Key Findings Presentation and Post-Census Update

Hispanic/Latino Quality of Life Resource Advisory Commission

CITY OF AUSTIN ECONOMIC DEVELOPMENT DEPARTMENT

OCTOBER 26, 2016

Austin's Prosperity Engine

The **City of Austin's Economic Development Department** (EDD) develops and leads the innovative programs that increase the prosperity of Austin's citizens, our businesses, and our diverse neighborhoods.

Austin's Prosperity Engine

Citizens

We build programs that create a better future for all Austinites.

Businesses

We help Austin's businesses and entrepreneurs reach their full potential.

Neighborhoods

We revitalize, energize and uplift Austin's diverse local communities and neighborhoods.

Austin's Prosperity Engine

Prosperity for All Citizens | Prosperity for Businesses | Prosperity for Neighborhoods

Cultural Arts

The Cultural Arts Division provides leadership and management for the City's cultural arts programs and for the economic development of arts and cultural industries.

- Cultural Development and Contracting Services

Global Business

The Global Investment & Innovation Division increases jobs and investment in Austin through business attraction and by assisting local businesses with international expansion and trade.

- Business Expansion & Relocation Assistance Program

Music/Entertainment

The Music & Entertainment Division develops and executes initiatives that accelerate the growth of Austin's music and entertainment industry infrastructure, by focusing on job creation, talent export, trade development, and industry revenue growth.

- Music Venue Assistance Program

Redevelopment

The Redevelopment Division facilitates innovative partnerships and projects to re-invigorate Austin's existing built environment, binding neighborhoods and business hubs into civic urban villages.

- Commercial Corridor Enhancement Program

Small Business

The Small Business Division provides opportunities. programs and resources to Austin's local businesses and entrepreneurs, helping them expand their opportunities at home and throughout the world.

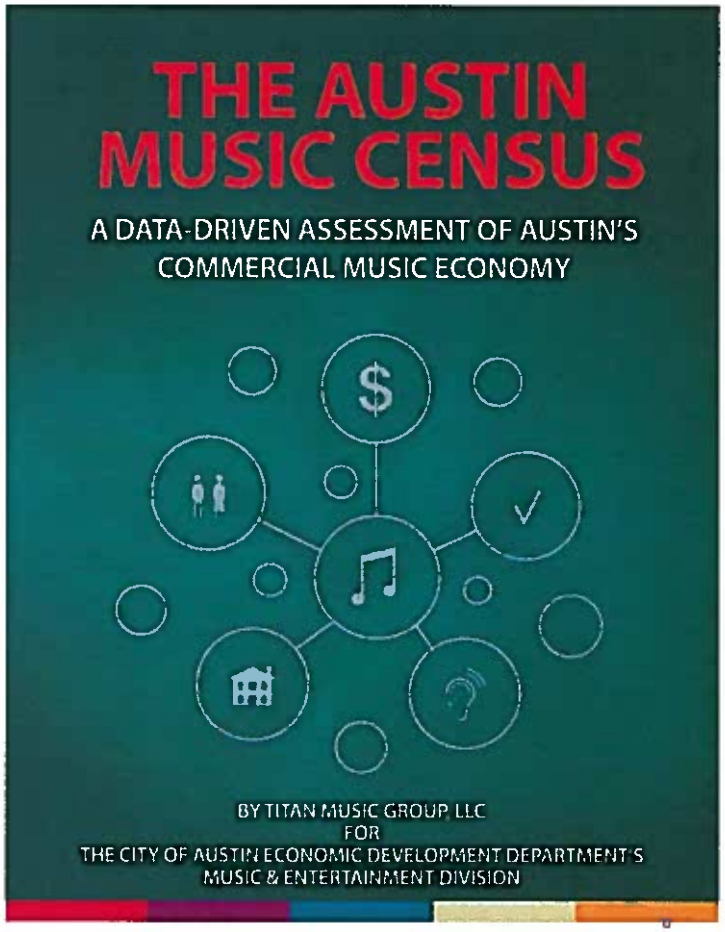
- Family Business Loan Program

Why the Austin Music Census?

- First of its kind, both in Austin and elsewhere
- Transition from anecdotal, first-person narrative to data-driven understanding of the Austin commercial music economy
- Gather "ground-up" data, providing prescriptive focus on ways to increase industry growth, salaries, and jobs.

Methodology: Census Development

- Eight month process: September 2014 – April 2015
- Responses were collected via 15 minute survey that was open to the public
- 8 cross-industry formal focus groups, 20 informational interviews
- 4,000 respondents
- Statistical analysis of data



Key Findings: Strengths

- Diverse ecosystem of music venues
- Wide variety of musical styles & genres
- Growing base of music tourism revenue opportunities
- Substantial support from nonprofit organizations
- High percentage of new entrants to music industry job market (18.2% = 2 years or less)
- Increased event business building more job opportunities

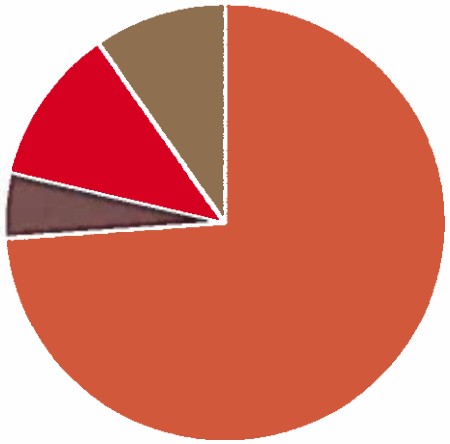
Key Findings: Challenges

- Fewer willing to pay “cover charge” for local acts
- Cover charges the same or less than they were 10 years ago, even though venue operating expenses have increased
- Stagnating pay for musicians & declining revenue sources is critical
- Events & festivals not making up the revenue loss for venues or local music
- Affordable housing & cost of living is edging out musicians

Musician Data

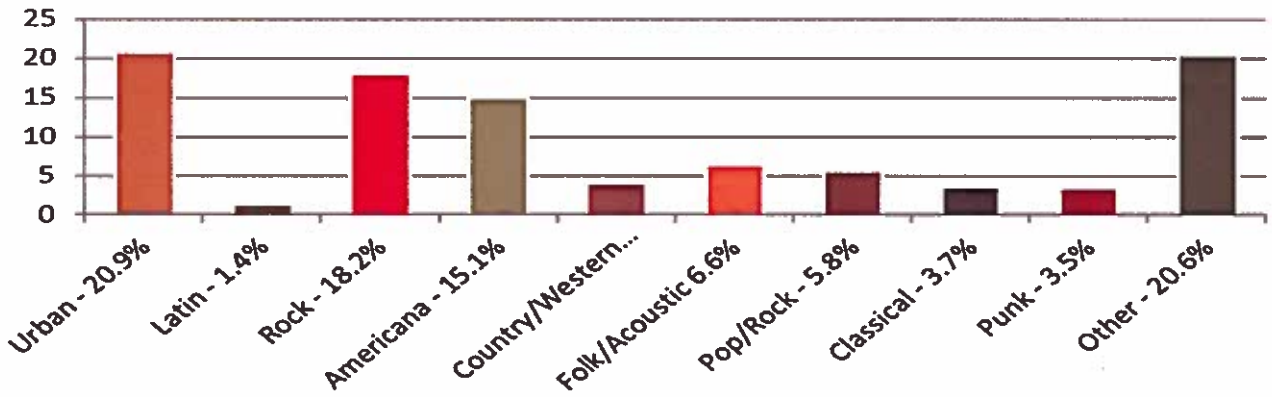
- 56% work another full or part-time job in a non-music related industry
- 22.7% consider themselves full time musicians

2380 Respondents



Genre Representation: Breakdown

All Genres

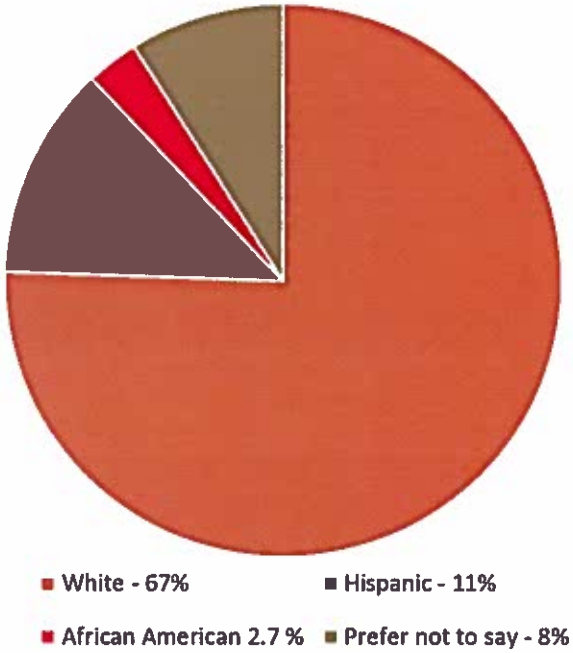


- Urban - 20.9%
- Latin - 1.4%
- Rock - 18.2%
- Americana - 15.1%
- Country/Western 4.1%
- Folk/Acoustic 6.6%
- Pop/Rock - 5.8%
- Classical - 3.7%
- Punk - 3.5%
- Other - 20.6%

Industry Data

- Working in 72 sectors of the music industry
- 41% have worked in the music industry for more than 10 years

1,401 Respondents



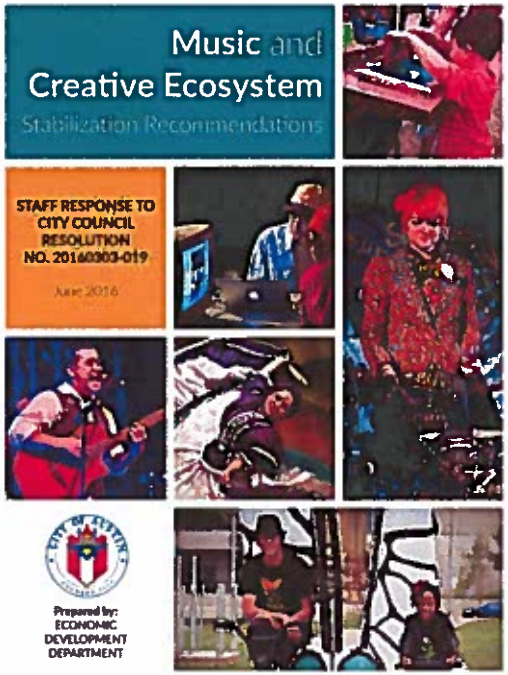
Venues: Regulatory Issues

- Nightlife venues require anywhere from 10 to 18 different permits from 8 different City Departments
- Temporary events require a minimum of 5 and up to 12 permits from 6 different City Departments
- Most permits have to be renewed every 12 months
- 61% said it is very difficult to navigate City permit system and communicate with proper officials
- 62% said inconsistent enforcement of sound ordinance and temporary event permit requirements are having substantial impact on their business.

Post-Census Activity

- Refocused comprehensive strategy for music office operations
- Additional Resources in Fiscal Year 2016
  - Two full-time employees for the Music & Entertainment Division
  - Allocation of an additional $30,000 to the Music & Entertainment Division operating budget
- Increased community outreach efforts
- Increased programming efforts (venue summits, revenue development workshops)
- Closer examination of the Music & Entertainment Division's role in the permitting process

- February 26, 2016 - the Austin Music & Creative Ecosystem Omnibus Resolution



www.atxmusic.org

- ATX Music Census Report
- Music and Creative Ecosystem Recommendations

Thank you

City of Austin Economic Development Department

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