

**ARTS**WA

CREATIVE VITALITY  
**IN WASHINGTON STATE**  
DECEMBER 2013



[arts.wa.gov](http://arts.wa.gov)

# JOBS THE BIG WIN

Since 2005 we've partnered with the Western State Arts Federation (WESTAF) to track reliable, annual data on Washington's creative economy. We accomplish this with a tool called the Creative Vitality Index, or CVI.

The most recent CVI data paints a **compelling picture of job growth in our state**, showing that the creative industry has been resilient in tough economic times.

**117,816 CREATIVE JOBS** IN 2011 EXCEEDED THE NATIONAL BASELINE BY 13 PERCENT.

**7,530 NEW CREATIVE JOBS** WERE ADDED TO THE ECONOMY IN 2011, FOR A GROWTH RATE OF NEARLY 7 PERCENT.

**Other signs of strength** in the arts-related sectors in 2011 included these statewide statistics:

REVENUES FROM ARTS-RELATED NONPROFIT ORGANIZATIONS AND FOR-PROFIT BUSINESSES TOTALED **\$1.84 BILLION**.

NONPROFIT ARTS ORGANIZATION REVENUES EXCEEDED THE NATIONAL BASELINE BY **15 PERCENT**.

BOOK AND RECORD SALES EXCEEDED THE NATIONAL BASELINE BY **13 PERCENT**.

MUSIC STORE SALES EXCEEDED THE NATIONAL BASELINE BY **9 PERCENT**.

The CVI results also show potential areas for growth in the arts sector. Although art galleries and individual artists added more than \$622 million to the state's economy in 2011, Washington falls 25 percent below the national baseline in this category. Revenue from our performing arts organizations also trailed the national baseline – by 11 percent. Although we generated more arts-based revenue than did Oregon, we lagged behind on a per capita basis. Overall, creative vitality in Washington exceeded the national baseline in 2011 by 2 percent. This represents a slight dip from 2010, but an upward trend, nonetheless, since 2005.

We have much to celebrate in this report. The CVI provides the key data we need to help guide our cultural efforts, policies, and investments to forge an even more prosperous future together.

KRIS TUCKER  
Executive Director

**ARTS**WA

*This report is based on the latest data provided by WESTAF.*

*Watch [www.arts.wa.gov](http://www.arts.wa.gov) for the 2012 data, due out in fall 2014.*

*The Creative Vitality™ Index (CVI™) was designed and developed by the Western States Arts Federation (WESTAF), a regional non-profit arts service and research organization and experienced developer of technology solutions for the arts.*

## CONTENTS

WHAT IS THE CREATIVE VITALITY INDEX?

CREATIVE JOBS GROWTH & DATA

REAL STORIES FROM WASHINGTON STATE

JOBS

FILM & ANIMATION

NONPROFITS

MUSIC & LITERATURE

ARTS TOURISM

THE BEST IS YET TO COME



WASHINGTON'S  
CREATIVE VITALITY INDEX

1.02

2% ABOVE NATIONAL BASELINE OF 1.0

WHAT IS THE  
**CREATIVE VITALITY INDEX™**

# WHAT IS THE CREATIVE VITALITY INDEX?

The Creative Vitality Index (CVI) combines arts revenue and arts employment data from across the U.S into one simplified indicator. Called a CVI value, this indicator shows how an area's creative economy stacks up against a baseline of 1.00. The baseline can represent the national average, or an average at the state, regional, or local level. If a state or an area scores higher than 1.00, this indicates a stronger arts economy than the area with which it is being compared.

As with other indices – such as the Dow Jones – minor fluctuations up or down are not as important as long-term trends. In 2011 Washington's CVI value was 1.02, meaning that our arts economy is 2 percent better than the national baseline.

**The CVI is not an economic impact study.** It does not try to quantify the financial ripple effect of art institutions in their communities (such as how much someone spends at restaurants and hotels while in town for the opera). Instead, the CVI focuses on quantifiable and objective data collected from the three following data streams:

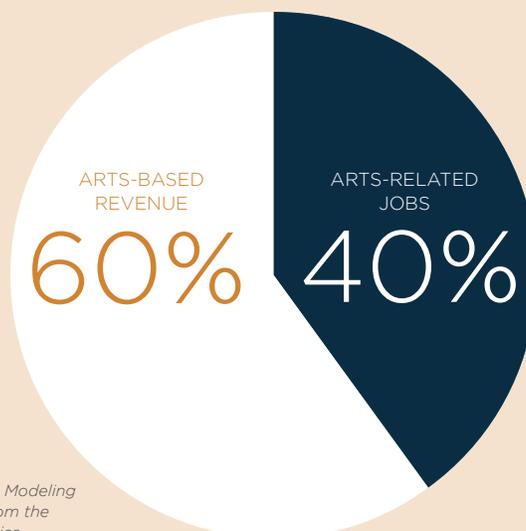
- Revenue from nonprofit arts organizations
- Earnings from for-profit arts-related businesses
- Employment numbers for arts-related jobs

The CVI measures arts participation and arts jobs. It has two big components. One measures seven indicators of community participation in the arts. The other measures arts-related employment. As you can see in the graphic below, these components are weighted 60/40, with more weight going to the seven participation indicators.

## WHAT COMPRISES THE CVI

### Seven measures indicate community participation in the arts

- Per capita art gallery & individual arts sales
- Per capita performing arts revenue
- Income from other nonprofit "arts active" organizations
- Per capita musical instrument & supply store sales
- Per capita photography store sales
- Per capita book & record store sales
- Income from nonprofit arts organizations

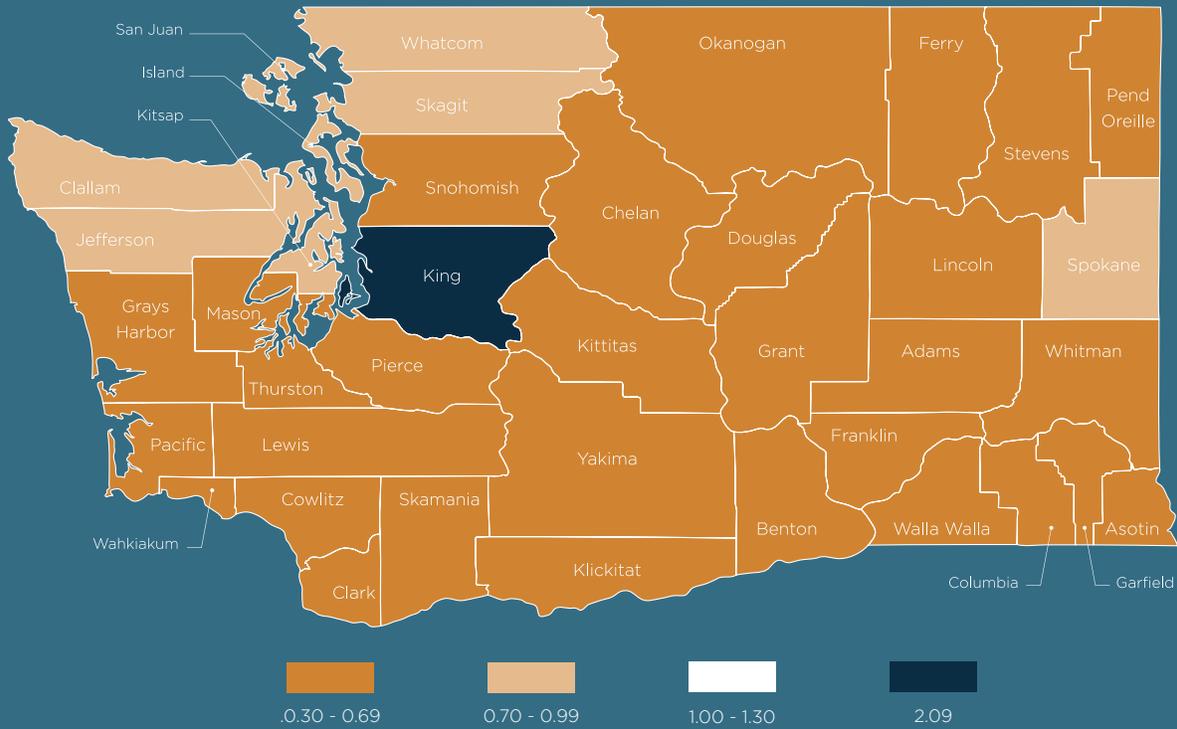


### Arts-related employment tracked in more than 36 professional categories

Actors; Advertising and Promotions Managers; Agents and Business Managers of Artists, Performers, and Athletes; Architects; Art Directors; Audio and Video Equipment Technicians; Broadcast Technicians; Camera Operators: Television, Video, and Motion Picture; Choreographers; Commercial and Industrial Designers; Dancers; Editors; Fashion Designers; Film and Video Editors; Fine Artists including Painters; Sculptors, etc.

*Industry and employment data provided by Economic Modeling Specialists, International. The nonprofit data comes from the Urban Institute's National Center for Charitable Statistics.*

# CREATIVE VITALITY IN WASHINGTON STATE



## THE BIG PICTURE



WDA REGION**	2010 INDEX	2011 INDEX
WDA 01 Olympic Consortium (Clallam, Jefferson, Kitsap)	0.69	0.79
WDA 02 Pacific Mountain (Grays Harbor, Mason, Pacific, Thurston, Lewis)	0.58	0.59
WDA 03 Northwest Washington (Whatcom, Skagit, San Juan, Island)	0.72	0.76
WDA 04 Snohomish County (Snohomish)	0.56	0.53
WDA 05 Seattle-King County (King)	2.14	2.09
WDA 06 Pierce County (Pierce)	0.66	0.63
WDA 07 Southwest Washington (Cowlitz, Clark, Skamania, Wahkiakum)	0.54	0.50
WDA 08 North Central Washington (Okanogan, Chelan, Douglas, Grant, Adams)	0.38	0.40
WDA 09 Tri-County (Kittitas, Yakima, Klickitat)	0.42	0.42
WDA 10 Eastern Washington Partnership (Pend Oreille, Ferry, Stevens, Lincoln, Whitman, Walla Walla, Garfield, Columbia, Asotin)	0.51	0.47
WDA 11 Benton-Franklin (Benton, Franklin)	0.46	0.48
WDA 12 Spokane (Spokane)	0.74	0.76
<b>WASHINGTON STATE INDEX</b>	<b>1.04</b>	<b>1.02</b>

\*\*A WDA is a Workforce Development Area. More densely populated counties tend to be their own WDA, whereas more lightly populated counties from a cohesive region tend to be grouped together into one WDA.

# CREATIVE ECONOMY

## CVI SHOWS CREATIVES ARE KEY TO THE ECONOMIES OF WHATCOM AND THURSTON COUNTIES

*“Artists, because of their typically lower incomes, usually need to seek out less expensive, developing neighborhoods where they can afford the rent. But because of their creativity they are able to fix up these areas, eventually attracting hip boutiques, galleries, and restaurants.” - Maya Roney, Business Week Magazine<sup>1</sup>*

To test the value of the CVI for local policy makers, ArtsWA in 2010 began offering small grants to fund community projects that used the CVI data. Grantee partnerships in Whatcom and Thurston counties discovered a valuable tool in their CVI data.

As Allied Arts of Whatcom County began tracking their county’s CVI values, the significance of the arts economy to the county’s overall economy emerged in a new way. Looking back to 2006, Allied Arts saw that Whatcom County had gained creative jobs every year except 2010. After losing jobs in 2010, the creative job economy surged back in 2011 to a total of 3,000 creative jobs. This growth, taking place in the middle of a recession, shows how artists can contribute to a regional economic rebound.

*Business Week* writer Maya Roney, who focuses on real estate economics and research, found that an influx of creative workers into a community is often an early indicator of regional economic growth. Why? According to Roney, <sup>1</sup> “Artists, because of their typically lower incomes, usually need to seek out less expensive, developing neighborhoods where they can afford the rent. But because of their creativity they are able to fix up these areas, eventually attracting hip boutiques, galleries, and restaurants.”

What attracts artists to a region? Among the most important factors: affordable cost of living and a lively, pre-existing arts scene.

Whatcom County’s largest city, Bellingham, isn’t just hoping for artists to make their community more vibrant — they’re employing them to do so through investment of public and private money in public artwork. Early indicators show a payoff in a greater perceived quality of life for residents, making Bellingham a more attractive city in which to live and work.

In a 2011 survey of 1,632 Bellingham residents, Allied Arts found that 81 percent agreed with the statement: “Public artwork adds beauty and interest to downtown [Bellingham].” <sup>2</sup> Public investment in Bellingham’s Arts District hasn’t gone unnoticed. Not only is the Arts District a favorite place for locals to mix and mingle, it gained international recognition in 2011 when Planetizen.com, a news website for urban planning, ranked it eighth in their *Top 100 Public Spaces in the US and Canada* list. <sup>3</sup> No wonder artists are excited to call Bellingham home.

When the Economic Development Council of Thurston County started participating in the CVI, they didn’t know how significant the arts were to their economy, but they do now. Since the economic downturn in 2008, the creative sector has been the one area of Thurston County’s economy with positive growth every year. Seeing how vital the creative sector is to their overall economy, the Council now includes CVI data alongside the other economic tracking and forecasting tools in their annual economic reports.

<sup>1</sup> Roney, M. *Bohemian Today, High-Rent Tomorrow*, Feb. 26, 2007. BusinessWeek.com, accessed Nov. 18, 2013.

<sup>2</sup> Allied Arts of Whatcom County. 2013. Art Means Business.

<sup>3</sup> Halbur T, Haugh G, Kent E, Goodyear S. “The Top 100 Public Spaces in the U.S. and Canada,” Oct. 27, 2011. Planetizen.com, accessed Nov. 18, 2013.



## CREATIVE JOB GROWTH BY WDA: 2011 COMPARED TO 2010

### Creative jobs grew despite sluggish economy

The pace of growth in our creative sector jobs in 2011 was an encouraging 6.83 percent. We might have expected growth in dense urban centers like Seattle and Spokane — and there was, at 7.87 percent and 10.05 percent, respectively — but the story doesn't end there.

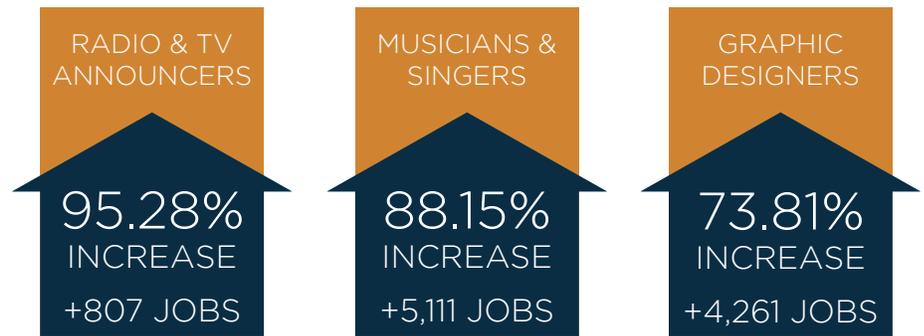
- Growth in arts-related jobs took place across the state.
- All but one region, or Workforce Development Area (WDA), gained creative jobs between 2010 and 2011.
- Some Washington counties showed steady gains in creative jobs throughout the worst of the economic downturn.

WDA REGION**	GROWTH RATE	JOBS ADDED	TOTAL JOBS
WDA 01 Olympic Consortium (Clallum, Jefferson, Kitsap)	3.16%	162	5,285
WDA 02 Pacific Mountain (Grays Harbor, Mason, Pacific, Thruston, Lewis)	4.24%	236	5,798
WDA 03 Northwest Washington (Whatcom, Skagit, San Juan, Island)	7.18%	421	6,284
WDA 04 Snohomish County (Snohomish)	6.67%	552	8,825
WDA 05 Seattle-King County (King)	7.87%	4,490	61,519
WDA 06 Pierce County (Pierce)	7.74%	565	7,861
WDA 07 Southwest Washington (Cowlitz, Clark, Skamania, Wahkiakum)	5.42%	299	5,812
WDA 08 North Central Washington (Okanogan, Chelan, Douglas, Grant, Adams)	6.91%	153	2,367
WDA 09 Tri-County (Kittitas, Yakima, Klickitat)	0.47%	12	2,554
WDA 10 Eastern Washington Partnership (Pend Oreille, Ferry, Stevens, Lincoln, Whitman, Walla Walla, Garfield, Columbia, Asotin)	2.25%	51	2,316
WDA 11 Benton-Franklin (Benton, Franklin)	-1.85%	-43	2,277
WDA 12 Spokane (Spokane)	10.05%	632	6,918

\*\*A WDA is a Workforce Development Area. More densely populated counties tend to be their own WDA, whereas more lightly populated counties from a cohesive region tend to be grouped together into one WDA.

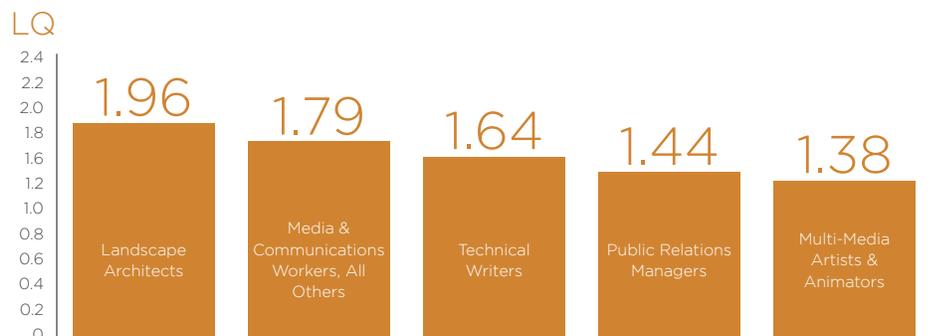
## FASTEST GROWING CREATIVE JOBS

CVI data can't tell us why job growth spikes occur, but a closer look at some communities can offer context to the data. We might look, for example, at the story behind the surge of graphic design jobs in 2011 — a total of 4,261 added since 2010. See page 7 to learn about one Washington resident who is benefiting from creative job growth.



## CVI SHOWS WHICH CREATIVE JOBS EMPLOY THE MOST PEOPLE

The CVI also tracks which creative jobs have the highest location quotient (LQ), meaning the jobs in greatest supply after taking population size into account. As with the CVI, LQ is compared to a baseline of 1.0; therefore, an LQ of 1.96 would be 96 percent above the national baseline.





CREATIVE VITALITY  
**REAL STORIES**  
**FROM WASHINGTON**  
**STATE**

# JOBS

## ARTIST WITH MULTIPLE INTERESTS HONES IN ON GRAPHIC ARTS AS A PROFESSION

*“Going back to school has given me a fresh perspective on what real design looks like in the working world.” - Mark Alvis, Graphic Designer*

Mark Alvis is a multi-talented artist. But as a Nashville-based touring drummer, Alvis wasn't making enough to live on. So when he relocated to Washington state, he began exploring other ways to make a living with some of his less-developed talents.

A working knowledge of a few computer-based design tools helped land Alvis an entry-level, part-time job as a graphic designer. He was hungry to develop his skills but low on money. The School of Visual Concepts, a Seattle area design school, offered him training with working professionals, enabling him to sharpen his skills and learn new ones to stay competitive.

According to Mark, “Going back to school has given me a fresh perspective

on what real design looks like in the working world.”

With his newly honed skills, Alvis was recently hired as the in-house designer for Storyville Coffee Company, a Bainbridge Island coffee roaster – just in time to be able to provide for the arrival of twin baby daughters.



Training institutions like the School of Visual Concepts help artists hurdle the financial barriers to entering a career in design, while also raising the bar for quality work in our state. These types of institutions are one of the important stories behind Washington's 74 percent growth in graphic design jobs.

# FILM & ANIMATION

## FILM THE FOCUS IN EASTERN WASHINGTON

As the largest city between Seattle and Chicago, Spokane is a pool for communications and media talent on the Eastern side of the state. Here's what Spokane's statistical landscape looked like in 2011:

- A concentration of media and communications equipment workers 162 percent higher than the national baseline.
- A concentration of film and video editors 143 percent higher than the state baseline, and 98 percent higher than the national baseline.

- Commercials
- Independent feature films
- Hollywood movies

North by Northwest, named after the Hitchcock film of the same name, has been around since 1990, originally producing promotional and industrial videos. Under the leadership of founder Rich Cowan, North by Northwest has produced more than 40 feature films.

In 2011 North by Northwest employed 40 full-time staff and 75 Spokane-area freelance artists and technicians. Cowan says that hiring locally and keeping the movie budget low pays off. In a time when Hollywood studios are betting on huge franchises, and sometimes losing big, Cowan has found a way to make the movie business viable in a smaller, more personal way.

## SPOTLIGHT ON NORTH BY NORTHWEST

North by Northwest is one of the stories behind Spokane's film and video production concentration. The company's work involves the editing, distribution, and sales of a range of film products:





## EAST KING COUNTY ' ANIMATED IN MORE WAYS THAN ONE

When people think of the arts in Washington state, Seattle likely comes to mind first. But across the lake from downtown and the Space Needle, King County's eastside is having a big impact on our creative economy, partly through animation. The area is home to just 25 percent of King County's population, but in 2011 produced 16,309 creative jobs (26 percent of King County's creative jobs and 15 percent of our state's creative jobs) and generated \$133 million in creative industry revenues.

Washington boasts a concentration of multimedia artists and animators 36 percent higher than the national baseline. Many of them work in East King County.

### WHY SO MANY ANIMATORS IN EAST KING COUNTY?

According to producer Jennifer O'Brian, who works for Redmond-based Pyramide Productions, the market for animation in East King County owes much to the large corporations that call the eastside home. Says O'Brien, "The bulk of video animation going on in East King County

is for corporate clients like ours."

A rich ecosystem of consulting companies and production houses have sprung up to service the communications needs of companies drawn to East King County by attractive tax breaks and a concentration of educated workers.

It shouldn't surprise us to find clusters of creativity like this. Says Richard Florida, a world-leading academic and consultant on the creative class, "Ideas flow more freely, are honed more sharply, and can be put into practice more quickly when large numbers of innovators, implementers, and financial backers are in constant contact with one another."<sup>1</sup>

Corporate communication isn't the only thing driving the multimedia and animation cluster in the area. Video games play a large role as well. Gaming powerhouses Nintendo of America, Microsoft (Xbox), Bungie, Valve, ArenaNet, 343 Industries, and Big Fish Games also base out of East King County. The companies rely on skilled animators to produce high-quality video games.

*"Ideas flow more freely, are honed more sharply, and can be put into practice more quickly when large numbers of innovators, implementers, and financial backers are in constant contact with one another." - Richard Florida, The Atlantic Magazine<sup>2</sup>*

<sup>1</sup> East King County is defined in this report by 13 zip codes in the eastern part of the county.

<sup>2</sup> Florida, R. 2005. "The World In Numbers: The World Is Spiky." The Atlantic. October: pp. 48-51. <http://www.theatlantic.com/past/docs/images/issues/200510/world-is-spiky.pdf>

## NONPROFIT GROUPS

Take a quick look at Washington's nonprofit organization statistics for 2011.

573

nonprofit arts organizations

\$343,518,429

in arts organization revenue

\$636,614,782

in revenues when combined with revenues of arts-active organizations like history museums

15%

above national baseline for arts organization revenues

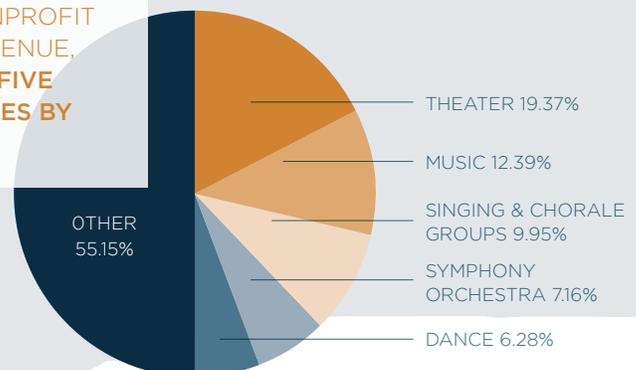
## NONPROFIT ARTS GROUPS GOING STRONG

Over the past few years Washington has become a leader in driving increased participation in the arts. From 2008 to 2013 ArtsWA guided the nonprofit arts community through an audience-building research effort funded by the Wallace Foundation and called the Arts Participation Leadership Initiative (APLI).

This investment allowed 29 Seattle-area arts organizations to:

- Experiment with new ways to engage young and diverse communities.
- Make investments in social media and digital tools to engage audiences.
- Participate in training events that brought the latest in audience building expertise to our region.

OF WASHINGTON'S NEARLY \$3.5 MILLION IN NONPROFIT ORGANIZATION REVENUE, HERE ARE THE **TOP FIVE ORGANIZATION TYPES BY MARKET SHARE**



# MUSIC & LITERATURE



<sup>3</sup> Seattle Youth Symphony Orchestras. 2013. "SYSO in the Schools Impact and Outcomes." [http://www.syso.org/pubfiles/SITS\\_impact2013.pdf](http://www.syso.org/pubfiles/SITS_impact2013.pdf)

## SEATTLE YOUTH SYMPHONY ORCHESTRAS NURTURE ECOSYSTEM OF EMPLOYMENT

Already nationally renowned, the Seattle Youth Symphony Orchestras (SYSO) used APLI grant funding from ArtsWA to strengthen innovative programs that partner with orchestra and band teachers in Seattle Public Schools. These programs contribute to what SYSO leaders like Kathleen Allen, Director of Education, Communications and Partnerships, call an ecosystem of employment.

Between 2009 and 2013, SYSO's public schools programs grew to employ 20 young, professional musicians. These outreach programs deploy SYSO instructors to some of Seattle's most diverse schools to "team teach" with school instructors.

According to a SYSO report<sup>3</sup>, group lessons within SYSO's Southwest Seattle Strings Project program led to:

- Quadrupled participation rates in the schools' orchestra programs over four years (growing from 94 students to 377).
- High retention rates of students going on to play at secondary levels (94 percent, versus Seattle Public School's 80 percent average).

With SYSO offering the **largest youth orchestra program in the country** – to the tune of 1,700 students – these young artists are well positioned to rise through SYSO's middle school and high school programs and to reap the economic rewards of their efforts. Many students emerge from SYSO to become private music teachers or instructors in music programs, including within SYSO's own program. Likewise, SYSO alumni play in nearly every major orchestra in the nation.

SYSO's ecosystem of employment and opportunities for musical enjoyment clearly demonstrate the benefits of music education, but music education also pays off big in other economic ways. According to research by the Arts Education Partnership, **music education helps narrow the achievement gap** for diverse and socio-economically challenged students (aep-arts.org). Higher academic achievement means better employment possibilities down the road.

## BOOK AND RECORD SALES RANK WELL AGAINST THE NATION

CVI data shows that Washington's book and record store sales of more than \$195 million exceeded the national baseline by 13 percent. The CVI doesn't include online retail sales, which means actual book and record sales were even higher in 2011.

Seattle has garnered national press for being home to a highly literate population. Spending habits, as displayed in the above graphic, support this reputation. However, the second and third highest ranked WDAs in terms of per capita sales hail from east of the Cascades. Spokane County and the Tri-Cities region (Benton and Franklin counties) also enjoyed great book and record sales. In terms of per capita sales, Spokane and the Tri-Cities region were nearly tied.

Learn more at [arts.wa.gov](http://arts.wa.gov)

Information from the Tri-City Development Council offers a possible explanation as to why Benton and Franklin counties have such high book and record sales. The Council notes that 82.3 percent of the Tri-Cities' population possess a high school, college, or graduate education. Furthermore, more scientists and engineers per capita reside in the Tri-Cities area than anywhere else in the nation.

The well-educated populace of the Tri-Cities region find their way often to bookstores like Adventurers Underground, which advertises itself as "low-fi internet, from our house to yours." An independent retailer, Adventurers Underground sells books, comic books, graphic novels, toys, and vinyl records.

Selling both online and from their 10,000-square-foot store in Richland, Adventurers Underground emphasizes accessibility. They also serve as a sort

community hub. A look at their jammed calendar reveals that groups enjoy everything from tabletop gaming nights to Toastmaster meetings at the store.

Reading is truly a source of statewide pleasure for Washingtonians, and a source of strong support for the economy.

### TOP THREE AREAS FOR BOOK & RECORD SALES

- 1) WDA 5 KING COUNTY  
\$106,202,00 TOTAL SALES
- 2) WDA 12 SPOKANE COUNTY  
\$106,202,00 TOTAL SALES
- 3) WDA 11 BENTON & FRANKLIN COUNTIES  
\$106,202,00 TOTAL SALES

## MUSIC THEME RUNS THROUGH CVI DATA

We've seen the impact of music in the nonprofit sector. What about the business sector? As it turns out, music was big business in Washington in 2011. In fact, music store customers spent more than \$70 million on instruments and supplies. These numbers put Washington 9 percent ahead of the national baseline for per capita national sales that year.

When Arts of Clark County looked more closely at the data behind their county's musical instrument and supplies sales in the Workforce Development Area, they made a surprising discovery. Clark County's per capita sales in this category were 40 percent better than the national baseline and 26 percent better than the state baseline.

Pat LaCroix of Arts of Clark County reasons, "We had some knowledge of our love of music through our award winning musical groups in the high schools and the local community college." But could music education account for these impressive numbers?

Though music education is only part of the picture here, it's a strong part. Another contributing factor: Beacock Music, says LaCroix. Located in the county seat of Vancouver, Beacock is committed to producing a community of music makers.

Family owned since 1973, Beacock is:

- The largest independent music store in the Northwest.
- Winner of several industry awards, including National Association of Music Merchant's Dealer of the Year.
- A vigorous promoter of music in the schools.

Not content to let students come to them, or just purchase online from them, Beacock Music travels to surrounding schools up to 200 miles away to get students set up with rental instruments. Beacock's reach is expansive, and their roster of registered rentals, at roughly 4,000 a year, is even more impressive.

Says Gayle Beacock, co-owner of Beacock Music, "When creating music makers in the community is your overall, shining goal, then that sets your course. Suddenly, it's not work anymore... Everything you do contributes to that overall goal."

Beacock's business delivers on her goal in one other important way: music instruction. Teaching everything from woodwinds to ukulele, their many instructors are a hands-on force forging a community of music makers, one student and one lesson at a time.

*"When creating music makers in the community is your overall, shining goal, then that sets your course. Suddenly, it's not work anymore... Everything you do contributes to that overall goal."*  
- Gayle Beacock, Co-Owner of Beacock Music

## SPOTLIGHT ON THE HEAD AND THE HEART

Formed over a series of open-mic nights in 2009, The Head and the Heart quickly developed a local following – so much so that they couldn't keep their self-produced debut album in stock at local record stores. Over 10,000 records sold at shows and in stores.

Already a going concern without a label, Seattle record company Sub Pop, famous for launching alternative acts like Nirvana, saw something they liked in The Head and the Heart and snatched them up in 2010. Their reproduced debut album, now under the SubPop label, sold over 250,000 copies.

Both economic and cultural impacts accrue from bands like The Head and the Heart. Band and record label revenues boost the tax base, as do revenues from live music venues and sales of musical instruments.

What's more, the vitality of our music scene attracts other artists and culture makers to move to the state. The resulting cultural milieu becomes a draw for people from all walks of life as they consider where to work, play, and make their home.



## FROM “SEATTLE SOUND” TO SEATTLE SOUNDS — AN ARRAY OF SEATTLE ACTS MAKE IT BIG

Music education alone cannot account for Washington’s music store sales. Without a doubt, the state’s music store revenues have been bolstered by a thriving music scene that increasingly inspires young artists and produces professionals.

In 2011, the CVI category of singers and musicians proved to be one of the fastest-growing areas of full- and part-time employment in the arts across the state.

- 5,112 singers and musicians were added to the creative economy.
- This represented an 88 percent jump over 2010, giving our state a concentration of singers and musicians 4 percent higher than the national baseline.

Since the CVI measures both part-time and full-time jobs, some of the singers

and musicians represented aren’t yet making living wages from their art. That said, 2010-2011 saw several Washington acts go mainstream.

The state’s musical legacy includes Bing Crosby, Quincy Jones, and Jimi Hendrix. Today the state is home to hundreds of musicians and bands (including Dave Matthews, Alice in Chains, Sound Garden, and Brandi Carlile).

Seattle’s sound has diversified in recent years to include:

- Fresh hip hop acts (Macklemore, Blue Scholars, Shabazz Palaces)
- Folk bands (Fleet Foxes, Hey Marseille, The Head and the Heart)
- Gospel-tinged, blue-eyed soul (Allen Stone)



### THE BEST WDAS FOR MUSIC STORE SALES

#### WDA 5 (KING COUNTY)

**\$30,983,000** IN SALES,  
53% BETTER THAN THE  
NATIONAL BASELINE

#### WDA 6 (PIERCE COUNTY)

**\$11,118,000** IN SALES,  
33% BETTER THAN THE  
NATIONAL BASELINE

#### WDA 7 (CLARK, COWLITZ, SKAMANIA, WAHIAKUM COUNTIES)

**\$5,797,000** IN SALES,  
10% BETTER THAN THE  
NATIONAL BASELINE

## 2011: A YEAR IN THE LIFE OF WASHINGTON’S MUSIC SCENE

Chewelah native **Allen Stone**’s 2011 self-titled record peaks at #2 on iTunes R&B/Soul charts and hit #4 on Billboard’s Heat Seekers chart.

Tacoma native and acoustic rocker, **Vicci Martinez**, comes in third on NBC’s The Voice, gets signed by Republic records.

Seattle rapper **Macklemore** releases his second Billboard #1, “Can’t Hold Us,” continuing his ascent to serious national act.

# ARTS TOURISM

## ART SALES, TOURISM, AND FESTIVALS: THREE HOTSPOTS

King County's art gallery and individual artist sales, at close to \$400 million, are boosted by a number of factors, including these:

- Seattle has long been a destination for tourists the world over.
- The city has the highest median income in the state.

With with a deep concentration of high-quality art galleries – at least 39 in downtown's Pioneer Square area alone – Seattle has no shortage of serious art. And serious art attracts serious buyers. Combine these factors, and it isn't surprising that King County art gallery revenues were 66 percent higher than the national baseline for that category in 2011.

Other areas of the state also showed strong gallery sales. The San Juan Islands, located within WDA 3, are a major tourist destination loved for their natural beauty, whale watching, and a myriad of other outdoor activities.

Isolating San Juan County's art gallery revenues for 2010 reveals an interesting picture:

- Per capita art gallery and individual artist sales were about \$402, roughly twice the per capita sales in these categories as King County had in the same year.
- Per capita art gallery and individual artist revenues were about 84 percent higher than the national baseline.

A similar picture of tourist-driven art purchasing appears in WDA 1, the Olympic Consortium, which includes Port Angeles and Port Townsend. This WDA's gallery revenues exceeded \$33 million (2 percent higher than the state baseline).

Port Angeles Fine Arts Center (PAFAC) director, Robin Anderson, credits the artistic vitality in the Olympic Consortium to a combination of factors: "...An enthusiastic community of retirees, frequent arts events, like PAFAC's Plein Air Painting Competition, and tourists coming to visit Olympic National Park, one of the top five parks in the U.S."

In fact, a full 50 percent of PAFAC's business comes from out of state and international tourists.

Lisa Waipio Werner, the Director of Operations at Port Townsend's Centrum, an arts festival and education organization, noted that Centrum's festivals drive tourist traffic to her town, filling up the hotels and restaurants. While the CVI doesn't track the economic echo of arts institutions and events (as arts tourists spend in the community), tourist activity in Port Townsend is certainly better for art gallery sales, which the CVI does track.

*"...An enthusiastic community of retirees, frequent arts events, like PAFAC's Plein Air Painting Competition, and tourists coming to visit Olympic National Park, one of the top five parks in the U.S." - Robin Anderson, Port Angeles Fine Arts Center*



## UP AND COMING ARTS DESTINATIONS

Everett and Tacoma have in common a maritime and blue-collar past, and both have been reinventing themselves to court a culturally rich future.

Tacoma's civic and architectural revitalization has been underway for two decades, with new or redeveloped buildings on the campus of the University of Washington Tacoma, an events center, and several new museums. Though growth stalled somewhat in the recent recession, Tacoma's economy appears on the rise again:

- The seat of Pierce County, Tacoma is in the middle of a WDA that demonstrates musical instrument and supplies sales 45 percent above the national baseline.
- The School of the Arts (SOTA), a magnet high school training Tacoma's artists of tomorrow, recently won a School of Distinction award from the John F. Kennedy Center for the Performing Arts.
- The Broadway Center for the Performing Arts is poised to draw in bigger and younger audiences, thanks to their participation in an ArtsWA and Wallace Foundation grant to expand audience participation.

The local craft and underground arts scene is active too. Guerilla artists Tom Llewellyn and Lance Kagey, of Beautiful Angle, see themselves as part of a burgeoning craft movement in their city. Said Llewellyn, "Tacoma's blue-collar roots are in much of what's going on. A lot of the art coming out of Tacoma has a historical and functional slant to it – letterpress, glass, ceramics, commercial sign painting, and poster art. Our artists are redefining the city's future by revisiting its commercial past."

Everett has also been undergoing an arts renaissance. New sculptures dot Everett's downtown core. Beautiful new public spaces teem with people. Plus a new, \$6 million mixed-use building housing the Schack Arts Center has been built to service professional as well as recreational artists.

The Schack, home to the Arts Council of Snohomish County, also features gallery space, classes for the public, and the most advanced glass-working hotshop of its kind on the West Coast. Upstairs are the Artspace Everett Lofts, which give low-income artists affordable work and live spaces.

These investments in the arts are concurrent with a 6.67 percent growth rate in creative jobs in WDA 4, which includes Everett. Though not yet exceeding the national baseline for creative jobs yet, Everett and WDA 4 appear to be on their way.

For Everett's former Executive Director of Economic Development, Lanie McMullin, investing in the arts in her community was a no brainer, "Arts institutions are about having cultural presence in your community – and I view cultural presence as an important part of what attracts people to a community. I put it right alongside entry-level and living-wage jobs; great educational opportunities; gathering places, parks and proximity to outdoor recreation; walkable downtowns with awesome housing; and great bars, clubs and restaurants."

Responses to the Schack Art Center and Artspace Everett Lofts have been enthusiastic. Strong public involvement in art classes has exceeded expectations. Plus, the art center boosted the appeal of Everett in the eyes of artists. One exciting example: Courting artists to rent empty retail spaces in Everett got easier for McMullin after the art center went in. Fewer empty shops and a brighter cultural landscape – what city wouldn't want that kind of progress?



*"Tacoma's blue-collar roots are in much of what's going on. A lot of the art coming out of Tacoma has a historical and functional slant to it – letterpress, glass, ceramics, commercial sign painting, and poster art. Our artists are redefining the city's future by revisiting its commercial past."*  
- Tom Llewellyn,  
*Beautiful Angle*

*"Arts institutions are about having cultural presence in your community – and I view cultural presence as an important part of what attracts people to a community. I put it right alongside entry-level and living-wage jobs; great educational opportunities; gathering places, parks and proximity to outdoor recreation; walkable downtowns with awesome housing; and great bars, clubs and restaurants."*  
- Lanie McMullin, former  
*Executive Director of Everett Economic Development*

# THE BEST IS YET TO COME

As Washington slowly emerges from the recession that has slowed growth and constrained budgets, **we've gained a new picture of the arts.**

Despite the fact that artists, like everyone else, have been hit hard by the economy, creative **jobs have risen nearly 7 percent.** Nearly 120,000 people with artistic skills and passion, and a will to use them to make a living, have found fertile ground for employment in the state.

In Washington alone, **the arts are a \$1.84 billion industry.** Washingtonians are reading, enriching their lives at non-profit arts institutions, and enjoying music to the tune of hundreds of millions of dollars a year.

The Creative Vitality Index provides key data to help guide cultural efforts, policies, and investments to forge **an ever more prosperous and creative future together.**

CATALYST  
FOR THE ARTS IN  
WASHINGTON STATE

**PHONE** (360) 753-3860

**FAX** (360) 586-5351

**EMAIL** [info@arts.wa.gov](mailto:info@arts.wa.gov)

**OFFICES**

711 Capitol Way S., Ste 600  
Olympia, WA 98501

**MAILING ADDRESS**

PO Box 42675  
Olympia, WA 98504-2675



[arts.wa.gov](http://arts.wa.gov)

PHOTO CREDITS

Front/Back Cover: State Art Collection artwork title: *Where will you go from here?* 2010. Artist, Steve Gardner. Located at Pasco High School. Photo courtesy of the artist.

Page 6: *Bellingham Arts Festival*, courtesy Allied ARts of Whatcom County.

Page 9a: *Mark Alvis*, courtesy Mark Alvis.

Page 9b: *City of Spokane and Spokane River*, courtesy City of Spokane.

Page 10: courtesy Pyramide Productions

Page 11: *Vancouver Symphony Orchestra*, courtesy Paul Quackenbush.

Page 12: *The Head and the Heart*, courtesy SubPop Records

Page 13: *Kenny Sultan*, Port Townsend Country Blues Festival, courtesy Centrum

Page 14: *Performance of dance opera, "The Onion Twins"*, courtesy Centrum/Kevin Elliff

Page 15: *Reflection of the old Luzon*, courtesy Rotator Magazine

