

EXECUTIVE SUMMARY

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

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

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

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

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