



SAN ANTONIO MUSIC INDUSTRY STUDY

The Impact of Music on Our City &
How We Can Help It Grow

Study Researched, Written and Produced by:

San Antonio Sound Garden



In Partnership with:

Music Canada, LLC

The University of Texas at San Antonio's

Department of Music's Music Marketing Program



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Photo: 9001 Photography

MANDATE OF THE STUDY

The City Council of San Antonio adopted its Fiscal Year 2017 Budget in September 2016. This budget included funds designated for San Antonio Sound Garden to conduct a study of San Antonio's music industry, including the following:

- Analysis of formal training programs
- Current local need for training and education
- List of San Antonio live music venues
- Inventory of recording studios in and around San Antonio
- Review of City policies that impact music
- A strategic plan for making San Antonio a music city with recommendations regarding changes to city policies and other action steps for the city, the community and the music industry. The plan includes the following strategic areas:
 - Music-friendly and musician friendly policies
 - Role and structure of San Antonio Music Office
 - Role and structure of a music advisory board
 - Strategies for engaging the broader music community
 - Access to spaces and places
 - Audience development
 - Music tourism

EXECUTIVE SUMMARY

The music industry's varied components are feeling the pressures of a transforming economy and technology base, which has shifted concentrations from physical record sales to digital-purchasing mediums, as well as a greater focus on live performance for revenue generation. To combat issues faced by this development, it is important that our city take actionable steps that lay a strong foundation to bolster the industry's growth. San Antonio currently lacks the necessary infrastructure and investment in areas such as city government, educational programs, as well as professional development opportunities for our musical populace.

In terms of revenue generated and people employed by the music industry, San Antonio lags behind its Texan metropolitan neighbors and cities of comparable size across the nation. Through community impact surveys and feedback sessions conducted across the city, several trends emerged that reflect possible reasons for the present output of the music industry.

- We have found that ~80% of music industry professionals must earn a majority of their income from other vocations, which means that the impact of the music industry is naturally diminished because a great percentage of their energy is dedicated to other sectors (i.e. we have a part-time industry).
- Two-thirds of the city's music venues are located in two of our ten districts, and of those venues a fraction is open to all-age groups.
- Music education falls primarily upon private and nonprofit organizations, the latter of which are operating on tight budgets in comparison with agencies of similar size.

Through case studies with industry leaders and integration of key insights from facilitated community feedback sessions on what will help make San Antonio a music city, we have made recommendations to reimagine ways to access downtown music, improve access to spaces and places, create a marketing campaign to rebrand San Antonio, invest in more networking and educational opportunities, and establish a database for musicians and resources. Consensus was found along the following themes:

- San Antonio must find a way to market itself and capitalize upon its present growth and momentum.
- Investing in music education programs and training will contribute to a more successful and sustainable music economy.
- San Antonio should create more industry sharing practices in order to grow together.



Photo: Laura Rangel

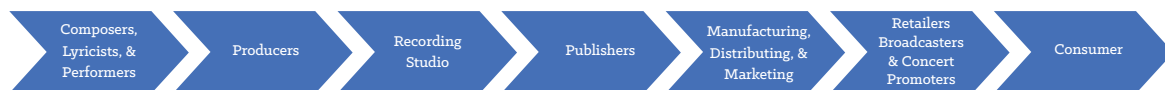
INDUSTRY ANALYSIS

Definition

The music industry as a whole is a large and nuanced set of relationships that expands from individual artists to multi-tiered businesses and organizations. For the purpose of this study, we are discussing the following components of the music industry: Live Performance, Recording, and Music Education & Artist Development. Each of these areas has an essential role in shaping the music culture of a city like San Antonio.

Recording Industry

Throughout the study we look at the recording industry holistically, considering businesses that manufacture, distribute, publish, license and market recorded music. In this industry, unless an artist self-records or employs an independent studio, a record label would be involved in the album-publication process. Record labels invest in artists to facilitate the production, recording, distribution and marketing of an album, and are increasingly involved in an artist's touring activities. Here is a graph that shows the value chain for the recording industry in a simplified manner¹:



Over the last two decades, the recording industry has seen a dramatic transformation from physical to digital, including issues surrounding ownership and revenue shares. While still far from the \$23.8 billion high in 1999, the total revenue from the global recorded music revenue, according to IFPI's Global Music

¹ Music Canada, "Economic Impact Analysis of the Sound Recording Industry in Canada". Pricewaterhouse Coopers LLC (2012): 9.

² IFPI, "Global Music Report 2017". IFPI (2017): 11

Report in 2017², is at a 5-year peak and expected to keep rising. Currently the market reports \$15.7 billion, with digital making up 50% of the entire recorded industry (only the second time it has beat out physical, and up from 29% in 2010).

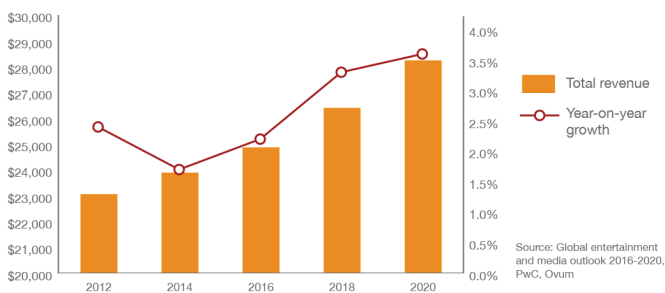
With the advent of the digital revolution, the door has been opened for a new wave of independent artists and entrepreneurs, some of which choose to operate their own music businesses or labels. Generally, this requires other forms of intermediaries to facilitate distribution.³ Whether working with a label or on their own, the technological transformation has put greater pressure on artist incomes, and artists are wise to develop a deep understanding of the business so that they can be more successful. It is in the best interest of the artist on both sides of the market to be represented in a music-oriented city.

Artists & The Live Music Industry

Another vital component is the live music industry, which includes performance rights, i.e. “the revenue generated

The increasing dependence on live music has triggered new strategies and revenue streams

Global total live music revenue (US\$m) and year-on-year growth (%), 2011-2020



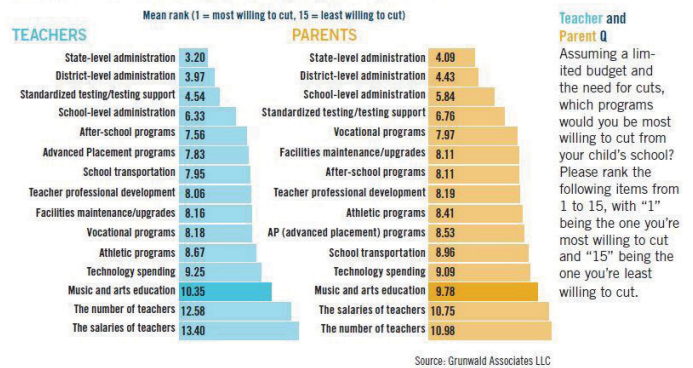
by the use of recorded music by broadcasters and public venues”.⁴ The decline in physical record sales has led to a steady growth in performance rights, as artists must come

up with new and innovative ways to make a living. The growth of the live music industry is projected to continue as we move into 2020 as seen in the graph above.⁵ Yet, there are issues facing performance rights legislation, as the statutory framework currently does not support fair negotiation, especially with broadcasters. This, coupled with the consumption of music “moving away from ownership and towards services that offer consumers

access to music” makes it is critical for artists and industry leaders to be aware of their rights, and how to make use of this valuable sector of the music economy.

Music Education & Professional Development

Figure 6:
Eliminating Music and Arts Education Is Not an Option:
Teachers and Parents are More Willing to Cut Virtually Every Other Program Instead



As the music industry evolves, it is important that artists are being trained and developed in order to keep up with global trends, which has a two-fold benefit to the growth of the industry. One, we are securing an educated group of artists and industry professionals who can build upon the innovation ripe in the industry, as well as provide employment opportunities for current leaders and industry professionals. A collaborative report conducted by the Naam Foundation and Grunwald Associates found that both teachers and parents see a vital need in keeping music and arts education a high priority in their schools. As shown in the graph above, both teachers and parents ranked music and arts education third on a list of things they would be least willing to cut in schools.

It should be noted that private and postsecondary institutions like Berklee College of Music are less subject to funding cuts than their publicly funded and primary education counterparts. Once students who are invested in a potential career in music have bridged the gap from high school to college, it is instrumental that they be connected within the industry to find job offerings, mentorships, and other opportunities.

³ Cherie Hu, “The Record Labels Of The Future Are Already Here,” Forbes, accessed 11 April 2017

⁴ Ibid, 12

⁵ “PwC Global Entertainment and Media Outlook: 2016-2020,” PwC, accessed 12 April 2017. www.pwc.com/outlook & <http://www.pwc.com/gx/en/industries/entertainment-media/outlook/segment-insights/music.html>

Conventions and networking events are major facilitators of these connections. In Berklee College's home of Boston, MA, for example, the Breakthrough Music Business Summit and the Brazilian Music Network Conference connect students with industry professionals. It is important that industry meet ups like this happen to streamline the method by which people interested in a music career can get their foot in the door.

In Bogota, Colombia, city leaders have invested in a music education program offered by a national foundation, giving children from low-income families a chance to learn an orchestral instrument and play with a community orchestra. Over the years, the program has enhanced musical and social development in the city, and has introduced music into the lives of young people who would not have access to it otherwise. The benefits are widespread and should be kept in mind when creating a music city.

Industry Size

The music industries of various cities may be objectively compared by measuring the ratio of extant record labels against the total population. This method provides insight into the importance of music to that city's culture and people; if record labels were not important to a city, they would not be in business. In New York, the nation's most populous city, there are 38,009 people per record label, and in Los Angeles, there are 39,525. In Nashville, one of the most prominent music cities in the country, the ratio is 14,143. Texas has 242 active record labels registered with the Texas Music Office. In Austin, there are 9,520 people for every record label.⁶

Another viable piece of economic information comes from the Texas Cultural Trust's 2017 State of the Arts Report. It gives a comparative chart using a 2015 survey of each of the major Texas metropolitan areas, showing their difference in taxable sales and collection in the arts and culture industries.⁷ As the music industry falls under this category, the chart provides an insight into where San Antonio ranks in a purely economic sense versus other large Texas metro areas.

ESTIMATED METRO AREA SALES TAX COLLECTION GENERATED BY THE ARTS AND CULTURE INDUSTRIES IN 2015 ¹¹		
METRO AREA	TAXABLE SALES	DOLLARS RETURNED TO LOCAL SALES TAXING CITIES
Austin-Round Rock	\$502,195,150	\$5,021,952
Dallas-Plano-Irving	\$1,267,565,172	\$12,675,652
Fort Worth-Arlington	\$332,935,945	\$3,329,359
Houston-Sugar Land- Baytown	\$1,025,314,133	\$10,253,141
San Antonio	\$330,844,451	\$3,308,445

⁶ "Texas Record Labels," Texas Music Office, accessed 12 April 2017. <http://gov.texas.gov/musicdirectory/results/record-labels/p1>

⁷ The Texas Cultural Trust, "2017 State of the Arts Report," (2017): 3.

Focus: "Economic Impacts of the Music Industry in San Antonio 2015"

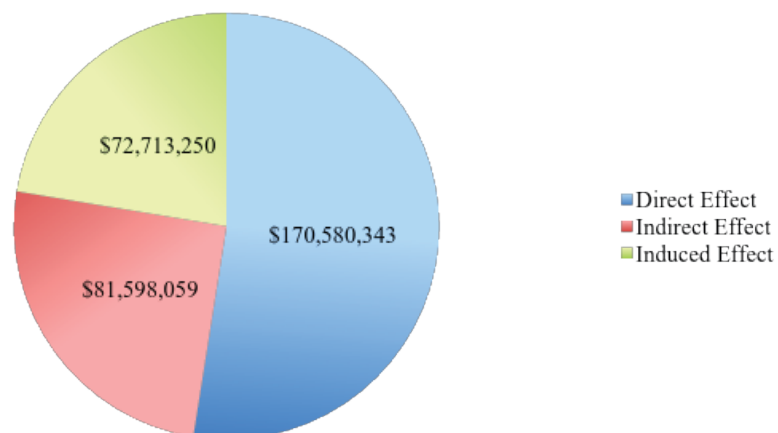
The following data was collected and presented by Steve Nivin, Ph. D. in conjunction with this study. he used the following methodology:

- Industry was defined by six-digit NAICS code
- Employment by each sector in 2015 was pulled from EMSI.
- Includes QCEW employees, self-employed, and extended proprietors.
- Employment data was run through the IMPLAN input-output model for the San Antonio metropolitan area.

*Impacts include multiplier effects.

Those employed in the music industry and those businesses impacted by the industry earned incomes of over \$325 million in 2015.⁸

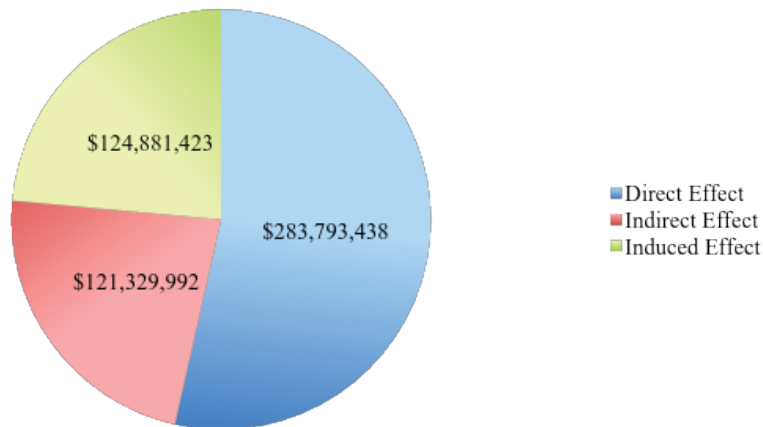
**Income Impacts of Music Industry in San Antonio: 2015
(2016 \$)**



⁸ Nivin, 6.

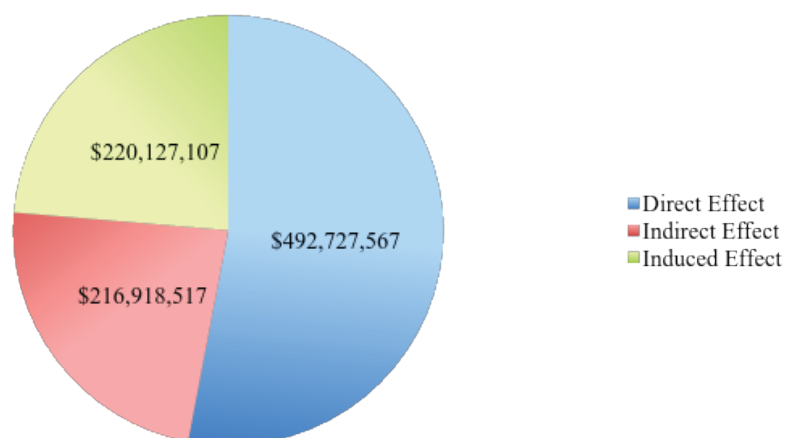
The activities of the music industry contributed a total of \$530 million in gross regional product to the San Antonio economy.⁹

Gross Regional Product Impacts of Music Industry in San Antonio: 2015 (2016 \$)



The music industry generated \$930 million in output in 2015.

Output Impacts of Music Industry in San Antonio: 2015 (2016 \$)



More of Dr. Nivin's findings can be found in "Our Research" in the following section.

⁹ Nivin, 7.

Growth Rate

The Texas Cultural Trust's (TCT) 2017 State of the Arts Report provides a survey showing nearly a million dollar increase in Texas taxable sales and tax generated by the arts and culture industries over the past ten years.¹⁰ Every year, artistic and cultural activities contribute roughly a third of a billion dollars to the state of Texas in taxes, not to mention the indirect contribution that it can bring. Music and art are a significant source of capital for both generated tax and its indirect effect on local economy, as shown in the following figure from the TCT State of the Arts Report on taxable sales and tax generated from 2005-2015.

STATE OF TEXAS SALES TAX GENERATED BY THE ARTS AND CULTURE INDUSTRIES ¹		
YEAR	TAXABLE SALES	TAX GENERATED (@6.25%)
2005	\$4,397,228,994	\$274,826,812
2006	\$4,652,696,052	\$290,793,503
2007	\$4,845,547,767	\$302,846,735
2008	\$4,892,251,875	\$305,765,742
2009	\$4,656,255,378	\$291,015,961
2010	\$4,506,001,820	\$281,625,114
2011	\$4,669,233,785	\$291,827,112
2012	\$4,905,152,939	\$306,572,059
2013	\$5,095,599,168	\$318,474,948
2014	\$5,340,215,423	\$333,763,464
2015	\$5,499,432,825	\$343,714,552

The balance of local and foreign economic shifts must also be considered within a growing music city. A prime example is the significant change in the music scene of neighboring city Austin. Two studies conducted in 2010 and 2014 by economic strategist company TXP, Inc. for the group Austin Music People (AMP) provide the following information:

Comparing the two reports, music tourism economic impact significantly increased from \$806 million in 2010 to over \$1.1 billion in 2014. However, the economic impact of primary music – that is, year-round economic activity by local artists, venues and businesses – declined more than 15%, from \$856 million in 2010 to \$726 million in 2014. This represents a decrease of \$130 million and a loss of more than 1,200 local music industry jobs in just a four year period.

While the many festivals and concerts boost tourism and consumer numbers overall, many of the performing artists come from outside of the native Austin economy, translating to a loss of potential job opportunities from the local industry members. Mayor of Austin Steve Adler commented on the situation saying, "Austin can't keep losing musicians, music venues, artists, and performance space and remain the city that we love."

Key Growth Factors

According to a study conducted by Music Canada and the International Federation of the Phonographic Industry (IFPI), well-established music cities share common essential elements:¹¹

- Artists and musicians
- Access to spaces and places
- An engaging and receptive audience
- Record labels
- Music related business

The study also stresses that support from many different levels of government is vital to a healthy and thriving music city. The several strategies listed below will lead to quicker development of a music city and bolster some of the elements previously mentioned.

1. The presence of a **music office** will bring better communication between musicians, the music industry, music enthusiasts, and local government. A music office that is staffed by someone who is well-educated on the issues of the music community can help city officials have a better understanding of the characteristics, strengths and challenges of the local music industry, facilitating the introduction of music friendly policies. Another service a music office provides is maintaining an information database which includes such things as a directory of local artists, recording spaces, performance venues, resources, and industry contacts.¹²

2. **Demographics** play a vital role as well. Well-established music cities share similar demographics including large student populations, plentiful all-age events, close proximity to music markets, and access to transportation to music markets. For example, the San Antonio Symphony offers a successful series of movie soundtrack

¹⁰The Texas Cultural Trust, 3.

¹¹Terril, Amy, et. al. "The Mastering of a Music City," IFPI and Music Canada, (2015): 13, accessed 25 April 2017, <http://www.ifpi.org/downloads/The-Mastering-of-a-Music-City.pdf>

¹²Terril, 55,59.

concerts that target all demographics. This has become one of the symphony's best-selling annual concert series¹³.

3. Developing easier **access to spaces and places**, such as recording studios, performance spaces, and rehearsal rooms, can boost productivity and it is proven to be effective in cities around the world. Examples of this in the city of San Antonio include the development of the Downtown Street Performer Policy developed by City Center Development and Operations (CCDO), which opened up more park spaces and downtown business sectors for artists to share their craft.

4. **Collaboration** between different players in the industry must be present in a thriving music city. Some of the recommendations from the report conducted by Music Canada suggested that providing networking and education opportunities for local industry players can create relationships and build trust in the community.¹⁴ One example within the San Antonio locale includes the Texas Music Educators Association (TMEA) conference that takes place every year. It is the largest convention for music educators and music enthusiasts in the nation. Another example of local collaboration is the relatively new campaign Local Music Week, which sees both seasoned and new players of the music industry come together to maintain and stimulate growth in the local music scene.¹⁵

A similar event at the national level, takes place in Nashville, TN. Music Biz is “the only music business event in North America that brings together the influential decision-makers from the commerce, content and creative communities under one roof for four productive days of meetings, education and networking.”

5. Building an **audience for local musicians** is vital for a thriving music scene. In an ideal music city fans are willing to pay for shows by artists at all different career levels so that emerging artists

are just as supported in their development as the better-known touring artists. In addition to benefiting artists with a larger fan base, the proper audience development can also lead to an increase in shows, ticket sales, and traffic to small business around venues.

6. **Music education** is essential in a music city. It provides formal training in music, develops musicians, and increases appreciation of music at a younger age, seeding future generations of musical excellence. San Antonio maintains a musical presence in the public school system through various symphonic, orchestral, choral ensembles, and other fine arts organizations, such as musical theater. Work done by nonprofits such as Urban-15, and Network For Young Artists contributes greatly to students serviced by these schools and provides supplemental services not always offered during the school day.¹⁶

Beyond these sectors, the business community provides training programs, such as at places like School of Rock, and spaces for lessons at retail stores such as Sam Ash Music, High School Music, and Alamo Music Center. All of these organizations play a distinct role in contributing to the necessary creation of a musical pipeline for the future of our music industry to succeed.

Developing easier access to spaces and places, such as recording studios, performance spaces, and rehearsal rooms, can boost productivity and it is proven to be effective in cities around the world.

¹³BWW News Desk, “San Antonio Symphony Presents Live-to-Picture ‘Jurassic Park in Concert’ in February 2017,” Broadway World, accessed 28 April 2017. <http://www.broadwayworld.com/san-antonio/article/San-Antonio-Symphony-Presents-Live-to-Picture-Jurassic-Park-in-Concert-in-February-2017-20160430>

¹⁴Terril, 66.

¹⁵Shannon Sweet, “Local Music Week 2016: Where to Go and Who to See,” accessed 28 April 2017. <http://www.sacurrent.com/sa-sound/archives/2016/06/13/local-music-week-2016-where-to-go-and-who-to-see>

¹⁶“Mission and Vision,” *Urban 15*, accessed 26 April 2017. <https://urban15.org/mission-and-vision/>.



Photo: Laura Rangel





Photo: Kevin Barton

OUR RESEARCH: A CLOSER LOOK AT SA'S MUSIC LANDSCAPE

Overview

San Antonio is a diverse community with historical and strategic military significance. It is situated in South Texas and has consistently grown and become a top destination not only for tourism but also residency. Texas employment grew the most of the 10 fastest growing states¹, with greater San Antonio growing faster than any other area in Texas in 2015 at 5.9 percent².

- Population - 1,469,845 (2016 estimate)
- Hispanic or Latino - 63.2% (2010 estimate)
- Bachelor's degree or higher - 25% (2015 estimate)³

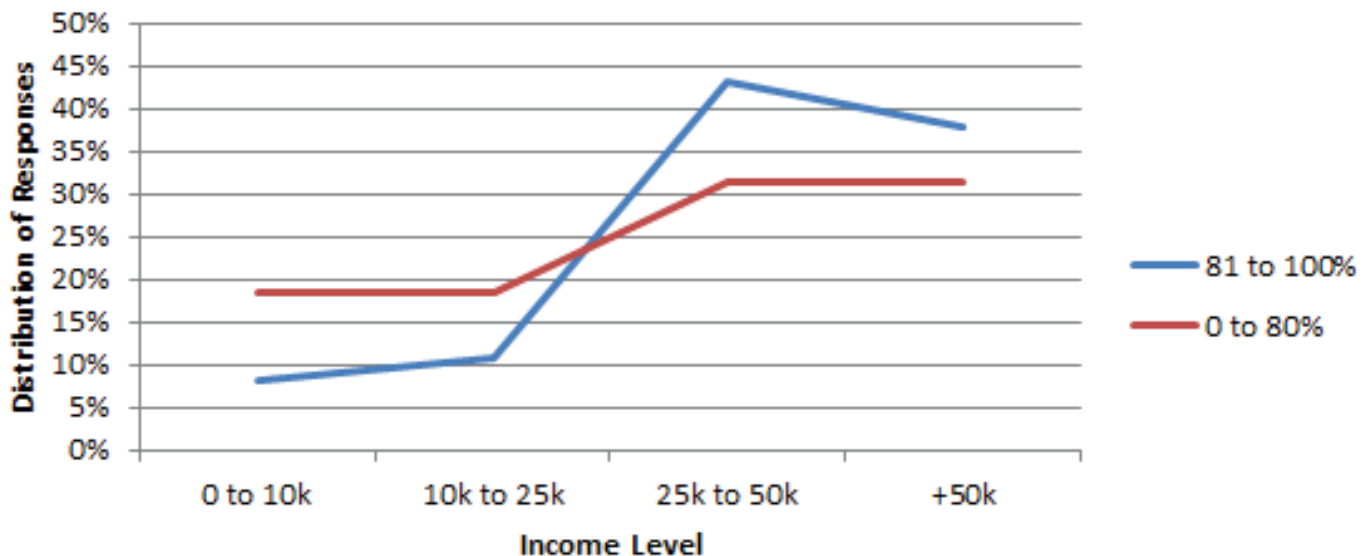
The Music Industry contributes \$930 million to the San Antonio GDP. It is critical to understand the influence of music on the San Antonio economy and to take actionable steps to amplify that impact, just as many other cities have done.

¹<http://gov.texas.gov/files/ecodev/texas-economic-overview.pdf>

²https://www.bea.gov/newsreleases/regional/gdp_metro/2016/pdf/gdp_metro0916.pdf

³<https://www.census.gov/quickfacts/table/LND110210/4865000>

Level of Income



Current State

The following data was accumulated as a part of a SA Music Industry Survey distributed via email to a database of San Antonio industry leaders and organizations composed by the Texas Music Office.

A team of professionals at SASG completed research to reach a greater population in San Antonio, and also traveled on site to organizations and leaders to ensure the most comprehensive reach possible.

Additionally, the three community feedback sessions led by SASG, all open to the public, helped garner a number of survey completions.

In total, 228 responses were submitted for the survey.

The following observations stood out for the SA music industry's current landscape-

- The San Antonio Music Industry currently operates as a part-time industry with only 26% of the 228 respondents identifying music as their primary source of income and 81% of respondents working multiple jobs. Note: For the purpose of this study, a respondent must earn greater than 80% of their income to identify that occupation as their primary income source.

- Of the respondents who identified solely as performers, just 7% reported music as their primary source of income. That means that of the musicians who responded to the survey, only 7% are working full time in the industry. For the remaining 93%, it stands to reason that music is a part-time occupation and not a manner to seriously earn income.

In Nashville, music is treated as a profession, and the city works to ensure it stays that way, which is why Nashville continues to maintain its prominent position as a world leader with a music impact of over \$9 billion to its economy. The following was noted from their music industry study:

"The origins of the music industry in Nashville are deeply entrenched with the broader economy of the city. Early leaders in music, from the insurance industry linkages to radio programs to the first studios and labels developed in conjunction with Nashville performers and business backing, have ensured that the music industry is not a stand-alone outsider, but an ingrained part of the area. Today, banking, accounting, legal services, construction and other standard sectors found in all cities are uniquely and strongly linked to the everyday operations of the music industry. Increasingly, in fact, music activity finds all of its operational resources available close to home."

- It was interesting to see that respondents with a bachelor's degree or above are 36% more likely to have

music as a primary source of income, validating the importance of education. People that have a bachelor's degree are more likely to view music as a profession and identify themselves as an entrepreneur.

- Respondents with annual income above \$25K were more likely to report music as their primary income source than respondents making less than \$25k per year- in other words, people making less tend to have multiple sources of income.

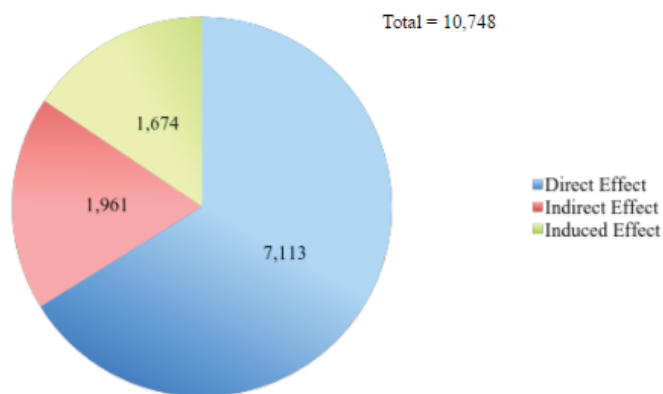
Through our proprietary research, we determined that while music was largely a part time industry in San Antonio, there was an intense desire for it to become more. However, respondents revealed that there was no clear path for them to follow to achieve that. As an example, their respondents reported a basic lack of infrastructure to work within. While there will always be a "hobby" portion of the music industry, cities like Nashville have developed

the guidelines for how to turn it into a major driver of the economy.

While San Antonio's music economy has not been fostered like Nashville or Austin, we are in a unique position to capitalize on that and learn from the successes and mistakes of other cities. Austin is currently declaring a crisis in local music as it realizes that focusing purely on live music is unsustainable, while Nashville continues to rise as a force in music with its focus on music industry.

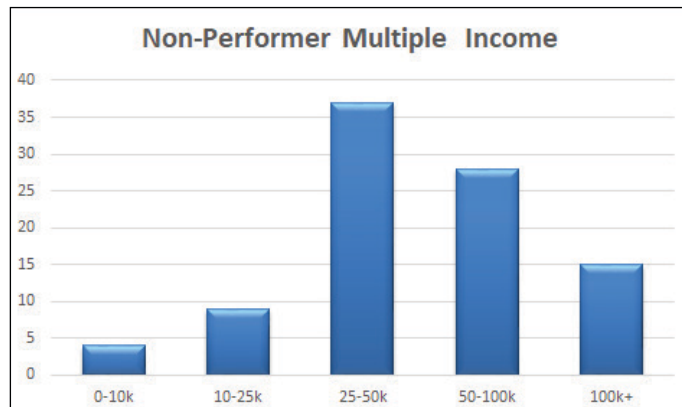
Music industry supported 10,748 jobs in San Antonio.

Employment Impacts of Music Industry in San Antonio: 2015

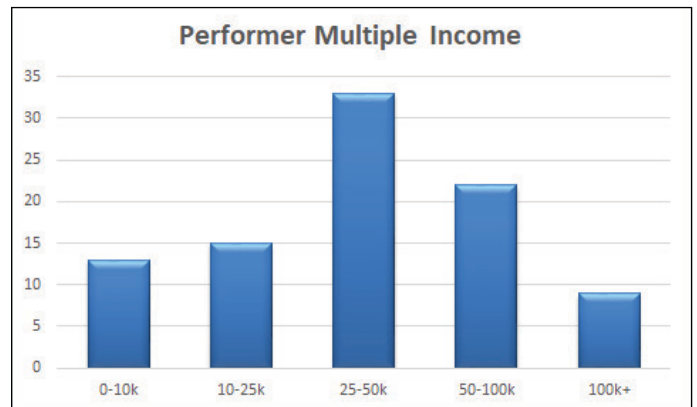


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Further data supports the existence of music as a part time industry by reviewing the breakdown of income across industry segments.



Represents 89 survey responses



Represents 92 survey responses



Represents 43 survey responses

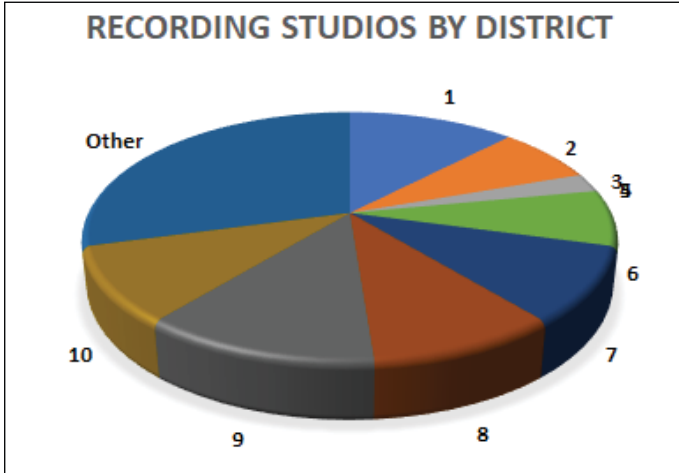
There is a disproportionately high number of individuals below the poverty line when it comes to the “performer only” individuals. While the respondents that identify as working multiple positions across “performance” and “non-performance” showed a regular distribution, the respondents that identified as “performer only” showed a non-normal data distribution. A non-normal data distribution can naturally occur, however the fact that the other segments have a normal data distribution would indicate there is an imbalance that is occurring in the “performer only” segment (i.e. there are variables impacting individuals who choose to pursue music full-time that should be addressed).



Photo: Laura Rangel

The Inventory

Recording Studios

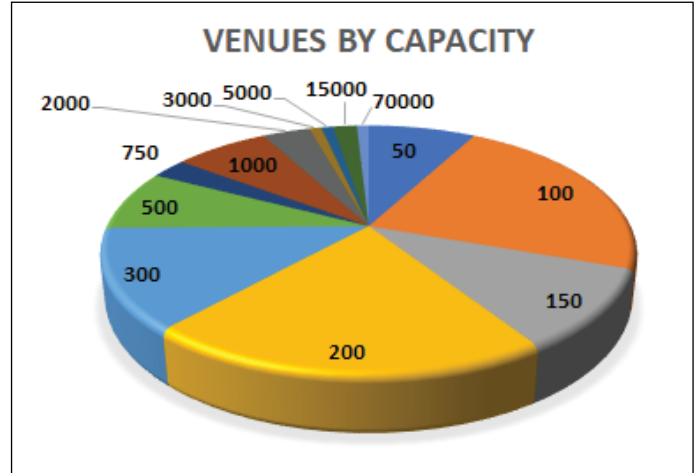


Observations

- There is a disproportionate concentration in districts 8,9 and 10 versus the education programs and venues which had a clear concentration in District 1.

Hypothesis: Recording studios are not dependent on the location of other music industry

Venues

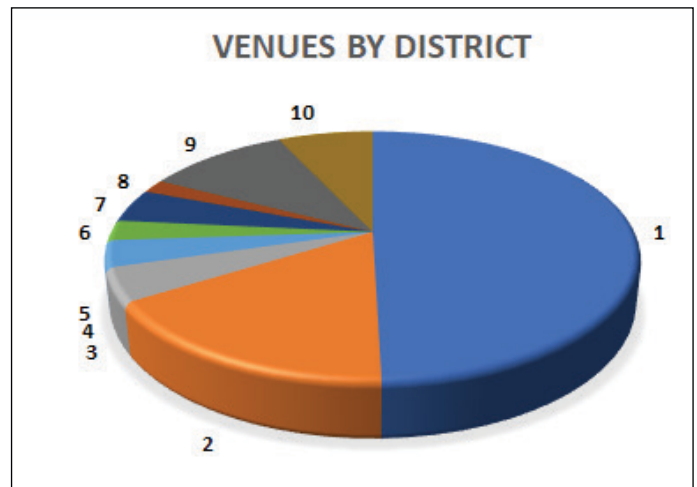


Observations

- 83% of the venues have a capacity of less than 500, and
- 62% of the venues have a capacity less than 200.



Photo: Laura Rangel



Observations

- 66% of the venues in San Antonio are in Districts 1 and 2

Case Study

Emerging Venues & Community Engagement

"We Are At A Peak"

Aaron Zimmerman - Vice President of Programming,
Tobin Center for the Performing Arts



Currently entering its 4th operating year, the Tobin Center for the Performing Arts is the largest music venue that is also a 501(c)3 nonprofit, and thus they have taken a multi-tiered approach at impacting the music industry. "We're not the norm," Zimmerman said in reference to the Tobin's place amidst the other larger venues. "Commercial entertainment allows us to support community initiatives."

The H-E-B Performance Hall alone saw 250+ events in this past year, up 40% from their second season. When coupled with the BMW of San Antonio Signature Series and the Carlos Alvarez Theater's Studio Sessions, the consumer base has a vast range of choices- and that's without considering other major players in the industry.

"I think we are seeing as much traffic as we can right now, we are at a peak," Zimmerman said, referencing what he calls a "huge boom" in the past three to four years. "Aztec is doing way more than they've ever done, and Sam's [Burger Joint], Amp Room, Limelight, and Paper Tiger have all really stepped up their game. This market has become extremely competitive all of a sudden."

Given such an explosion in entertainment options, Zimmerman believes that people (Millennials especially) will stick around and the industry will organically grow as people's pocketbooks do. "If that appreciation can be ingrained at a younger age, I believe in 10 years we will have that incumbent scene," Zimmerman said. "Really the most important thing right now is music education."

Initiatives, such as the Tobin's Generation Next, bring 50,000 students through the Tobin Center's doors every year for free, providing a master class as well as Q&A for all involved. "This sounds like a massive number," Zimmerman said. "But it's not enough."

Similar programs are offered through nonprofit 91.7 KRTU's Growing Jazz program, as well as Musical Bridges Around the World's Concerts To Classrooms, yet Zimmerman seems to be calling for involvement at the school level. "There's got to be someone who says that every school should have 400 recorders, anything to engage students at this level," Zimmerman said.

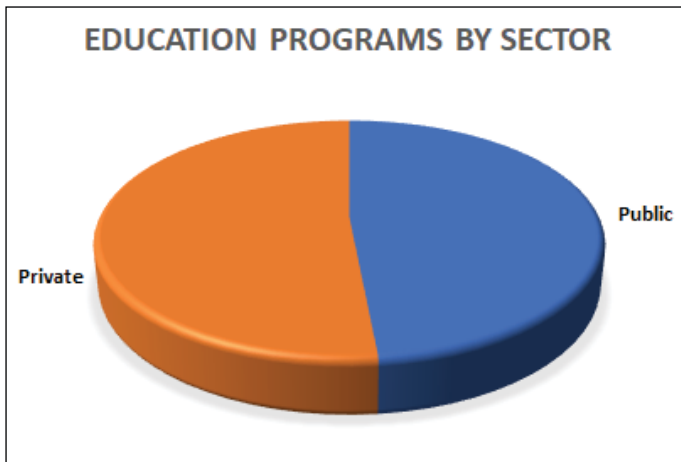
As a part of its mission, the Tobin Center also offers residencies to eight unique organizations and ensembles- one of which is gaining great esteem for its creativity and cross-pollination. "Some of the best work in the city is done by YOSA," Zimmerman said. "Such a shining star of how to grow a music scene, everything they do is thoughtful and it has a purpose."

Sold out in every iteration, YOSA's collaboration with local musicians for tributes to Radiohead, The Beatles, and Prince gave the organization's aspiring artists an opportunity to network, co-create, and empower themselves upon the most acoustically sound stage of its size in the city. "Not only are they educating the students, but these local musicians act as a mentor to these kids who say- I wanna come back and be in a band."

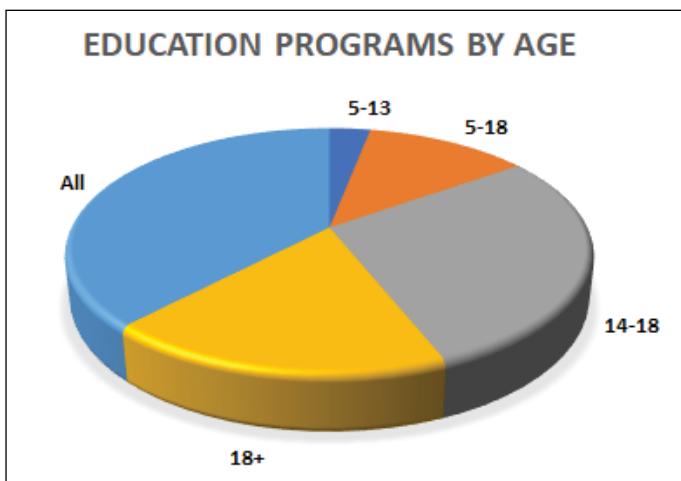
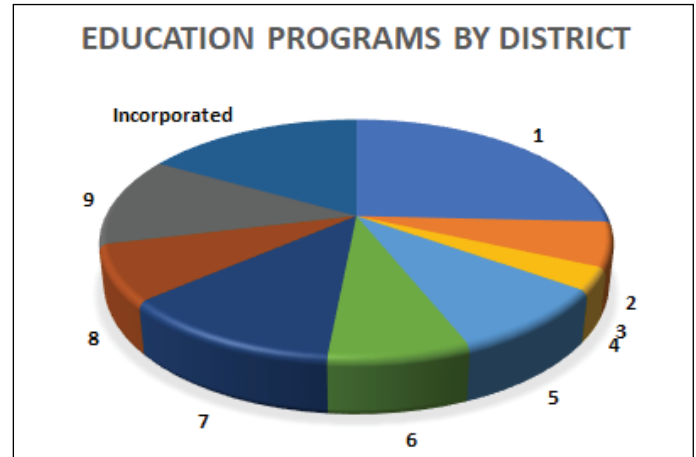
Outside of education, Zimmerman believes that San Antonio has gaps to fill in terms of sustaining a venue that has between the capacity of the Majestic and Freeman. "A place like Sunken Gardens, if they could do 25 events a year, I think that's what we're missing the most," Zimmerman said. "This will help break the geographic barrier, people will be more likely to travel to these shows."

That said, it would eliminate the issue of travel if more of the consumer base lived in the spaces where live music was being played. "Create cost-effective living downtown and the music scene will come- this is so important for the growth of this market," Zimmerman said.

Education Programs

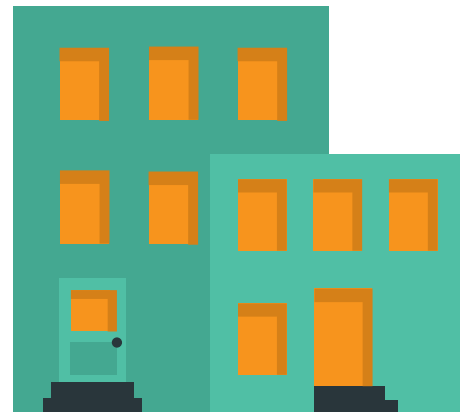


Hypothesis: Corporations, organizations and non-profits have been providing a greater portion of music education.



Observations

- 47% of programs serve only the 14+ age bracket.
- The organizations that support all ages are private.
- 85% of the programs are either private or serve the 14+ age bracket.



"Create cost-effective living downtown and the music scene will come- this is so important for the growth of this market."

-Aaron Zimmerman

Case Study

Music Business and Giving Back

"We Work Hard to Stay Competitive"

Angela Perez - Operations Manager,
Sam Ash Music - San Antonio



Sam Ash Music, one of a handful of family owned music businesses in our city, has maintained their business in San Antonio by operating with the same commitment to community that the people of this city would expect. With 13 full-time staff and many more instructors in their educational sector, the organization commits itself to respecting the industry it works in by making their equipment and resources as affordable and accessible as possible.

"While the buying power isn't as strong for "Mom & Pop" shops, we're starting to see people paying the same for products across the board," Perez said. "At Sam Ash we offer layaway options, low-price guarantees, financing, and credit for old gear towards new products- we work hard to stay competitive, but it is a challenge to navigate the balance of industry vs. affordability."

Located at 410 & McCullough, the store is within a few miles of High School Music, a locally owned and operated business that caters to the youth- other major music stores are located closer to downtown, or north of 410. "When you get into the harder pressed pockets-deep westside, southside- there is more poverty than not," Perez said, referring to the lack of music businesses in those areas, as the demand isn't as high. "I think in a lot of these areas music equipment and lessons are considered a luxury- not sure that they understand that a good musical education lead to scholarships."

Beyond their business of selling the gamut of musical paraphernalia, Sam Ash spends a great deal of time giving back through communal endeavors. "We offer a weekly open mic for people to perform and earn gift cards for the store, studio space for Parks & Recreation to execute their drum lessons, as well as participate actively in fundraising events," Perez said, referencing the business main beneficiary, The Alzheimer's Association, for whom they raise nearly \$5,000 a year. "Sam Ash encourages all of it's store to be good community partners and pursue endeavors such as "The Longest Day".

Perez called repeatedly on the business' focus on education as key to its mission. "We partner as well with SASIC and their music engineering program and we always open up to field trips for local schools," Perez said. "Not sure enough people know that playing and reading music when you're learning as a child increases your ability to learn."





Photos By: Oscar Moreno



Photo: Oscar Moreno

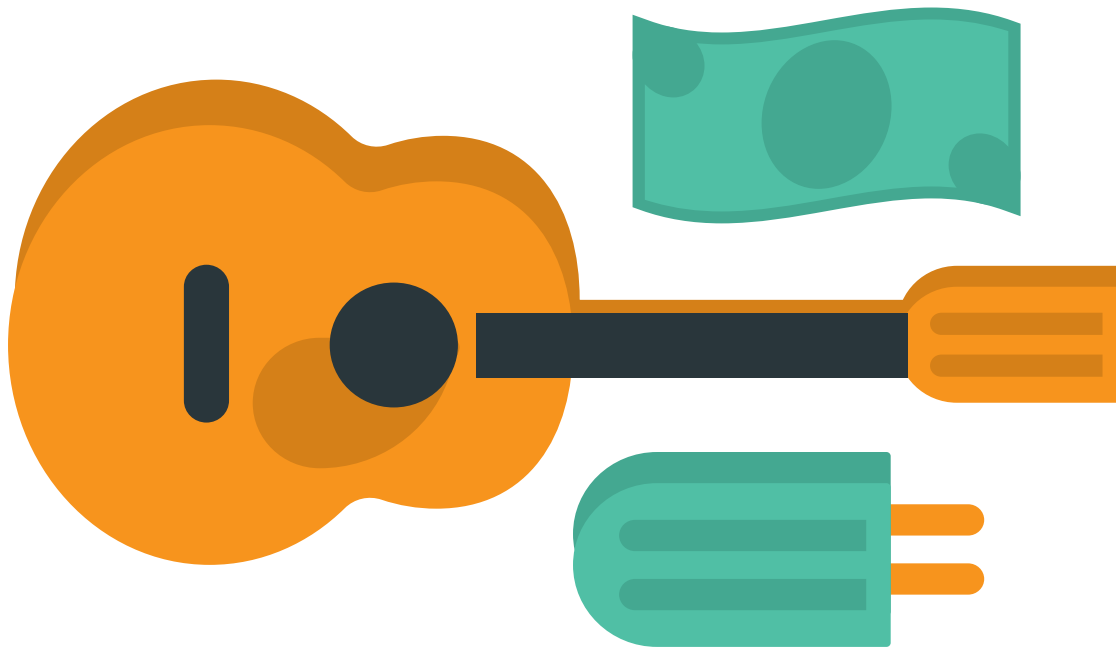
COMMUNITY INSIGHTS & MUSIC INDUSTRY RECOMMENDATIONS

Over the course of ten weeks, San Antonio Sound Garden organized and executed three unique community feedback sessions to garner insight on the state of the music industry, as well as future opportunities to grow. The sessions were open to the public and held at city-sponsored facilities in District 1 (San Antonio Central Library), District 2 (The Crown Room at St. Paul's Square), and District 3 (Guadalupe Cultural Arts Theater) in order to both provide neutral locations and honor the areas that maintain a higher concentration of music industry professionals and organizations.

Individuals present represented diverse sectors of the music industry- high school musicians and long-term industry professionals shared the table alongside nonprofit and business leaders, who engaged with venue owners and record label executives to discuss the issues important to them in the music industry.

Each feedback session was developed in accordance with the insights garnered from the previous session and facilitated by objective members of San Antonio Sound Garden's all-volunteer team. The sessions began with an open call for ideas from the community members present and did not attempt to lead the conversation in any direction, only support the full discussion of the topics derived from their insights.

On the following pages are the five recommendations that were gleaned from the community-oriented sessions, which provide a general framework for addressing some of the greater issues that face our current music industry.



Recommendation #1

Produce a more vibrant, economical, and family-friendly environment for musicians and audiences through enhanced accessibility to our downtown and central city music scene.

Participants in the feedback sessions agreed that an inhibiting factor to patronage of the local music community (of which we have found over 50% is concentrated in District 1) is the accessibility—in terms of both the number of family-friendly opportunities and barriers to physical access. Here are some of the major themes that emerged:

- Musicians need proper loading hours and zones, not just a permit.
- Partnerships with transportation agencies and city departments are essential to changing the present environment.
- Audience members are repelled by lack of options and affordability.
- Our parks and downtown spaces should be better utilized on a daily basis outside of festivals and major events.



Photo: Laura Rangel

Strategy for Implementation

Several key initiatives such as the Downtown Performer Policy (orchestrated by City Center Development and Operations (CCDO)) represent of how to assess the present environment and all the key players in order to create positive change for the music industry. Such entities must be better utilized to understand how we build out weekly and monthly programs (such as Centro's Houston Street Live!) that simultaneously benefit our musicians and enhance our city spaces.

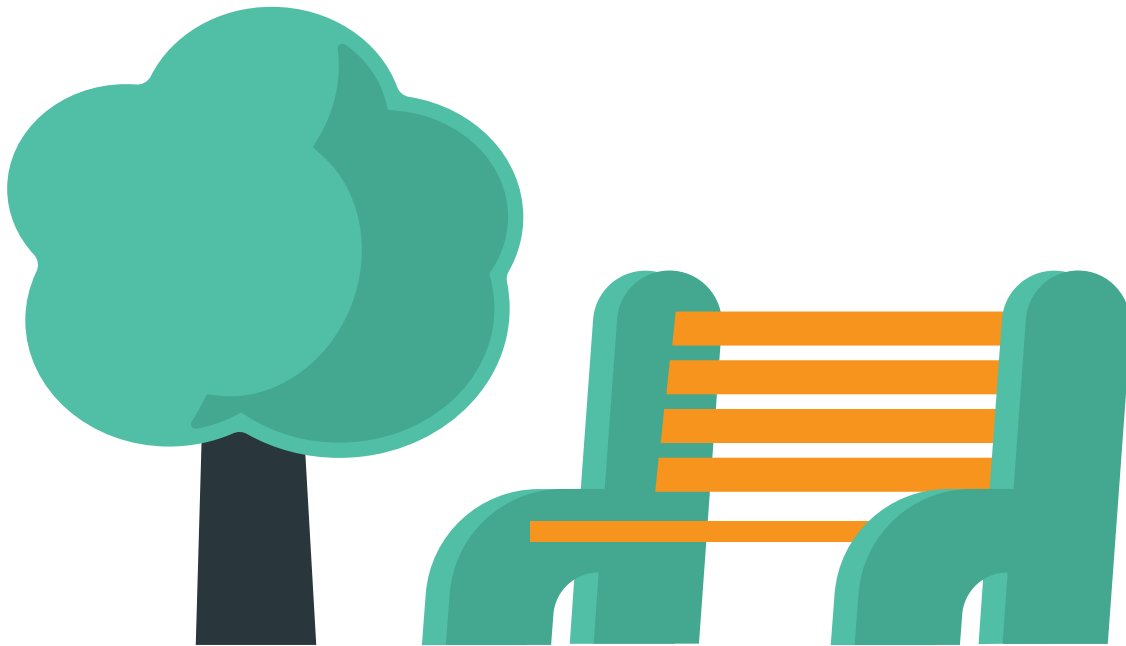
Engagement is already underway through musicians' union Local 23, the San Antonio chapter of the American Music Federation. They have engaged city council in conversations about said parking and loading zones, and continue to advocate for musicians' rights and accessibility in our center city spaces.

Future Forward

Continued and coordinated partnerships between City of San Antonio departments, downtown and central city

business owners, local musician-centered nonprofits, and artist collectives will act as the impetus to real and lasting change for our music economy. Leaders from all of these sectors must create a shared agenda, communicate clearly and consistently, and establish realistic measures of success to make sure that we capitalize upon the opportunity available in the heart of our music scene. If a great majority of our venues, non-public education programs, and music businesses are located in the District 1 corridor, the enhancement of this environment is essential to raising the impact of music on our city's economy.

Imagine if even a quarter of the 80% of musicians who are not performing full-time were given consistent opportunities to hone their craft while contributing to the vibrancy of our city's entertainment hub—what would the impact be?



Recommendation #2

Reimagine spaces and places where music can be developed, rehearsed, and performed, creating new music hubs and venues.

Through the feedback sessions, leaders of the San Antonio music industry agreed that we must take advantage of the built environment and transform it in creative ways to provide for our music economy. They recognized that while the lay audience may be paying attention to music in presentation and performance, not enough is being done to account for the other aspects of music production - creating, rehearsing, recording. A few trends emerged that highlight the opportunities available in providing for key aspects of the music economy:

- We need to build musical ecosystems, accounting for the full spectrum of what industry participants need to create and sustain a quality product.
- We should proactively seek unconventional spaces for rehearsals, such as school auditoriums, churches, and underutilized city buildings.
- We want to see existing venues and arts-oriented spaces open up for musical production, creation and rehearsal.

Strategy for Implementation

In order to transform existing spaces, it is necessary to first take assessment of vacant city properties and downtown spaces willing to collaborate with the music industry. Following this inventory, the city's music office or commission would then work to establish guidelines on what types of spaces qualify for alternative use, and subsequently establish an application process. Venue and business owners would have to take part in the conversation to determine incentive sources and funding for bands when non-traditional spaces are transformed to have live music; the participants expressed that these newly-created opportunities should not be misinterpreted as opportunities of "exposure"—musicians would still have to be paid for their performances.

Future Forward

Reimagining spaces and places in San Antonio's music industry would take strategic coordination with aforementioned business owners and venues in order to determine logistics for utilizing the spaces, such as a certification process or contract to ensure protection of the property. All of this would have to be accessible and easily understandable by the average musician, so that they could easily locate the most convenient places to rehearse, perform and record.

We need to build musical ecosystems, accounting for the full spectrum of what industry participant need to create and sustain a quality product.



Photo: Laura Rangel

Case Study

Record Production & Artist Development

"If The Music Is Good, It Will Work Out"

Damian Rodriguez - Musician & Owner of Zinc Media Inc.

Mack Damon - Producer & Owner of Hollywood Studios



Within San Antonio's recording industry, the distribution of home-studios vs. larger-scale professional businesses leans towards the smaller spaces that favor a more intimate interaction. Regardless of the size of the studio or the type of equipment you're working with, there seems to be consensus around one thing: a great song is a great song.

"You can take a bad (poorly written) song and record it in the best studio, it's still a bad song," said Zinc Media owner Damian Rodriguez. "I tell my students all the time that what you record to and how you record it is a small factor- if the music is good, it will work out."

Rodriguez has been working in the sound engineering field for roughly 13 years, and has been playing music for 25 years. "It's the experience of the person running the space, not necessarily the space or gear," Rodriguez said. His recording studio is about 900 square feet and can accommodate up to 32 tracks for a full band. "You want to have a producer who values your experience, who takes the product to the next level-it's a collaborative and creative process."

According to Rodriguez there's an intimacy to the home studio approach, as there is no absolute process, no formula to make a great record. "From professional studios to mobile rigs, there are plenty of options out there for artists."

Mack Damon, owner of Hollywood Studios and record producer, has worked with national acts and currently has records in Grammy contention, but is more concerned with what an artist is doing outside of the recording studio. "This is an extension of me being a better record producer," Damon said of his studio space. "I'm interested in artist development, shopping artists and getting them to the next level."

Damon's ideas aligned with Rodriguez's in that there are greater issues at play than recording, and the delivery of the song in a live setting is critical. "You have got to make sure the delivery is honest and entertaining, people can tell when something is manufactured," Damon said. "I think the venue thing is very important, more critical to play live than record."

The "venue thing," according to Damon, is that San Antonio finds itself missing an iconic venue that touring bands want to play at, as well as local artists growing out of the same venues. "There is a significant lack of venues, I can count the list of good venues people want to play on one hand," Damon said, referencing 502 Bar, Sam's, and the Tobin's Carlos Alvarez Theater. "Frank and Rosella are some great alternative spaces that could be better utilized."

Damon proposed having a sort of "clearing house" where musicians could register with a city agency to be shopped to venues, whether those whose primary function was music, or a transformed location. "This could act as an incentive for some of these places to book live music, if the venue receives some sort of break for booking live musicians," Damon said.

According to Damon, if we are to capitalize on Austin's trend of "pushing indie musicians out of the market", we have to be educated and know our craft. "If you expect to run a business do it, know how to draw a contract, I know a lot of folks can't do that," Damon said.

The responsibility is thus shared between the venues, musicians, as well as the audience in Damon's eyes. "The biggest problem people have with musicians is how to value their work," Damon said. "If I could give more money to artists after I see them I would."



Recommendation #3

Create a comprehensive information source for the local music industry, a web-hosted database that maintains information on all its members. Use database to create more cross-sector partnership opportunities that will impact music industry initiatives and attract music industry professionals.

Over the course of the three feedback sessions, a great number of new relationships and networks were created, revealing an interesting observation- leaders in the music industry are unaware of key community organizations and players in the music industry that could make their lives easier. Therein emerged the desire for a singular source of information that directs both industry professionals and the lay audience to the appropriate aspect of the industry- Where are the venues concentrated? What are the resources available for recording? How do you connect with up and coming artists?

Outside of the web, participants called for industry meet-ups and initiatives that open up the conversation around the state of music in our city and help connect the dots so that solutions can be found more expediently. From these conversations, there were some critical observations:

- The comprehensive information source should be easily accessible through City platforms and free to the public.
- An official entity or individual must be held responsible for maintaining the database to keep it organized and up to date.
- We must work with visitor and tourism offices to attract conventions, festivals, and music industry conferences to our city.

Strategy for Implementation

In regards to the comprehensive information source, San Antonio Sound Garden can work closely with the Department of Arts & Culture to create a formalized database (utilizing information from this study and building upon it) that will live online through an official music commission website. Ideally, an official employee would be designated by the city through a music office or commission, and work to continually update the database in coordination with industry members, accurately reflecting growth and changes in music industry dynamics.

The incentive for establishing more music industry meetups and conferences is not only intrinsic value to musicians and industry professionals, bringing our community on par with music city standards, but it would also be a huge economic boon to our city-attracting leaders from other music cities and showcasing the talent that our city maintains. Cross-sector engagement with entrepreneurial and forward-thinking organizations such as LiftFund and Geekdom can provide best practices on how to build successful music industry networking and workshop events. Then, it is the onus of leaders in respective industry sectors (venues, recording, community services, production) to align and envision what the greatest needs are and how to support one another in that process.

Future Forward

With the support of the Texas Music Office and other pre-existing sources of artist collection and information (e.g. Do210, SATX Music, Department of Arts & Culture), our city has a solid starting point from which to consolidate information. It will be critical to discuss with those

organizational leaders how that information was gathered, and how it has been maintained in order to start off on the right foot.

Transparency from industry leaders in various music sectors in terms of opportunities and threats to the current environment will allow for a clear set of needs to emerge, acting as a natural channel for creating the necessary industry initiatives and workshops that will help ensure our music economy is operating at the highest capacity possible.

The incentive for establishing more music industry meetups and conferences is not only intrinsic value to musicians and industry professionals...but it would also be a huge economic boon to our city-attracting leaders from other music cities and showcasing the talent that our city maintains.

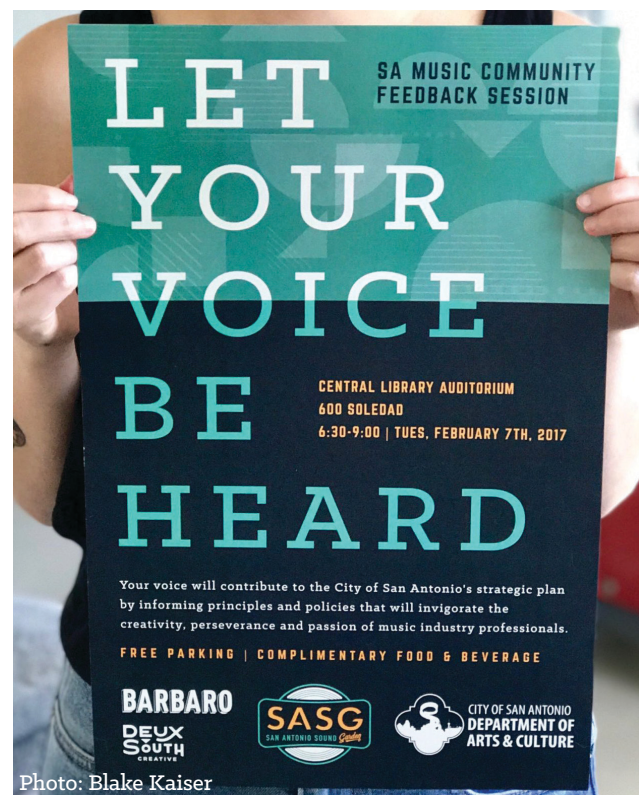


Photo: Blake Kaiser

Case Study

Latino Inclusion in Music Industry

Identifying Opportunities for Representation and Building Trust

Various Community Leaders



Pictured: Roberto Livar

Latino and Chicano influence is felt in every part of San Antonio's cultural and social fabric, yet there remains a feeling of misrepresentation and mistrust on behalf of key contributors in that demographic of the music industry. When leadership representing this community from the Conjunto Heritage Taller, Guadalupe Cultural Arts Center, Grammys, RAICES, Arts Commission, and several grassroots music-based nonprofits came together at San Antonio Sound Garden to discuss the issues important to them, several key trends emerged.

Lack of Representation & Support

With over 60% of the population identifying as Hispanic or Latino in origin via the U.S. Census (although many self-identify as Chicano/a), the group believed that a commensurate level of representation is necessary at the civic level. "We should have at least half or more representation on the City's music commission," said one musician, who also expressed concern around civic departments branching off to do their own thing when they had pledged a voice for the Latino & Chicano community.

Members also called for more city support for alternative and safe spaces for niche communities that bring together people in the music industry. "There's a risk involved because we're not

seen as a fundamental foundation for the music scene," said the leader of a small nonprofit. "How do we compete for grant funding? Can we receive support without giving up control?"

How To Build Trust

Roberto Livar, community activist and bandleader for Bombasta, claims that "gatekeepers" in the music industry seem to be an inhibiting force at building trust within the Latino community. "There are people who interject themselves with their own self-interests," Livar said.

Livar believes that a way to avoid any monopolization of industry funds is to make sure that key collaborations are created within the nonprofit agencies that serve the music community: having San Antonio Sound Garden partner up with organizations such as the Guadalupe Cultural Arts Center, San Anto Cultural Arts, and the Esperanza Center. Putting a collective weight behind grant-funding opportunities and strategic initiatives will make these groups more competitive and allow them to more effectively reach their target populations.

It was the consensus of the group that in the past certain festivals and endeavors misappropriated funds leaving many Latino-serving organizations short-changed and underrepresented in cultural activities they should play a greater role in.

An educational leader in the group expressed their belief that such actions have contributed to a "historic trauma" that creates mistrust on behalf of their community. "People are hesitant to go to meetings and get involved when they are unsure of the ones in charge and what their predisposition is towards our community," that leader said. "However, we know things are happening and we need to get people to public meetings and back up a representative."



Recommendation #4

Invest in strategic partnerships between secondary education institutions and the greater music industry in order to form apprenticeships, mentorship programs, and workshops that build an educational pipeline.

The makeup of the feedback sessions included a number of teenagers and college-aged artists, as well as musician parents and industry leaders passionate about seeing more opportunities for music education in our city. There was a focus on providing accessible and affordable training and programs that align with music industry needs, as well as keeping our future music professionals at a high level of knowledge and experience. Agreement was found around several central themes:

- There must be an equal amount of music education opportunities for students from kindergarten through college.
- Nonprofits must partner with San Antonio's 16 ISDs to create more out of school time opportunities, but need more funding to do so.
- Music industry professionals can help create "shadowing" opportunities, workshops in schools, and engagement through City of San Antonio sponsored seminars and leadership events.

Strategy for Implementation

Through the inventories done within this study, key players in the music education industry have been identified, and must continue to be sought out. Representatives from each school district in the music industry can act as liaisons between the musicians and the school's administration to address where gaps are in the district's music education and how the nonprofit and civic sector can help support where desired.

Educational initiatives such as UTSA's Music Marketing Program, (who recently executed their second Music Biz Day, a gathering of music industry professionals and future leaders to share knowledge and resources), can act as an example of a pipeline that puts students in real-world internships in the music industry. Schools such as the San Antonio School for Creativity and Inquiry (SASIC) and youth-serving arts organizations such as Say Si can play a major role in determining how to create engagement with schools that complements both the curriculum of the institution and the mission of that particular music organization.

Future Forward

City and county leaders must continue to engage with emerging leaders in the music industry to create the same types of workshops and opportunities for music education that are available for leadership, business, and other private sector vocations. Involving the youth in these conversations is a key ingredient to success, as they are aware of the latest trends in the music industry, as well as what will keep them in San Antonio to pursue their musical careers.



Photo: Chrisotpher Burgueño

Music industry professionals can help create “shadowing” opportunities, workshops in schools, and engagement through City of San Antonio sponsored seminars and leadership events.



Photo: Micheal David Garcia

Case Study

Music Education & Nonprofits

"Music Education Should Be Accessible"

Diana Arevalo - Executive Director, Network for Young Artists



Almost twenty years since its founding, the Network for Young Artists (NYA), a 501(c)3 nonprofit serving students ages 4-20 in dance, voice, guitar, drums, and keyboard, is pushing through barriers to continue to serve the youth of San Antonio. What was born from "Pass Concerts" in the Edgewood Independent School District, (musical events featuring such greats as Selena and Emilio Navaira, The Barrio Boyz, etc) which rewarded academically struggling students for overcoming their challenges), has become a bastion of affordable music education for students of all ages and demographics.

At just \$25 per month, the team at NYA provides their enrollees with access to a music education opportunity, full rehearsal spaces, a few Grammy-nominated instructors, and a network of musical performance opportunities that find them learning the ropes of the music business. "Music education should be accessible for all students," Arevalo said.

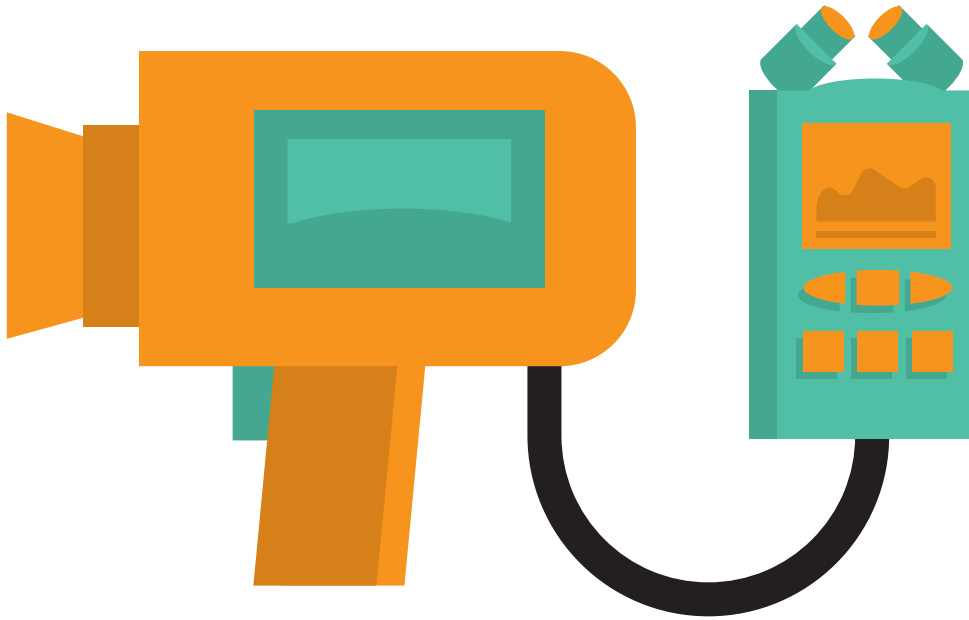
While there are success stories such as El Charro del Oro Sebastien de la Cruz, there are other successes of students who have participated in NYA and went on to fulfill their educational goals by becoming doctors lawyers. "The goal of NYA is not become a "star," it's to build self confidence, self-esteem, and learn the importance of working with others." If I provide an opportunity for a child to perform on stage, in front

of strangers, when that child gets off the stage they have already accomplished so much. The shyness starts to fade away, and suddenly performing in front of strangers translates into not being afraid to raise your hand in class or giving a speech in front of your peers at school."

According to Arevalo, while places like Turner Street Studios and School of Rock provide great programs and empower their students, NYA remains the only place that is affordable and accessible to all populations- and they do it all on a shoestring budget. "We are able to make the membership fees affordable by doing a series of fundraising from having staple events such as the Deco District Arts and Music Festival, an official Fiesta event, or partnering with Univision for the Mala Luna Music Festival, to working with various concert promoters. But, like all non-profits there are some challenges as well."

Arevalo finds challenges as well in terms of competition for grant funding, an issue for niche nonprofits that are competing against the likes of the Witte for the same dollars, especially when those boards are built to be fundraisers. "It's hard to convince the public to invest in nonprofits like ours unless they have an actual interest in music and arts and culture," Arevalo said. "How much [money from the City] goes to music education in a non-classical format? Many of my students cannot even afford their own instruments, so we face greater issues than the classical arts."

According to Arevalo, it's important to distinguish between music as a hobby and music as a profession, an issue that faces the parents of NYA students. "We have to educate parents to understand the difference between music education and music business," Arevalo said. "What we really need is a mini SXSW for music and art where professionals can meet and talk about these experiences. With the momentum granted through this study, we can continue to have these conversations and move things forward."



Recommendation #5

Establish a City-sponsored initiative to create multimedia content that represents the culture, current landscape, and history of San Antonio music.

Across the board, it was clear from the participants that San Antonio is not short on talent, passion, or culture, yet we are lacking in how we communicate that to the greater city and nation. In short, SA needs a brand and we have to utilize print, TV, radio, the web, and personal relationships to deliver that brand far and wide. To be a true “music city”, it was agreed, we have to have a powerful message that defines the richness and vibrancy that many outside of our music industry are unaware of. The participants wanted to ensure that several things happened in the process of creating this brand:

- Our brand must be able to attract talent locally as well as nationally and globally- the message should be universal.
- Strategic coordination has to occur between our visitor's bureau and the music industry to ensure our message is communicated properly outside of the city.
- We must be able to document SA's story within this marketing campaign in a concise and compelling manner.

Strategy for Implementation

After ideation efforts with music industry professionals, city tourism officials, and high-level marketing firms, a mass communication campaign will be required to distribute the content to all music industry professionals (which could happen via the music office or commission's database referenced in Recommendation #3). There must be focused coordination and proper feedback sessions that allow all the proper players a voice at the table in deciding on the future brand for our city.

Collaboration with other major music cities across the nation could also lend best practices to the process of how we define our city on musical grounds. How has Nashville captured its story? When did Austin become the "Live Music Capital of the World"? Connecting with music offices and cultural departments in these cities will also be critical as we ideate and establish a brand that accurately reflects what we wish to project as a music hub.

Future Forward

Major music initiatives and festivals can act as opportunities to gain feedback from the community on what they see as the defining aspects of our music city. We can begin building relationships with key media partners and marketing organizations to understand guidelines of how to appeal to the greater consumer base. All the while, we must pay greater attention to the veterans of the music industry and cultural torchbearers, in order to make sure that we speak not only to the latest trends, but the roots that made San Antonio what it is today as a musical crossroads.

There must be focused coordination and proper feedback sessions that allow all players a voice at the table in deciding on the future brand for our city.



For a full summary of the Mastering of a Music City recommendations according to Music Canada, including insight on building a Music Office and Music Advisory Board, please visit the Index at the end of this study.

Case Study

The SA Music Market *"You Can't Sell the Industry"*

Libby Day - Marketing Manager at Aztec Theater,
General Manager at SATX Music



As in any business, the music industry in San Antonio is reliant upon strategic cross-sector partnerships that leverage resources to most efficiently accomplish the task at end- which often comes in the form of sponsorship packages. According to Libby Day, formerly of Do210 and still General Manager for SATX Music, there are plenty of pools in our city to tap into in terms of sustaining the industry- we just have to know our product and the people buying it.

"If you're doing sponsorships right, there should be diversification already, matching a sponsor with the audience, genre, proper market," Day said. "As far as dollars spent in SA [by sponsors], there is definitely room for growth."

The music industry most often relies upon beverage sponsors, and many companies are primarily focused on higher-end markets, of which San Antonio is not. "These companies are focused on markets where there is history of consumer growth and disposable income," Day said. "San Antonio is still primarily a blue-collar working-class city- which means folks have to think long and hard about how they spend their dollars. Ultimately this means we have room for growth in consumer

spending/engagement, and there are a lot of companies that may not be using sponsorship in their own marketing efforts that could/should be."

If bigger sponsorship dollars are not coming through, what are the other options for musicians? "I've noticed that people often go to the City first for arts funding - my first thought is that this stifles our philanthropic community," Day said. "It's our job [musicians, community developers, marketers] to create the relationships with those folks and make sure they're aware of the need."

Day believes that there is plenty of private money available in SA and good people who'd be willing to support the arts and music, but they need to understand the value. "You can't just market the music industry - no one falls in with the music industry - they fall in love with certain bands, stories, people who engage on a personal level," Day said. "When it comes to building passion and philanthropy for music it's a lot of personal relationships and happy-hour conversations."

Through her new job at the Aztec, Day is already learning a great deal about the metrics and methodology of marketing, things she learned on a more experiential level with Do210 and SATX Music. "Each show has its own marketing plan," Day said. "Every single time we do anything it's not a shoe in. Every time is a test-you're never guaranteed success."

According to Day, there is a slow but steady improvement in ticket sales at the Aztec, something she believes translates to the market as a whole. "People are starting to spend more money on entertainment, and doing so earlier in advance," Day said. "We're seeing more tours coming to SA, maybe bypassing Austin or Houston."



WHAT'S NEXT?

This is only the first step in transforming the music industry in San Antonio, a context upon which to build the foundations of a dynamic, resourceful, and world-class music city. In the coming months and years, the observations and information gathered here must lead to deeper questions, pursuit of the answers with tenacity and purpose, and the creation of a unique collaboration of industry professionals, community agents, business enterprise, and civic leaders to reach our goals.

This study may open doors to brand-new strategies and initiatives like our city has never seen before- it may not. That all hinges on the action taken right now as the energy in the music industry is swelling. There is an opportunity to capitalize upon this momentum, to shift the paradigm of the “starving artist” and help music be valued not as a luxury or an optional supplement to our economy, but as a necessary facet of what makes our city great.

INDEX

Key Insights from Music Canada's *Making A Music City*

One of the key aspects of creating a thriving and sustainable music city is the presence of governmental leadership and community engagement with civic partners. The Texas Music Office acts as an information clearinghouse and promotion office for the Texas music industry, providing valuable resources and networks for members of the industry.

In order to successfully create the type of music economy that can truly capitalize upon its resources and establish an identity throughout our city, a central office for musicians and industry professionals is critical to individuals feeling invested in, advocated for, and included in the growth of the industry.

The following insights from "Mastering of a Music City" are quoted below to demonstrate the importance of a Music Office and Music Advisory Board in keeping transparency and clear communication between local government and the music industry.

The Role of a Music Office

Navigating City Hall

One of the basic functions of a music office is to be the main point of contact at City Hall for music businesses, including live venues. Many municipal government policies and regulations impact music, and hence many city departments have some level of authority over music businesses.

In some of the most successful Music Cities, experience has shown that a single office or point of contact at City Hall is the best way to ensure clear communication and direction between the

municipality and the music community.

Liaison with Music Commission or Advisory Board

In cities with a volunteer music advisory board, committee or commission, the music officer typically acts as the primary city staff support or liaison.

Lead a City's Music Strategy

Many successful Music Cities have a music strategy that has been endorsed by City Council. These are multi-year, complex plans that benefit from a single staff or department lead.

Internal Advocacy/Education about Music

A music officer who understands the issues and challenges facing the music community can also serve as an advocate or educator within City Hall.

Education/Networking Programs and Events

Music offices often host or support programs and events that focus on networking or education.

Grant or Loan Programs

Municipal financial support for the music community, where it exists, can be funneled through music offices. However, this function is distinct from the direct funding provided by Arts Councils to artists in a wide range of creative sectors.

Recommendations

1. *Establish a single point of contact—whether an individual or team—for the music industry within City Hall mandated to:*
 - a. *Help the music community navigate relevant city government departments and policies;*
 - b. *Lead the city's music strategy or lead the development of a strategy if one does not exist*
 - c. *Liaise with the volunteer music advisory board or commission*
 - d. *Help other city employees, agencies and elected officials understand the issues facing the music sector*
 - e. *Mediate between the music community and other community groups in order to resolve conflicts.*
2. *Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.*
3. *Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.*
4. *Engage the broader music community as well as political decision-makers to continuously promote the importance of the music officer/office to ensure sustainability and continued funding*

Creating A Music Advisory Board

Music Advisory Boards or Commissions provide an effective link between a city's music community and local or provincial governments as well as other city stakeholders. They are a forum to generate dialogue within the music community and open lines of communication to others in the private and public sectors. In keeping with their names, they are generally advisory in nature, rather than decision-making bodies. Some boards participate more heavily in the delivery of programs.

The overarching purpose of Music Advisory Boards is to enhance the environment in which music operates within a city. In some cities, this is defined in very broad terms.

Music advisory boards typically fulfill the following

functions:

Create consensus within the music community

Music advisory boards most often include music industry leaders representing all segments of the music industry. The boards create a forum for discussion of issues affecting the music community and a means by which to develop consensus and present a unified voice to government.

Provide advice on the regulatory and legislative environment

Music advisory boards act in an advisory capacity to government on legislation, regulations and programs. This often means that boards have the ability to draft resolutions

for a committee of council, full city council, or for the Mayor or Premier, depending on the level of government with which they interact.

Provide opportunities for the music community to liaise with key city stakeholders

Music advisory boards create opportunities for information exchange and advice between the music community and other key stakeholders such as chambers of commerce, tourism and convention agencies, neighborhood associations and government departments involved in economic development or arts and culture.

Membership

Most music advisory boards are composed primarily of leaders from the music industry, with key elected representatives and government staff from relevant departments or agencies. Music industry representatives at the municipal level tend to be appointed by the

mayor, city council or a combination of the two, but in some cases are appointed by the city music office or an equivalent body. Some boards contain a broader membership that incorporates community leaders whose roles have a connection to music – for instance, tourism agencies, hotel associations, Chambers of Commerce and music commissions or officials serving a higher level of government.

Jurisdiction

Some music advisory boards have been established at the provincial or state level, rather than the municipal level. These focus on the overarching needs of a state/provincial music community and the impacts of the legislation, regulations and programs overseen at the provincial/state level.

Recommendations

1. *Develop a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).*
2. *Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.*
3. *Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.*

Summary of *Mastering of a Music City* Recommendations

Government Policy: Music-Friendly Policies

1. Government departments responsible for liquor licensing, business licensing and other public safety measures, should work with the music community to identify compliance issues that restrict business growth in an effort to identify mutually-beneficial solutions.
2. Transportation planning and parking zones should take into account the needs of existing and developing music business clusters for efficient access. This should include short-term, reserved parking spots for active loading and unloading.
3. Land use planning should take into account culturally significant sites and zones to protect their ongoing viability, recognizing that these are often the assets that make neighborhoods attractive to additional investment. Developers should be required to take into account these existing sites as part of the planning process, coordinate their activities with all relevant city departments, and inform future purchasers about the presence of music venues and clusters.
4. Music communities should explore the viability of historical designation or cultural zone designation to bring awareness to the value of individual sites and zones.
5. The Agent of Change principle should be explored in areas where there is already a significant number of live music venues.
6. Conduct a needs assessment of your community of musicians, singers, songwriters and producers in order to identify policies that can help them succeed along with key challenges and obstacles to pursuing music as a vocation.
7. Inventory the music professionals and businesses available to support artists in their careers including managers, agents and labels.
8. Based on these assessments, identify the priority needs and opportunities. These may require financial support, infrastructure spending, training or programs in other areas.
9. Identify key public and private sector players who can help deliver programs to meet the identified needs and priorities.

Music Office or Officer

10. Establish a single point of contact – whether an individual or team – for the music industry within City Hall mandated to:
 - a. Help the music community navigate relevant city government departments and policies;
 - b. Lead the city's music strategy or lead the development of a strategy if one does not exist;
 - c. Liaise with the volunteer music advisory board or commission;
 - d. Help other city employees, agencies and elected officials understand the issues facing the music sector; and
 - e. Mediate between the music community and other community groups in order to resolve conflicts.
11. Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.
12. Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.
13. Engage the broader music community to continuously promote the importance of the music officer/office to ensure sustainability and continued funding.

Music Advisory Boards

14. Establish a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).
15. Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.
16. Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.

Engaging the Broader Music Community

17. Create opportunities for networking, mentoring and education in order to build relationships and trust within the music community.

18. Seek consensus on common issues that will deliver broad benefits across the sector.

19. Address issues of conflict and competition behind closed doors in order to present a united front; where consensus cannot be achieved on an issue, do not bring it forward.

20. When crisis occurs, use the situation to build support for sustainable music advocacy organizations and sustained engagement.

21. Develop strong relationships with elected officials at all levels of government, and of all political stripes to help overcome bureaucratic inertia.

Spaces and Places

22. Conduct an inventory of existing rehearsal spaces, recording studios and live music venues, noting their capacity, primary uses, licensing conditions, cost to access, quality of sound and lighting, and accessibility to transportation and parking.

23. Based on the inventory, identify gaps in the venue ladder and other music spaces, and identify potential public and private partners, as well as underutilized buildings that may be repurposed to fill the gaps identified.

24. Clusters, hubs and accelerators in their many forms can make efficient use of resources and expertise, while establishing an environment where artists are nurtured and respected. Investigate the opportunity for projects in your community.

Audience Development

25. Live music strategies should include specific goals to expand access to all ages events and facilities.

26. Joint marketing of live music events should be coordinated by music associations, cities or tourism agencies, to ensure information on the full breadth of available options is available music fans.

27. Transportation planning must take into account the night economy in order facilitate access both to and from

live music events.

28. Artist mobility should be enhanced in order to expose remote or segregated communities to a variety of music for its social and cultural benefits.

Music Tourism

29. Together, the music community, city and tourism officials should identify the available music tourism assets including music heritage sites, live venues and festivals, and initiate policies and programs that support their continued operation and growth.

30. A Music City brand should be developed with the involvement of tourism experts in conjunction with the local music community, in order to ensure its authenticity.

31. Music tourism should be defined as a distinct category in tourism impact studies, in order to better identify music-specific opportunities and challenges.



SA Music Industry Databases

Venues, Educational Programs, and Recording Studios

The following does not represent all of the establishments under their respective categories, but is intended to give individuals and organizations an easily accessible resource to a greater cross-section of these institutions.

San Antonio Music Venues by Capacity

Venue	Capacity	Address	District
Candlelight Coffeehouse, Wine Bar & Café	50	3011 North St. Mary's, San Antonio, TX 78212-3534	1
Carmens De La Calle	50	320 N Flores	1
Sabinas Coffee House	50	2303 W Commerce	1
Bettys Battalion	50	1524 E Grayson	2
Tuckers	50	1338 E Houston	2
Tuesdays Musical Club	50	3755 N St. Mary's	2
Silo	50	434 North Loop 1604 W	9
Barriba Cantina	100	11 W Crockett St #214	1
Bohanans Bar	100	219 E Houston	1
Bottom Bracket Social Club	100	1603 N Colorado	1
Faust Tavern	100	517 E Woodlawn	1
Havana Ultra Lounge	100	212 College St	1
Jandros	100	2623 N St. Mary's	1
Southtown 101	100	101 Pereida St	1
Tacoland Riverwalk	100	123 Loysoya St	1
The Brooklynite	100	516 BROOKLYN AVE	1
The Squeezebox	100	2806 N St. Mary's	1
The Wax Club	100	2211 San Pedro	1
Viva Tacoland	100	103 W. Grayson	1
Web House	100	320 Blanco	1
Bar23	100	4429 Walzem	2
Midtown	100	2014 E Houston St	2
Soho Wine & Martini Bar	100	214 W Crockett	2
210 Southtown	100	310 Riverside Dr	3
Brooks Pub	100	3354 Lasses, San Antonio, TX 78223	3
Franky Diablos	100	1301 Roosevelt Ave, San Antonio, TX 78210	3
Bluestar Brewing Co.	100	1414 South Alamo Street ste.105	5
Halcyon	100	1414 S Alamo	5
El Volcan at Soundcheck	100	6844 Ingram Rd,	6
Imagine Books & Records	100	8373 Culebra Ste 201B	6

BurnHouse	100	4553 NW 1604	8
Charlie Brown's Neighborhood Bar & Grill	100	11888 STARCREST DR	9
Chicago Bar	100	19141 STONE OAK PKWY	9
Oasis Lounge	100	502 Embassy Oaks	9
Boozehounds	100	8531 Perrin Bietal	10
Alchemy Kombucha & Culture	150	1123 N Flores	1
Azuca Cocina Latina Nuevo	150	713 S Alamo	1
Bar Rojo at the Grand Hyatt Hotel	150	600 East Market Street	1
Jazz Texas	150	312 Pearl Pkwy Bldg 6	1
Korova	150	107 E. Martin St	1
Ventura	150	1011 Ave B	1
Alibi Sports & Spirits	150	1141 E Commerce	2
Club Oasis	150	8303 S Presa St	3
Bar 1919	150	1420 S Alamo	5
Retox Bar	150	1031 Patricia	9
Country Nights	150	12130 O'Connor	10
Bonds 007 Rock Bar	200	450 Soledad St	1
Club Sirius	200	228 LOSOYA ST	1
County Line Bar-B-Q Riverwalk #104	200	111 W Crockett St #104, San Antonio, TX 78205	1
Hi-Tones	200	621 E Dewey Pl	1
La Botanica	200	2911 N St. Mary's	1
Limelight	200	2718 N St Mary's St	1
Luna	200	6740 San Pedro Ave	1
Monte Vista Stings	200	519 W Summit Ave,	1
Sanchos Cantina & Cocina	200	628 Jackson	1
The Amp Room	200	2407 N St. Mary's	1
The Bang Bang Bar	200	119 El Mio dr.	1
The Basement	200	244 Losoya St	1
The Mix	200	2423 N St. Mary's	1
Dirty Nellys Irish Pub	200	200 S alamo	1
Elements Ultra Lounge	200	1581 Bandera Rd	7
Dixie's County Bar	200	502 Embassy Oaks	9
SA Country	200	10127 Coachlight	9
Epic Bar	200	1375 Austin Highway	10
Rebar	200	8134 Broadway	10
Rod Dogs Saloon	200	2617 Wagon Wheel	10
Zombies Bar Music Venue	200	4202 Thousand Oaks	10
Broadway 5050 - Alamo Heights	250	5050 Broadway, San Antonio, TX 78209	2
Tonic Bar	250	5500 Babcock Road, No. 117, San Antonio, TX 78240	7
502 Bar	250	502 Embassy Oaks	9
Arjon's	250	8736 Tesoro Drive	10

Alamo Ice House	300	802 N Alamo St	1
AV Expressions	300	125 Guadalupe St	1
Cadillac Bar	300	212 South Flores Street, San Antonio, TX 78204	1
Heat	300	1500 N Main	1
Mad Dogs British Pub and River walk	300	123 Losoya Ste 19	1
Moses Roses Hideout	300	516 E Houston St,	1
The Brass Monkey	300	2702 N St. Mary's	1
The Cove	300	606 W CYPRESS	1
Groove Lounge	300	501 E Crockett	2
Reggae Bar	300	2016 Austin Highway, San Antonio, TX 78218-2503	2
Club Movida	300	306 E MITCHELL ST	3
Brick at Blue Star	300	108 Blue Star	5
Cooter Brown Saloon	300	11881 Bandera Rd, Helotes, TX 78023	7
Ice Lounge	300	5545 ME Loop 410 Suite 116	7
Jack's Patio Bar	300	3030 Thousand Oaks	10
Arneson River Theatre	500	418 Villita St	1
Howl At The Moon San Antonio	500	111 W Crockett St	1
Kremlinn Ultra Lounge	500	212 College St	1
Sam's Burger Joint	500	330 E Grayson	1
Burleson Yard Beer Garden	500	430 Austin	2
151 Saloon	500	10619 Westover Hills	6
County Line Bar-B-Q I10	500	10101 W IH 10	8
Click's Billiards - San Antonio	500	903 BITTERS RD	9
Fitzgerald's	600	437 Mccarty Rd #101	1
Blanco Ballroom	750	3719 Blanco	1
Carver Community Cultural Center Jo Long Theatre	750	215 N HACKBERRY ST	2
The Industry	750	8021 Pinebrook Dr	7
Aztec Theatre	1,000	104 N St Mary's St	1
Beethoven Maennerchor Halle und Garten	1000	422 Pereida St	1
Bonham Exchange	1,000	411 Bonham	1
Majestic Theatre	1000	224 E Houston	1
Paper Tiger	1000	2410 N St. Mary's	1
Alamo City Music Hall and Club (Backstage)	1000	1305 E Houston St	2
The Rockbox	1000	1223 E Houston	2
Live Ultra Lounge	1000	19314 Hwy281	9
Club Rio	1500	13307 San Pedro Ave	9
Tobin Center	2000	100 Auditorium Circle	1
Lila Cockrell Theatre	2,500	200 East Market, San Antonio, TX 78205	1
Thirsty Horse Saloon	2500	2335 NW Military	9
Alamo Brewery	3000	415 Burnet St	2

Cowboys Dance Hall	5,000	3030 NE Interstate 410 Loop, San Antonio, TX 78218	2
Freeman Coliseum	15,000	3477 Northeast Pkwy	2
AT&T Center	15,000	1 AT&T Center Pkwy	2
Alamodome	70,000	100 Montana	2

San Antonio Recording Studios by Capacity

Recording Studios	Capacity	Type	Address	District
A/V	Full Service, Individuals, Bands	Professional	125 Guadalupe 78204	
Amen Music	Full Service, individuals, bands	Professional	P.O. Box 241225	
Ami Discos Records	Full service,	Professional	4942 Irma Ave	
Audio Engineering Institute	Full Service, individuals, bands	Professional	2477 North Loop 1604 E, Studio CBC, San Antonio, TX 78232	9
Bad Vibes Studio	Full Service, Individuals, Bands	Professional		
BAM Recording Studios	Full Service, individuals, bands	Professional	28152 US Highway 281 N, Ste H	
Bauhaus Media Group	Full Service, individuals, bands	Professional	3015 San Pedro Ave, San Antonio, TX 78212	
BGM Studios	Full Service, individuals, bands	Professional	2411 Northeast Loop 410 Access Road, San Antonio, TX 78217	
Bulverde Academy of Music	Full Service, individuals, bands	Professional	28152 US Highway 281 N	
Chris Liek studio	Full Service, individuals, bands	Professional	10886 Hillpoint, San Antonio, TX 78217	10
CKSF Records	Full Service, individuals, bands	Professional	9200 Broadway	
Constituents Creatives				
Dead room recording studio	Full Service, individuals, bands	Professional	24200 Waterwell Oaks	10
Echo Base Studios			2338 Field Wood	
Edit Point Recording Studio	Full Service, individuals, bands	Professional	1003 Donaldson Ave	7
Good for the Soul Music	Full Service, Individuals, Bands	professional	16607 Blanco Road #1108	
Harter Music	Full Service, individuals, bands	Professional	3477 Northeast Parkway, San Antonio TX, 78218	2
Heartbreak Records				
Heartfire Media	Full Service marketing/media firm	Professional	816 Camaron Street, Ste. 240	7

Hollywood Studios	Custom Service, individuals	Home	Private Residence - 32 Donore Square	8
IIIG recording studio	Custom Service, individuals	Professional	14415 Old Blanco Rd #104, San Antonio, TX 78216	9
Lost in sound				
Lupo Studio Productions				
Mandala Music Production	Full service, individuals, bands	Professional	1325 W Magnolia Ave	
Matador recording studios	Custom Service, individuals	Home	806 S Hackberry	2
Music Lab Recording Studio.				
Nexus Recording Studio	Full Service, individuals, bands	Professional	8535 Fairhaven St	8
Polar World Recording Studio	Full Service, individuals, bands	Professional	13777 Judson Rd	10
Recording Connection Audio Institute	Full Service, individuals, bands	Professional	21750 Hardy Oak Blvd #102, San Antonio, TX 78258	9
Reel Tracks Studio	Full Service, Individuals, Bands	Professional	2035 Pleasanton Rd	
Salmon Peak Recording Studio	Full Service, individuals, bands	Professional	25802 Hazy Hollow Dr, San Antonio, TX 78255	Outside dist 8
San Antonio College Music Studios	Individuals, bands	professional	1819 N Main Ave, San Antonio, TX 78212	
Scorpio Productions	Full Service, individuals, bands	Home	8311 Wild Wind Park, Garden Ridge TX 78266	
Slackmonster Studios	Full Service, individuals, bands	Professional	6506 Bandera Rd Leon Valley TX 78238	7
Studio 1601				
Studio 37				
Studio M	Full Service, individuals, bands	Professional	10923 West Ave, San Antonio, TX 78213	1
The Living Room, Inc.	Full Service, individuals, bands	Professional	8535 Fairhaven St, San Antonio, TX 78249	8
Velasquez Music	Full Service, individuals, bands	Professional	4044 N PanAm Expy, San Antonio, TX 78219	2
Wavemaker Recording Studios	Full Service, individuals, bands	Professional	211 Sunnycrest Dr, San Antonio, TX 78228	7
Windmill Valley Recording Studio				
Zaz recording	Full Service, individuals, bands	professional	6711 W Commerce St, San Antonio, TX 78227	6

Education Programs in San Antonio

Program	Age	#Served	Public/ Private	Address	District
Alamo Heights High School	15-18	1,551	Public	6900 Broadway, San Antonio, TX 78209	1
Alamo Heights ISD	5-18	4,808	Public	7101 Broadway, San Antonio, Tx 78209	1
Alamo Rock School (Based out of Alamo Music Center)	7+	Varies	Private	425 N Main Ave #7, San Antonio, TX 78205	1
Anthem School of Music	7+	450 students/ weekly	Private	23127 W I10 #207, San Antonio, TX 78256	8
Arpeggio Music Academy	7+	100 students/mo	Private	5135 N Loop 1604 #101	8
Brain Science Productions LLC dba BSharpTricks.com	7+	Varies	Public	Online location	0
Bulverde Academy of Music	All	150+	Private	28152 US Highway 281 N	0
Dance & Spirit Groups Coordinator	14-18	Varies	Public	1700 Tampico St., Rm 209, San Antonio, TX 78207	5
East Central High School	15-18	2810	Public	7173 FM1628, San Antonio, TX 78263	0
East Central ISD	5-18	10,203 students	Public	6634 New Sulphur Springs Rd San Antonio, TX 78263	0
Edgewood Fine Arts Academy	15-18	Target capacity 200	Public	607 SW 34th St., San Antonio, TX 78237	7
Edgewood High School	15-18	Edgewood Independent School District does not publicly archive enrollment data.	Public	402 Lance St, San Antonio, TX 78237	7
Edgewood ISD	5-18	16,297	Public	5358 W Commerce Street, San Antonio, TX 78237	7
Guitar Center	7+	200+ Varies w/ nbr of instructors	Public	7325 San Pedro #105, San Antonio, TX 78216	1
Highlands HS	14-18	Varies	Public	San Antonio, Texas 78207	2
Incarnate Word	17+	80	Private	4301 Broadway, San Antonio, TX 78209-6397	2
Instrumental Coordinator	14-18	Varies	Public	1700 Tampico St., Rm 209, San Antonio, TX 78207	5
International Academy of Music and the Arts	All	Varies	Private	1016 N Flores	1
Jensen's Yamaha Music School	All	Varies	Private	8055 West Ave #112, San Antonio, TX 78213	1
Judson High School	14-18	3163	Public	9142 Farm to Market Road 78, Converse, TX 78109	0
Judson Isd	5-18	23,000 +	Public	8012 Shin Oak Drive Live Oak, Texas 78233	0

Lackland ISD	5-18	657 Elementary + 304 Jr/Sr HS = 961	Public	2460 Kenly Avenue, Building 8265, Lackland Air Force Base, San Antonio, TX 78236	0
Language Borderland, LLC	7+	Varies	Private	13453 Blanco Rd, San Antonio, TX 78216	9
Lanier HS	14-18	Varies	Public	1514 W. Cesar E. Chavez Blvd., SA TX 78207, Phone: (210) 978-7910	1
LJE Music Lessons	7+	Varies	Private	9815 Culebra #106	6
Music and Arts	7+	Varies	Private	7325 San Pedro #106, San Anto- nio, TX 78216-6225	1
Music Masters	3-14	Varies	Private	15714 Huebner, SAT 78248	9
Musical Arts Center of SA	7+	Varies	Private	12732 Cimarron Path #100, SATX 78249 & 2106 E Sonterra #211, SATX 78259	8
Network for Young Artists	4-20	100+	Public	1800 Fredericksburg Rd, Ste. 122 San Antonio, TX 78201	1
North Central Piano Academy of San Antonio	7+	Varies	Private	15811 Rothbury Ln, San Antonio, TX 78232	9
Northeast Lakeview	17+	4,758	Public	1201 Kitty Hawk Rd. Universal City, Texas 78148	0
Northwest Vista	17+	15,526	Public	3535 N. Ellison Drive, San Anto- nio, Texas 78251	6
Our Lady of the Lake	17+	30	Private	411 Southwest 24th Street, San Antonio, TX 78207-4689	5
Palo Alto	17+	8,925	Public	1400 West Villaret Blvd., San An- tonio, TX 78224	4
Piano Stone Oak, Piano Lessons in Stone Oak	7+	Varies	Private	24345 Wilderness Oak #2410, San Antonio, TX 78258	9
PianoForte Music Studio	7+	100	Private	4622 Manitou, San Antonio, TX 78228	7
Pop Band Academy of Music	7+	Varies	Private	8318 Jones Maltsberger Rd #103, San Antonio, TX 78216	1
Recording Connection		Varies	Private	21750 Hardy Oak #102, San Anto- nio, TX 78258	9
SAC	17+	17,457	Public	1300 San Pedro Avenue, San An- tonio, TX 78212-4299	1
Sam Ash	7+	Varies	Public	25 NE 410, San Antonio, TX 78216	1
Sam Houston HS	14-18	Varies	Public	4635 E Houston St, San Antonio, TX 78220	2
Sam Houston HS Magnet Pro- gram	14-18	Varies	Public	4635 E Houston St, San Antonio, TX 78220	2
San Antonio ISD - Fine Arts	14-18	Varies	Public	1700 Tampico St., Rm 209, San Antonio, TX 78207	5
San Antonio Music Academy	7+	Varies	Private	9911 W LP 1604 N Su. 103	7
San Antonio Strings	7+	Varies	Private	San Antonio, Texas 78212	1
School of Rock	7+	Varies	Private	109 Gallery Circle #101	9

Secondary Choir & Elem Music Coordinator	14-18	Varies	Public	1700 Tampico St., Rm 209, San Antonio, TX 78207	5
South San Antonio High School	14-18	2421	Public	7535 Barlite Blvd, San Antonio, TX 78224	4
South San Antonio ISD	5-18	9,960	Public	5622 Ray Ellison Blvd, San Antonio, TX 78242	6
St. Mary's Music	18+	Varies	Private	1 Camina Santa Maria, San Antonio, Texas 78228	7
St. Mary's university	17+	30	Private	1 Camino Santa Maria Box 62, San Antonio, TX 78228-8562	7
St. Phillip's	17+	11,655	Public	1801 Martin Luther King Drive, WFAC 207-A, San Antonio, TX 78203-2098	1
Steve Nichols Piano Lessons	7+	Varies	Private	12351 Mapletree St · San Antonio, TX 78249	8
Studio (Assoc of Anthem School of Music)	4 +	Varies	Private	21803 Encino Commons Ste 106, San Antonio, TX 78259	9
Take Note Band	14-18	10-13	Public	9023 Bowen, San Antonio, TX 782	6
Taylor Robinson Music & Voice Lessons	All	Varies	Private	358 Quentin Dr, San Antonio, TX 78201	7
The Brain Garden Piano Studio	5+	Varies	Private	2719 Woodline St, San Antonio, TX 78251	6
The Children's Chorus of San Antonio	5-22	250	Private	106 Auditorium Circle #115, San Antonio, TX 78205	1
The International Academy of Music and the Arts: The IAMA Sound Lab	All	200-250	Private	1016 N Flores St, San Antonio, TX 78212	1
Theatre/Visual Arts Coordinator	14-18	Varies	Public	1700 Tampico St., Rm 209, San Antonio, TX 78207	5
Treehouse Music Together	0-5	12 students per class	Private	19239 Stone Oak Pkwy, San Antonio, TX 78258	9
Trinity Music	17+	2,506	Private	Music Department, One Trinity Place, San Antonio, TX 78212-7200	1
UTSA Music Dept	17+	28,787	Public	Department of Music, One UTSA Circle, San Antonio, TX 78249-0645	8
Veterans Memorial High School	14-18	605	Public	7618 E Evans Rd, San Antonio, TX 78266	0
Virginia Allred Stacey Jr-Sr High School	13-18	304	Public	2460 Kenly Avenue, Building 8265, Lackland Air Force Base, San Antonio, TX 78236	0
Wagner High School	14-18	2093	Public	3000 N Foster Rd, San Antonio, TX 78244	0

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