

Impacts of the Music Industry in Greater Olympia:

**Estimating the Economic and Non-Dollar Values Music Brings to Our
Community**

Prepared for the Olympia Arts Commission

By: William Bennett, Becca Kenna-Schenk, Abbey LaBarre, & Rose Sampson

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Executive Summary

Music is a critical element of the cultural foundation of any community, and the value music adds to the community in Olympia, Washington is no exception. In fact, for many Olympia has a reputation for being a particularly musically oriented community. In order to gain a better perspective of the values music brings to the area, the Olympia Arts Commission solicited the assistance of the Evergreen State College's Masters in Public Administration Program to conduct a study of the impacts of the music industry. This report is the initial result of this request.

This report provides a multi-phased research design for analyzing the economic and non-dollar values of the music industry in the greater Olympia area. The report includes the results of an economic indicator analysis, which is referred to as "Phase I" of the study, as well as designs and recommendations for the use of surveys and focus groups to measure the non-dollar value of music in Olympia. The implementation of these community surveys and focus groups is referred to as "Phase II" of the study, which will be implemented in the 2010-11 academic year by a subsequent group of students.

Phase I of this study uses conservative measures to estimate the total economic impact of the music industry in the Olympia area. Yet, despite the conservative nature of the analysis, the results indicate the economic impacts of the music industry to the Olympia-area economy are significant. This study estimates that the music industry in the Olympia area generated approximately \$27 million in total direct sales in 2008. That year the music industry in the Olympia area was responsible for approximately 1,414 jobs in the region, with 508 jobs directly related to the industry and 907 jobs created as an indirect impact of the music industry and roughly \$7.4 million was earned in labor income. In addition, the music industry contributed approximately \$2.5 million in annual local and state taxes in 2008.

While the results of Phase I of the study offer dollar-value estimates of the impact music has in Olympia, the authors of this report make no claim of providing a professionally conducted economic impact analysis. The results of Phase I of the study were derived through the collection of basic economic indicator data that is accessible to the public, and the results of the community surveys are unlikely to be statistically significant. In this way, this study is merely intended to serve as a

framework or supplemental tool for exploring the differing values of music in the city, whether economic, personal, or public.

Introduction

Olympia has long had a uniquely vibrant musical presence. This presence was not pre-planned or accounted for by any agency or program. Rather, it was created by the independent will of many different people throughout the history of the city. It is the result of the combined will and creative, entrepreneurial output of many hundreds of Olympia residents. Among musicians throughout the country, Olympia is regarded as a center for strong creativity and as the home of a cadre of diverse, talented musicians, singers, songwriters, producers and other musically inclined individuals of many varieties. Olympia's musical spirit, while nebulous and without a specific intended stylistic direction, has been represented by many popular artists throughout the years, most notably Kurt Cobain, Nirvana, Sleater Kinney, and the Fleetwoods. More importantly than its most famous former inhabitants are the lesser-known musical citizens who have remained in the community and continue to create a positive, if not thriving environment for themselves and for future musicians. It is these people, people who have started record labels, record stores, all-ages venues, organized events and participated in the myriad other functions of creating a musical community, who have the most to gain by this research. When this research is conducted, it may be the evidence the City Council needs in order to move forward with a more progressive policy concerning music in its city limits.

Purpose of the Study

This study was prepared in response to a request by the Olympia Arts Commission for an evaluation of the music industry in the Olympia area. The purpose of our study is to evaluate the economic and non-dollar impacts of the music industry in Olympia and to make suggestions as to how the music industry and the city can support one another to enable a richer and healthier community. In this way, the project is intended to galvanize new policies and initiatives that will more effectively cultivate musical endeavors in the community.

Other Impact Studies of Music Industries

Economic impact studies of other regional music industries have been conducted in major U.S. cities such as Seattle, Chicago, and Nashville. These studies provided useful models for ways to operationalize concepts such as “economic impact” and “music industry.” For example, the Seattle, Chicago, and Nashville studies all used either North American Industry Classification System (NAICS) or Standard Industry Classification (SIC) codes to define the types of businesses to be included in the “music industry” of the area. This study followed a similar approach in classifying Olympia area businesses within the music industry.

Two studies have been conducted on the economic impacts of the music industry in Seattle. The first, which was published in 2004, was the first of its kind in the country and has served as the model for studies in Chicago, Nashville, and elsewhere. The Seattle studies measure total economic impact by compiling labor income data from the Washington State Employment Security Department (ESD). The ESD data was checked for accuracy by comparing it to both the purchased Name Finders list as well as publicly available data published by the U.S. Census Bureau in the County Business Patterns database. To capture the self-employed segment of the music industry, the Seattle studies used a ‘double-blind’ procedure to identify music related occupations listed in the American Community Survey (ACS). The 2008 Seattle study surveyed informants in the industry and in other local organizations for supplemental data (Beyers 2004) (Beyers 2008).

The Chicago study compared the music industries of eleven metropolitan areas by measuring each regional industry’s total employment, payroll, revenue, and sales of recordings. It also considered the availability, affordability, and accessibility of live music, which was measured by numbers of performances, tickets sold, sell-out rates and gross receipts for these shows. The Chicago study also identified the quality, variety, and intensity of the live music scene, which was measured by variables such as the percentage of shows performed by the most critically-acclaimed artists, the size of venues, the range of musical offerings, the number of grassroots performers, and the geographical distribution of clubs (Rothfield 2007).

Methodology

In part, this study employs methods similar to the other economic impact studies of music industries mentioned above. In general, these studies estimate both the direct and indirect economic impact in a particular region by collecting data on revenue, tax revenue, and labor income generated within a defined “music industry.” This data generally constitutes the music industry’s direct economic impact. The indirect impact is typically estimated by inputting the direct economic impact data into a multiplier effect model that includes other economic indicators unique to the region in order to calculate the indirect or “ripple” effect of the industry. (Beyers 2008) (Beyers 2004) (Raines 2006) (Rothfield 2007).

In this study, revenue data was collected from the Washington State Department of Revenue and employment and labor income data from the Employment Security Department. Although the focus of this study is concerned with the music industry within the City of Olympia, we used data sets for all of Thurston County due to the close proximities of the Cities of Lacey and Tumwater and the interconnected nature of the tri-city area. The results of the economic indicator data collection, which comprises Phase I of the study, can be found in the next section.

This study supplements these established techniques for economic impact analyses with community surveys targeted for three audiences: independent/self-employed musicians, businesses or vendors that host music events in the area, and the Olympia public at large. These surveys aim to provide supplemental data on the economic impact of the Olympia area music industry, as well as provide a more qualitative analysis of the intrinsic value of the music industry within the community. In addition, targeted focus groups with music industry “experts” from the community may be used to establish a more comprehensive and substantive picture of the strengths and weaknesses of the music industry in the Olympia area. Community surveys and focus group designs are included in this report. However, the implementation and analysis of the community survey and focus groups make up Phase II of the study, which will be completed by a subsequent group of Evergreen MPA students in the 2010-11 academic year.

Phase I – Economic Indicator Analysis

Defining the Music Industry in Greater Olympia

Music industries, like other arts industries, are in some ways more difficult to define than other types of industries that involve the production or exchange of a good or service that is more tangible than “music.” Music can be considered both a good and a service, as well as many other things, thus making the task of defining a “music industry” somewhat difficult.

While the community surveys and focus groups will use alternative definitions of “music industry,” the economic indicator portion of this study borrows definitions of “music industry” from similar studies conducted in Seattle and Chicago. These studies defined the music industry by developing a list of “sub-industries” related to music using the NAICS industry classification system (Beyers 2008) (Rothfield 2007). The NAICS is a system for categorizing businesses according to type of economic activity and processes of production that is maintained by the US Office of Management and Budget. We synthesized the Chicago and Seattle studies’ lists of six-digit NAICS codes to use as the parameters for the economic indicator component of our study. We used this list (shown in Figure 1) when collecting revenue and employment data from government agencies.

Figure 1. NAICS Sub-Industries Included in Study

Sub-Industry	NAICS Code
Musical Instrument Manufacturing	339992
Musical Instruments and Supplies Stores	451140
Prerecorded Tape, Compact Disc and Record Stores	451220
Record Production	512210
Integrated Record Production/Distribution	512220
Music Publishing	512230
Sound Recording Studios	512240
Other Sound Recording Industries	512290
Radio Networks	515111
Radio Stations	515112
Musical Groups and Artists	711130
Audio and Video Equipment Manufacturing	334310
Prerecorded Compact Disc, Tape and Record Reproducing	334612
Art, Drama and Music Schools	611610
Theater Companies and Dinner Theaters	711110
Promoters of Performing Arts, Sports and Similar Events	711300
Agents and Managers for Artists and Entertainers	711400
Independent Artists, Writers and Performers	711500
Drinking Places (Alcoholic Beverages)	722410

Business Revenue

Music-related businesses in Thurston County earned approximately \$27,662,697 in total revenue in 2008. Revenue data of businesses within the Olympia area music industry was obtained through the Research Division of the Department of Revenue. They provided the data depicted in Figure 2.

Privacy laws prevent government agencies from releasing the names of specific businesses within each six-digit NAICS code, and in instances where there are three or fewer businesses or when one business comprises 80% or more of an industry within a requested geographic area, agencies are prohibited from sharing employment or tax data. In these cases, the Department of Revenue provided aggregated totals of similar six-digit NAICS codes so that the total number of businesses and taxable revenue for all music-related businesses that report such data is included in the totals.

Figure 2. 2008 Taxable Revenue, Thurston County, Washington

Sub-Industry	NAICS Code(s)	Taxpayers	Taxable Revenue
Audio and Video Equipment Manufacturing; Prerecorded Compact Disc, Tape and Record Reproducing	334310; 334612	5	\$206,246
Musical Instrument Manufacturing	339992	7	\$7,773
Musical Instruments and Supplies Stores; Prerecorded Tape, Compact Disc and Record Stores	451140; 451220	52	\$8,331,505
Record Production; Integrated Record Production/Distribution; Music Publishing; Sound Recording Studios; Other Sound Recording Industries	512210; 512220; 512230; 512240; 512290	11	\$13,698
Radio Networks; Radio Stations	515111; 515112	6	\$155,089
Art, Drama and Music Schools	611610	6	\$33,476
Theater Companies and Dinner Theaters	711110	5	\$582,224
Musical Groups and Artists	711130	6	\$43,242
Promoters of Performing Arts, Sports and Similar Events; Agents and Managers for Artists and Entertainers; Independent Artists, Writers and Performers	711310; 711320; 711410; 711510	101	\$1,168,070
Drinking Places (Alcoholic Beverages)	722410	41	\$17,121,374
Total		240	\$27,662,697

Source: Washington State Department of Revenue, Research Division, Created on: April 19, 2010.

Employment

In 2008 there were approximately 489 music-related jobs in the Olympia area, contributing to approximately \$7.4 million in labor income annually. Employment data pertaining to the music industry was obtained from the Labor Market and Economic Analysis division of the Employment Security Department (ESD) based on the specified list of NAICS codes. Figure 3 reports the average annual employment and wage data for 2008 in Thurston County provided by ESD. The data is grouped by similar NAICS industry codes in instances where confidentiality restrictions prevented individual sub-industry reporting.

Figure 3. 2008 Employment and Wage Data, Thurston County, Washington

Sub-Industry	NAICS groupings	Firms	Avg # of Jobs	Total Wages	Avg Annual Wage
Musical Instruments and Supplies Stores;					
Prerecorded Tape, Compact Disc and Record Stores	451140 451220	11	59	\$953,631	\$16,163
Record Production; Integrated Record Production/Distribution;	512210 512220 512230				
Music Publishing; Sound Recording Studios; Other Sound Recording Industries; Radio Networks; Radio Stations	512240 512290 515111 515112	5	80	\$1,856,336	\$23,204
Theater companies and dinner theaters	711110				
Musical groups and artists	711120				
Promoters of Performing Arts, Sports, and Similar Events without Facilities	711130 711300 711400	8	78	\$1,694,318	\$21,722
Independent Artists, Writers, and Performers	711500				
Audio and Video Equipment					
Manufacturing; Prerecorded Compact Disc, Tape and Record Reproducing	334310 334612	*	*	*	*
Musical instrument manufacturing	339992	*	*	*	*
Art, Drama and Music Schools	611610	10	42	\$308,892	\$7,355
Drinking places (Alcoholic beverages)	722410	30	248	\$2,572,581	\$10,373
** Total		64	507	\$7,385,758	\$78,817

Source: Developed from data obtained from the Washington State Employment Security Department, Labor Market and Economic Analysis, Obtained on: May 18, 2010.

Employment Multipliers

The 2002 Washington State Input-Output Model (I-O Model), developed by the Washington State Office of Financial Management, was used to estimate the ripple effects of employment within the music industry in the Olympia area. The I-O Model is a forecasting tool that provides a detailed picture of the interdependencies of the State's major industries that is categorized by NAICS industry sectors. Among other data, the I-O Model reports statewide employment multiplier (jobs per direct job by industry sector (Beyers 2008)).¹ The I-O Model employment multipliers for the NAICS industry sectors included in this study are indicated in Figure 6.

Tax Revenue

In 2008, the music industry in the Olympia area generated approximately \$2,628,551 in local and state taxes. This figure includes approximately \$481,340 in state Business and Occupation (B&O) Tax revenue, \$1,766,693 in state sales tax revenue, and \$380,518 in local sales tax revenue. Revenue generated from property taxes and local B&O taxes was not included in this study due to time limitations. A summary of tax revenue generated within the Olympia music industry is depicted in Figure 4.

The Business and Occupation (B&O) Tax in Washington is determined by fixed, statewide rates based on the types of activities being conducted by the business (e.g. retail, service, or manufacturing). B&O Tax revenue generated from the music industry in the Olympia area was estimated by the DOR for the purposes of this study. State and local sales tax revenue was calculated by applying the state (6.5%) and local (1.4%) sales tax rates to the revenue totals of businesses that were included in the study.

¹ The I-O Model also provides multipliers for total output and total labor income, which if included in this study would yield a significantly larger indirect dollar-value impact of the music industry in the Olympia area. However, due to various limitations, this study only calculates the multiplier effect of music in terms of jobs created per direct job within the industry.

Figure 4. Tax Revenue Generated by Olympia-Area Music Industry

Description	State B&O Tax Revenue	State Sales Tax Revenue	Local Sales Tax Revenue
Computer and Electronic Product Manufacturing	\$23,740	\$13,406	\$2,887
Miscellaneous Manufacturing	\$460	\$505	\$109
Sporting Goods, Hobby, Book, and Music Stores	\$50,960	\$541,548	\$116,641
Motion Picture and Sound Recording Industries	\$780	\$890	\$192
Broadcasting (except Internet)	\$41,610	\$10,081	\$2,171
Educational Services	\$1,770	\$2,176	\$469
Ambulatory Health Care Services	\$142,010	\$9,273	\$1,997
Performing Arts, Spectator Sports, and Related Industries	\$101,340	\$75,925	\$16,353
Food Services and Drinking Places	\$118,670	\$1,112,889	\$239,699
Totals	\$481,340	\$1,766,693	\$380,518

Total Economic Impacts of the Music Industry

The music industry in the Olympia area was responsible for approximately 1,414 jobs in the region in 2008, with 508 jobs directly related to the industry and 907 jobs created as an indirect impact of the music industry. Roughly \$7.4 million was earned in labor income in 2008 from businesses directly involved with the music industry in the Olympia area. Total business revenue generated from the music industry was approximately \$27 million in 2008, and the industry contributed approximately \$2.5 million in annual local and state taxes that year. Figure 6 depicts the total economic impacts of the music industry in the Olympia area.

Using the industry sector multipliers from the I-O Model, the indirect or ripple effect of each I-O sector was calculated and added to the direct impact for each industry sector to derive the total impact of revenue and employment from the music industry.

Figure 6. Total Economic Impacts from Phase I of Research

Washington	Total Employment Multiplier	Direct Jobs	Indirect Jobs	Total jobs (direct & indirect) created	Direct Revenue
21. Computer and Electronic Product	N/A	0	N/A	N/A	\$206,246
27. Other Manufacturing	2.034	1	2	3	\$7,773
29. Retail	1.623	59	96	155	\$8,331,505
37. Other Information	3.359	80	269	349	\$168,787
43. Educational Services	1.55	42	65	107	\$33,476
47. Arts, Recreation, & Accommodation	1.479	78	115	193	\$1,793,536
48. Food Services and Drinking Places	1.451	248	360	608	\$17,121,374
TOTALS		508	907	1,415	\$27,662,697

Source: Data derived from Washington State Office of Financial Management's Input-Output Table for Impact Analysis Worksheet (<http://www.ofm.wa.gov/economy/io/2002/io4.pdf>)

Phase II – Community Survey and Focus Groups

(To Be Completed in 2010-11 Academic Year)

Community and Vendor Surveys

Two surveys have been developed to provide qualitative information on the value of music in the Olympia community and to obtain additional economic indicator data that was not covered in Phase I of the study. The general community survey is intended to gather information on participation in the Olympia-area music industry, including information about patrons of music-related events in the city, as well as self-employed musicians. The community survey currently has twelve questions, which are both qualitative and quantitative in scope. The questions range from asking how much time the survey respondent spends in the downtown area, to what type of music they are likely to seek out, to approximate annual income for self-employed musicians. See Appendix A for a sample of the community survey.

The other survey is targeted toward music venue owners, operators, and managers in the Olympia area. The venue questions, like the community questions, are both qualitative and quantitative. The questions in the venue survey were designed

using the Olympia Downtown Theatre District survey as a template. The venue survey questions seek information related to gross revenue, expenses, number of employees, revenue sources other than music, and booking of musical acts. See Appendix B for a sample of the vendor survey.

The method used to collect data is not likely to utilize random probability sampling as it could be cost prohibitive. Rather, the community survey will likely be implemented using a web-based tool such as Survey Monkey and perhaps the random distribution of paper surveys during local events such as Arts Walk or Lake Fair. The venue survey will be distributed individually to each of the venue contacts listed in Appendix D.

Focus Groups

Focus Groups should be used (Krueger and Casey, 2009, p. 19):

- To identify a range of ideas or feelings that people have about something;
- Understanding differences in perspectives between groups or categories of people. This can alleviate major problems when they aren't recognized or understood;
- To pull ideas from a group; a group possesses the capacity to become more than the sum of its parts, to exhibit a synergy that individuals alone cannot;
- To pilot-test ideas, plans, materials, or policies;
- When the researcher needs information to design a large-scale quantitative study. Focus groups provide researchers with valuable insights into conducting complex investigations. What words do people use to talk about this issue? What do they see as the range of options for answering a question?;
- When a researcher needs information to help shed light on quantitative data already collected. Annual measures show employee satisfaction to be decreasing. What do employees attribute these changes to?; and
- When clients or intended audience places high value on capturing the comments or language used by the target audience.

Possible Themes and Questions, Chapter 3 (Krueger & Casey, 2009)

- See Steven Reiss' 16 Motives on p. 51
- See Process for Brainstorming Questions on p. 52
- Single, Multiple, Double-Layer, Broad-Involvement Designs (pp. 25-28)
- Chapter 5 Moderating Skills (Krueger & Casey, 2009)
- Checklist for Focus Group Interviews (Krueger & Casey, 2009, p. 107)

- Use only 12 questions/2 hours, for example:

Opening Questions:

- Tell us your name & _____

Introductory Questions:

- What medium do you use to get information about music in Olympia?

Transition Questions:

- What was your first experience with music in Olympia? What was that first impression?
- How has that experience and your feelings about music in Olympia progressed?

Key Questions:

- How do you perceive music in Olympia now?
- What are its challenges?
- Has it impacted you?

Ending Questions:

- How do envision music in Olympia?
- What's your advice/suggestions for Olympia regarding music?
- What do you think we should know or consider about this subject?

Possible places to hold the group meeting

Timberland Regional Libraries

<http://www.trlib.org/Services/Pages/Services.aspx>

Many Timberland Regional Libraries have one or more meeting rooms that may be reserved by individuals and groups. If you are interested in reserving a room, call the local library to ask about availability and to reserve a time for your meeting.

Meeting Room Use Policy

Location	Capacity
<u>Lacey</u>	160 (80 sitting)
<u>Olympia</u>	43
<u>Tumwater</u>	52
<u>Yelm</u>	36

The Evergreen State College

<http://www.evergreen.edu/conference/meetingfacilities.htm>

Space Reservations

Conference spaces are available year-round though our status as an academic institution makes space availability contingent upon the needs of academic programs. We cannot schedule spaces until after the quarterly academic class schedules have been finalized. The Conference Service staff will schedule meeting facilities that are compatible with the size of your group and the needs of other programs on campus. Occasionally some facilities are not available because of academic scheduling, basic maintenance, or remodeling. We are happy to note your preference for facilities and will schedule them if at all possible. The College reserves the right to change building assignments for lodging, meeting space or recreational facilities.

Scale diagrams are available for our large general session spaces for planning seating and table configurations. Please provide advance notice of the number and type of tables you will need for your program and if any staging is required.

The Library building is home to many of the classroom spaces and multi-purpose rooms available on campus. Classrooms vary in size and can hold anywhere from 20-300 people depending upon your needs.

Limitations

It is not the intent of this portfolio to be used in place of a professional economic impact study. Rather, this report provides a framework for exploring the value of music in the Olympia area. The results of the economic indicator analysis (Phase I) offer a conservative dollar-value estimate of the impact of the music industry in Olympia considering the complexities involved with defining the music industry and collecting relevant data. For instance, while the community survey will provide some additional economic data such as wage earnings of self-employed individuals within the music industry and the direct and indirect economic impacts of patron spending in the industry, these figures too will provide a very conservative estimate of the true economic impact. The results of the NAICS-based economic indicator analysis are also incomplete since confidentiality laws and financial and time limitations precluded us from cross-checking the specific businesses included and excluded from the NAICS code lists to ensure all relevant businesses were included.²

² This information is available for purchase through online marketing vendors such as *ReferenceUSA*, a database listing of all firms in a specified region classified by its six-digit SIC.

Yet this conservative estimate, combined with qualitative information on the broader, incalculable impact music has on the community, provides a useful foundation for understanding the multifaceted impact of music in Olympia.

Conclusion

The results of Phase I of this study offer supporting evidence to the preexisting notion that Olympia is home to a vibrant and well-known music industry. The results of the economic indicator analysis suggest that nearly 1,500 jobs in the greater Olympia area are a result of the music industry's presence in the community and that approximately \$2.5 million is generated annually in local and state government tax revenue. In comparison, the most recent Seattle study estimated that the music industry in Seattle has generated 11,500 jobs and roughly \$90 million in annual local and state tax revenue (Beyers 2008).

The results of the surveys and focus groups (Phase II) will provide critical supplemental information to the overall analysis of the impact of the music industry, including information on patron spending on music-related events and income generated by self-employed musicians in the area. The focus group and surveys will also provide valuable insight into key relationships, dynamics, and trends within the industry that will hopefully assist decision makers in future policy and funding decisions pertaining to music in the community. Combined, the results of Phases I & II of this study present a comprehensive perspective of the economic and non-dollar values of the music industry in the greater Olympia area.

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Appendix A – Sample Community Survey

1) How many nights a week do you go downtown and spend money?

1-2, 3-4, 4-5, 6-7

2) If music performance was hypothetically banned in downtown Olympia how many nights a week would you spend money downtown?

1-2, 3-4, 4-5, 6-7

3.) When you attend music-related events in Olympia, how likely are you to spend money on food or beverages in Olympia as well?

a. very likely b. moderately likely c. not likely

4) The city of Olympia has done an excellent job creating a positive community for those who love music.

Strongly agree, agree, neutral, disagree, strongly disagree

5) How would you characterize the relationship between the city of Olympia and musicians living/performing here?

Mutually beneficial, distant, strong, adversarial, other _____

6) What suggestions do you have to improve the relationship between the city and musicians? _____

7) How did you find out about the last musical event you attended?

8) In the last three months, how many times did you attend a music-related event in the Olympia area?

Less than 5; 5-10; 10-15; 15-20; other _____

9) What was the average amount of money you paid to attend each event?

a. \$30+ b. \$30-\$20 c. \$10-\$20 d. \$1-\$10 e. nothing

10) What genre of music are you most likely to seek out?

11) On average, approximately how much money do you spend on food and beverages when attending a music-related event on the same day?

a. \$30+ b. \$30-\$20 c. \$20-\$10 d. \$1-\$10 e. \$0

12) Describe your role in Olympia's music community.

Consumer: Very active, somewhat active, not very active

Performer: Very active, somewhat active, not very active

Appendix B – Sample Vendor Survey

Name of Venue:

For the Year Ending:

Information Contact:

Email:

Total number of live artists/bands for the year:

Total number of live shows for the year:

Total number of paid attendees for the year:

Average price per ticket:

How many artists are outside the county?

Number of full time employees:

Number of part time employees:

Number of volunteers:

Gross revenue from entry fee/ ticket sales:

Gross revenue from all other sources:

Annual expense budget:

Would you say that your expenditures are:

a. local b. mostly local c. somewhat local d. not at all local

What other sources of revenue do you have, besides music?

a. beer/wine b. full liquor license c. non-alcoholic beverages d. food e. merchandise f. other

Annual local personnel costs including benefits:

As a venue owner, would you be willing to join with other music venues in networking to publicize events?

Where are your performers from?

How do you find and book musicians?

What sources do you use to find and book musicians?

Appendix C – Letter to Music Industry Contacts

Hello,

My name is Will Bennett. I am working with a team of fellow students in the Master's of Public Administration program at the Evergreen State College to prepare a research proposal which will be used to determine the economic impact of music on the City of Olympia. We are working at the behest of the City's Arts Council.

It is assumed that the music industry is vital to Olympia's economy. This research hopes to display the full extent of the impact of music on Olympia. My team will not actually be conducting this research. We are providing this proposal to the arts council so that research could begin as soon as this summer -2010.

Our research has two main prongs: an analysis of public records that evaluates tax information for the music industry, and a qualitative research packet which will explain more thoroughly the meaning of the quantitative data. This should illicit information from musical participants in the city.

I am writing to you to request your assistance in this process. The qualitative research will involve an open public survey as well as a series of focus groups. I am compiling a list of contacts who might help us spread the word about the study, and who might possibly help distribute the survey as well secure participants for the focus groups. Your help in these matters would be greatly appreciated.

Finally, we're looking to find as many contacts as possible. We are looking specifically for people who have a large stake in the life of music in the Olympia community. If you know of anyone who may be able to help us or would otherwise like to participate, please feel free to forward this message to them.

If you would like to get involved, please send an email to somethingnoisy@gmail.com

Thanks,

William Bennett

Appendix D – Music Industry Contact List

Note: The music industry/venue contacts listed will be handed off to the next group of students implementing Phase II of the study in the 2010-11 academic year.

