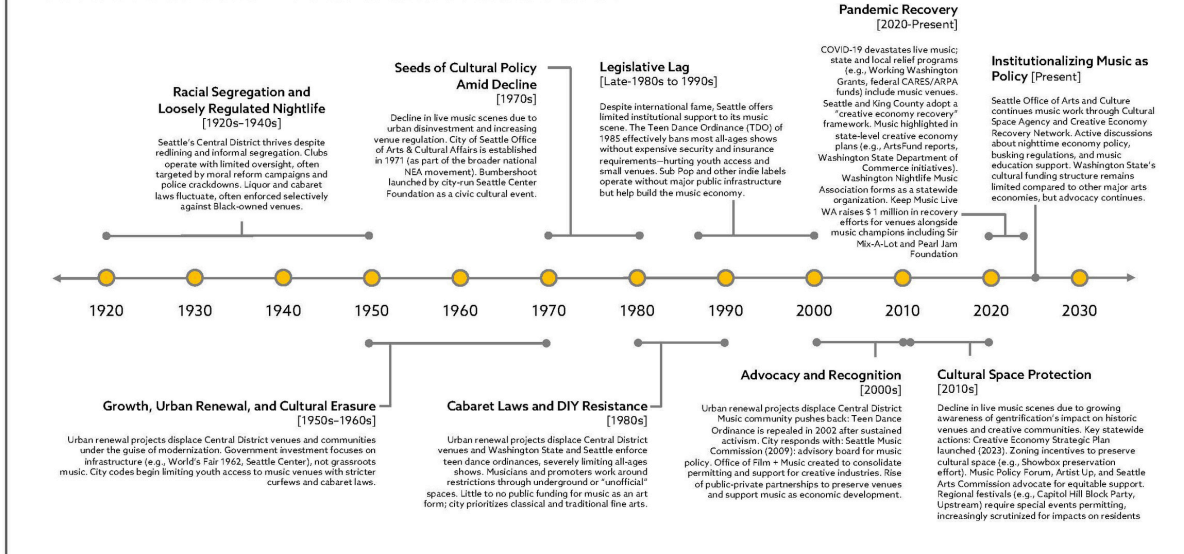


KEY TIMELINES

ECOSYSTEM ANALYSIS ECOSYSTEM TIMELINE



ECOSYSTEM ANALYSIS REGULATORY LANDSCAPE TIMELINE



ECOSYSTEM ANALYSIS

A SNAPSHOT OF WASHINGTON'S MUSIC ECOSYSTEM



RECORD LABELS

Sub Pop Records
Barsuk Records
K Records
Suicide Squeeze Records
Youth Riot Records
Hush Hush Records
Light in the Attic Records

Seattle
Seattle
Olympia
Seattle
Tacoma
Seattle
Seattle



INSTRUMENT MANUFACTURERS

Warmoth Guitar Products, Inc.
McElroy Guitars
Walla Walla Guitar Co.
RainSong Graphite Guitars
Tacoma Guitars
Nash Guitars

Puyallup
La Conner
Walla Walla
Woodinville
Tacoma
Olympia



PERFORMING ARTS ORGANIZATIONS

Spokane Symphony
Seattle Symphony
Northwest Symphony Orchestra
Symphony Tacoma
Yakima Symphony Orchestra
Seattle Opera

Spokane
Seattle
Burien
Tacoma
Yakima
Seattle



RECORD STORES

Easy Street Records & Cafe
Silver Platters
Sonic Boom Records
Jive Time Records
Hot Poop Record Store
4000 Holes
Bigfoot Records
Light in the Attic Record Shop
Groovy Records
Adventures Underground Records

Seattle
Bellevue, Lynnwood
Seattle
Seattle
Walla Walla
Spokane
Spokane
Seattle
Kennewick
Richland



INSTRUMENT RETAILERS

Avalon Music
Kennelly Keys Music
Hoffman Music Co.
Prosser Piano & Organ
Dusty Strings Music Store & School
Hugo Helmer Music
Metropolitan Music
Music 6000
Ted Brown Music

Wenatchee
Lynnwood, Everett, Bellevue
Spokane
Shoreline, Tacoma
Seattle
Burlington
Seattle
Olympia
Tacoma, Seattle, Puyallup, Silverdale, Richland, Yakima

ECOSYSTEM ANALYSIS

A SNAPSHOT OF WASHINGTON'S MUSIC ECOSYSTEM



FESTIVALS

Bumbershoot Festival
Timber! Outdoor Music Festival
Winthrop Rhythm & Blues Festival
Darrington Bluegrass Festival
Watershed Music Festival
Capitol Hill Block Party
Cloudbreak Music Festival
Mariachi Northwest Festival
Southsound Block Party
Fisherman's Village Festival

Seattle
Carnation
Winthrop
Darrington
George
Seattle
Seattle
Wenatchee
Olympia
Everett



EDUCATION

Seattle Drum School
Music Works Northwest
Music Center of the Northwest
School of Rock
Central Washington University
Cornish College of the Arts
University of Washington
DigiPen Institute of Technology
Seattle Drum School

North Seattle, Georgetown
Bellevue
Seattle
Seattle, Bellevue
Ellensburg
Seattle
Seattle
Redmond
North Seattle, Georgetown



STUDIOS

Jack Straw Cultural Center
Robert Lang Studios
Bear Creek Studio
Sage Arts Studio
Avast Recording Co.
Orbit Audio
Studio X
London Bridge Studio
The House Studios

Seattle
Shoreline
Woodinville
Arlington
Seattle
Seattle
Seattle
Shoreline
Seattle



STREAMING AND MEDIA PLATFORMS

Amazon Music
Napster
MediaNet
Big Door Music Publishing
Activist Music
Ramble Tamble Entertainment
Rio Paso Music Publishing
Magnetic Media Group
Blue Danube Productions
Audiosocket

Seattle
Seattle
Seattle
Seattle
Friday Harbor
Seattle
Seattle
Seattle
Seattle
Seattle

THANK YOU

By supporting WANMA, you're investing in a vibrant cultural scene, supporting small businesses, and ensuring that Washington's nightlife and music industry continues to thrive for years to come.

1. **Protecting Cultural Heritage**

- Nightlife and music are integral to Washington's identity, with cities like Seattle being historic hubs for innovation in music (e.g., grunge, indie rock).
- WANMA helps preserve and promote this heritage, ensuring future generations can experience the region's unique cultural landscape.

2. **Boosting the Local Economy**

- Nightlife and live music venues create jobs, attract tourism, and contribute significantly to the local economy.
- Supporting WANMA means advocating for policies that protect and strengthen these businesses, especially during economic downturns or crises like the COVID-19 pandemic and its aftermath.

3. **Advocating for Fair Policies**

- WANMA works with policymakers to ensure fair treatment of nightlife and music venues, addressing issues like licensing, zoning, and taxation.
- Advocacy by WANMA ensures that the industry remains vibrant and viable.

4. **Providing a Platform for Artists**

- Music venues supported by WANMA are vital for emerging and established artists to showcase their work and connect with audiences.
- This sustains the creative community and helps artists thrive.

5. **Fostering Community and Connection**

- Nightlife and live music events create spaces for people to connect, celebrate, and build community.
- Supporting WANMA ensures these spaces remain accessible and welcoming.

6. **Responding to Challenges**

- WANMA was formed during the COVID-19 pandemic to address the existential threat faced by the nightlife and music industry. Supporting WANMA helps ensure the organization can respond to future challenges and crises that might affect the industry.

CVL Economics is an economic consulting firm that takes a data-driven, human-centric approach to equitable development and sustainable growth, with a focus on the creative economy. Founded in 2021, CVL Economics partners with communities, municipalities, organizations, and institutions to address today's most complex challenges and foster bold action. Coupling our robust economic models with innovative research methodologies, we provide decisionmakers with the actionable insights needed to effect change, expand opportunity, and improve economic well-being.

✉ info@cyleconomics.com

🌐 www.cyleconomics.com

🌐 <https://www.linkedin.com/company/cyleconomics/>



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