

Turn Up



the Mic,



Tune Up



the Future

A NATIONAL RESEARCH STUDY
OF ROOTS MUSICIANS IN THE U.S.



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Executive Summary

In this research study, commissioned by Whippoorwill Arts on behalf of the Americana, bluegrass, blues, folk, acoustic, and other roots music communities, we tried to turn up the mic for working musicians – to better understand their needs, challenges, and visions for the future.

This research report is intended for a wide range of readers and stakeholders, from music industry leaders to the policy and philanthropy sectors. We hope its findings are relevant to everyone who cares about music, community, equity, and progress in the pivotal years ahead. Most importantly, this document is intended for roots musicians themselves and the organizations that serve them. Indeed, many of those organizations were partners in this research, including the [American Federation of Musicians Local 1000](#), [Americana Music Association](#), the [Blues Foundation](#), [Folk Alliance International](#), [GlobalFest](#), and the [International Bluegrass Music Association](#).

As the diagram below shows, this report explores three kinds of change that musicians cited as necessary in order to create a more sustainable, equitable, and thriving music ecosystem: **economic equity**, **professional protections**, and **collective effort**. These three pillars are built on a foundation of passion for making music, which we witnessed at every stage of the research. For the musicians we spoke with, music is not merely a career but a calling – and a powerful force for social good. And that **more equitable, thriving ecosystem**, in which musicians play such a central role, in turn makes possible **greater social good** – the personal and collective benefits of music in psychological, civic, and community terms.

A model of change for roots musicians and the music ecosystem.



PILLAR 1: ECONOMIC EQUITY

Most of the musicians in this study need to be able to make a living through their music, and they want to be valued and compensated in proportion to the benefits they create. The survey shows that the Covid-19 pandemic was acutely destabilizing for many musicians, both financially and emotionally. But it also revealed that income instability had been a chronic condition for many musicians long before it became exacerbated by the pandemic.

PILLAR 2: PROFESSIONAL PROTECTIONS

Across a variety of professional protections, the survey data shows many gaps exist for working musicians, including in protections from discrimination and harassment, economic safety-nets, and Covid-19 safety protocols. In some of the above areas, musicians as a whole are less protected than the average American. In other areas, problematic experiences are more prevalent for musicians with specific identities: women musicians of all ages, musicians with disabilities, LGBTQIA+ musicians, musicians under 40 years old, and Black and Indigenous musicians. These findings as a whole indicate a need for stronger policies and practices to ensure that musicians have safe, respectful workplace conditions.

PILLAR 3: COLLECTIVE EFFORT

This research suggests that various forms of collective action are desired by musicians and necessary to the future they envision, specifically working to foster more equitable pay structures (e.g., higher pay/benefits for gigs, more sufficient pay from venues, and fair income from streaming services). Many also want non-economic kinds of change related to other aspects of well-being and social value. Musician membership organizations and unions clearly have important potential roles to play in such an effort, but some of the steps that musicians say would lead to a more equitable and thriving ecosystem would also require new legislation and longer-term public-policy priorities.

IMPLICATIONS & INTENTIONS

What are the most critical shifts in policy and practice necessary to achieve those goals? Based on the analysis and findings from this study, we've identified eight broad action-areas:

- 1. Determining what constitutes adequate compensation for working musicians.** We recognize that this will be challenging in a highly decentralized field with multiple market forces at work. But if music is an important human need and social agent, it's vital to make creating music a more sustainable career and life-choice for full-time artists. The pandemic only adds to the urgency of doing so. A candid, detailed dialogue should be facilitated between working musicians

and other industry professionals, perhaps with cultural economists and policy analysts at the table. Formulas should be developed collaboratively, taking into account both the social and economic value generated by musical performance, as well as the direct and indirect costs of performing and recording (e.g., travel, food, insurance, professional development). Independent economic analyses should be commissioned, and comparisons to other creative sectors should be analyzed. In the near and medium term, pandemic-relief goals should be set to increase pay for local concerts, residencies, fellowships, and commissions as in-venue performances resume.

2. Promoting pay equity standards, in part through guaranteed minimum pay for performances. More equitable pay standards are necessary to address disparities in compensation that often disadvantage musicians of color, female musicians, and other historically marginalized groups. Such standards are also vital to solving structural problems like musicians feeling pressured into performing for exposure or receiving pay that is less than the resources they've invested. Advancing pay equity needs to proceed along other parallel tracks, as noted in the following implications.

3. Working with streaming platforms toward a fair division of streaming profits. The current system, which prioritizes the platform over the creators and performers, may need to be dismantled or radically re-envisioned. This seems possible only with the collective commitment and creativity of the musicians *and* the public (see next point), along with allies across the industry, in government, etc.

4. Raising awareness of musician pay inequities among roots audiences. Fans may not be aware of the pay-related unfairness and uncertainties faced by their favorite artists – unfairness made possible in part by their subscriptions to streaming services. A public education-and-advocacy campaign could begin to mobilize audiences to demand and drive change in both recording and live-performance contexts.

5. Creating standards of conduct and policy for venues. New national guidelines would need to establish policies not just for pay equity but for the other elements of equity that interact with pay: performance-invitation equity; formal protocols to address, report and act on discrimination and harassment; Covid-19 safety protocols; other workplace safety protocols; and accessibility standards to meet and exceed ADA requirements for musicians. (One example of efforts already in motion is the American Federation of Musicians' efforts to add musicians to the federal tax code as eligible for unemployment benefits.)

6. Expanding the range of funding mechanisms that roots musicians can access. Musicians working in certain genres have long had access to government and philanthropic support; others have been considered “commercial” and therefore not in need of – or perhaps not as deserving of – such support. A more contemporary lens is needed: *all* working musicians contribute to important individual and collective impacts and therefore should have access to a diverse array of funding mechanisms. It’s time for policy updates and definitional shifts that would open investment and grant opportunities for roots musicians from sources such as local governments, federal agencies, and national, regional, and community foundations.

7. Strengthening musician solidarity with the help of membership organizations, unions, and other organizations that advocate for and connect musicians. In addition to other priorities discussed above and throughout this report, these efforts should focus on providing more support for musicians from marginalized communities and identities (e.g., musicians of color, musicians with disabilities, LGBTQIA+ musicians); ensuring and disseminating knowledge about safety protocols (Covid-19 and otherwise); compensating musicians for performing at award events, conferences, and showcases; and providing opportunities for non-competitive networking and education (e.g., workshops about collaboration, taxation, booking gigs, marketing, digital technology).

8. Bridging the digital divide. Some musicians do not have access to the technology and knowledge necessary for online performances, digital audience interaction, remote artistic collaboration, onscreen auditions, etc. How can they make a living in a society where so much happens online – especially during a pandemic? Rather than expecting these musicians to surmount those barriers, policies and partnerships could aim to provide more opportunities for live, paid performances for small audiences, thereby fostering local vitality and communal engagement. Simultaneously, education about digital tools and practices should be provided to musicians, not just online but in physically accessible forms.

Based on the needs of working roots musicians uncovered in this study, Whippoorwill Arts is also committed to shaping its own program priorities. The organization is currently forging a national Save Our Musicians™ coalition, complementary to the successful Save Our Stages Act. The Save Our Musicians™ coalition aims to address the systemic issues and policies that are driving musical artists out of work and exacerbating inequalities across the music ecosystem. Please see the foreword by Whippoorwill Arts for more information.

General Trends	Younger musicians (18-40)	Mature musicians (41-56)	Older musicians (57+)
PART-/FULL-TIME AS A MUSICIAN	← All groups include a mix of people who make less than half their income as a musician, more than half their income as a musician, and all of their income as a musician →		
DEMOGRAPHICS	Slightly more diverse group (e.g., race/ethnicity, sexual orientation, and disability)	← Slightly less diverse groups (e.g., race/ethnicity, sexual orientation, and disability) →	
TENURE AS A MUSICIAN	Most with 5-20 years	Most with 10-40 years	Mix of tenure
MEMBERSHIP ORGS AND UNIONS	Similar likelihood to belong to a membership org, but relatively <u>more likely</u> to belong to a union	← Similar likelihood to belong to a membership org, but relatively <u>less likely</u> to belong to a union →	
MEDIAN INCOME (FOR FULL-TIME MUSICIANS)	Pre-pandemic: \$30,001-40,000 Pandemic: \$20,001-30,000 ↓	Pre-pandemic: \$40,001-50,000 Pandemic: \$20,001-30,000 ↓	Pre-pandemic: \$40,001-50,000 Pandemic: Under \$10,000 ↓
MEDIAN STREAMING INCOME	All Pre-pandemic: \$501-1000 Pandemic: \$251-500 ↓	Pre-pandemic: \$101-250 Pandemic: Under \$100 ↓	Pre-pandemic: \$101-250 Pandemic: \$101-250 ← →
GENERAL FINANCIAL STABILITY	<u>About two thirds</u> got behind on one or more expenses in three years before pandemic	<u>About one third</u> got behind on one or more expenses in three years before pandemic	<u>Less than one quarter</u> got behind on one or more expenses in three years before pandemic
PANDEMIC FINANCIAL STABILITY	<u>Over two thirds</u> got behind on one or more expenses in three years before pandemic	<u>About one third</u> got behind on one or more expenses in three years before pandemic	<u>Less than one quarter</u> got behind on one or more expenses in three years before pandemic
DISCRIMINATION & HARASSMENT	Most likely to report discrimination and harassment	← Women across all ages are more likely to report discrimination and harassment →	
TOP-OF-MIND-CHALLENGES	<u>Marketing</u> is most top-of-mind challenge	<u>Streaming processes</u> is most top-of-mind challenge	<u>Booking gigs</u> is most top-of-mind challenge
DESIRED CHANGES IN INDUSTRY	Interest in a <u>variety of changes</u> (e.g., higher pay/benefits for gigs, lodging, clean private spaces)	← Strongest, shared desire for <u>higher pay/benefits</u> for musicians for gigs →	

Foreword

At Whippoorwill Arts, many of us are working, touring, and recording musicians. We have years of experience on the road and know how challenging, rewarding, frustrating, and beautiful life as a musician can be. We hope that this project reflects both our deep respect for working roots artists and our sincere commitment to help improve their working conditions.

The idea for a national survey of roots musicians was hatched by the founders of Whippoorwill Arts, Hilary Perkins and Jim Nunally, who were motivated by seeing things become increasingly difficult for artists committed to this career path. However, without hard data, that perception was hard to prove. This survey was designed to document the conditions under which musicians work and to identify ways to better support the lives and careers of working musical artists. We use the term 'working' intentionally; our attention here is directed toward career roots musicians, not hobbyists. We focused on musicians that aren't the top ten-percent earners but make their living performing in theatres, at festivals, and at local and regional venues. While this survey was focused on roots musicians, broadly defined, the data reflect trends that likely hold true for other musical communities as well.

This research project came to life during the Covid-19 pandemic, but many of the issues it aims to address predate the pandemic. Historically, there has been little data collected about the challenges roots musicians face over the course of their careers. This survey helps define the real issues our peers face in the current marketplace, including how financial and health-related factors can impact creativity, how workplace safety and accessibility need to be improved, and how equity and racial/gender inclusivity need to be prioritized. We wanted the study to paint a detailed portrait of the life of a working roots musician, and we hope that the results offer insights that help mitigate the current crisis as well as long-term challenges.

This report reveals that performers of traditional American music are experiencing difficulty on multiple fronts. Many musicians will not be shocked at these results, as they have been grappling with these conditions for years. But the comprehensive data gives us a better picture of the extent of the challenges. While we might not be surprised by the lack of adequate and guaranteed pay for so many career musicians, we were struck by the ways in which musicians expressed this state of affairs: One focus group participant spoke of playing in the same bar in Austin where Willie Nelson had performed 40 years before – the gig paid \$100 then, and it still does today.

But we also face new kinds of financial inequity: In 2020, as part of the Covid-relief legislation, the federal government allocated \$15 billion to the Save Our Stages Act.

This important initiative was designed to save the businesses that own the stages. Without musicians, those stages remain empty. So, inspired by the successful Save Our Stages Act and the widespread support it garnered, we propose a phase two: Save Our Musicians™ call to action. It is a call to action to address the systemic issues and policies that are driving musicians out of work and exacerbating inequalities across the music ecosystem. Our top five strategies to be executed through the Save Our Musicians™ initiative are a distillation of what musical artists themselves say they need to survive and thrive:

- Guaranteed pay to musical artists for all performances, with attention to equitable pay for the marginalized;
- More opportunities to perform for small, attentive audiences;
- Accessible venues for people with mobility issues: backstage, stage, green room, restrooms, etc.;
- Significantly increased streaming revenue for music creators and simplified, fair and transparent compensation of royalties;
- Government, corporate, foundation, membership organization, and audience support for performance pay and professional development, such as fellowships.

We think that the time is right for this type of initiative. Despite its limited focus, the Save Our Stages Act was a national, bipartisan success; this fact, coupled with the current presidential administration's firm commitment to the arts, makes us optimistic that we'd be able to muster strong political support for our Save Our Musicians™ initiative. The government has shown that it is committed to supporting musical venues; now we need to enlist it to support the survival of the musicians themselves. We hope that, with increased support from local, state, and federal governments as well as private corporations and citizens, we will be able to support working musicians in this moment of crisis while also creating a more equitable future that ensures the flourishing of American roots music.

Without swift action, we are at risk of losing the voices of a variety of working musicians. We don't want that to happen; we don't want to lose the diversity and depth of this musical tradition, and we don't want to see the options for future performers narrow to either bar gigs or stadium gigs, with little in between. This research should serve as a wake-up call: our musicians are in crisis, and they need our support. At Whippoorwill Arts, we look forward to continuing our alliance with other organizations committed to the well-being of working musicians across America, both in response to the pandemic and beyond.

In this report, our research partners from Slover Linett present data about the challenges facing working roots musicians today, from financial insecurity to social inequity and pandemic-related safety concerns. We hope that you will gain insight from this study whatever your relationship to roots music might be—whether you identify as a performer, crew member, support staff, music industry professional, or fan. After reading the findings, please stay with us; at the end of this report we discuss specific actions we can all take—actions we must take together—to support our musicians and change the way they are valued in this country. There is much work to be done, but we believe that knowledge is power, and we hope that this study allows us to build a movement that can spark real change in the music ecosystem. Together we can create a more inclusive and equitable future in American roots music—for the musicians that share their songs and stories, and for the audiences that listen.



Hilary Perkins



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Whippoorwill Arts

For more information, please visit www.whippoorwillarts.org

About Whippoorwill Arts

INVEST. UPLIFT. TRANSFORM.

Whippoorwill Arts is on a mission to provide opportunities for roots musical artists to survive and thrive. We aim to nurture musicians' creativity with initiatives that focus on collaboration, fair wages, equity, and social justice. Founded by veteran touring and award-winning musicians Jim Nunally and Hilary Perkins (aka Nell Robinson) and led by Executive Director Rachelle Furst, Whippoorwill Arts has launched the milestone national Roots Musician Survey and the campaign to Save Our Musicians™ campaign.

As an organization, Whippoorwill Arts invests in American roots musical artists; uplifts their talent, gifts, and hard work; and through collective effort, seeks to transform the music ecosystem. We believe in asking musicians directly what they need, using data to inform decision-making, and thinking outside the box to re-imagine the American music environment.

Whippoorwill Arts is committed to ongoing equity evaluation and action in our work, by which we mean fairness and equality in both compensation and opportunities, and to identifying and overcoming intentional and unintentional barriers that arise from—and perpetuate—harmful bias.

About Slover Linett

Slover Linett is a social research practice for the arts, culture and community sector, broadly defined to include the arts, museums, libraries, parks and public spaces, public media, science engagement, placemaking, and philanthropy. Founded in Chicago in 1999, the firm uses equitable research and evaluation methods – from community ethnography and asset-mapping to quantitative survey research, advanced statistical modeling, and generative, co-creative workshops – to illuminate public perceptions, values, behaviors, outcomes, and new possibilities for relevance. **Slover Linett's mission is to help changemakers increase equity and access, deepen engagement, and meet community needs.** We place inclusion, empowerment, and social justice at the center of our work, and we've been honored to collaborate with some of the most beloved and innovative cultural enterprises and foundations in the U.S., from the High Line, Library of Congress, Kennedy Center, Carnegie Hall, and Baltimore Museum of Art to the Smithsonian Human Origins Program, Cornell University, National Academy of Sciences, MacArthur Foundation, Nina Simon's international Of/By/For All initiative, and Signature Theatre Company's low-cost ticket access initiative. Our Chicago-based staff of twelve includes social scientists from disciplines such as psychology, anthropology, and public policy, many with advanced degrees.

During the pandemic, Slover Linett has helped lead Culture & Community in a Time of Transformation: A Special Edition of Culture Track, a large-scale audience and population study in partnership with LaPlaca Cohen, Yancey Consulting, and NORC at the University of Chicago, with generous support from the Wallace Foundation, Barr Foundation, William Penn Foundation, and Terra Foundation for American Art, and crucial in-kind contributions from Microsoft and FocusVision. Reports from the initiative include a BIPOC-focused analysis released in December 2020, Centering the Picture: The Role of Race & Ethnicity in Cultural Engagement in the U.S. and the forthcoming 'A Place to Be Heard, A Place to Be Held': Black and African American Perspectives on Creativity, Trustworthiness, Welcome, and Well-Being – Findings From a Qualitative Study.

For more information, please visit sloverlinett.com and [@sloverlinett](https://twitter.com/sloverlinett) on Twitter.

Introduction

Music is one of the universals of human society. It's tied to how our brains have evolved and how we connect with each other across distance, time, and difference. In a time of social change and collective challenge, music matters even more – and so, therefore, do the people who make it. In this research study, commissioned by Whippoorwill Arts and undertaken in collaboration with the membership organizations and union serving the Americana, bluegrass, blues, folk, roots, acoustic, and other musical communities, we aimed to “turn up the mic” for working musicians and better understand their needs, challenges, and visions for the future. After all, musicians are central to the musical ecosystem and cultural and economic “scenes” that make American communities vital and vibrant, and no strategic policy for pandemic recovery or community development would be complete without their voices. We've been heartened to see the Save Our Stages Act succeed in shining a spotlight on the important economic and artistic role those places play; this study is an attempt to complete that picture by adding a nuanced portrait of the people whose talents and hard work animate such venues, and to ensure an equally bright future for them.

We're aware that the genres in which many roots musicians work hold an uneasy place between the commercial and philanthropic. It is often considered distinct from nonprofit forms of arts and culture that receive philanthropic and governmental support. But this music is deeply connected to long-cherished traditions of story and sound, and it is typically shared through community-based radio stations rather than commercial radio. It's clear that the public value and social purpose of

“I see a lot of campaigns to save and fund venues, which I am all for. However, many of the venues on said lists frankly don't pay or treat their musicians well. My hope is that venues, companies, and streaming services who monetarily benefit from the work of musicians learn that we deserve fair pay, treatment, and respect – as one would with any other profession.”

music transcends genres and business-model categories. The musicians we heard from across the country – like the team at Whippoorwill Arts and all of the service organizations – are committed to the role that roots music plays in bringing people and communities together, in telling meaningful stories, and in contributing to individual and collective well-being. So this research report is intended for a wide range of readers and stakeholders, from music industry leaders to the policy and philanthropy sectors – anyone who cares about community, culture, equity, and progress in the pivotal years ahead. Most importantly, though, this document is intended for roots musicians themselves and the organizations that serve them. We hope it provides a valuable “signal boost” for their shared passions, challenges, and aspirations

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and helps the outlines of a more sustainable, equitable, and thriving future emerge.

In order to provide this amplification, we asked questions about economic issues such as pay and financial security, but also about artistic, social, and emotional aspects of being a working musician today. We acknowledge that this study is not an endpoint, but rather a vivid snapshot that we hope will lead to reflection, dialogue, and action. Like most research, this study answers some questions and raises new ones that will require future research. We invite questions, comments, and suggestions. To discuss the design, implementation, and analysis of this study, please email the research team at musicians@sloverlinett.com. To discuss the genesis of this work and its future applications, please email research@whippoorwillarts.org.

PROJECT COLLABORATORS

As we've already noted, this research was a collaborative effort, and the Slover Linett and Whippoorwill Arts teams are grateful to all of the organizations that contributed to the design of the research and to alerting their members to the opportunity to participate. These partner organizations included the [American Federation of Musicians Local 1000](#), [Americana Music Association](#), the [Blues Foundation](#), [Folk Alliance International](#), [GlobalFest](#), and the [International Bluegrass Music Association](#), and the leaders who generously served as an informal steering group for the project. This project would not have been possible without their insight and endorsement.

METHODOLOGY

We used both qualitative and quantitative methods to develop a holistic view of the music ecosystem and the experiences and working conditions of musicians within it. Although some of the genre-based membership organizations involved serve musicians in both the United States and Canada, our study concentrated on U.S.-based musicians. The project involved:

- **One-on-one interviews with nine thought-leaders and changemakers** in the field, conducted via Zoom and lasting 30-45 minutes each, to understand the broad state of the music ecosystem and inform our survey design process.
- **A national online survey of professional working musicians** conducted between April 26, 2021 and May 10, 2021, with 1,234 completed responses from full- and part-time musicians around the US, to explore their experiences and needs both before and during the pandemic. Survey questions focused on motivations, economic circumstances (including details about income, expenses, etc.), pandemic impacts, post-pandemic recovery needs, perceptions

of equity, and future aspirations. Musicians were invited to complete the survey by the membership organizations, who reached out through email lists and social media; these efforts were supplemented by Whippoorwill Arts' network of contacts and word-of-mouth. The survey was hosted on the Decipher platform and took an average of 15-20 minutes to complete, and respondents could enter into a drawing to win a \$500 VISA gift card or one of five \$100 VISA gift cards. (Please see appendix for the survey questionnaire.)

- **Four online focus groups** involving a total of 23 musicians (11 full-time and 12 part-time), conducted via videoconference after the survey data had been analyzed and lasting 90 minutes each. The objective was to review the survey findings with representative musicians and elicit their reactions, context, and comparisons to their own experiences or situations, in order to be able to bring additional qualitative nuance to this final report. The quotations interspersed in this document are mostly drawn from those follow-up focus groups.

We prioritized accessibility at each stage of the research. The one-on-one interviews and focus groups were held on Zoom with the option to participate by phone only (this was chosen by two participants). The survey was hosted online but with an option to complete it via phone for those without consistent internet access or with visual impairments.

WHO COMPLETED THE SURVEY?

Our goal was to reach professional roots musicians rather than hobbyists, and to focus on those with small- to medium-size audiences (not the top income-earners). Both goals were achieved. All survey respondents self-identified as "US-based working musicians" who have generated some portion of their income through music before and/or during the pandemic. Most reported drawing their musical inspiration from the roots, Americana, blues, bluegrass, folk, world, and acoustic music categories, although many noted that they are also inspired by other genres. (Many musicians feel that genre definitions and boundaries don't necessarily apply to how they approach their work.) Survey respondents were well distributed geographically, representing all four regions of the U.S. (see Figure 1).

Respondents varied in the proportion of their income generated by music: 30% reported earning all of their income through music, 44% generated more than half their income but less than all through music, and 26% earned less than half their income through music. (Hobbyist musicians were "screened out" from the survey during initial questions.) Similarly, respondents ranged in tenure in the music industry from under 5 years (7%) to over 41 years (22%).

Survey respondents also represented a wide range of performance-ensemble types and familiarity with different venues. A third (33%) were currently in multiple

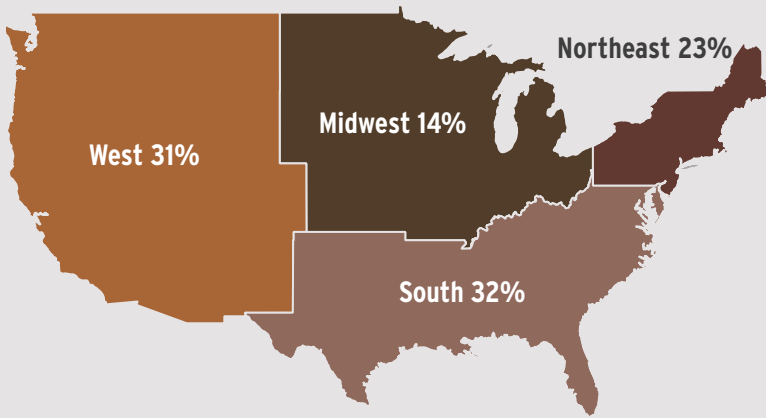


FIG. 1
Geographic distribution of survey respondents

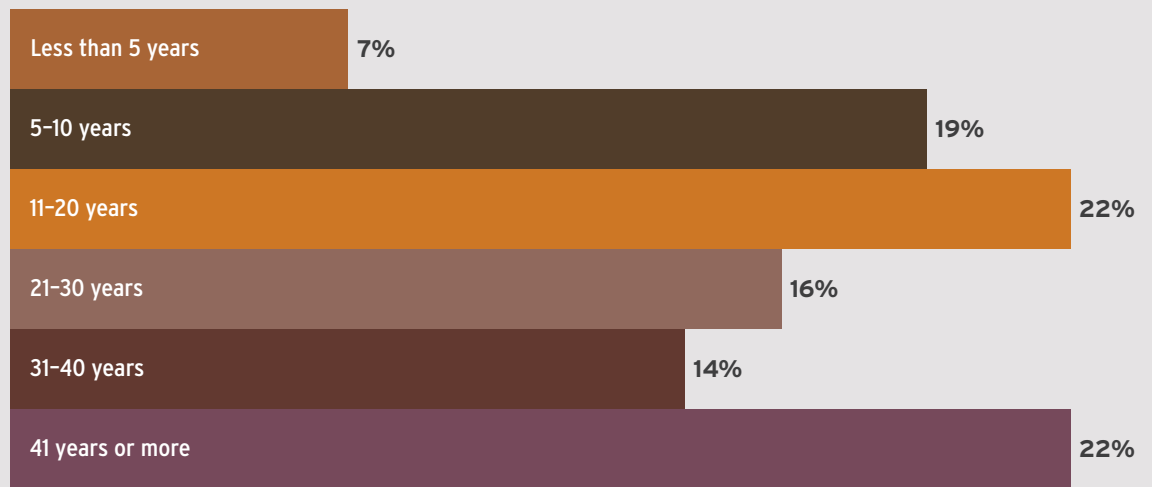


FIG. 2
Q2: How long have you been professionally working as a musician?
(i.e., generating some portion of your income, either part-time or full-time) (n=1,234)

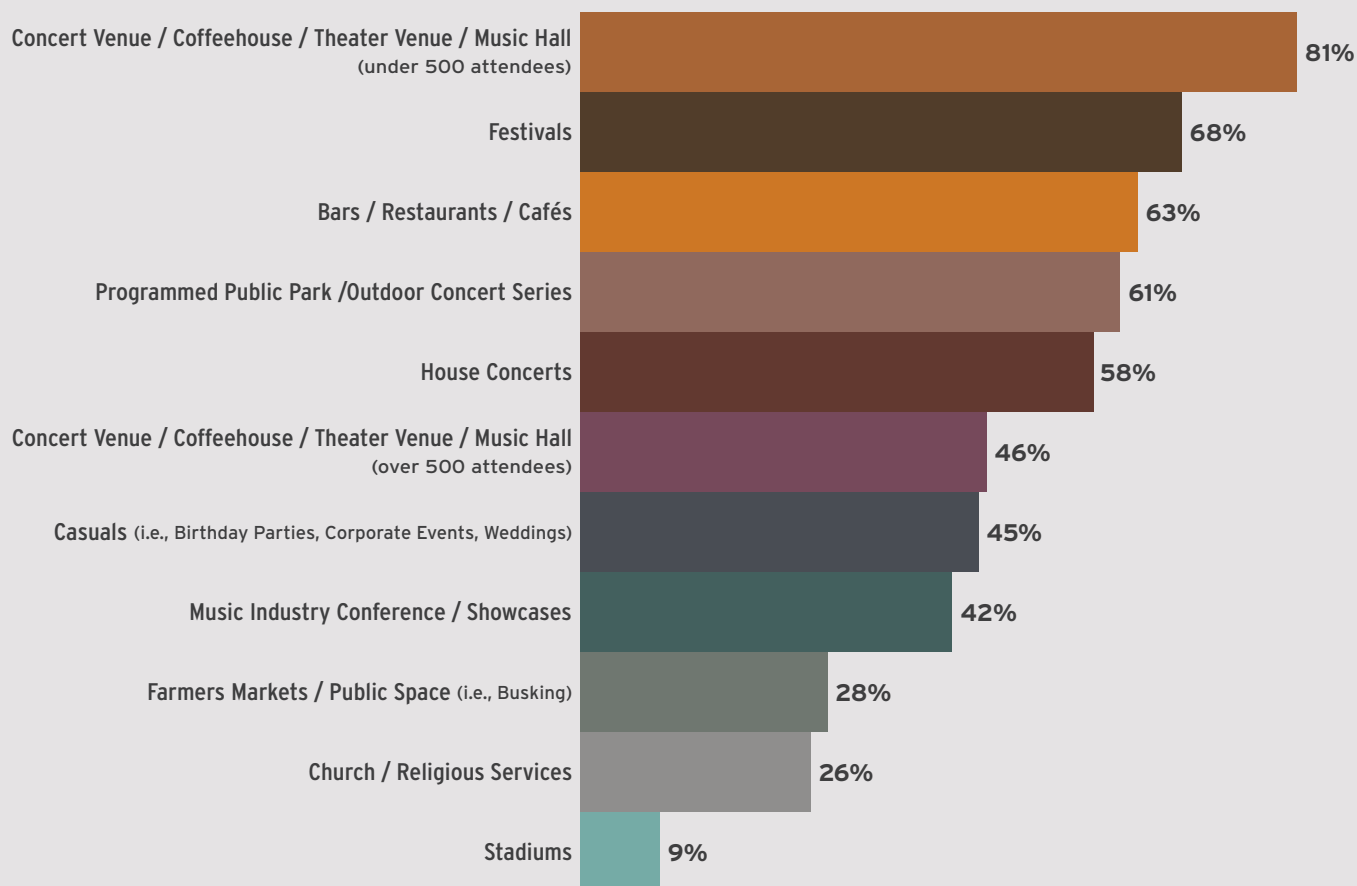
ensembles of different kinds or sizes, while a quarter (25%) identified primarily as solo performers (25%) or band leaders (23%), and fewer were in ensembles of 3+ musicians (10%) or duos (9%). They performed in a wide variety of venues, with most having shared experiences performing in venues with under 500 attendees (81%), and fewest performing in stadiums (9%). As one full-time musician noted, performances in intimate venues enable “the joy of creating sounds and interacting with others.”

Demographically, there was less diversity. 80% of respondents were white, and a majority were heterosexual, able-bodied men with bachelor’s degrees or above.

FIG. 3

Q5: In what kinds of venues did you perform before the pandemic?

(Think back to the past 3 years before the pandemic). Please select all that apply. (n=1,220)



However, the Whippoorwill Arts team took measures to encourage participation of other demographic groups by sharing the survey link through targeted social networks and personal connections, and by ensuring the four focus groups included more voices from traditionally marginalized groups. As a result, a number of other groups were represented well enough for us to compare their responses statistically, including women (35% of respondents), LGBTQIA+ musicians (19%), disabled and neurodivergent musicians (14%), and musicians of color (20%). We recognize that that lower level of racial/ethnic diversity is itself a finding of this research, and we discuss it later in this report.

And finally, survey respondents ranged in age from 18 to 86, with an average age of 51. Based on their response patterns for other questions, we organized respondents into three broad age groups for analysis in this report: under 40 (which we call “younger,” 33% of respondents), 40-56 (“mature,” 24%), and 56+ (“older,” 43%).

Findings

OVERVIEW

A NEW MODEL FOR A MORE EQUITABLE AND THRIVING MUSIC ECOSYSTEM

If music is vital to a healthy, thriving society, as we argue in the Introduction, then it's important to ask how the music ecosystem can be made more equitable and "thrive-able," to borrow a coinage from equity-and-transformation consultant Lisa Yancey.¹ Yancey and her colleagues note that sustainability shouldn't be the goal if the system being sustained isn't equitable, healthy, and working well for all involved; rather, the goal should be genuine thriving. We heard a similar theme from the musicians in this research, who amply confirmed the Whippoorwill Arts team's observational hypothesis that working musicians in the U.S. often struggle economically and perceive the systems in which they work as, at best, misaligned with their interests and, at worst, exploitative and devastating to those at the core of music creation. These perceptions have been worsened by the pandemic and the economic and cultural disruption it has caused, but they also predate it: they're "pre-existing conditions" affecting the lives and careers of musicians and their ability to contribute to the social and community well-being they care so much about. Many musicians we spoke with noted that their income streams have been shrinking for decades, and from multiple directions (e.g., two noted examples

are music performance, where pay is seen as stagnating for decades, and music streaming, which in the words of Spotify's creator, Jim Anderson, was created as a way to "get music out there...not to pay people money.")²

"I feel like the music industry relies on the work of musicians to function, and yet musicians themselves are so often expected to foot the bill for everything despite being consistently paid the least. I want to see a world where musicians are paid a living wage."

But that word "equitable" has a specific meaning, of course, especially now that the country's racial reckoning has accelerated. Many of the musicians who participated in this

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study care not just about the fairness and equity of their own careers, but also about equity, diversity, and inclusiveness of the musical communities and genres in which they perform *and* of the wider society in which they live. That includes racial, gender, and other dimensions of equity and inclusion – and many musicians recognize that the field has real work ahead to achieve those values in terms of bookings, visibility, compensation, opportunity, and beyond.

In the diagram below, we've placed that vision of a **more equitable and thriving** music ecosystem – and therefore more equitable and thriving careers and lives for musicians – near the top to indicate its importance to the goals of this study and to the musicians who participated. That broad vision is supported by three kinds of change that musicians expressed a need for in this research: **economic equity, professional protections, and collective effort**. As the purple arrow on the left of the diagram suggests, those three categories or pillars of change would all increase the *value* of the ecosystem and the lives and careers of musicians. And those pillars are built on a foundation of **passion** for music as a calling and for music as a social good, which we heard at every stage of the research. And that more equitable and thriving ecosystem, in which musicians play such a central role, in turn makes possible **greater social good**—the personal and collective benefits of music in psychological, civic, and community terms. We've organized our findings in this report around the base and pillars shown in the diagram.

FIG. 4

A new model for a stronger music ecosystem centering the role of working musicians—and a structural overview of the key findings from this research.



THE FOUNDATION: PASSION

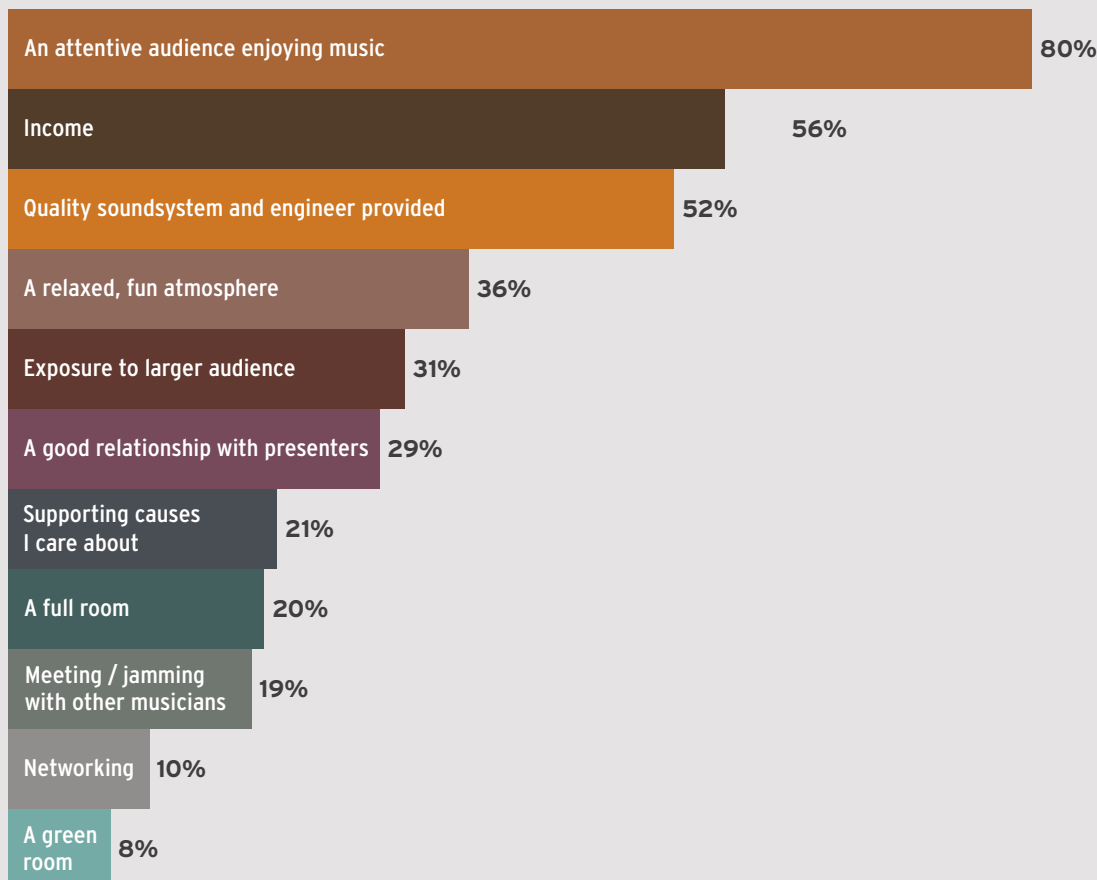
MUSIC AS A CALLING, MUSIC AS A SOCIAL GOOD.

The survey responses make it clear that most musicians are motivated by connecting with their audiences through music: Asked what's most important to them, 80% of respondents selected "an attentive audience enjoying the music." This was echoed in our follow-up focus groups with musicians about these survey findings, where one participant noted, "the energy that happens when you play for or with others can't be duplicated any other way," and several described that musical-social energy as a precondition for the positive change that music can foster. Through their work in music, they said, they can help audiences slow down, see the world from different perspectives, embrace uniqueness, and give each other "space to feel" as humans. One described musicians as "essential workers" in social and community change, particularly during periods of collective pain such as the Covid-19 pandemic.

Others spoke in terms of equally deep but more personal, inward rewards. One noted that how music feels is "core" to themselves and would remain central even if they couldn't perform professionally. Another described it as "the purest form of self-expression," while others called it "a way to process life events" or their "happy place."

FIG. 5

Which of the following were most important to you when you performed at a venue or event? Please select up to 4. (n=1,206)



But neither the social nor the personal priorities of musicians are separable from their financial realities, as the second bar in the chart on the previous page reminds us. Not only did more than half (56%) cite income as one of their most important considerations when performing; over half of all respondents selected *both* income *and* audience enjoyment as highly important. (Full-time musicians were even more likely to say this, with three-quarters selecting both.) The subsequent group discussions confirmed this duality: musicians can't afford to be – and don't want to be expected to be – “starving artists” in the service of social connection and well-being. They need to be able to make a living through their music, and they want to be valued and compensated in proportion to the benefits they create. Yet many musicians currently do feel a deep emotional toll in being undervalued and undercompensated, as we discuss in the next section of this report.

“No one would question whether or not my time was worth compensating as a server or hospitality worker, but so many people are willing to exploit the time and energy of musicians.”

PART-TIME MUSICIAN

Overall, the survey data suggests that the pandemic has exacerbated the stresses and challenges that can lead to pessimism and frustration among musicians – but many issues clearly predate the current crisis by decades³ and will require structural solutions. America's working musicians are passionate and purposeful about what they do and aware of the significant public value of their work, so it makes sense that they want the economic and creative ecosystem to change in ways that better align with their needs and roles.

“We need to recognize musicians as workers essential to our society, and be valued for such, both monetarily and culturally.”

PART-TIME MUSICIAN

We also found that, despite their strong philosophical commitment to music as a profession, many musicians aren't particularly optimistic about the future. Slightly more than half (55%) report feeling positive and hopeful about “the future of being a musician in your music community.” Despite this, almost all respondents (92%) do plan to continue performing over the long term, either full-time or alongside other kinds of paid work, but these hopes may not ultimately align with practical and financial realities.

“When everything in the world is turned upside down, and especially for people of African descent, you depend on culture. Our major instrument is the tambourine and the voice. We're spiritual first responders.” FULL-TIME MUSICIAN

PILLAR 1: ECONOMIC EQUITY

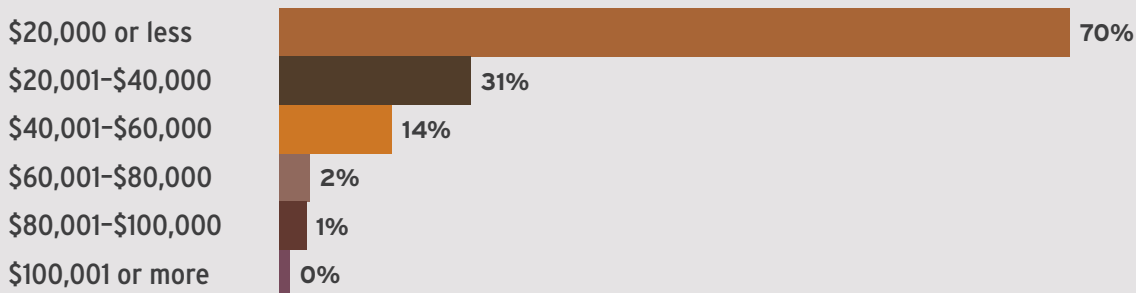
It's no surprise that a career in music, which has long been associated with income instability, would be deeply affected by an economic and cultural disruption like the pandemic. Indeed, our survey shows that the Covid-19 pandemic was highly destabilizing for many musicians, both financially and emotionally. And the data suggests that pay inequity may continue well beyond the pandemic itself, unless steps are taken to counteract the structural forces that have worsened in the last eighteen months. Because of the exacerbated crisis, these steps may be needed at multiple levels, from top-down government support (e.g., through resources such as emergency funds, loosened restrictions and beyond) as well as bottom-up advocacy (e.g., through musician-centered collectives and other group efforts).

FIG. 6

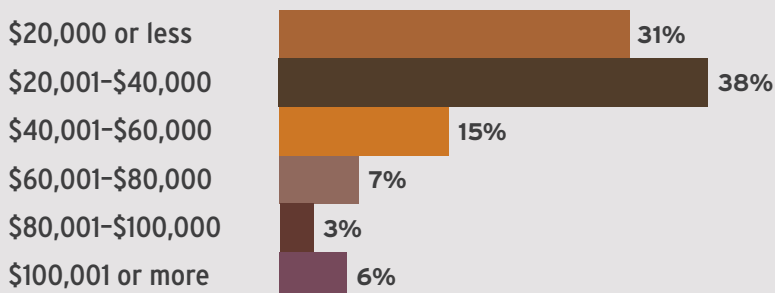
Q11: by proportion of income derived from music: Thinking about the 3 years before the pandemic, what is the average annual income you generated as a musician (before expenses)?

If your income has fluctuated, please make your best guess. (If you are a band leader, please count only the income that comes to you personally...)

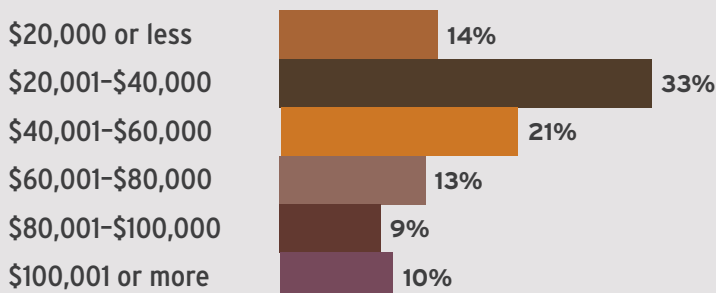
Among those who make less than half their income through music (n=527)



Among those who make more than half their income through music (n=306)



Among those who make all their income through music (n=306)



It's not that musicians would like to return to the pre-pandemic "normal." Most respondents made modest incomes before the crisis began: 71% reported earning under \$40,000 per year from their music, and even among full-time musicians, about half (47%) made less than that amount.

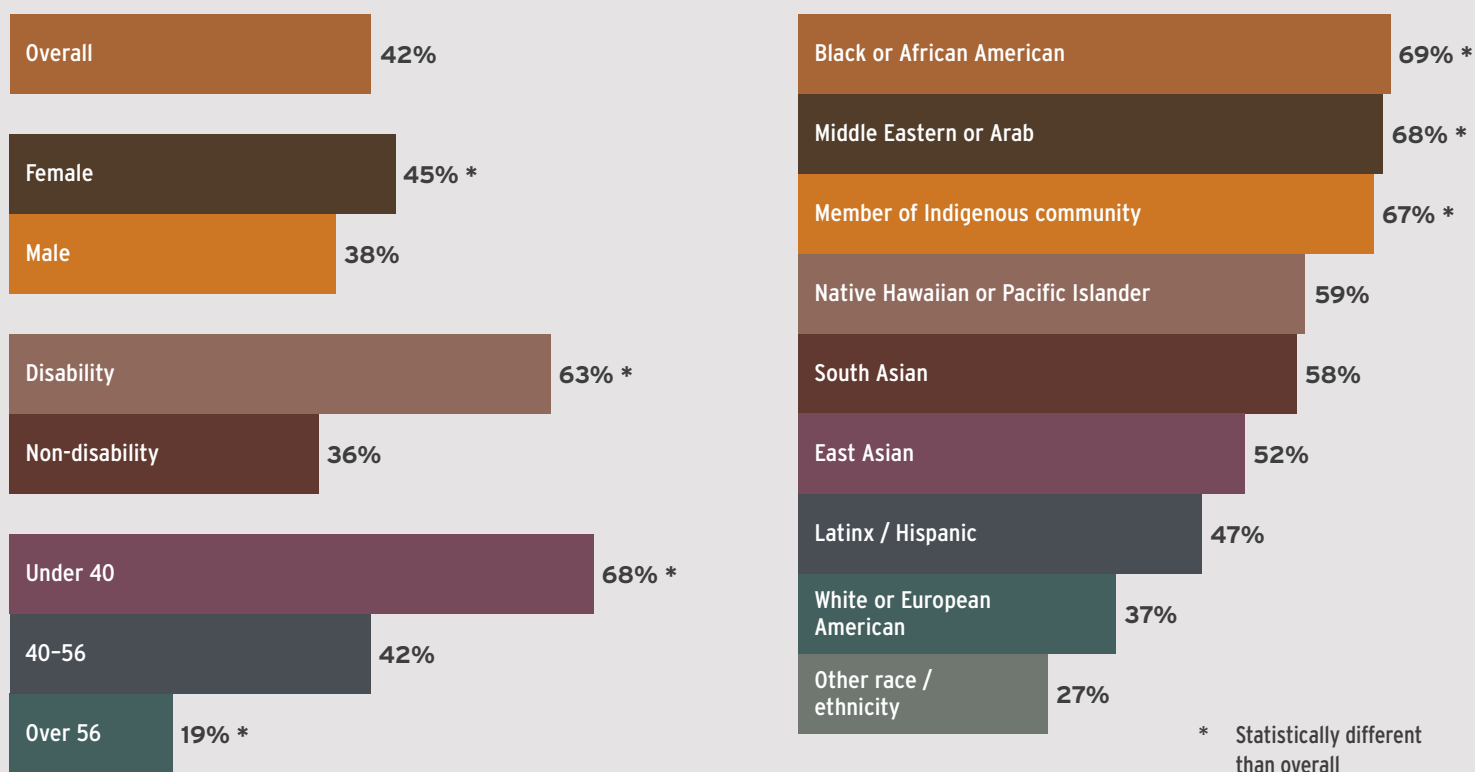
Much of those pre-pandemic earnings came from live performances: touring/out-of-town performances was a top income source for 73% of musicians, and local performances were a top source for 53%. (Not surprisingly, full-time musicians were more likely to derive their income mostly from touring, whereas part-time musicians were more likely to derive it from local performances.) Similarly, for most musicians, the streaming platforms (Spotify, Pandora, Apple Music, etc.) weren't a viable income source before the pandemic, despite the dramatic audience growth on those platforms in the last decade: less than half of survey respondents (42%) made *any* income from streaming in the three years before the pandemic, and of those who did, most (72%) made less than a thousand dollars per year.

But the challenge for working musicians before the pandemic wasn't just that their incomes were mostly low. It was that those incomes were also *unstable*, which made it hard for some of them to meet regular expenses. And this was particularly true for a number of demographic groups within the musician population: those with disabilities and long-term health conditions; younger musicians; and Black or Indigenous musicians.

FIG. 7

Q13: Thinking back to the 3 years before the pandemic (2017-2019), did you get behind on expenses for any of the following?

(Those that fell behind on at least one of the listed expenses)



In all of the groups noted above, around two-thirds of respondents struggled to meet expenses during that pre-pandemic period – a much higher figure than for respondents overall. (Musicians who supported multiple dependents in their family were also more likely to fall behind on expenses, which implies a disadvantage for musicians who are the primary breadwinner of their families.)

Discussing these statistics with us in the focus groups, participants distinguished between two levels of pay inequity: the undervaluing of *musicians generally* within the music ecosystem, compared to roles in other areas of the industry such as record labels, presenters, promoters, and streaming platforms; and unequal opportunities for musicians in *specific demographic groups*, such as those mentioned above.

Interestingly, younger and older musicians shared similar, acute frustrations about the difficulty of earning and maintaining a livable income, while spending thousands of unpaid hours practicing to reach a professional skill level. A number of older musicians who had navigated the industry for a longer time noted that pay for musicians has stagnated for decades (“The industry is stuck in a pay system from forty years ago—the pay has never gone up for us”) or, worse, actually devalued over the years (“In the ’80s you could make a very good living [as a musician], but you’re now making the same dollar amount you did in the ’80s, not considering inflation”). In some cases, they noted, that pay erosion had unfortunate effects on their creativity (e.g., having to perform popular covers rather than original compositions), forced them to go down to part-time work as musicians and take other non-music-related jobs, or reduced the longevity of their careers. Some older musicians also noted that hobbyists sometimes performed ‘for exposure’ (i.e., for free or very low pay), making it more difficult for both early-career and established musicians to advocate for fair pay.

And being a woman means even higher hurdles, as one survey respondent in that demographic group noted in her open-ended response (see quote at left).

Younger musicians, for their part, also described feeling trapped in an impossible situation, especially as they struggle to get their careers started. One cited the

“It is infinitely harder for women to book, make connections, get on labels, bills, etc. in this industry than it is for men. And I’m not only talking about women of color, but white women as well.”

PART-TIME MUSICIAN

common but unsustainable experience of having to “spend \$5,000 on equipment and \$500 for a car for a \$50 gig.” Several noted how these financial pressures could “mess with the creative process,” causing them to scrap projects and ideas or pressuring them into taking gigs where audiences “couldn’t care less” – experiences which made them doubt their own potential and their ability to afford to stay in music. As one full-time musician noted, “I’d rather have people boo me than not pay

attention to me.” Moreover, several younger musicians noted the challenge of significant pay inconsistencies among venues, some of which expect musicians to negotiate their fees and to sell a minimum of alcoholic beverages. All these pay-related barriers can make being a musician feel like a losing battle, mentally and physically exhausting over time.

“Because it’s such a hustle to get all the shows, a 40-hour work week feels impossible. It’s massive hours to make it work to pay bills. Not getting rest for fear of losing income wears me down sometimes.”

FULL-TIME MUSICIAN

With all that as a pre-Covid “normal,” it’s hardly surprising that the pandemic has been deeply disruptive to musicians, especially in terms of financial security. Although 85% of musicians have made at least some income as a musician during the pandemic, it’s much reduced from pre-pandemic levels: more than half (57%) of respondents have made less than \$10,000 from music during the crisis, and almost all (91%) report having lost planned-for income as a result of the pandemic. And the majority (61%) took additional jobs to support themselves during the pandemic, most of which were non-music related.

FIG. 8

Q21: How much total income did you earn working as a musician in any way during the pandemic [approximately a 14 month period] (before expenses)? (n=934)



Pandemic effects have also been emotional: over half of respondents reported feeling much more worried and afraid these days (i.e., in the spring of 2021) than they had been before the pandemic – and those figures were even higher for full-time musicians and older respondents. But despite that emotional toll, a majority of musicians are still striving to connect with their audiences and continue working and earning money, now largely in the digital realm: online performances (53%), digital music sales (48%), and streaming revenue (44%) where the pay is unsustainably low.

In the focus groups, several musicians noted that the forced break from their typical performing work helped them see clearly for the first time how acute the financial and emotional stresses of being a musician had been prior to the pandemic (see

FIG. 9

Q22: How have you earned your income working as a musician during the pandemic?

Please select all that apply. (n=936)

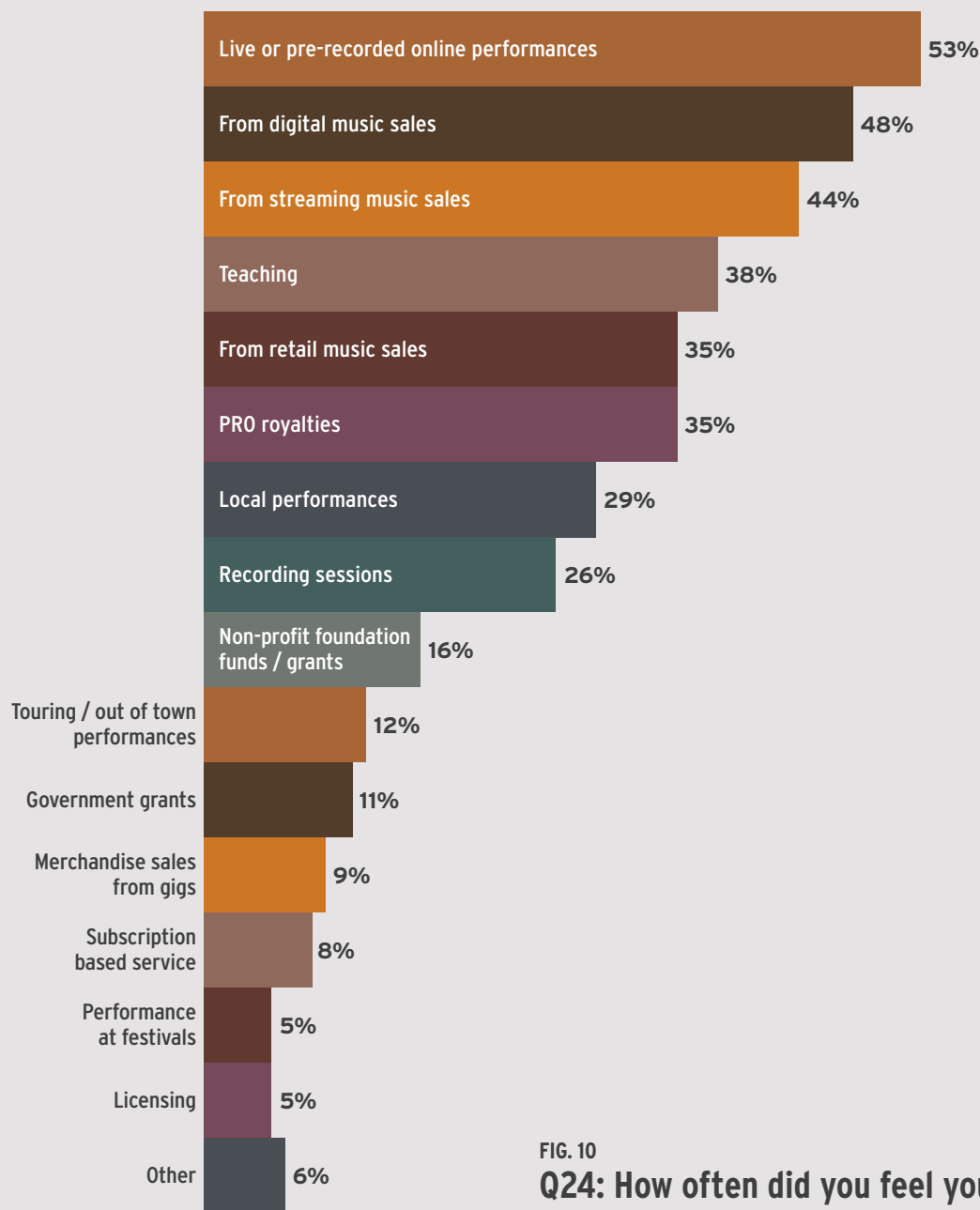
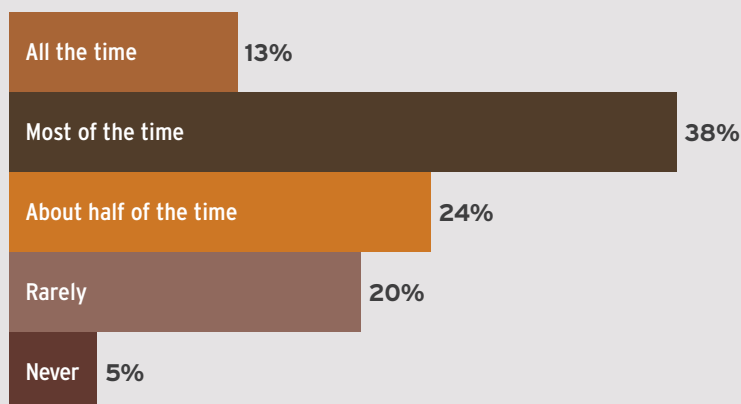


FIG. 10

Q24: How often did you feel you were fairly compensated for your online performances during the pandemic?

(n=493)



quote at right). Others pointed out that the need to quickly pivot to engaging audiences digitally could exacerbate inequities for musicians without access to technology or less well versed in using it. Indeed, the survey responses reveal that, for many musicians, the pandemic-driven digital era is not generating much income. Only about half of musician respondents say that most of their pandemic-era digital performances have been fairly compensated; others see continued inadequacy and inconsistency in the digital realm. And streaming pay is not a sustainable replacement for in-person performances either (e.g., with streaming services like Spotify, the average pay to musicians is only around \$.00348 per stream).⁴

“In the beginning of the pandemic, some of us were relieved to have to stay home because we were so stressed out about surviving in the industry... It is scary that we felt that way.”

FULL-TIME MUSICIAN

Given these chronic and acute economic stresses on musicians and their perception of ongoing inequity in the field, some musicians may feel pressure to take gigs as in-person performance resumes, even if they're not fairly compensated – and even if they don't feel safe from a Covid-19 perspective. We turn to questions about professional protections in the next section.

PILLAR 2: PROFESSIONAL PROTECTIONS

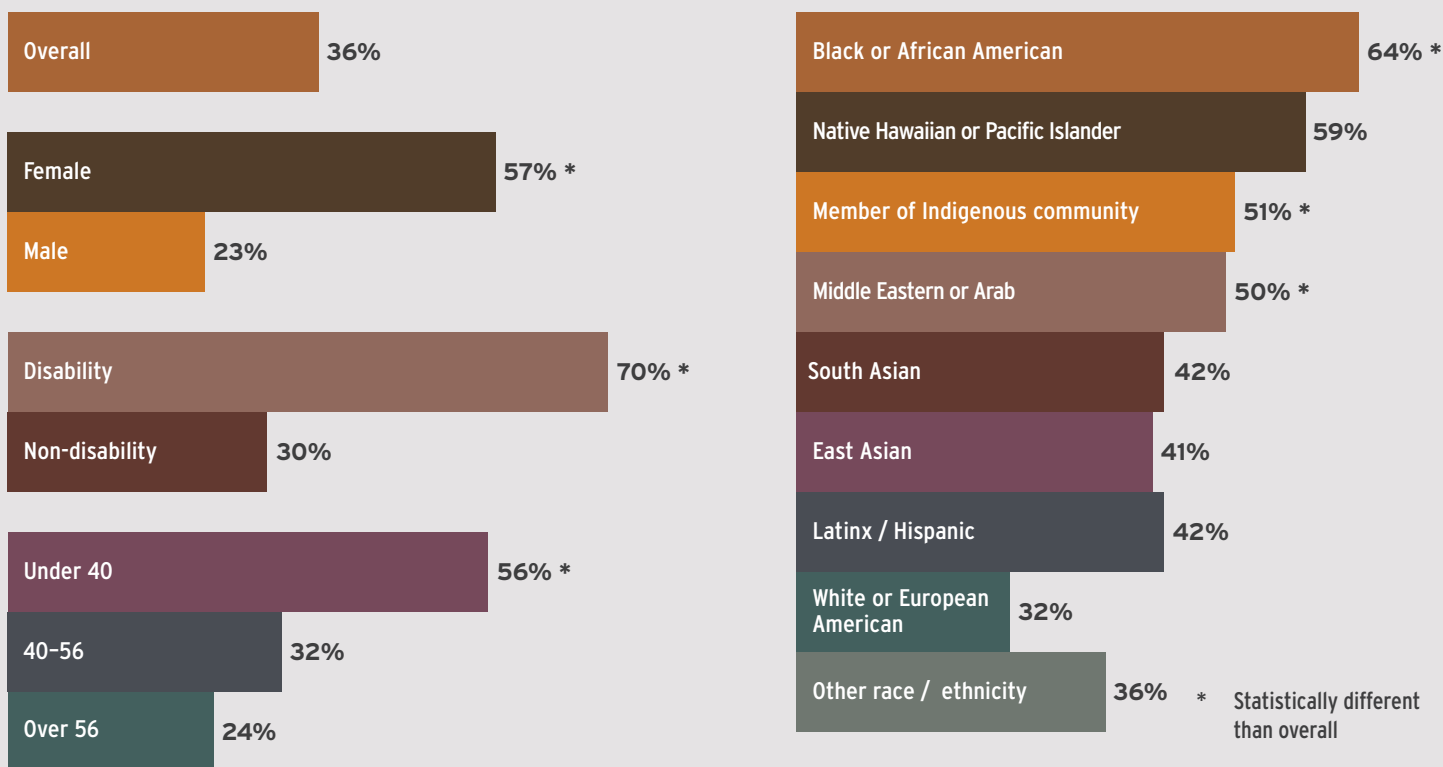
The second pillar or category of change revealed in this research has to do with policies and practices to ensure that musicians are respected and protected. We heard the need for such measures in three areas: protections from discrimination and harassment, economic safety-nets, and Covid-19 safety protocols.

Overall, most survey respondents did not report feeling discriminated against or harassed in the music industry in recent years. However, the majority of those respondents are white, male, heterosexual, and able-bodied musicians, and the story changes when we look at the experiences of musicians with other identities: women musicians of all ages, musicians with disabilities, LGBTQIA+ musicians, musicians under 40 years old, and Black and Indigenous musicians are significantly more likely to feel discriminated against and harassed in the course of their work.

FIG. 11

Q15: Have you felt discriminated against or harassed while working in the music industry between 2017 to 2019?

(i.e., based on your gender, sexual orientation, racial background, age...) (Percent selecting "yes")



“Unfortunately for me and people who look like me, it is a case of systemic racism and we don’t know what happens behind closed doors. We were given other people’s checks accidentally once. For my group of nine we were supposed to get \$900, but we got \$400. Four white men playing jazz were being given \$2,500.” FULL-TIME MUSICIAN

This may make the music industry feel inhospitable and potentially unsafe for these musicians. And in most of the contexts in which these musicians work, there are few systems or structures in place to help prevent discrimination and harassment or take action when it occurs (fully 80% of respondents said they didn't have access to a formal process to reporting such incidents at venues).

In the focus groups, participants from historically oppressed and marginalized demographic groups reacted strongly to these survey results, in part because they resonated with some of their own experiences and observations of systemic racism, sexism, etc. (see quotes below). Such experiences and observations may be pushing people out of the music field or forcing them to work under unsafe, emotionally destabilizing, and/or inequitable circumstances.

Similarly, when it comes to economic safety-nets, the survey data shows that there are many gaps for working musicians. Although 81% of respondents did have some kind of health insurance before the pandemic, this number is lower than the average for Americans generally.⁵ And 66% did not have retirement funds, 85% did not have unemployment insurance, 86% did not have any sort of paid leave, 85% did not have disability insurance, and 85% did not have mental health coverage. The pandemic has dramatically exposed this lack of safety nets for musicians. Only 32% of respondents overall were able to receive unemployment benefits, despite a much higher percentage losing income. These figures highlight the need for more holistic support for working musicians, beyond basic health insurance.

The pandemic has dramatically exposed this lack of safety-nets for musicians. Only 32% of respondents overall were able to receive unemployment benefits, despite a much higher percentage losing income. Almost two-thirds (63%) reported dipping into their life savings to cover expenses during the pandemic – and that was necessary for even higher percentages of women, disabled, young, Black, Indigenous, and Middle Eastern/Arab musicians.

“It is different for women. When you hear about country radio, and they don't hire women. Same for people of color. People running companies at higher levels, they are not bringing people in. They are limiting people.”

FULL-TIME MUSICIAN

“With my disability, I couldn't get unemployment in the arts community and people giving out money were not considering disabled musicians. There literally was nothing there.”

FULL-TIME MUSICIAN

FIG. 12

Q32: Have you received any funds or resources during the pandemic from the following sources?

(i.e., based on your gender, sexual orientation, racial background, age...) (Percent selecting "yes")

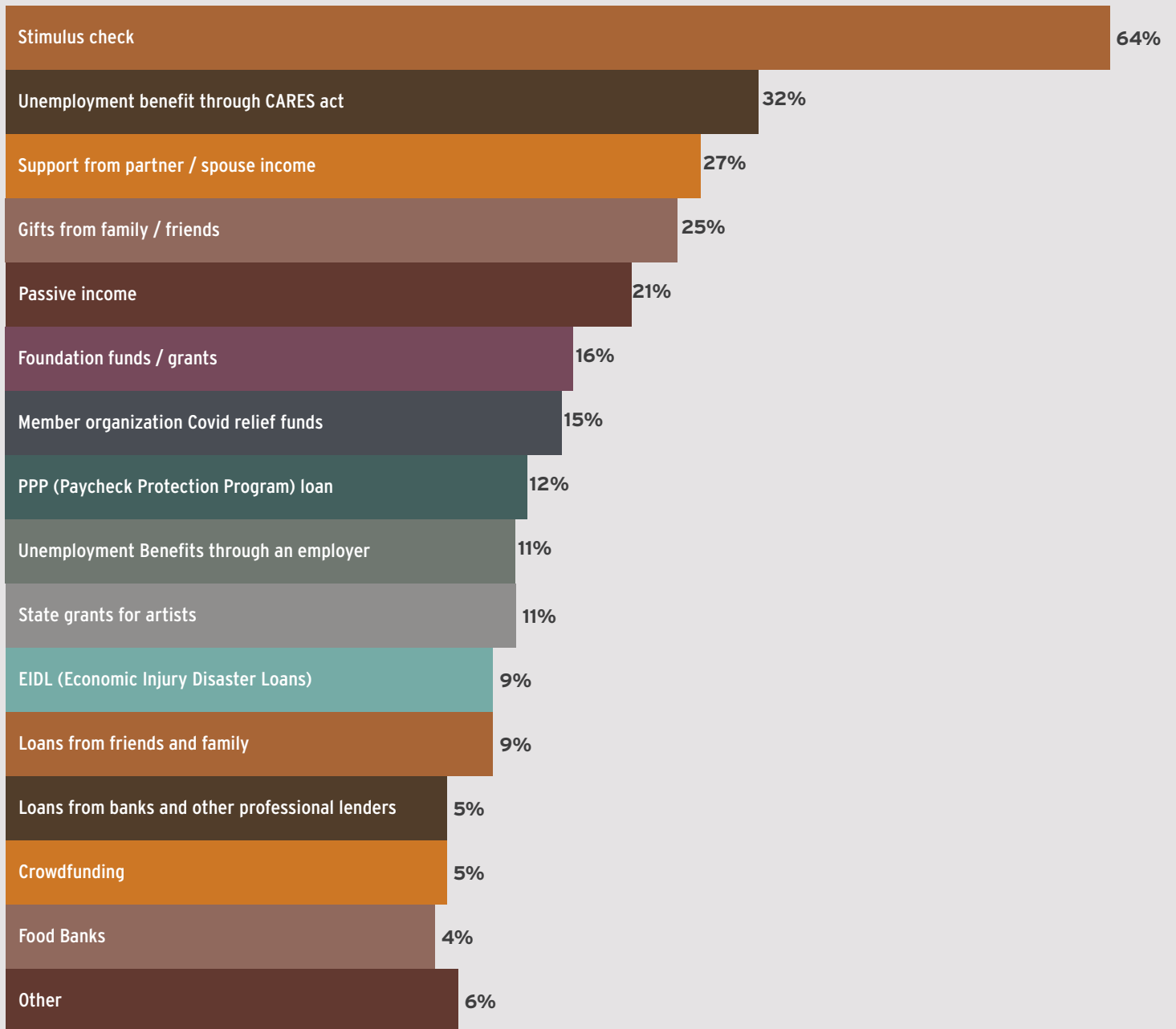
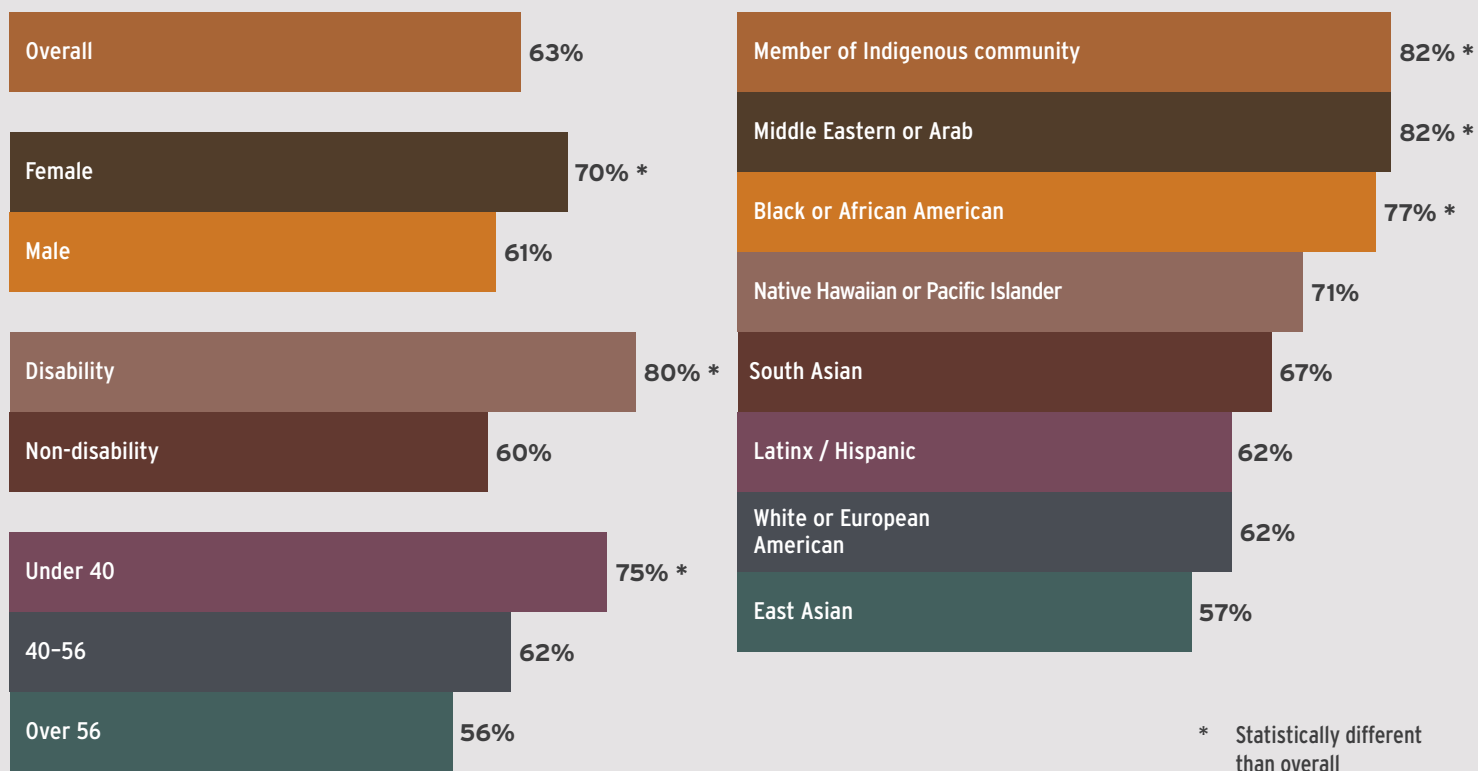


FIG. 13

Q31: Have you ever gone into your savings to cover your expenses during the pandemic?

(Percent answering "yes")



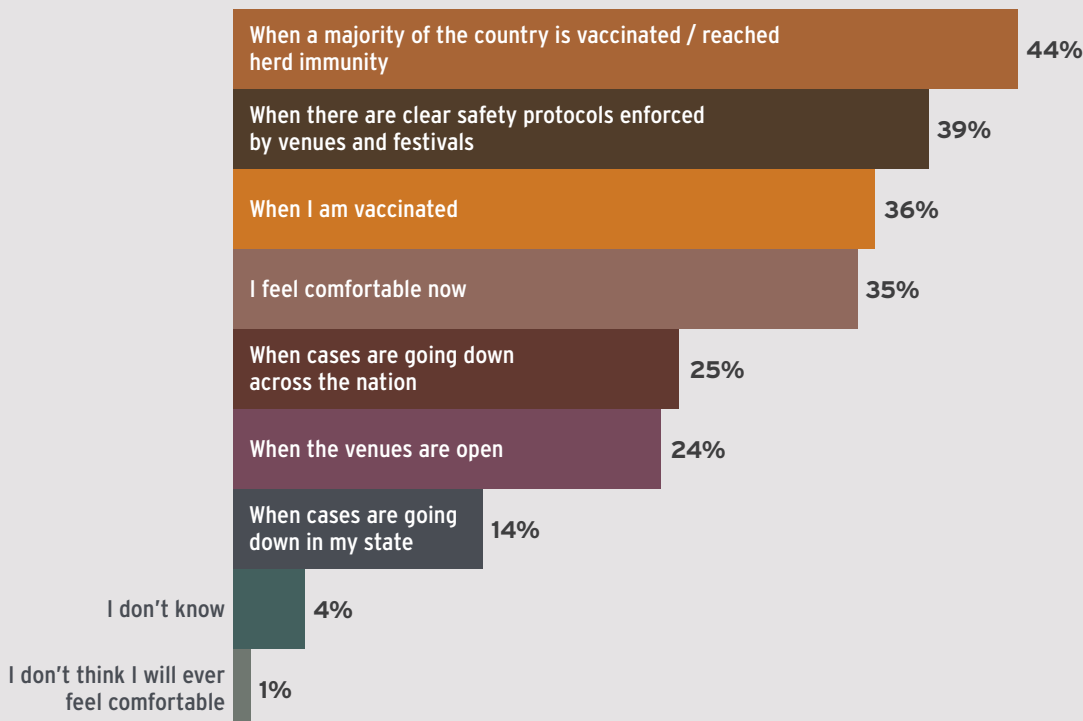
And finally, with regard to Covid-19 safety, almost two-thirds (65%) of musicians did not yet feel comfortable returning to in-person performing when we conducted the survey in late April and early May 2021, saying they felt the need for additional safety measures before they would feel comfortable. At that time, the delta variant accounted for less than two percent of cases in the U.S.; as of this writing, it accounts for almost all cases and is driving a rise in hospitalizations and deaths. So musicians' Covid-related concerns, and attendant need for protection, may continue for some time.

We asked what conditions would make them feel safe again playing for live audiences, and the answers centered on widespread vaccination and clear safety protocols enforced by the venues: many musicians would feel comfortable performing when both of these conditions are met. (See Figure 14 for more details about Covid-19 precautions.) It's also important to note that, even in early May, about a third of respondents already felt comfortable returning to in-person performances. If those musicians pursue gigs before others are ready to resume playing in venues, a new kind of disparity could be created in the music ecosystem – one with both economic and health-safety dimensions. So developing a consistent national policy to protect musicians and ensure a safe, equitable recovery could be an important step forward. To that end, on August 13th, 2021, Whippoorwill Arts published Covid-19 safety guidelines for musicians in collaboration with several national music organizations.⁶

FIG. 14

Q35: When would you feel the most comfortable returning to in-person performances?

Select up to 3.



PILLAR 3: COLLECTIVE EFFORT

How can America's working musicians come together in solidarity with other stakeholders to achieve system-level change? This research suggests that various forms of collective action are desired by musicians and necessary to the future they envision, and that advancing the first two categories of change – economic equity and professional protections – will require the third. Membership organizations may have important potential roles to play in such an effort, but some of the steps musicians want to take toward a more equitable and thriving ecosystem such as new legislation and policy may lie outside the purviews of these organizations, as well as outside any one musical genre or professional community.

As discussed earlier, the change musicians most want to see is better and more equitable pay structures: higher pay/benefits for gigs (70%) and more sufficient pay from venues (63%) and streaming services (61%) (see Figures 15 and 16). But many also want non-economic kinds of change related to other aspects of well-being and social value. For example, half of respondents (51%) would like to perform more for listening audiences (as distinct from people doing other things, like drinking and talking). Focus group participants said that this desire for an attentive, musically engaged audience comes out of a need for human connection as they pour their lifetime of building musical skills and creative energy into their performances.

FIG. 15

Q46: Which of the following changes do you most hope to see in the music industry in the near future?

Please select up to 5. (n=1,045)

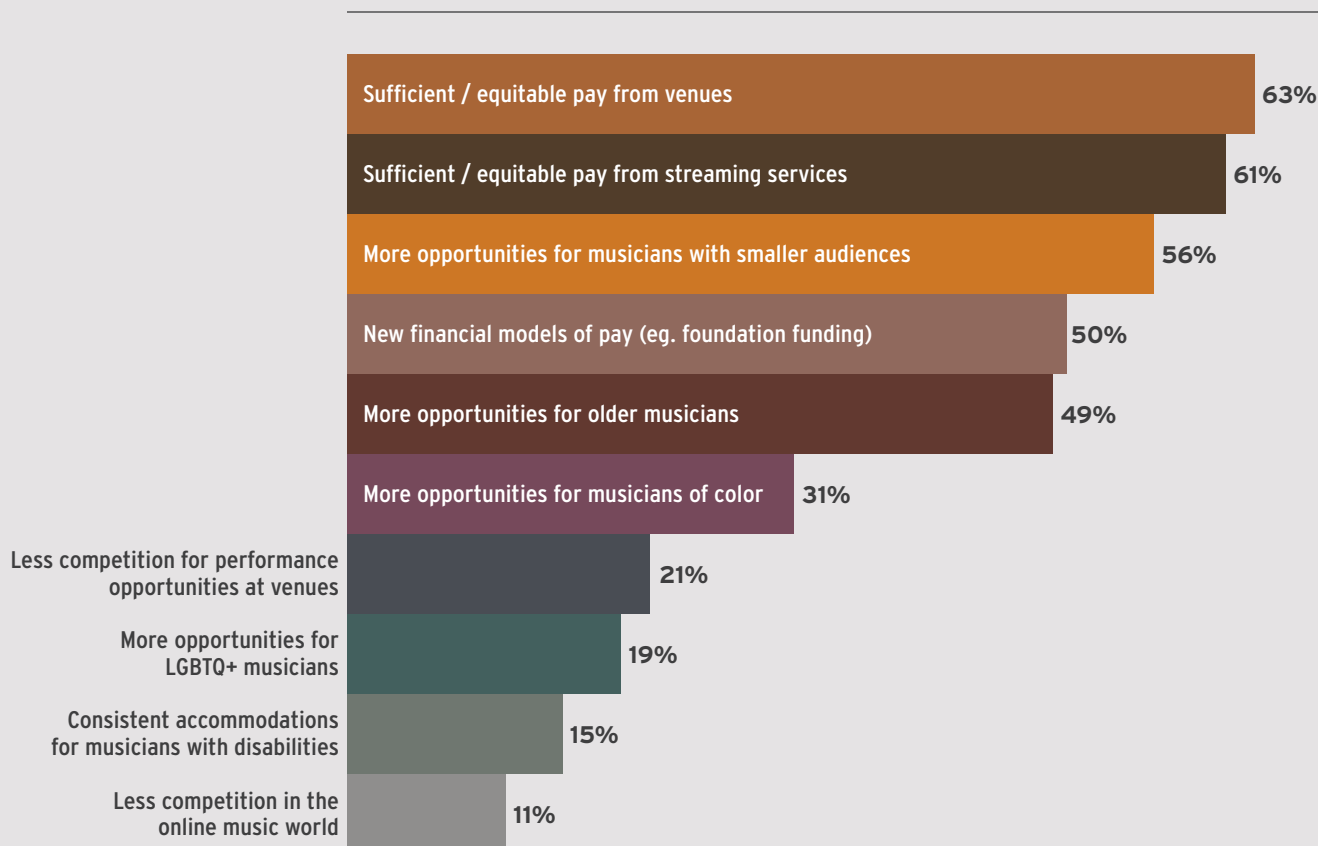
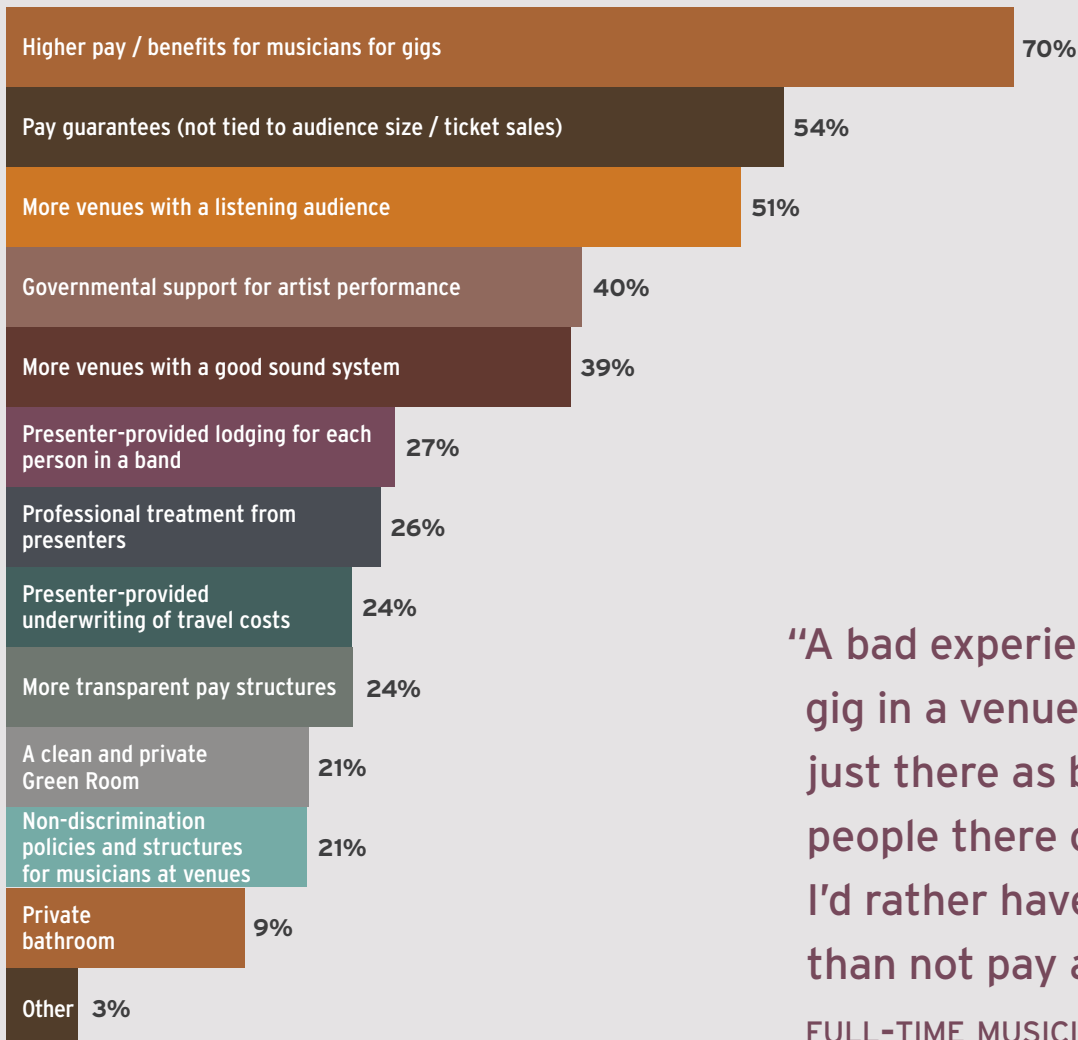


FIG. 16

Q46: Which of the following changes related to music performance do you most hope to see in the near future?

Please select up to 5. (n=1,040)



“A bad experience would be any gig in a venue where you are just there as background, where people there couldn’t even care. I’d rather have people boo me than not pay attention...”

FULL-TIME MUSICIAN

A majority also reported a desire for more opportunities for musicians with smaller audiences. If the status quo is not changed, this finding may be a harbinger of a potential future in which the only musicians who survive are those who can play for low pay in bars and other informal settings (i.e., hobbyists with full-time jobs outside of music) and those who are established enough to play in stadiums. This is a major loss for small venues, communities, and audiences. In a similar vein, focus group conversations with musicians revealed that they wish for new generations of audiences who value music and musicians more deeply – and are therefore more willing to pay for it than current audiences, many of whom have come to expect music online to be free. Several noted that music education in schools must be revived as part of the needed transformation of the music ecosystem. To make this change happen, some noted there would need to be large-scale, concerted efforts to create a sense of solidarity and a unified voice among musicians, which would require long-term effort. Others felt solidarity could grow more quickly through

“This [focus group] experience for me has been incredibly validating and affirming. I’m not alone in my struggles to have to have multiple revenue streams as a musician in 2021. I’m not alone in having to hustle to make most of my money from live performances. I’m not alone in not making enough money to live off my recordings alone. So just helping other musicians realize that they are the ‘norm’ and not a failure...connecting us through shared experience, could be really, really positive.”

FULL-TIME MUSICIAN

between 40 and 56 struggled the most with streaming processes. To help them meet those kinds of challenges, respondents would welcome more resources and opportunities, especially ways of connecting with diverse musical peers and a database of foundations and corporations that directly support musicians.

shared awareness and fostering musicians’ sense of connection with each other, in part by removing the stigma of struggle and normalizing people’s experiences and challenges. Strikingly, one participant in the focus groups observed that this research itself had played that connecting and normalizing role for them, to revelatory effect (see quote on the left).

We also asked musicians about their general challenges navigating the music ecosystem and the place of membership organizations and labor unions in that context. No single challenge stood out as most important to all musicians, but we see differences by generation and age. For musicians over 56, the most prominent challenges were difficulties with booking gigs (36%) and using new technologies (27%), whereas musicians under 40 struggled the most with marketing and public relations (24%), copyright and licensing (23%), and tax codes and filing (23%). Those

Could being a part of organizations that connect peer musicians help musicians

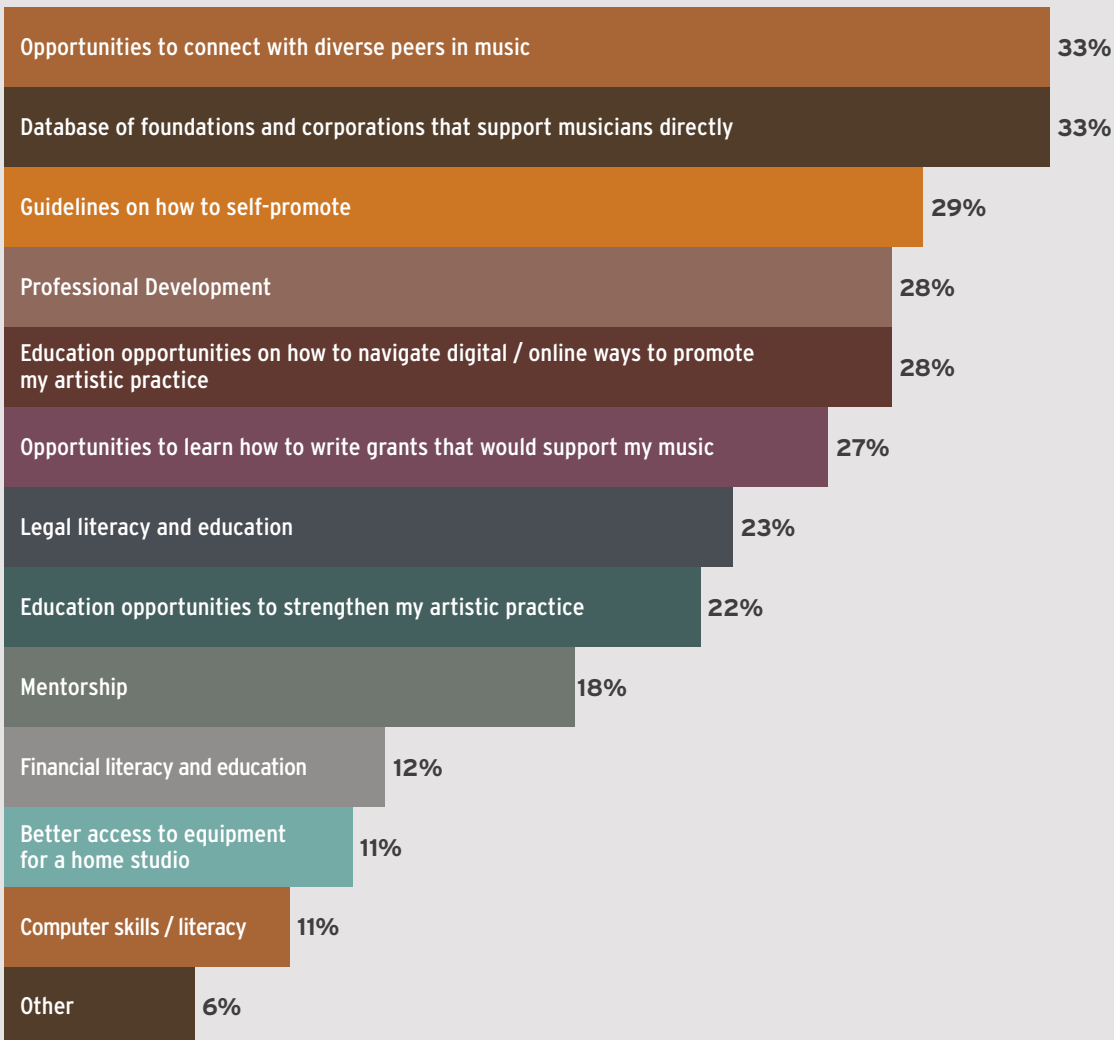
“Music education in the schools is the path forward for us as musicians to create our own audience. Then we will create a new society that values art and that is our own. We might not get the fruits in our lifetime but that is why we are put on this earth.”

PART-TIME MUSICIAN

FIG. 17

Q50: Which of the following resources would be most useful for you and your artistic practice?

Please select up to 4. (n=1,027)



navigate some of those challenges? Perhaps. We found that the musicians who responded to our survey have a variety of relationships to such organizations: only about 30% are members of a musician's union and a similar percentage are members of one or more membership organizations. When we asked about what kinds of benefits these types of organizations could provide that would motivate musicians to join, the most-desired benefits were: more performance opportunities with guaranteed pay and networking opportunities. So member organizations are only a part of the change needed here. The industry needs to change, and public and private sector funding needs to support roots musicians so they can continue to bring their art to appreciative audiences.

Implications & Intentions

The survey findings discussed in this report are meant to shine a spotlight on roots musicians' shared passions, challenges, and aspirations. But this kind of perspective-taking is ultimately a means to an end, and we hope this study contributes directly and causally to a more sustainable, equitable, and thriving future for both working roots musicians and the broader music ecosystem. In this final chapter of the report, we highlight some of the more pressing implications and offer a few concrete suggestions and intentions for better recognition and support of musicians in the months and years ahead.

The “we” in this chapter is broader than the preceding report; the implications here have been written collaboratively by Slover Linett and Whippoorwill Arts in order to bring together evidence-based research and deep, practice-based knowledge of the field. Following the co-authored implications from the study, Whippoorwill Arts shares its own intentions and initial next steps toward addressing systemic issues in the music ecosystem.

IMPLICATIONS FOR THE MUSIC ECOSYSTEM

What are the most critical shifts in policy and practice necessary to achieve those goals? Based on the analysis and findings from this study, we've identified eight broad action-areas:

- 1. Determining what constitutes adequate compensation for working musicians.** We recognize that this will be challenging in a highly decentralized field with multiple market forces at work. But if music is an important human need and social agent, it's vital to make creating music a more sustainable life and career-choice for full-time artists. The pandemic only adds to the urgency of doing so. A candid, detailed dialogue should be facilitated between working musicians and other industry professionals, perhaps with cultural economists and policy analysts at the table. Formulas should be developed collaboratively, taking into account the intangible as well as the economic value generated by musical performance and the direct and indirect costs of performing and recording (e.g., travel, food, insurance, professional development, etc.). Independent economic analyses should be commissioned, and comparisons to other creative sectors should be made. In the near and medium term, pandemic-emergence goals should be set for increased pay for local concerts, residencies, fellowships, and commissions.

- 2. Promoting pay equity standards, in part through guaranteed minimum pay for performances.** More equitable pay standards are necessary to address disparities in compensation that often disadvantage musicians of color, female musicians, and other historically marginalized groups. Such standards are also vital to solving structural problems like musicians feeling pressured into performing for exposure or receiving pay that is less than the resources they've invested. Advancing pay equity needs to proceed along other parallel tracks, as noted in the following implications.
- 3. Working with streaming platforms toward a fairer division of streaming profits.** The current system, which prioritizes the platform over the creators and performers, may need to be dismantled or radically re-envisioned. This seems possible only with the collective commitment and creativity of the musicians *and* the public (see next point), along with allies across the industry, in government, etc.
- 4. Raising awareness of musician pay inequities among roots audiences.** Fans may not be aware of the pay-related unfairness and uncertainties faced by their favorite artists—unfairness made possible in part by their subscriptions to streaming services. A public education-and-advocacy campaign could begin to mobilize audiences to demand and drive change in both recording and live-performance contexts.
- 5. Creating standards of conduct and policy for venues.** New national guidelines would need to establish policies not just for pay equity but for the other elements of equity that interact with pay: performance-invitation equity; formal protocols to address, report and act on discrimination and harassment; Covid-19 safety protocols; other workplace safety protocols; and accessibility standards to meet and exceed ADA requirements for musicians. (One example of efforts already in motion is the American Federation of Musicians' efforts to add musicians to federal tax code as being eligible for unemployment benefits.)
- 6. Expanding the range of funding mechanisms that roots musicians can access.** Musicians working in certain genres have long had access to government and philanthropic support; others have been considered "commercial" and therefore not in need of—or perhaps not as deserving of—such support. A more contemporary lens is needed: *all* working musicians contribute to important individual and collective impacts. It's time for policy and definitional shifts that open funding opportunities for roots musicians from sources such as local governments, federal grants, and national, regional, and community foundations.

7. Strengthening musician solidarity with the help of membership organizations, unions, and other organizations that advocate for and connect musicians. In addition to other priorities discussed above and throughout this report, these efforts should focus on providing more support for musicians from marginalized communities and identities (e.g., musicians of color, musicians with disabilities, LGBTQIA+ musicians); ensuring and disseminating knowledge about safety protocols (Covid-19 and otherwise); compensating musicians for performing at award events, conferences, and showcases; and providing opportunities for non-competitive networking and education (e.g., about collaboration, taxation, booking gigs, marketing, digital technology).

8. Bridging the digital divide. Some musicians do not have access to the technology and knowledge necessary for online performances, digital audience interaction, remote artistic collaboration, onscreen auditions, etc. How can they make a living in a society where so much happens online – especially during a pandemic? Rather than expecting these musicians to surmount those barriers, policies and partnerships could aim to provide more opportunities for live, paid performances for small audiences, thereby fostering local vitality and communal engagement. Simultaneously, education about digital tools and practices should be provided to musicians, not just online but in physically accessible forms.

WHIPPOORWILL ARTS' INTENTIONS

BY WHIPPOORWILL ARTS

Whippoorwill Arts is committed to shaping our program priorities based on the stated needs of working roots musicians. Our pledge to our artist community is to INVEST – UPLIFT – TRANSFORM. In our own work, we invest in musicians by guaranteeing equitable pay for all performers, and we uplift them through awards, fellowships, and festivals. We also seek to transform the music ecosystem in collaboration with a wide range of allies; this research falls into that latter category. We are building a Save Our Musicians™ coalition to address the systemic issues and policies that are driving musical artists out of work and exacerbating inequalities across the music ecosystem. In addition to guaranteed pay, roots musical artists are asking for more opportunities to play to small audiences that are there to listen. We are particularly passionate about bringing these traditional American roots genres to small venues, towns, and schools throughout the country.

Our top five strategies to be executed through the Save Our Musicians™ initiative are a distillation of what musicians themselves say they need to survive and thrive:

- Guaranteed pay to musical artists for all performances, with attention to equitable pay for the marginalized.

- More opportunities to perform for small, listening audiences.
- ADA-accessible venues to ensure that musicians of all physical abilities can access backstage, stage, green room, restrooms, etc.
- Significantly increased streaming revenue for music creators and simplified, fair and transparent compensation of royalties.
- Government, corporate, foundation, membership organization, and audience support for performance pay and professional development, such as fellowships.

Collective effort is critical. We strongly feel that everyone can play a role: national, state, and local governments; streaming services and all entities that buy music for their movies, apps, radio, etc.; music industry executives and staff (booking agents, venues, presenters, etc.); musician membership organizations; audiences and the public; and of course, musical artists.

Please join us in supporting working roots musicians and celebrating the cultural treasures that bring meaning and catharsis to our world. Together, we can do it!
Please email us at research@whippoorwillarts.org.

Acknowledgements

Slover Linett and Whippoorwill Arts would like to thank all the musical artists who participated in this important research for their time, candor, and insights. We're also grateful to several thought-leaders in the music field who graciously agreed to be interviewed early in the process; they added important perspectives to the study. In addition, Jim Nunally and John Lowell generously shared their decades of experience as roots musicians early in this process, adding valuable insights to help craft the survey topics.

As noted in our Introduction, six membership organizations signed on early and stayed committed to making sure this research project had the complete support and involvement of their membership. Thank you to Aaron Fowler and Colin Dean of the American Federation of Musicians Local 1000; Jed Hilly and Sarah Comardalle of the Americana Music Association; Patricia Wilson Aden and Joe Whitmer of the Blues Foundation; Aengus Finnan, Alex Mallett, Jennifer Roe, Marisa Kolka, Treasa Levasseur and Jerod Rivers of Folk Alliance International; Isabel Soffer and Ian Danke of GlobalFest; and Pat Morris and Paul Schiminger of the International Bluegrass Music Association for serving as advisors and partners in this research. Additional thanks to Michelle Conceison of MMGT for help along the way. Their combined outreach gathered an important cross section to make this research possible and representative.

Whippoorwill Arts also reached out to hundreds of working musicians who are unaffiliated with member organizations, and we'd like thank those participants for sharing their perspectives.

The research team is grateful to their colleague Camila Guerrero at Slover Linett for assistance with the interviews and focus groups, and to Addison Research (A Schlesinger Group Company) for their help in making the survey process accessible for those with sight or technology challenges.

Thanks also to Jackie Marushka and Erin O'Sullivan at Marushka Media, Susan Kleinman Wallis Consulting, Suzanne Sarto at CricketGrafix, and Kudos Design for the design of this report.

NOTES

1. *What are the paradigm shifts necessary for the arts sector to nurture thriving institutions of color? Learnings from practitioners in New York City-based organizations that serve African, Latinx, Asian, Arab, and Native American Culture and Communities*, 2018, Yancey Consulting for the Doris Duke Charitable Foundation. Available at <https://www.ddcf.org/globalassets/news-and-publications/2018-news-and-publications/final-yancey-consultings-alaana-thrivability-report-january-2018.pdf>. (Last retrieved on 10/19/2021)
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National Roots Musicians Research Project 2021

Sponsor: Whippoorwill Arts

SURVEY INTRODUCTORY LANGUAGE

Hello and welcome! We appreciate your participation in this survey, which is part of an independent research study to help Whippoorwill Arts and partner membership organizations inform advocacy and policy efforts that better support musicians. This survey is for US-based “working musicians” (i.e. generating some portion of their income through music before and/or during the Covid-19 pandemic) who draw inspiration from Roots, Americana, Blues, Bluegrass, Folk, World music, and Acoustic music.

Your responses to the survey will be kept anonymous. Your honest answers will help us get a complete picture of your experiences and insights. The survey takes an average of 15-20 minutes to fill out. Please complete this survey only once. At the end of this survey you’ll be eligible to enter a drawing to win a \$500 VISA gift card or one of five \$100 VISA gift cards.

While you’re completing the survey, if you need to go back to a previous page, please click on the back arrow at the bottom of the page instead of using your Web browser’s back button. (Trust us, this is better.)

SURVEY SECTION 1: MUSICIAN PROFILES

1) Please select the genre(s) below that best represent and/or inspire your work as a musician. Please select all that apply.

- a) Folk
- b) Americana
- c) Country
- d) Bluegrass
- e) Blues
- f) Global/World Music
- g) Roots
- h) Acoustic music
- i) Singer-songwriter
- j) Indigenous/Traditional music
- k) Prefer not to define
- l) Other (write-in)_____

2) How long have you been professionally working as a musician (i.e., generating some portion of your income, either part-time or full-time)?

- a) Less than 5 years
- b) 5-10 years
- c) 11-20 years
- d) 21-30 years
- e) 31-40 years
- f) 41 years or more
- g) I am not professionally involved with music

[TERMINATE SURVEY IF Q2=g]

3) How would you define your work as a musician in general? Please select the one that represents you the best.

- a) I perform as a hobby and I do not seek any income from being a musician
- b) I generate less than half of my income from being a musician, with more of my income coming from other income sources/work (either music-related or non-music related)
- c) I generate more than half of my income from being a musician, and I supplement this income with other income sources/work (either music-related or non-music related)
- d) I generate all of my income from being a musician

[TERMINATE SURVEY IF Q3=a]

4) Thinking about before the Covid-19 pandemic, which of the following best describes what you do? Please select one.

- a) I am an individual musician who performs solo
- b) I am musician in a duo
- c) I am a band leader in an ensemble of 3 or more people
- d) I am a musician in an ensemble of 3 or more people
- e) I participate in multiple ensembles

SURVEY SECTION 1: MUSIC RELATED EXPERIENCES

This section of the survey will focus on **your music-related experiences in general**. In answering the questions, please consider your experiences spanning **the last three years before the pandemic, from 2017 to 2019**.

5) In what kinds of venues did you perform before the pandemic? (Think back to the past 3 years before the pandemic). Please select all that apply.

[RANDOMIZE, KEEP B AND C TOGETHER]

- a) Stadiums
- b) Concert venue/coffeehouse/ theater venue/music hall (under 500 attendees)
- c) Concert venue/coffeehouse/ theater venue/music hall (over 500 attendees)
- d) Programmed public park/outdoor concert series
- e) Farmers markets/public space (i.e., busking)
- f) Bar/restaurants/cafes
- g) Festivals
- h) Church/religious services
- i) House concerts
- j) Music industry conference/showcases
- k) Casuals (i.e., birthday parties, corporate events, weddings)

6) Thinking about the places you performed at between 2017-2019, what kinds of compensation did you receive? Select all that apply. (Please choose all options that you received from at least one venue or more.)

- a) Guaranteed performance fee
- b) Guaranteed performance fee with backend (% of total take after venue expenses and their take)
- c) Non-guaranteed percentage split with the venue after venue expenses are paid
- d) Tips or suggested donations
- e) Free snacks and beverages
- f) Free full meals and beverages
- g) Free lodging in a hotel with one room per person
- h) Free lodging in a private home with one room per person
- i) Free lodging, shared rooms
- j) Travel costs (e.g., transportation, per diem, etc.)
- k) Percentage split with the venue for merchandise sales
- l) 100% of merchandise sales to the artist
- m) Other (write-in)

7) In which of the following venues did you most enjoy performing prior to the pandemic? Please select up to 4.

- a) Stadiums
- b) Concert venue/coffeehouse/ theater venue/music hall (under 500 attendees)
- c) Concert venue/coffeehouse/ theater venue/music hall (over 500 attendees)
- d) Programmed public park/outdoor concert series
- e) Farmers markets/public space (i.e., busking)
- f) Bar/restaurants/cafes
- g) Festivals

- h) Church/religious services
- i) House concerts
- j) Music industry conference/showcases
- k) Casuals (i.e., birthday parties, corporate events, weddings)

8) Which of the following were most important to you when you performed at a venue or event? Please select up to 4.

[RANDOMIZE]

- a) Exposure to larger audience
- b) Income
- c) Supporting causes I care about
- d) A good relationship with presenters
- e) Meeting/jamming with other musicians
- f) Networking
- g) Quality sound system and engineer provided
- h) An attentive audience enjoying music
- i) A relaxed, fun atmosphere
- j) A full room
- k) A green room

9) How did you earn your income as a musician before the pandemic (think back to the time period between 2017-2019)? Please select all that apply.

- a) From retail music sales (e.g., physical sales of recordings)
- b) From digital music sales (e.g., Songs sold on iTunes, Amazon...)
- c) From streaming music sales (e.g., Spotify, Pandora)
- d) PRO royalties (Royalties for the public performance of your work, airplay on radio, TV, movies, jukeboxes, live performance and foreign royalties)
- e) Recording sessions
- f) Touring/out-of-town performances
- g) Live local performances
- h) Online performances
- i) Teaching
- j) Licensing
- k) Merchandise sales at gigs
- l) Government grants
- m) Non-profit foundation grants
- n) Subscription based service (e.g., Patreon)
- o) Other (write-in)_____

10) [IF Q9 = at least 3 or more] Thinking of how you earned your income as a musician from 2017-2019, through which source did you generate the most income? Please select 2.

[Pipe in answers from Q9]

11) Thinking about the 3 years before the pandemic, what is the average annual income you generated as a musician (before expenses)? If your income has fluctuated, please make your best guess. (If you are a band leader, please count only the income that comes to you personally (i.e., do not include payments that go to others in your ensemble))

- a) Under \$10,000
- b) \$10,001–\$20,000
- c) \$20,001–\$30,000
- d) \$30,001 –\$40,000
- e) \$40,001-\$50,000
- f) \$50,001-\$60,000
- g) \$60,001-\$70,000
- h) \$70,001-\$80,000
- i) \$80,001-\$90,000
- j) \$90,001-\$100,000
- k) \$100,001-\$150,000
- l) \$150,001-\$200,000
- m) \$200,001 or more

12) [IF Q9 = c] Thinking about the 3 years before the pandemic, what is the average annual income you generated from streaming music sales (e.g., Spotify, Pandora)?

- a) Under \$100
- b) \$101-\$250
- c) \$251-\$500
- d) \$501-\$1,000
- e) \$1,001–\$5,000
- f) \$5,001–\$10,000
- g) \$10,001 –\$20,000
- h) \$20,001-\$30,000
- i) \$40,001-\$50,000
- j) \$50,001 or more

13) Thinking back to the 3 years before the pandemic (2017-2019), did you get behind on expenses for any of the following? Please select all that apply.

- a) Student loan payments
- b) Other loans
- c) Mortgage
- d) Utility bills
- e) Car payments
- f) Rent
- g) Food
- h) Healthcare costs
- i) Studio space/ equipment for my artistic practice/music work
- j) Band member/support staff costs

- k) Credit card payments
- l) Other (write-in)
- m) I did not get behind on expenses for any of these

14) Which of the following did you have during the period of 2017 to 2019? Please select all that apply.

- a) Health insurance
- b) Disability insurance
- c) Protection from discrimination and harassment (i.e., having a formal process to report discrimination and harassment at your work setting)
- d) Unemployment insurance
- e) Paid leave
- f) Workplace safety protections
- g) 401k/ Roth IRA/ other retirement funds
- h) Subsidized mental healthcare (i.e. covered by insurance)
- i) I did not have any of these

15) Have you felt discriminated against or harassed while working in the music industry between 2017 to 2019? (i.e., based on your gender, sexual orientation, racial background, age...)

- a) Yes
- b) No

16) Which of the following music-related processes did you find to be the most complicated/difficult to navigate prior to the pandemic? Please select up to 2.

- a) Streaming processes (e.g., generating income, visibility)
- b) Using new technologies (e.g., recording, websites, social media)
- c) Copyright and Licensing
- d) Tax codes and filing
- e) Marketing and public relations (e.g., promotional material distribution)
- f) Networking for career advancement
- g) Finding bookers, labels, agents, and distributors
- h) Booking gigs
- i) Band management (e.g., hiring, musical compatibility, tour budgeting)
- j) Creating and managing a budget
- k) Managing personal wellness
- l) Other (write-in)_____

17) During the time period between 2017-2019, what did you enjoy the most about your work as a musician? Please select up to two.

[RANDOMIZE]

- a) Opportunity to express myself/ be creative
- b) Working with people I love and respect
- c) Playing for people who are moved by music
- d) Generating income through what I love
- e) Leaving a mark in the world through art
- f) Seeing and experiencing different places through travel
- g) Other (write-in)

SURVEY SECTION 3: PANDEMIC IMPACTS

This section of the survey will focus on your experiences during the Covid-19 pandemic. In answering the questions, please consider your experiences spanning from **March 2020 to today.**

Some of the questions will explore personal topics such as your income streams and overall challenges during the pandemic. We would like to reassure you that any personal information that you enter in the survey will be anonymous and will not be associated with your name. The reason why we ask these details is to be able to inform policy and advocacy efforts to address these issues productively.

18) We're curious how the past year has affected you. Compared to your life before the pandemic, in general how have you been feeling these days? Please rate the degree to which you feel... [5-point scale: 1="A lot less" 3="About the same" 5="A lot more"]

- a) Worried or afraid
- b) Sad or depressed
- c) Bored
- d) Angry
- e) Connected to others
- f) Hopeful
- g) Self-reflective
- h) Happy or joyful
- i) Rested
- j) Creative and inspired

19) How have you communicated with your music audience during the pandemic? Please select all that apply.

- a) Pre-recorded online performance(s)
- b) Live online performance(s)
- c) In-person performance(s)

- d) Through Facebook
- e) Through Twitter
- f) Through Instagram
- g) Through Youtube
- h) Through Twitch
- i) Through Patreon
- j) By text messaging, WhatsApp, Community, or other messaging platform
- k) By Zoom
- l) By email newsletters
- m) By mail
- n) At online conferences
- o) Other (Please specify)
- p) I have not connected with my audience during the pandemic

20) Have you earned income working as a musician in any way during the pandemic (e.g., performance, music sales or royalties, teaching, music licensing, grants)?

- a) Yes
- b) No

21) [IF Q20= YES] How much total income did you earn working as a musician in any way during the pandemic (before expenses)? (If you are a band leader, please count only the income that comes to you personally (i.e., do not include payments that go to others in your ensemble).)

- a) Under \$10,000
- b) \$10,001–\$20,000
- c) \$20,001–\$30,000
- d) \$30,001 –\$40,000
- e) \$40,001-\$50,000
- f) \$50,001-\$60,000
- g) \$60,001-\$70,000
- h) \$70,001-\$80,000
- i) \$80,001-\$90,000
- j) \$90,001-\$100,000
- k) \$100,001-\$150,000
- l) \$150,001-\$200,000
- m) \$200,001 or more

22) [IF Q20=YES] How have you earned your income working as a musician during the pandemic? Select all that apply.

- a) From retail music sales (e.g. physical sales of recordings)
- b) From digital music sales (e.g., Songs sold on iTunes, Amazon...)
- c) From streaming music sales (e.g., Spotify, Pandora)
- d) PRO royalties (Royalties for the public performance of your work (airplay on radio, TV, movies, jukeboxes, live performance and foreign royalties)

- e) Recording sessions
- f) Touring/out-of-town performances
- g) Performance at festivals
- h) Local performances
- i) Live or pre-recorded online performances
- j) Teaching
- k) Licensing
- l) Merchandise sales from gigs
- m) Government grants
- n) Non-profit foundation funds/grants
- o) Subscription based service (e.g., Patreon)
- p) Other (write-in)_____

23) [IF Q22 = c] Thinking about the timeframe of the pandemic, how much income did you earn from streaming music sales (e.g., Spotify, Pandora) during this time?

- a) Under \$100
- b) \$101-\$250
- c) \$251-\$500
- d) \$501-\$1,000
- e) \$1,001-\$5,000
- f) \$5,001-\$10,000
- g) \$10,001 -\$20,000
- h) \$20,001-\$30,000
- i) \$40,001-\$50,000
- j) \$50,001 or more

24) [IF Q22=i] How often did you feel you were fairly compensated for your online performances during the pandemic?

- a) All the time
- b) Most of the time
- c) About half of the time
- d) Rarely
- e) Never

25) [IF Q22=i] How were you compensated for your online performances during the pandemic? Please select all that apply.

- a) Guaranteed performance fee
- b) Guaranteed performance fee with backend (% of total take after venue expenses and their take)
- c) Non-guaranteed percentage split with the venue after venue expenses are paid
- d) Tips or suggested donations
- e) Ticket sales
- f) Other (write-in)

**26) [IF Q19=a or b OR IF Q22=i] For your online performances, did you do any of the following?
Please select all that apply.**

- a) Hired a videographer, producer, audio engineer, or editor to stream/record my performances
- b) Streamed/recorded my own performances
- c) Streamed/recorded performances at a venue or professional studio
- d) I did not do any of these

27) [IF Q25=a] Did you make any profit from your online performance(s) after you paid for the videographer, producer, audio engineer, or editor?

- a) Yes
- b) No

28) Have you supplemented your income with work/jobs during the pandemic beyond your work as a musician? Work could be music-related (i.e., a record store) or non-music-related.

- a) Yes
- b) No

29) IF Q27=a] Did you begin work/jobs during the pandemic, beyond your work as a musician, that you had not done before the pandemic?

- a) Yes
- b) No
- c) I did work/jobs separate from my work as a musician before the pandemic but took on additional work/jobs during the pandemic

30) [IF Q27=a] In what kind of ways have you supplemented your income during the pandemic, beyond your work as a musician? Please select all that apply.

- a) Music-related full-time job (e.g., record store)
- b) Music-related part-time job (e.g., record store)
- c) Music-related hourly job/work (e.g., video editing)
- d) Non-music related full-time job
- e) Non-music related part-time job
- f) Non-music related hourly job/work (e.g., Uber/Lyft)
- g) Other (write-in)

31) Have you ever gone into your savings to cover your expenses during the pandemic?

- a) Yes
- b) No
- c) I don't have savings

32) Have you received any funds or resources during the pandemic from the following sources? Please select all that apply.

[RANDOMIZE]

- a) Unemployment Benefits through an employer
- b) Unemployment Benefits through CARES Act
- c) PPP (Paycheck Protection Program) loan
- d) Stimulus Check
- e) State grants for artists
- f) Foundation funds/grants
- g) Member organization Covid relief funds (i.e. music industry member organization fund)
- h) EIDL (Economic Injury Disaster Loans)
- i) Loans from friends and family
- j) Gifts from family and friends
- k) Support from partner/spouse income
- l) Passive income (i.e. through investments, rental property, inheritance)
- m) Loans from banks or other professional lenders
- n) Food Banks
- o) Crowdfunding (e.g., Gofundme..)
- p) Other (write-in)

33) Have you lost any income you planned on receiving (e.g., contracted work) during the pandemic?

- a) Yes
- b) No

34) During the pandemic, did you get behind on expenses for any of the following? Please select all that apply.

- a) Student loan payments
- b) Other loans
- c) Mortgage
- d) Utility bills
- e) Car payments
- f) Rent
- g) Food
- h) Healthcare costs
- i) Studio space/ equipment for my artistic practice/music work
- j) Band member/support staff costs
- k) Credit card payments
- l) Other (write-in)

m) I did not get behind in expenses for any of these

35) Were you covered by any type of health insurance during the pandemic?

- a) Yes, I was covered the whole time
- b) Yes, but only for part of the pandemic
- c) No, I was not covered

36) Was your mental health affected in any of the following ways during the pandemic? Select all that apply.

- a) Substance use
- b) Anxiety
- c) Depression
- d) Other (write-in)
- e) None of the above

37) What are some of the things that are helping you find joy during the pandemic? Please select all that apply.

[RANDOMIZE]

- a) Connecting with family and friends
- b) Connecting with my community of musicians online
- c) Connecting with my community of musicians in person
- d) Connecting with audiences through in-person performance
- e) Connecting with audiences through online performances
- f) My artistic practice
- g) Other art forms beyond my artistic practice
- h) Nature/outdoors
- i) Spiritual practice
- j) Self-reflection about future goals
- k) Exercise
- l) Resting
- m) Volunteering
- n) Trying new things
- o) Other (write-in)
- p) None of the above

SURVEY SECTION 4: COVID PROTOCOLS

38) When would you feel the most comfortable returning to in-person performances? Select up to three.

- a) I feel comfortable now
- b) When cases are going down in my state
- c) When cases are going down across the nation
- d) When I am vaccinated
- e) When a majority of the country is vaccinated / reached herd immunity
- f) When the venues reopen
- g) When there are clear safety protocols enforced by venues and festivals
- h) I don't think I will ever feel comfortable
- i) I don't know

39) What kind of COVID-19 protocols would you require to consider performing in-person, during a transitional time-period where there is still some societal risk of Covid-19 transmission? Please select all that apply.

- a) Performing outdoors
- b) Limited audience size
- c) Ventilation and air purifiers indoors
- d) Mask mandates for all audiences and venue staff
- e) Frequent Covid-19 testing for all staff
- f) Transparent cleaning and sanitization practices (e.g., mics, green room, etc.)
- g) Having received the Covid-19 vaccine myself
- h) Enforced social distancing between audiences and performers
- i) Vaccine documentation for all audience members and crew
- j) Other (write-in)_____
- k) I would not require any of the above
- l) I would not consider performing during a transitional period

SURVEY SECTION 4: Memberships and Perceptions of Member Organizations

40) Are you currently a member of a musician labor union? Please select all that apply.

- a) Yes, American Federation of Musicians (e.g., AFM local 1000)
- b) Yes, other musician labor union
- c) No, I am not a member of a musician labor union
- d) No, I used to belong to a musician labor union but I am no longer a member

41) [IF Q39 = c or d] What are the main reasons you are not a part of a musician labor union? Please choose up to 2.

- a) The membership is too expensive
- b) I don't find the membership to be financially beneficial
- c) My participation has not resulted in enough career advancement
- d) I have limited knowledge of unions
- e) There are no unions representing my specific genre(s) of music
- f) Unions do not adequately represent diversity
- g) Other (write-in)

42) Are you currently a member of any of the following organizations? Please select all that apply.

- a) Americana Music Association
- b) Blues Foundation
- c) Folk Alliance International
- d) GlobalFest
- e) International Bluegrass Music Association
- f) I am not a member of any of these organizations
- g) I used to belong to one or more of these organizations but I am no longer a member

43) [IF Q41=g or h] What are the main reasons you are not a part of a member organization? Please choose up to 2.

- a) The membership is too expensive
- b) I don't find the membership to be financially beneficial
- c) My participation has not resulted in enough career advancement
- d) I have limited knowledge of member organizations
- e) Organizations do not adequately represent my musical style
- f) Organizations do not adequately represent diversity
- g) Other (write-in)

44) [IF Q41=g or h] What kinds of offerings would lead you to consider membership in a member organization? Please select all that apply.

[RANDOMIZE, Anchor i) and j)]

- a) Conference showcases that pay the musicians for performance (including the conference fees and lodging cost)
- b) Conference showcases that have a listening audience for at least 20 minutes
- c) Free or discounted conference fees for those who cannot afford them
- d) Performance and booking opportunities that guarantee pay
- e) Performance opportunities for musicians with diverse backgrounds
- f) Educational and professional development opportunities
- g) Networking opportunities
- h) Grant/Fellowship opportunities
- i) Other (write-in)_____
- j) I am not interested in becoming a part of a member organization

SURVEY SECTION 5: Future directions

This section of the survey will focus on **your thoughts on the future of being a musician in the United States**. Please consider your music community in answering these questions (e.g., genre-based, geography-based, network-based, etc.)

45) Thinking generally, how do you feel about the future of being a musician in your music community?

[5-point scale: 1="Negative or Hopeless" 3="Neutral" 5="Positive or hopeful"]

46) Which of the following changes do you most hope to see in the music industry in the near future? Please select up to 5.

[RANDOMIZE]

- a) Less competition for performance opportunities at venues
- b) Less competition in the online music world
- c) More opportunities for musicians with smaller audiences
- d) More opportunities for musicians of color
- e) Consistent accommodations for musicians with disabilities
- f) More opportunities for LGBTQ+ musicians
- g) More opportunities for older musicians (people who have been a professional for 20-40+ years)
- h) Sufficient/equitable pay from venues
- i) Sufficient/equitable pay from streaming services
- j) New financial models of pay (e.g., foundation funding, private sector sponsorship, etc.)

47) Which of the following changes related to music performance do you most hope to see in the near future? Please select up to 5.

[RANDOMIZE]

- a) Higher pay/benefits for musicians for gigs
- b) More transparent pay structures
- c) Pay guarantees (not tied to audience size/ticket sales)
- d) Presenter-provided lodging for each person in a band
- e) A clean and private Green Room
- f) Private bathroom
- g) Presenter-provided underwriting of travel costs
- h) More venues with a listening audience
- i) More venues with a good sound system/audio engineer
- j) Professional treatment from presenters
- k) Non-discrimination policies and structures for musicians at venues
- l) Governmental support for artist performance
- m) Other (write-in)

48) Do you have any upcoming in-person performances booked for 2021 or after?

- a) Yes
- b) No
- c) Not sure

49) What are your long-term career aspirations as a musician? Please select only one.

- a) Continue writing, performing and working as a musician full-time
- b) Continue performing while supporting myself with other, non-music related part-time work
- c) Continue performing for fun while having a full-time day job
- d) I am planning to stop performing and change careers
- e) I don't have any plans
- f) Other (write-in)

50) Which of the following resources would be most useful for you and your artistic practice? Please select up to 4.

- a) Education opportunities to strengthen my artistic practice
- b) Professional Development
- c) Financial literacy and education (e.g., budgeting, taxes)
- d) Legal literacy and education (e.g., to understand copyright, contract language...)
- e) Opportunities to connect with diverse peers in music
- f) Mentorship
- g) Opportunities to learn how to write grants that would support my music
- h) Guidelines on how to self-promote
- i) Better access to studio space
- j) Better access to equipment for a home studio
- k) Computer skills/literacy
- l) Educational opportunities on how to navigate digital/online ways to promote my artistic practice (i.e. by using social media, online platforms such as Patreon)
- m) Database of foundations and corporations that support musicians directly
- n) Other (Write-in)

SURVEY SECTION 5: Demographics

You're almost finished! We have a few final and important questions about you that will help ensure that this research represents musicians from a variety of backgrounds. Your answers will be kept anonymous and never used outside of this research study.

51) In what year were you born? _ _ _ _ _

52) What is your gender? (Please select all that apply.)

- a) Female
- b) Male
- c) Non-binary
- d) Prefer to self-identify: _____
- e) Prefer not to answer

53) How would you define your sexual orientation?

- a) Heterosexual
- b) Gay or Lesbian
- c) Bisexual
- d) Pansexual
- e) I don't label myself as anything
- f) Other (please state): _____
- g) Prefer not to answer

54) In what country do you live?

- a) DROP DOWN LIST ALL COUNTRIES [WITH UNITED STATES AND CANADA AT TOP]
- b) Other (please specify: _____)

55) [IF Q53=US] What is the ZIP code of your primary residence? _____

56) With which of the following racial or ethnic groups do you identify as? Please select all that apply.

- a) Black or African American
- b) East Asian
- c) Member of an Indigenous community (First Nations, Native American, Inuit, Alaskan Native, Sami, Maya, Maori, or other Indigenous group)
- d) Latinx or Hispanic
- e) Middle Eastern or Arab
- f) Native Hawaiian or Pacific Islander
- g) South Asian
- h) White or European American
- i) Other (please specify: _____)
- j) Prefer not to answer

57) For how many people, other than yourself, are you financially responsible (e.g., paying expenses for children, parents, spouse, etc.)?

- a) None
- b) 1
- c) 2
- d) 3
- e) 4

f) 5 or more

58) What is the highest level of education that you've completed?

- h) Some high school
- i) High school graduate (high school diploma or the equivalent GED)
- j) Some college/Associates degree
- k) Bachelor's degree
- l) Master's degree
- m) Professional or doctorate degree
- n) Other (write-in)

59) Do you have a long-lasting condition or identify as a person with a disability or as neuroatypical/neurodivergent?

- o) Yes
- p) No
- q) Prefer not to answer

**60) Is there anything else you would like to share to help in efforts to support musicians?
(Write-in)_____**

END PAGE / DRAWING

Thank you for taking the time to complete this survey.

To be entered in the raffle for a \$500 VISA gift card and one of five \$100 VISA gift cards, please enter your name and email address below.

Your responses to this survey will not be connected to your personal information in any way.

Name _____

Email Address _____