



Seattle Office of Arts and Cultural Affairs CVI™ Report 2009-2010

WESTAF

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Introduction

This report details the findings of research on the overall health of a region's arts-related creative economy. The strongest indicator of this health is a region's Creative Vitality™ Index (CVI™) value. The CVI™ is a robust and inclusive measure of the economic vitality of the arts and arts activities in a specified geographic or political region of the United States. Rigorously constructed and updated annually, a region's CVI™ report is a credible and clear data source for arts research and advocacy purposes.

What is an Index?

An index is generally an efficient means of summarizing quantities of interrelated information and describing complex relationships. An index can be, as in the case of the CVI™, a single indicator of multiple variables and interactions between these variables. Changes in an index will reflect changes in the data used to generate the index. Standardization and unification of data mean that indexes are ideally suited for comparative analysis. The comparative nature of the CVI™ has added analytical and policy value.

What is the Creative Vitality™ Index?

The Creative Vitality™ Index (CVI™) measures annual changes in the economic health of an area by integrating economic data streams from both the for-profit and non-profit sectors. Using per capita measurements of revenue data from both for-profit and non-profit entities as well as job data from a selection of highly creative occupations, the research aggregates the data streams into a single index value that reflects the relative economic health of a geography's creative economy. The CVI™ provides an easily comprehensible measure of economic health to help communicate information from a broad arts coalition to policy makers and stakeholders. This longitudinal data allows for compelling year-to-year comparisons as well as cross-city, county, and state comparisons. The CVI™ research system also provides users with a series of reports on the rise and fall of key data factors measured by the index. The CVI™ goes beyond an annual tally of what is often inflation-driven growth in the non-profit art sector. Instead, it is a more inclusive reporting mechanism that is rooted in robust data streams that reflect the entire arts-based creative economy.

The Creative Vitality™ Index is a resource for informing public policy and supporting the work of advocates for creative economies. CVI™ reports have been used as a way to define the parameters of an area's creative economy and as a means of educating communities about the components and dynamics of a creative economy. The CVI™ is frequently used as a source of information for arts advocacy messaging and to call attention to significant changes in regional creative economies. This research has also been used to underscore the economic relationships between the for- and non-profit sectors and as a mechanism for diagnosing a region's creative strengths and weaknesses.

What does the Creative Vitality™ Index Measure?

The CVI™ measures a carefully selected set of economic inputs related to the arts and creativity in a given geographic area, with measurements of both for-profit and non-profit arts-related activities. The index has two major components including measurements of community participation based on per capita revenues of arts-related goods and services, and measurements of per capita occupational employment in the arts. The weighted indicators within the community participation portion of the index are the following: non-profit arts organization income, non-profit humanities organizational income, per capita book store sales, per capita music store sales, per capita photography store sales, per capita performing arts revenues, and per capita art gallery and individual artist sales. These indicators account for sixty percent of the overall index values. A forty percent weighting has been assigned to occupational employment in the arts that captures the incidence of jobs associated with

measurably high levels of creative output.

The rationale for this approach is the cause-and-effect relationship between participation levels and jobs. The underlying theory is that public participation in the arts or public demand for arts experiences and events ultimately drives budgets and organizational funding levels, which in turn support artists and art-related jobs within the economy.

Where does Creative Vitality™ Index Data Come From?

Index data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics, and Economic Modeling Specialists, Inc. (EMSI). The Urban Institute's National Center for Charitable Statistics aggregates information from the Internal Revenue Service's 990 forms. The forms are required to be submitted by non-profit 501(c) organizations with annual gross receipts of \$25,000 or more; however, organizations with smaller revenues also occasionally report. EMSI uses a proprietary economic modeling technique to capture industry and occupational employment data. A brief synopsis of the data sources employed in this model are outlined as follows:

Industry Data

In order to capture a complete picture of industry employment, EMSI combines covered employment data from Quarterly Census of Employment and Wages (QCEW), produced by the Department of Labor, with total employment data in Regional Economic Information System (REIS), published by the Bureau of Economic Analysis (BEA) and augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES), published by the U.S. Census Bureau.

Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

Communicating CVI™ Data

Different state, local, and regional organizations have undertaken multiple communication strategies for publicizing the results of their CVI™ reports. WESTAF has found that the best strategy for communicating CVI™ information often relies on the specifics of organizational needs.

WESTAF is willing to consult individual agencies free of charge regarding communication strategies after CVI™ data have been finalized. Potential strategies include: creating low-cost communication pieces and press releases "in-house"; creating more formalized communication; using a professional designer; including a number of stories related to the local creative economies; forming working groups to discuss the creative economy and long-term messaging strategies based on CVI™ data; commissioning in-depth research to investigate certain aspects of CVI™ data apparent in the overall CVI™ results; and using CVI™ data as an internal policy formulation document, while communicating data to specific key stakeholders, such as legislators and executives.

Data Preview and Summary

A region's Creative Vitality™ Index value is compared to a national baseline value of 1.00. For example, a region with a CVI™ value of 1.30 has a stronger creative vitality index value

than the nation as a whole by 30%. A CVI™ value as compared to a specific region—a county, state, or combined area—can also be generated. The unique geographic sensitivity of this measure means that arts advocates and policy makers have a clear and concise understanding of their particular region. It is important to note that in this report the City of Seattle is comprised of the zip codes listed below. These aggregated zip codes have been determined by WESTAF researchers and the Seattle Office of Arts and Cultural Affairs as a means to define the City of Seattle.

City of Seattle Zip Codes

98101	98113	98127	98146	98174
98102	98114	98129	98148	98175
98103	98115	98131	98154	98177
98104	98116	98132	98155	98178
98105	98117	98133	98158	98181
98106	98118	98134	98160	98185
98107	98119	98136	98161	98188
98108	98121	98138	98164	98189
98109	98122	98139	98165	98190
98110	98124	98141	98166	98191
98111	98125	98144	98168	98194
98112	98126	98145	98170	98195
				98198
				98199

City of Seattle Data Highlights:

In 2009 and 2010, the City of Seattle outperformed the United States, the State of Washington, the Pacific Northwest region, and the western region in all eight categories measured by the CVI™. The city also surpassed the Portland Metropolitan Statistical Area (MSA) and the Seattle MSA in seven categories. Performing arts participation revenues and non-profit arts organization revenues fared well when the City of Seattle is compared to the above-mentioned geographies. Seattle reported over 28,000 creative jobs in 2010 with a strong occupational index value of 2.42. Between 2009 and 2010, the number of non-profit arts and arts-active organizations grew from 317 to 336.

Additional Data Points

CVI™ data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics and Economic Modeling Specialists, Inc. (EMSI). The totality of data from these streams is presented in the following section. The following are select data points in this region:

- The overall CVI™ value for the City of Seattle in 2010 was 2.92.
- In 2010, Seattle reported \$270.2 million in non-profit arts organization revenues and more than \$145.1 million in non-profit arts-active organization revenues.
- The City of Seattle had 336 arts related organizations in 2010.
- In 2010, fashion designers had the highest percentage of job growth in the City of Seattle.
- Independent artist sales accounted for the most revenues and the highest per capita spending of all the industries measured by the CVI™ in 2010.
- In 2010, performing arts participation revenues had the strongest industry CVI™ value of 4.41.

CVI™ data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics and Economic Modeling Specialists, Inc. (EMSI). The totality of data from these streams is presented in the following section.

Creative Vitality Report Details

It is important to recall that the CVI™ value of this region is always compared to a value of 1.00. While a region might not be at the 1.00 level, this does not indicate an absence of activity. Here, it can be useful to look at the relative strength of the categorical index values being examined. Additionally, looking at refined state and regional contexts can give valuable insight to how a “low performing” region might actually be contributing positively to a state and regional economy.

A few key terms used in the CVI™

Index: summarizes multiple sources of data into a single indicator, using one number to describe a complex set of variables, activities, and events. A few of the best-known indexes are the Dow Jones Industrial Average, the Body Mass Index (BMI) and the Consumer Price Index (CPI).

Per Capita: most simply put, per capita means the average per person. In the context of the CVI™, per capita is referring to the ratio of the CVI™ input--such as industry revenues, non-profit revenues, and jobs--to the number of people within the study area.

CVI™: a comparative indicator of a region's creative vitality, including non-profit and for-profit arts activities; it reflects the relative economic health of a region's creative economy.

Arts Organizations: organizations that have primary missions related to serving or presenting the arts. These organizations include traditionally subsidized arts organizations such as art museums, symphonies, operas, and ballets.

Arts-Active Organizations: organizations that do not have primary missions related to serving or presenting the arts, but do conduct a number of activities that can be considered "arts-based." For example, within any history museum, there is a significant amount of arts activities associated with exhibit design; the concept reflects a widely accepted trend in arts research to consider how certain creative activities and occupations that do not directly produce art, but are creative and artistic in nature, deserve recognition as vital parts of a creative economy.

Location Quotient (LQ): an index value for each occupation, measuring whether or not there is a per capita concentration of an occupation within the area being measured; LQs are given for both the state and the nation, showing the relative concentration of employment for an area when compared with the state and with the nation. The location quotient approach is typically used in community analysis and planning to assess basic industries, or those exporting goods.

City of Seattle Creative Vitality Index by Year

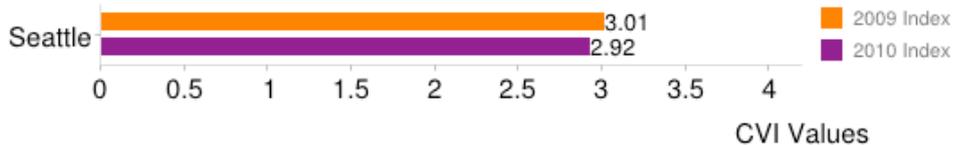
Table #1 and Chart #1 represent the total CVI™ values for the aggregated zip codes within the City of Seattle for the years 2009 and 2010. The 2009 overall CVI™ value of 3.01 for Seattle decreased slightly to 2.92 in 2010. The longitudinal data reveal interesting trends related to how creative industries and non-profits fared within the City of Seattle when compared to the rest of the nation. Changes in index values should be considered alongside general local, regional, and national trends. The nature of the index accounts for both the influence of national trends and inflation by recalculating national comparison data in each year. This comparative mechanism also allows for an accurate description of local and regional trends while accounting for the influence of national changes. Sources for the variations of index values in each year experienced within the individual data streams are detailed further within this report.

Table #1
City of Seattle Comparative CVI™ 2009-2010

Region	Index 2009	Index 2010
Seattle	3.01	2.92
Totals	3.01	2.92

Source: WESTAF

Chart #1
City of Seattle Comparative CVI™ 2009-2010



Source: WESTAF

Comparative CVI™ of Six Areas

Table #2 and Chart #2 represent the total CVI™ values for the City of Seattle, Los Angeles County, San Francisco County, King County, Multnomah County, and Denver County for the years 2009 and 2010. San Francisco County had the top overall index value of 5.19 in 2010, while the City of Seattle had the second highest CVI™ value of 2.92. To view the CVI™ values for all geographies, see Table #2.

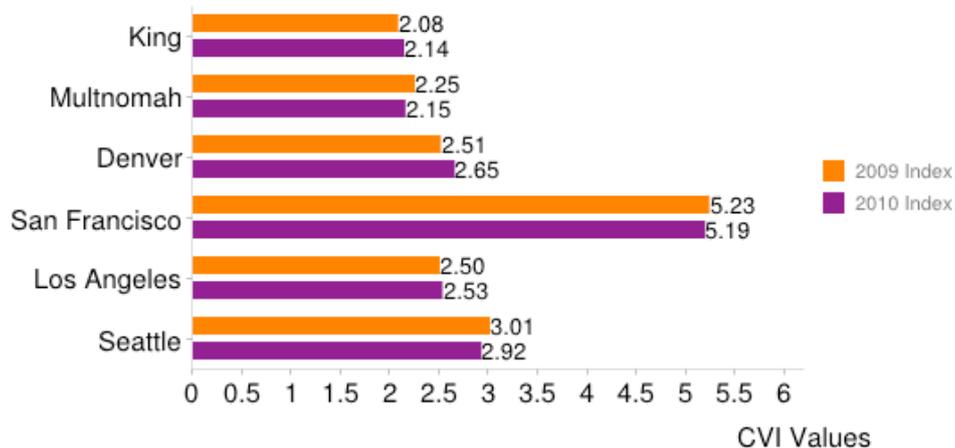
A note on CVI™ values: population density and regional sensitivity are important here. The CVI™ measures the concentration of creative economic activities within a geographic area. While concentration rates, and thus index values, can be affected by changes in the size of the region being studied, CVI™ values are not necessarily tied to population and population density. For example, some states with low population numbers, such as Alaska, Hawai'i, and Nevada, have high CVI™ values when compared to states with much higher populations and urban concentrations. Conversely, areas with high populations or population densities do not consistently have high CVI™ values. Certainly, the complexities of urban, suburban, and rural geographies and demographics play a role in the creativity and vibrancy of a region. The adjustable sensitivity of the CVI™ to precise regions is a considerable strength of this measure.

**Table #2
Comparative CVI™ 2009-2010**

Region	Index 2009	Index 2010
Seattle	3.01	2.92
Los Angeles	2.50	2.53
San Francisco	5.23	5.19
Denver	2.51	2.65
Multnomah	2.25	2.15
King	2.08	2.14
Totals	2.62	2.63

Source: WESTAF

**Chart #2
Comparative CVI™ 2009-2010**



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. the United States 2009-2010

Tables #3 and #4 along with Charts #3 through #6 provide the CVI™ values for the City of Seattle versus the United States in 2009 and 2010. The index value decreased minimally from 3.01 in 2009 to 2.92 in 2010. The decrease in the overall CVI™ value is related to the dramatic decrease in individual index values for photography store sales, book and record store sales, and non-profit arts-active revenues. Despite the minor decline in overall CVI™ value, Seattle outperformed the nation in all categories measured by the CVI™

Table #3
City of Seattle CVI™ vs. the United States 2009

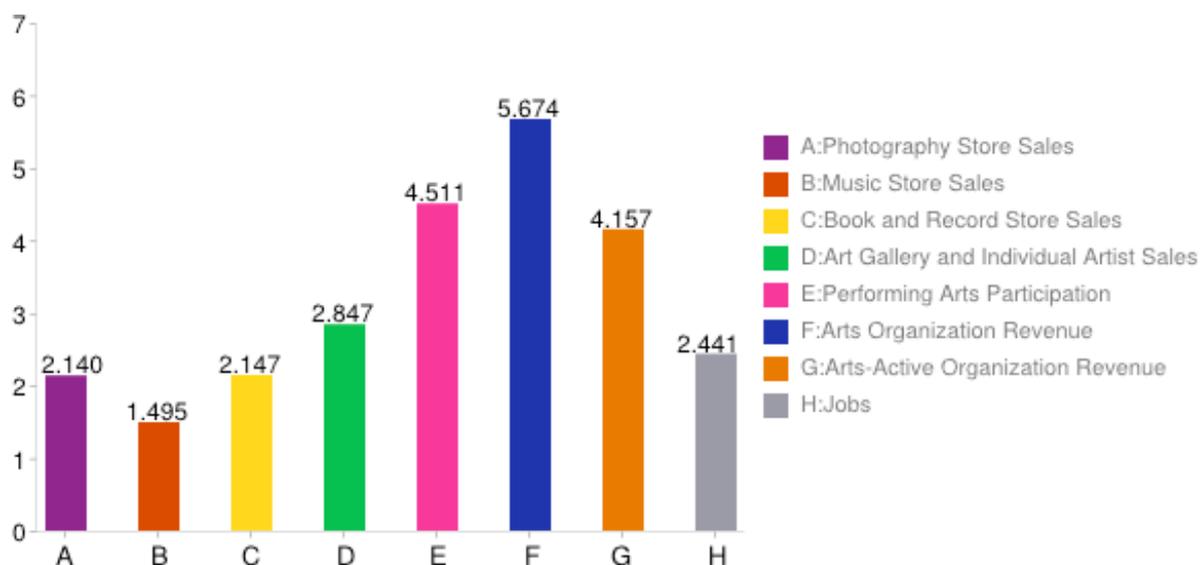
Region A: Seattle

Region B: United States

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	307,006,550	
Industry Data			
Photography Store Sales	\$6,564,000	\$1,150,165,000	2.140
Music Store Sales	\$11,625,000	\$2,916,567,000	1.495
Book and Record Store Sales	\$46,681,000	\$8,154,589,000	2.147
Art Gallery and Individual Artist Sales	\$289,951,000	\$38,192,381,000	2.847
Performing Arts Participation	\$183,478,000	\$15,252,498,000	4.511
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$14,911,005,244	5.674
Arts-Active Organization Revenue	\$179,722,501	\$16,212,378,473	4.157
Occupation Data			
Total Jobs	29,189	4,483,793	2.441
Total CVI : 3.011			

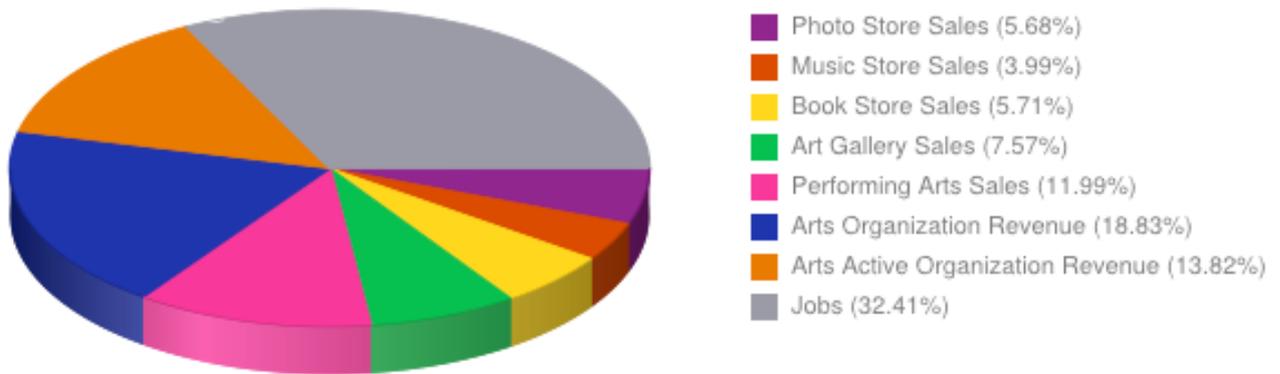
Source: WESTAF

Chart #3
CVI™ Values by Category 2009



Source: WESTAF

Chart #4
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #4
City of Seattle CVI™ vs. the United States 2010

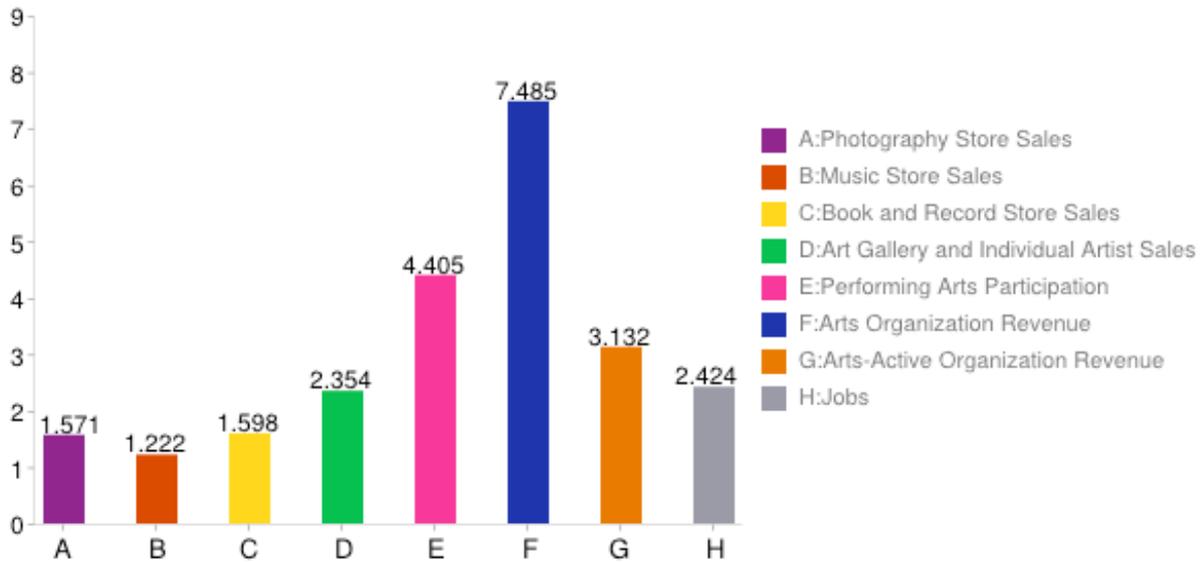
Region A: Seattle

Region B: United States

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	308,745,538	
Industry Data			
Photography Store Sales	\$6,355,000	\$1,517,983,000	1.571
Music Store Sales	\$9,893,000	\$3,038,863,000	1.222
Book and Record Store Sales	\$37,741,000	\$8,864,557,000	1.598
Art Gallery and Individual Artist Sales	\$254,319,000	\$40,552,564,000	2.354
Performing Arts Participation	\$193,451,000	\$16,483,111,000	4.405
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$13,548,198,164	7.485
Arts-Active Organization Revenue	\$145,126,183	\$17,390,481,678	3.132
Occupation Data			
Total Jobs	28,959	4,483,921	2.424
Total CVI : 2.924			

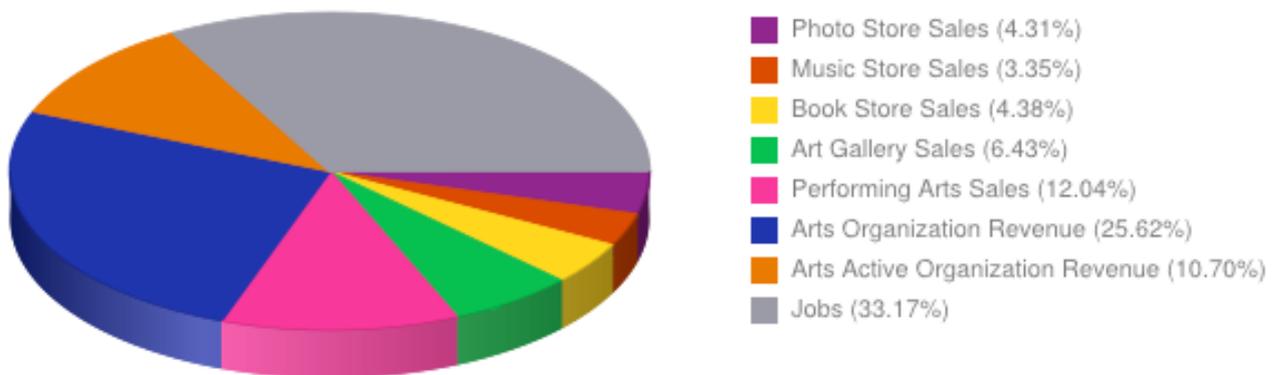
Source: WESTAF

Chart #5
CVI™ Values by Category 2010



Source: WESTAF

Chart #6
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. Pacific Northwest 2009-2010

The City of Seattle in comparison to the Pacific Northwest region is shown in Tables #5 and #6 as well as Charts #7 to #10. Oregon and Washington State comprise the Pacific Northwest region. Between 2009 and 2010, the City of Seattle experienced a small decrease in the overall index value. Seattle surpassed this region in all eight CVI™ categories. Non-profit arts organization revenues had the highest individual index value in this comparison region, followed by performing arts participation revenues.

Table #5
City of Seattle CVI™ vs. Pacific Northwest States 2009

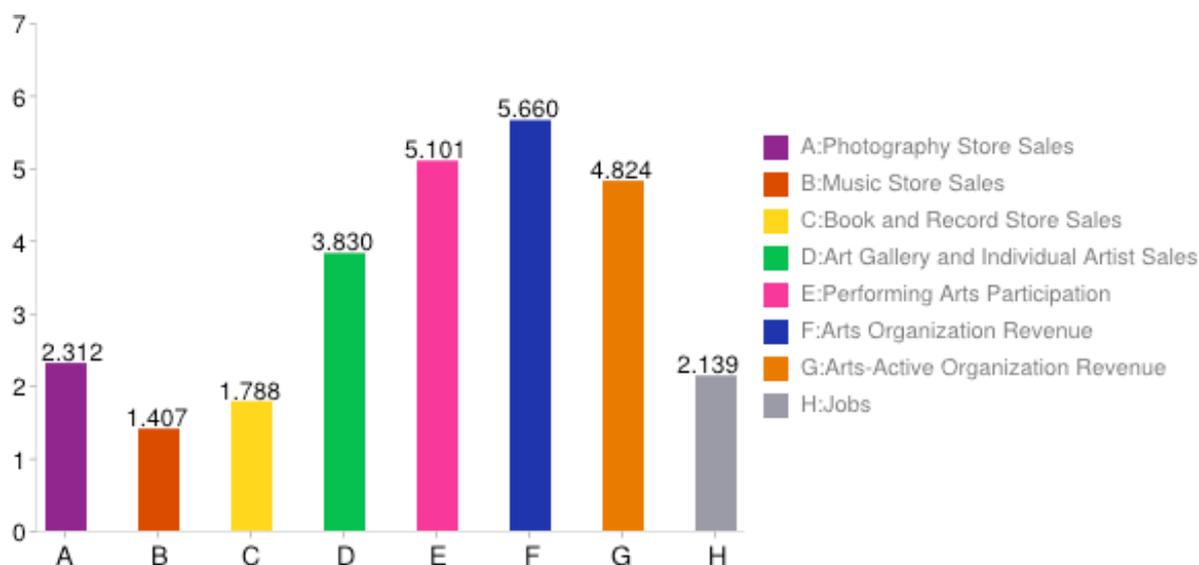
Region A: Seattle

Region B: Oregon, Washington

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	10,489,852	
Industry Data			
Photography Store Sales	\$6,564,000	\$36,383,000	2.312
Music Store Sales	\$11,625,000	\$105,837,000	1.407
Book and Record Store Sales	\$46,681,000	\$334,530,000	1.788
Art Gallery and Individual Artist Sales	\$289,951,000	\$970,148,000	3.830
Performing Arts Participation	\$183,478,000	\$460,896,000	5.101
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$510,701,621	5.660
Arts-Active Organization Revenue	\$179,722,501	\$477,396,320	4.824
Occupation Data			
Total Jobs	29,189	174,860	2.139
Total CVI : 3.059			

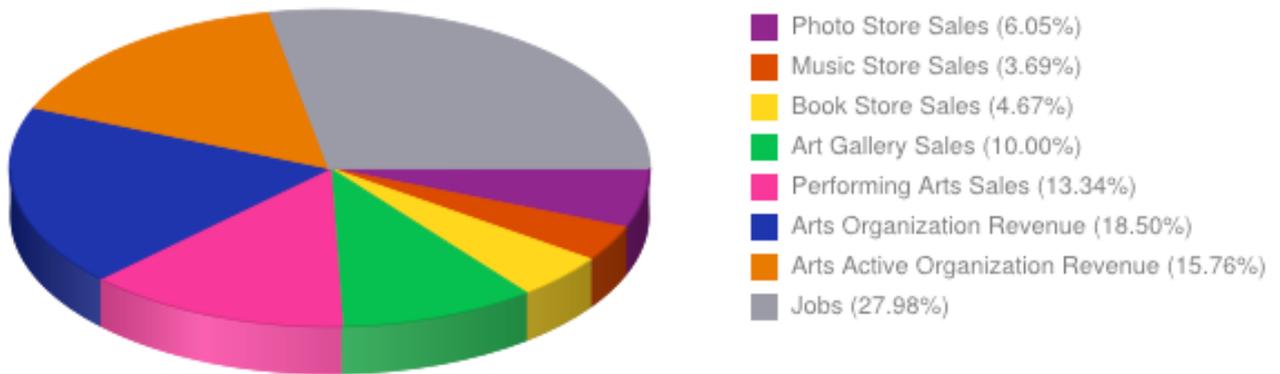
Source: WESTAF

Chart #7
CVI™ Values by Category 2009



Source: WESTAF

Chart #8
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #6
City of Seattle CVI™ vs. Pacific Northwest States 2010

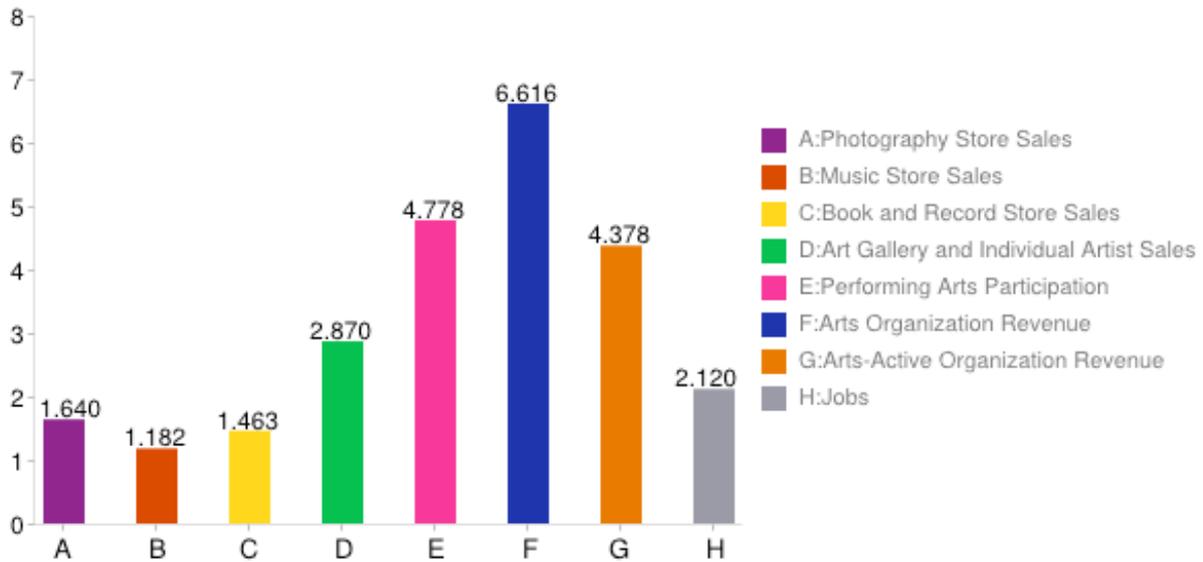
Region A: Seattle

Region B: Oregon, Washington

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	10,555,614	
Industry Data			
Photography Store Sales	\$6,355,000	\$49,722,000	1.640
Music Store Sales	\$9,893,000	\$107,389,000	1.182
Book and Record Store Sales	\$37,741,000	\$331,045,000	1.463
Art Gallery and Individual Artist Sales	\$254,319,000	\$1,137,171,000	2.870
Performing Arts Participation	\$193,451,000	\$519,506,000	4.778
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$524,052,726	6.616
Arts-Active Organization Revenue	\$145,126,183	\$425,344,095	4.378
Occupation Data			
Total Jobs	28,959	175,317	2.120
Total CVI : 2.903			

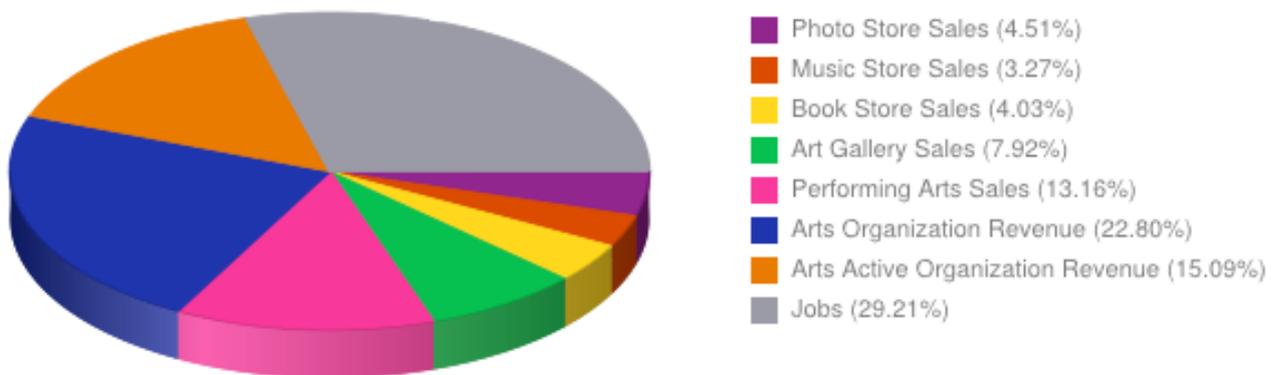
Source: WESTAF

Chart #9
CVI™ Values by Category 2010



Source: WESTAF

Chart #10
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. Western States 2009-2010

Please see Tables #7 and #8 along with Charts #11 through #14 to view summarized CVI™ data for the City of Seattle in comparison to the Western States. The Western States region includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming. In 2009, the overall CVI™ value for this comparison region was 2.69. This value fell slightly to 2.66 in 2010. The decrease in photography store sales is related to the overall decline in the CVI™ value for this comparison region between 2009 and 2010. In 2010, performing arts participation revenues, non-profit arts and arts-active revenues, and the number of people employed within creative occupations had an index value of greater than 2.00, which is considerably higher than the national average.

Table #7
City of Seattle CVI™ vs. Western States 2009

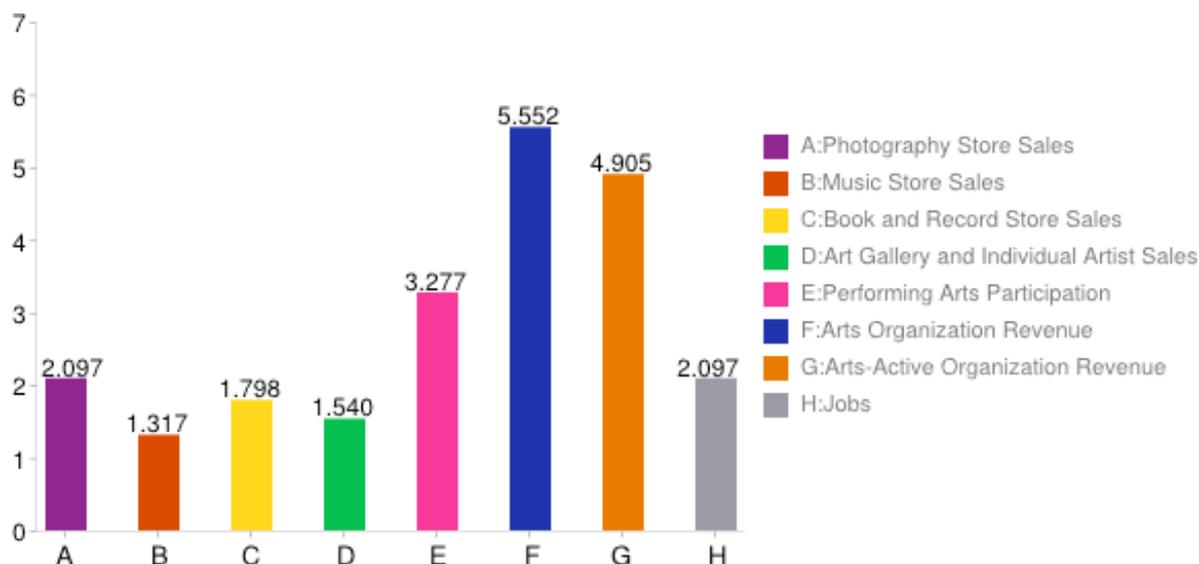
Region A: Seattle

Region B: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	71,568,081	
Industry Data			
Photography Store Sales	\$6,564,000	\$273,618,000	2.097
Music Store Sales	\$11,625,000	\$771,980,000	1.317
Book and Record Store Sales	\$46,681,000	\$2,269,878,000	1.798
Art Gallery and Individual Artist Sales	\$289,951,000	\$16,457,322,000	1.540
Performing Arts Participation	\$183,478,000	\$4,895,573,000	3.277
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$3,552,485,970	5.552
Arts-Active Organization Revenue	\$179,722,501	\$3,203,187,998	4.905
Occupation Data			
Total Jobs	29,189	1,216,696	2.097
Total CVI : 2.687			

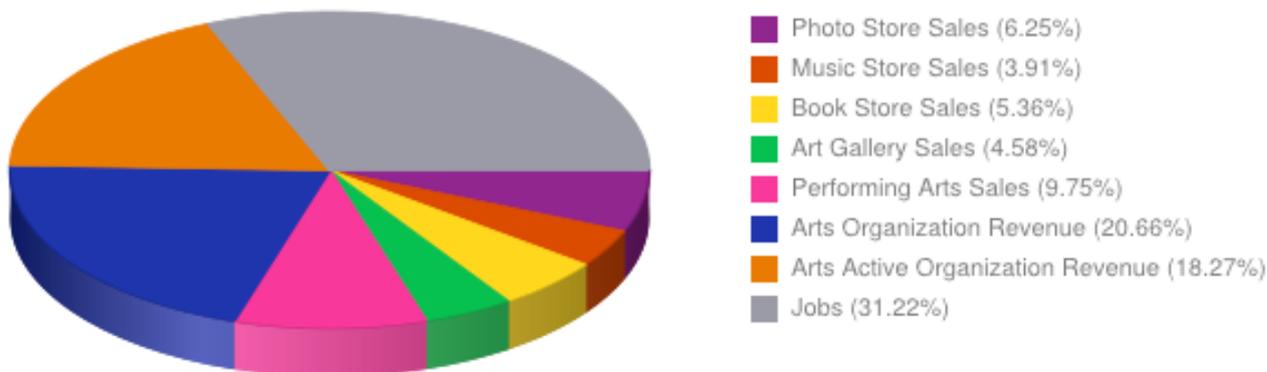
Source: WESTAF

Chart #11
CVI™ Values by Category 2009



Source: WESTAF

Chart #12
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #8
City of Seattle CVI™ vs. Western States 2010

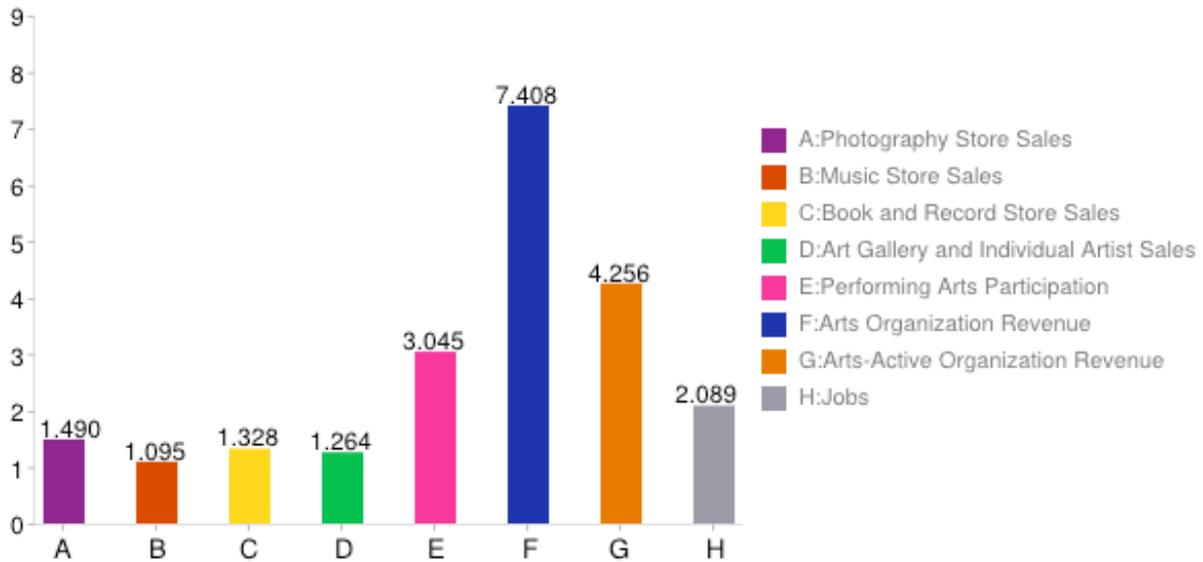
Region A: Seattle

Region B: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	71,945,553	
Industry Data			
Photography Store Sales	\$6,355,000	\$373,097,000	1.490
Music Store Sales	\$9,893,000	\$790,215,000	1.095
Book and Record Store Sales	\$37,741,000	\$2,485,465,000	1.328
Art Gallery and Individual Artist Sales	\$254,319,000	\$17,600,009,000	1.264
Performing Arts Participation	\$193,451,000	\$5,555,887,000	3.045
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$3,190,231,698	7.408
Arts-Active Organization Revenue	\$145,126,183	\$2,982,165,321	4.256
Occupation Data			
Total Jobs	28,959	1,212,544	2.089
Total CVI : 2.661			

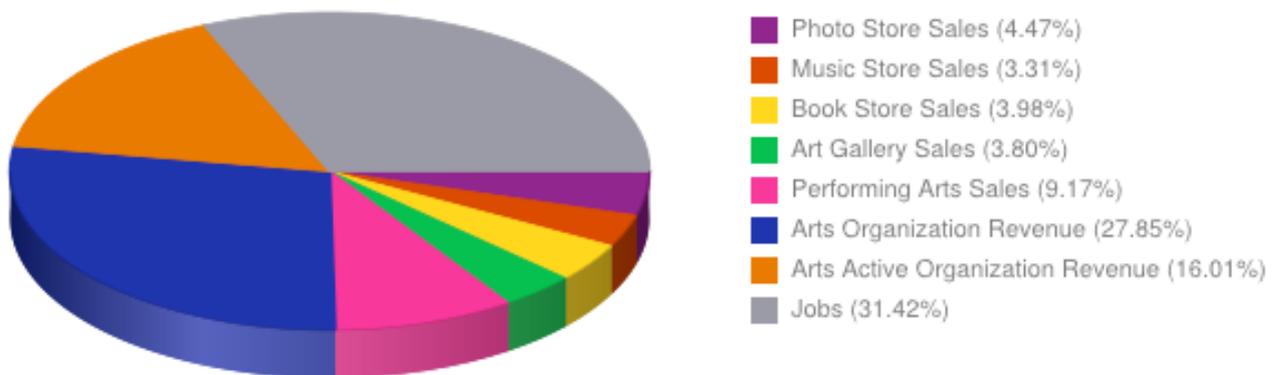
Source: WESTAF

Chart #13
CVI™ Values by Category 2010



Source: WESTAF

Chart #14
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. Washington State 2009-2010

Between 2009 and 2010, the overall CVI™ value for the City of Seattle in comparison to the State of Washington declined from 3.01 to 2.79. More detailed information regarding this comparison appears in Tables #9 and #10 and Charts #15 through #18. The decrease in the individual CVI™ value for photography store sales again contributed to a lower overall index value in 2010. All eight categories measured by the CVI™ were above the national average in this comparison region in 2010, and six of them had individual index values well over 2.00.

Table #9
City of Seattle CVI™ vs. Washington State 2009

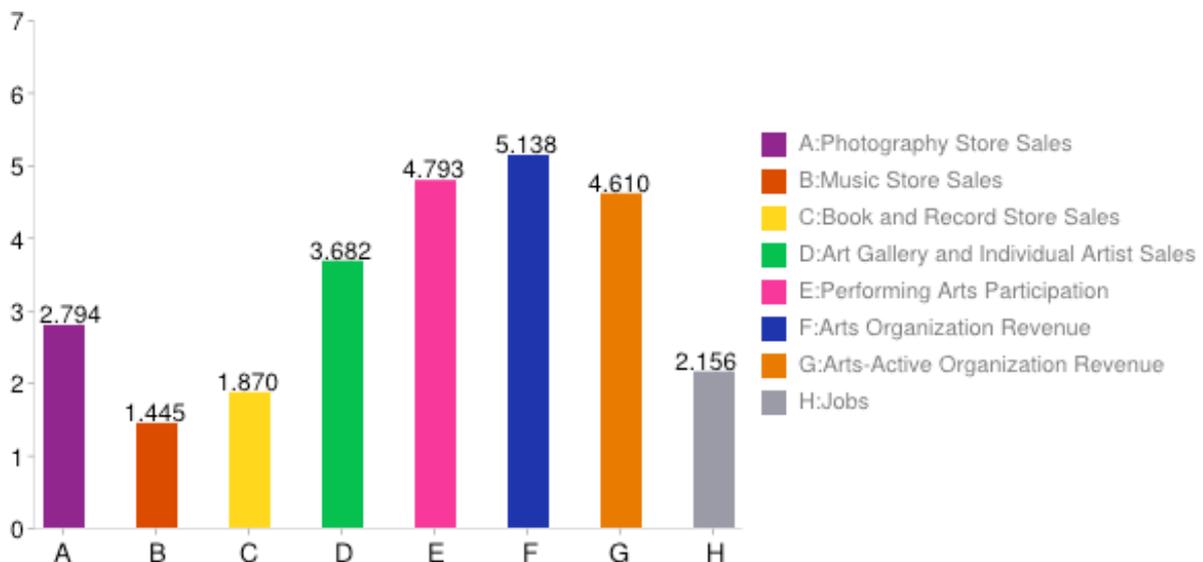
Region A: Seattle

Region B: Washington

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	6,664,195	
Industry Data			
Photography Store Sales	\$6,564,000	\$19,125,000	2.794
Music Store Sales	\$11,625,000	\$65,506,000	1.445
Book and Record Store Sales	\$46,681,000	\$203,226,000	1.870
Art Gallery and Individual Artist Sales	\$289,951,000	\$641,157,000	3.682
Performing Arts Participation	\$183,478,000	\$311,629,000	4.793
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$357,394,082	5.138
Arts-Active Organization Revenue	\$179,722,501	\$317,385,693	4.610
Occupation Data			
Total Jobs	29,189	110,209	2.156
Total CVI : 3.005			

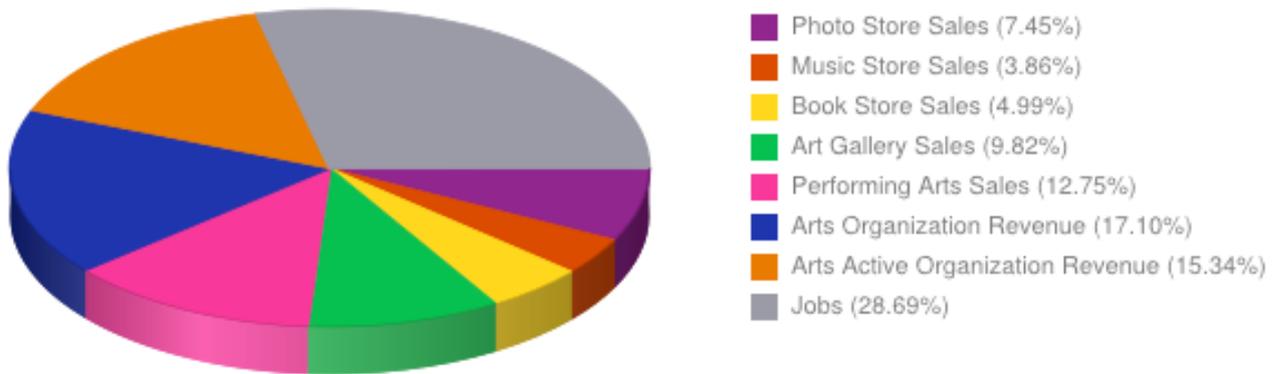
Source: WESTAF

Chart #15
CVI™ Values by Category 2009



Source: WESTAF

Chart #16
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #10
City of Seattle CVI™ vs. Washington State 2010

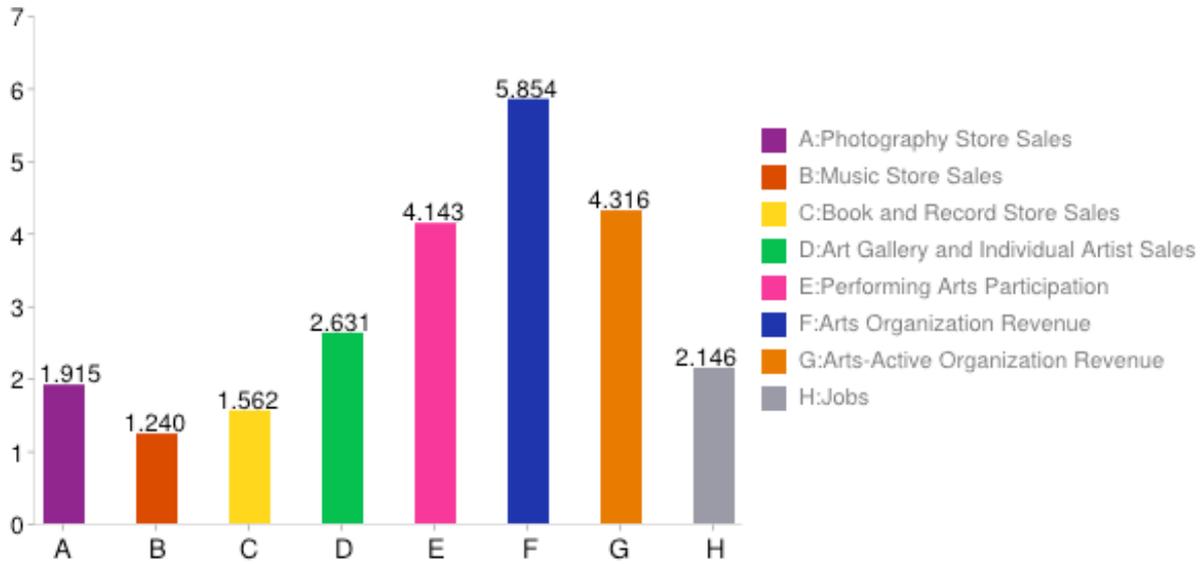
Region A: Seattle

Region B: Washington

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	6,724,540	
Industry Data			
Photography Store Sales	\$6,355,000	\$27,123,000	1.915
Music Store Sales	\$9,893,000	\$65,211,000	1.240
Book and Record Store Sales	\$37,741,000	\$197,481,000	1.562
Art Gallery and Individual Artist Sales	\$254,319,000	\$790,310,000	2.631
Performing Arts Participation	\$193,451,000	\$381,692,000	4.143
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$377,291,591	5.854
Arts-Active Organization Revenue	\$145,126,183	\$274,896,655	4.316
Occupation Data			
Total Jobs	28,959	110,286	2.146
Total CVI : 2.793			

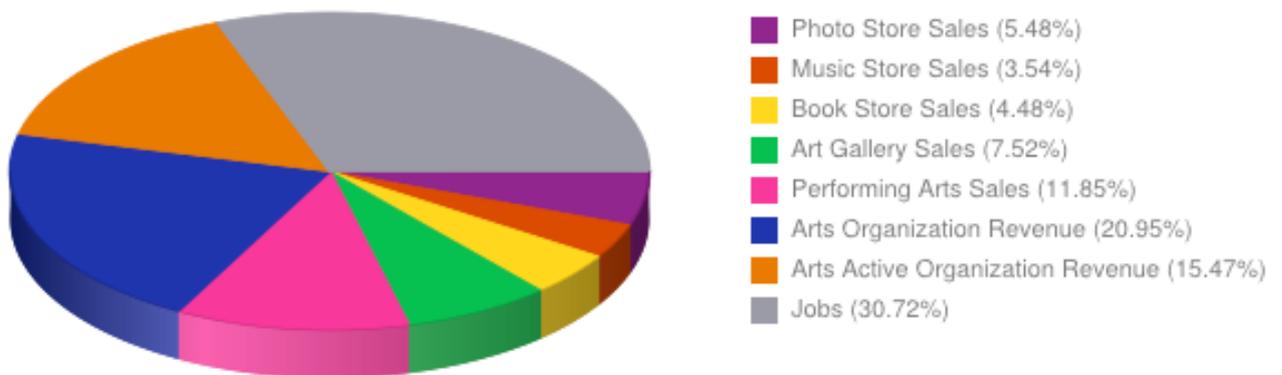
Source: WESTAF

Chart #17
CVI™ Values by Category 2010



Source: WESTAF

Chart #18
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. the Portland MSA 2009-2010

CVI™ data for Seattle versus the Portland MSA is provided in Tables #11 and #12 and Charts #19 through #22. The overall CVI™ value rose from 2.83 in 2009 to 2.91 in 2010. Substantial increases in performing arts participation revenues as well as non-profit arts organization revenues led to an overall higher index value in 2010. Music store sales was the only CVI™ category that was not above the national average in this comparison region.

Table #11
City of Seattle CVI™ vs. Portland MSA 2009

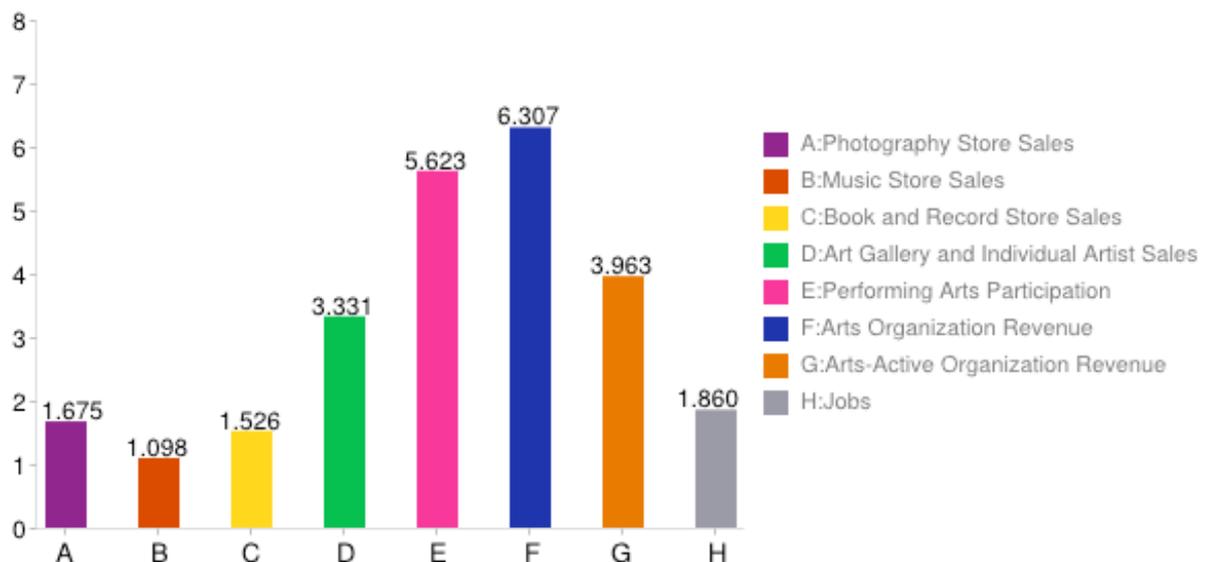
Region A: Seattle

Region B: Clackamas, Columbia, Multnomah, Washington, Yamhill, Clark, Skamania

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	2,241,841	
Industry Data			
Photography Store Sales	\$6,564,000	\$10,731,000	1.675
Music Store Sales	\$11,625,000	\$29,005,000	1.098
Book and Record Store Sales	\$46,681,000	\$83,771,000	1.526
Art Gallery and Individual Artist Sales	\$289,951,000	\$238,358,000	3.331
Performing Arts Participation	\$183,478,000	\$89,357,000	5.623
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$97,948,540	6.307
Arts-Active Organization Revenue	\$179,722,501	\$124,186,982	3.963
Occupation Data			
Total Jobs	29,189	42,965	1.860
Total CVI : 2.831			

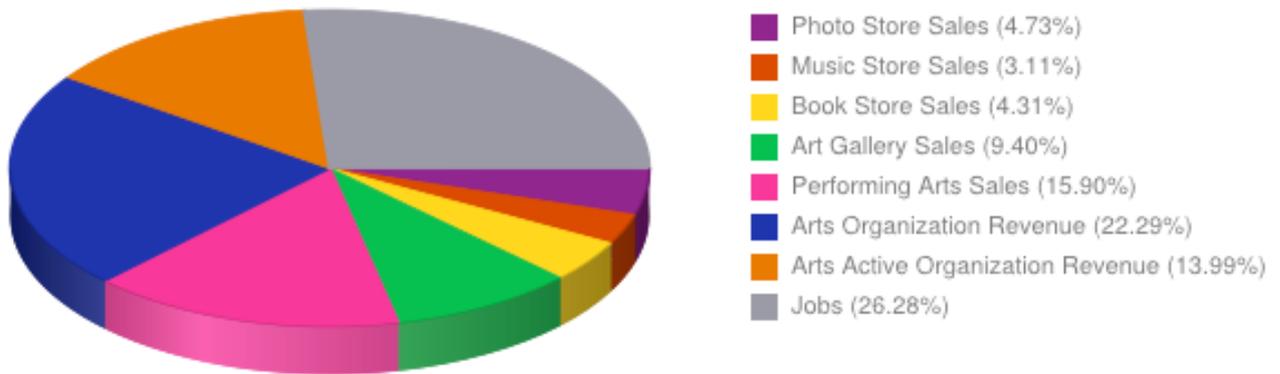
Source: WESTAF

Chart #19
CVI™ Values by Category 2009



Source: WESTAF

Chart #20
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #12
City of Seattle CVI™ vs. Portland MSA 2010

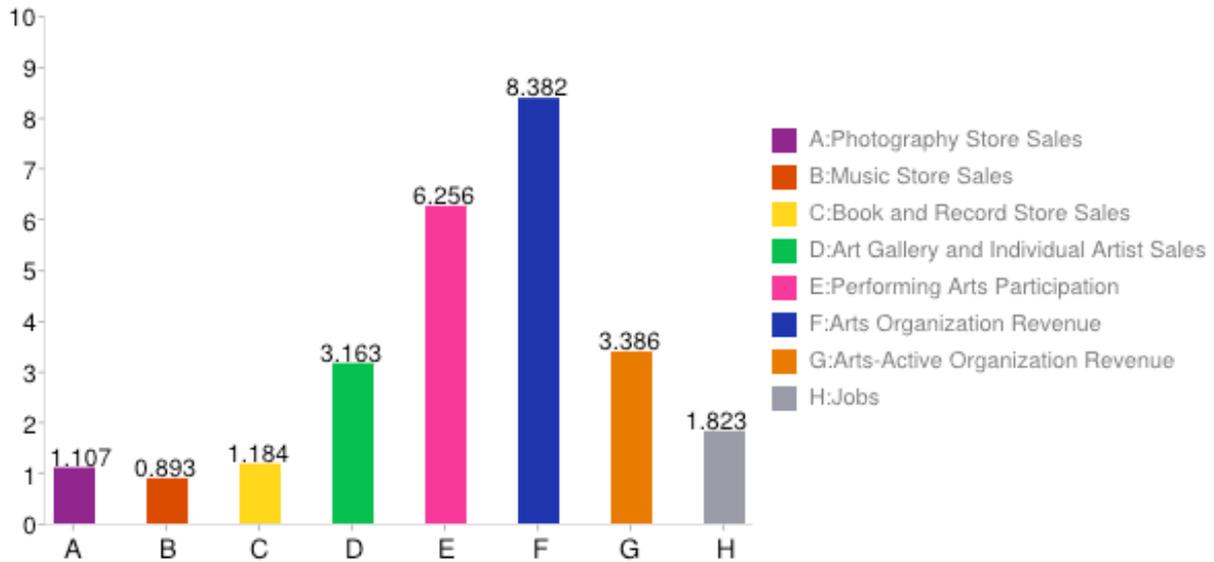
Region A: Seattle

Region B: Clackamas, Columbia, Multnomah, Washington, Yamhill, Clark, Skamania

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	2,226,009	
Industry Data			
Photography Store Sales	\$6,355,000	\$15,536,000	1.107
Music Store Sales	\$9,893,000	\$29,968,000	0.893
Book and Record Store Sales	\$37,741,000	\$86,233,000	1.184
Art Gallery and Individual Artist Sales	\$254,319,000	\$217,560,000	3.163
Performing Arts Participation	\$193,451,000	\$83,681,000	6.256
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$87,228,615	8.382
Arts-Active Organization Revenue	\$145,126,183	\$115,991,566	3.386
Occupation Data			
Total Jobs	28,959	42,984	1.823
Total CVI : 2.914			

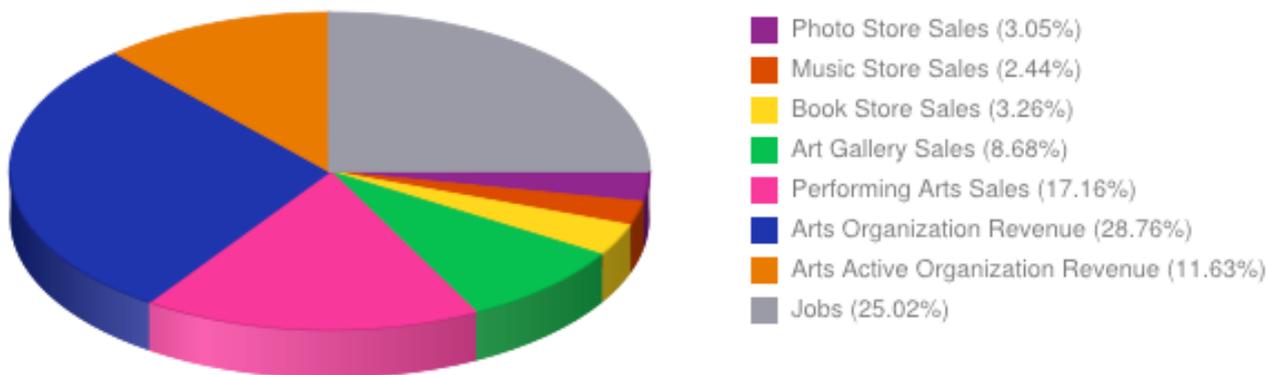
Source: WESTAF

Chart #21
CVI™ Values by Category 2010



Source: WESTAF

Chart #22
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

City of Seattle CVI™ Values and Calculations vs. the Seattle MSA 2009-2010

Tables #13 and #14 along with Charts #23 through #26 provide CVI™ data for the City of Seattle versus the Seattle MSA. The Seattle MSA is comprised of King, Pierce, and Snohomish Counties. From 2009 to 2010, the overall CVI™ value for this comparison region decreased from 2.09 to 1.93. This trend can be attributed to the decline in individual index values for photography store sales, art gallery, and independent artist revenues. Non-profit arts organization revenues had the highest individual CVI™ value of 3.54, while music store sales was the only category not above the national average.

Table #13
City of Seattle CVI™ vs. Seattle MSA 2009

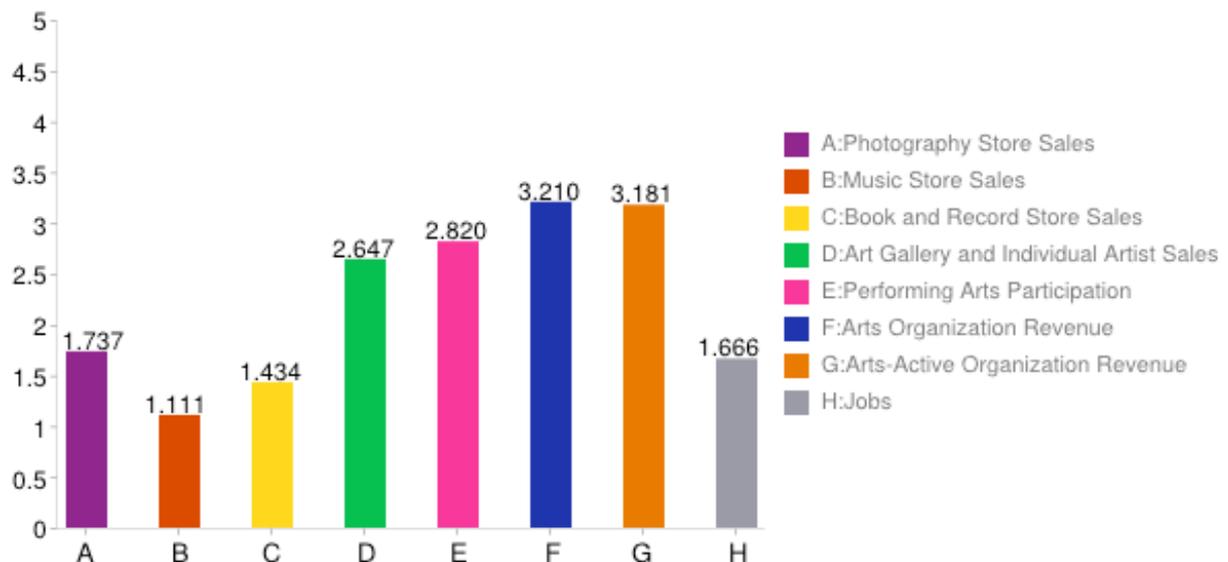
Region A: Seattle

Region B: King, Pierce, Snohomish

Description	Region A	Region B	Categorical Index
Year - 2009			
Population	818,621	3,407,848	
Industry Data			
Photography Store Sales	\$6,564,000	\$15,732,000	1.737
Music Store Sales	\$11,625,000	\$43,557,000	1.111
Book and Record Store Sales	\$46,681,000	\$135,504,000	1.434
Art Gallery and Individual Artist Sales	\$289,951,000	\$455,927,000	2.647
Performing Arts Participation	\$183,478,000	\$270,841,000	2.820
Non Profit Data			
Arts Organization Revenue	\$225,583,100	\$292,539,664	3.210
Arts-Active Organization Revenue	\$179,722,501	\$235,189,332	3.181
Occupation Data			
Total Jobs	29,189	72,946	1.666
Total CVI : 2.086			

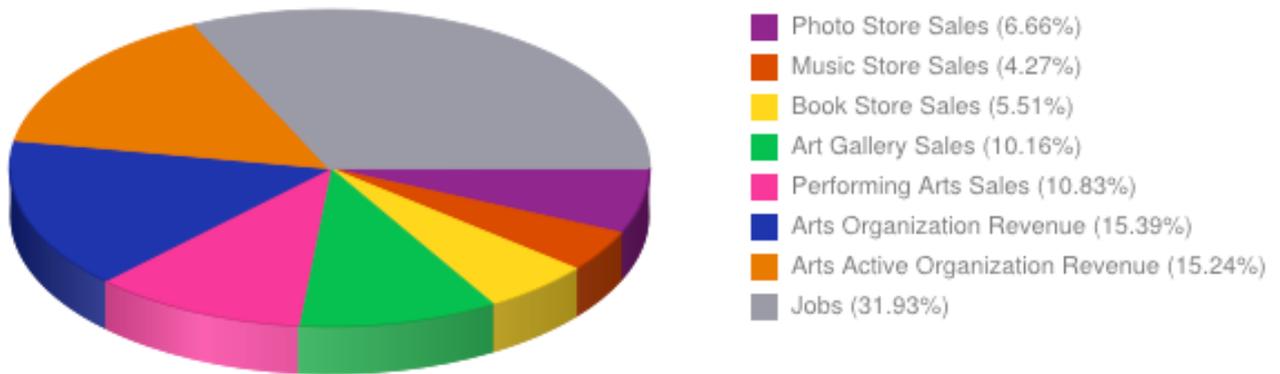
Source: WESTAF

Chart #23
CVI™ Values by Category 2009



Source: WESTAF

Chart #24
Contributions to the CVI™ after Weighting Inputs 2009



Source: WESTAF

Table #14
City of Seattle CVI™ vs. Seattle MSA 2010

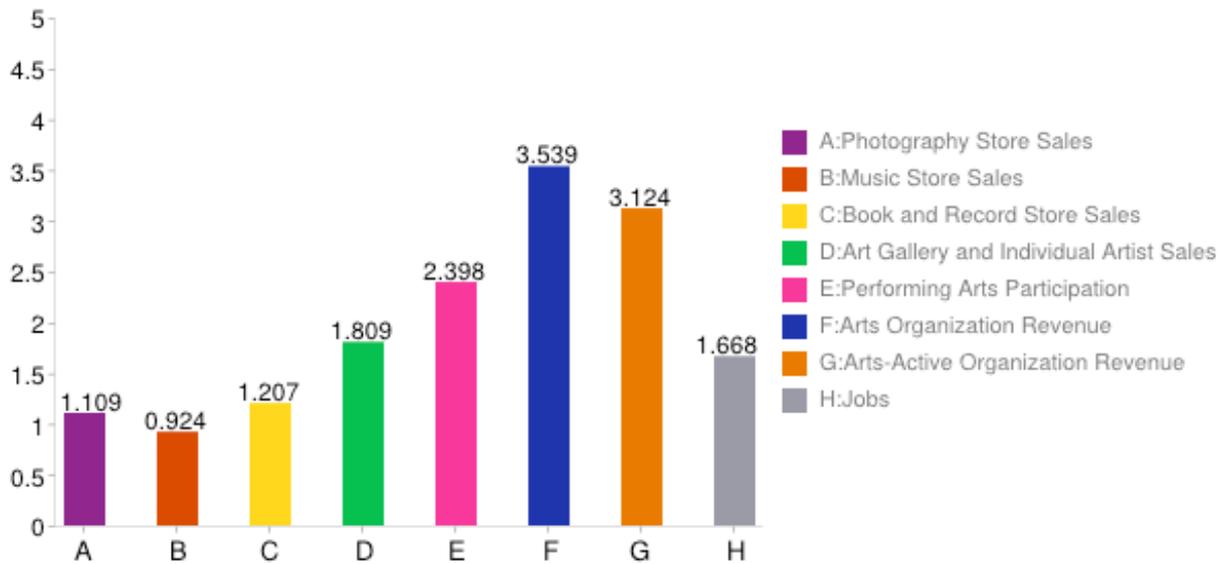
Region A: Seattle

Region B: King, Pierce, Snohomish

Description	Region A	Region B	Categorical Index
Year - 2010			
Population	822,615	3,439,809	
Industry Data			
Photography Store Sales	\$6,355,000	\$23,961,000	1.109
Music Store Sales	\$9,893,000	\$44,793,000	0.924
Book and Record Store Sales	\$37,741,000	\$130,794,000	1.207
Art Gallery and Individual Artist Sales	\$254,319,000	\$587,843,000	1.809
Performing Arts Participation	\$193,451,000	\$337,387,000	2.398
Non Profit Data			
Arts Organization Revenue	\$270,202,937	\$319,232,963	3.539
Arts-Active Organization Revenue	\$145,126,183	\$194,232,193	3.124
Occupation Data			
Total Jobs	28,959	72,598	1.668
Total CVI : 1.93			

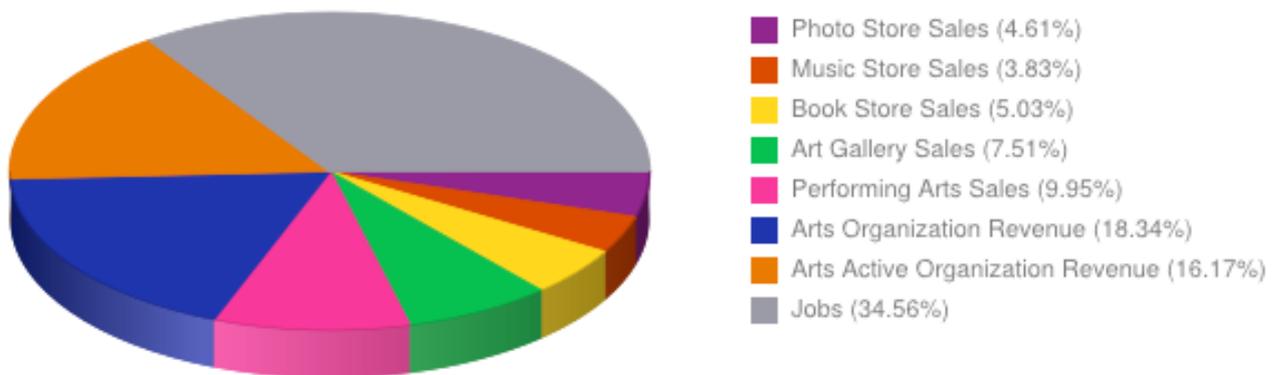
Source: WESTAF

Chart #25
CVI™ Values by Category 2010



Source: WESTAF

Chart #26
Contributions to the CVI™ after Weighting Inputs 2010



Source: WESTAF

The Occupational Index

The Occupational Index of the Arts measures the level of creative occupations per capita in a given geographic area compared with national per capita occupational employment. The CVI™ measures 36 selected occupational categories that are highly correlated with measured skill sets in thinking creatively, originality, and fine arts knowledge as measured by the Employment and Training Administration's "O*NET" occupational network database. Given this meticulous selection of occupations, the CVI™ presents an extremely justifiable report on creative economy employment.

Location quotients (LQs) for each individual occupation are included within the CVI™. LQs are essentially the "index values" for each individual occupation, measuring whether or not there is a per capita concentration of an occupation within the study area. LQs are given for both the state and the nation,

indicating the relative concentration of employment for an area when compared with the state and nation. The national standard LQ is "1.00." The strengths and weaknesses of occupational employment categories as measured by the LQ can provide important information about industry prevalence within a region's creative sector.

City of Seattle Occupational Information 2009-2010

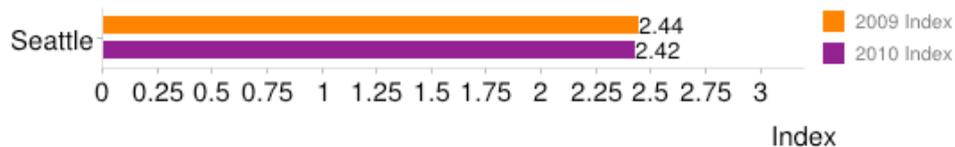
Between 2009 and 2010 Seattle lost 230 creative jobs at a rate of 0.79%. In 2010, there were 28,859 jobs related to the creative economy and Seattle had an occupational index of 2.42. Dancers, broadcast technicians, and editors experienced the highest rates of job loss. Despite an overall decline in creative jobs within the City of Seattle, occupations such as fashion designers, directors of religious activities, and floral designers reported increases in jobs between 2009 and 2010. Architects, camera operators, and sound engineering technicians had the highest concentrations of occupations in Seattle

Table #15
City of Seattle Occupational Index 2009-2010

Region	2009 Jobs	2010 Jobs	#Change	%Change	2009 Index	2010 Index
Seattle	29,189	28,959	-230	-0.79%	2.44	2.42
Totals	29,189	28,959	-230	-0.79%	2.44	2.42

Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #27
City of Seattle Occupational Index 2009-2010



Source: Economic Modeling Specialists, Inc. Complete Employment

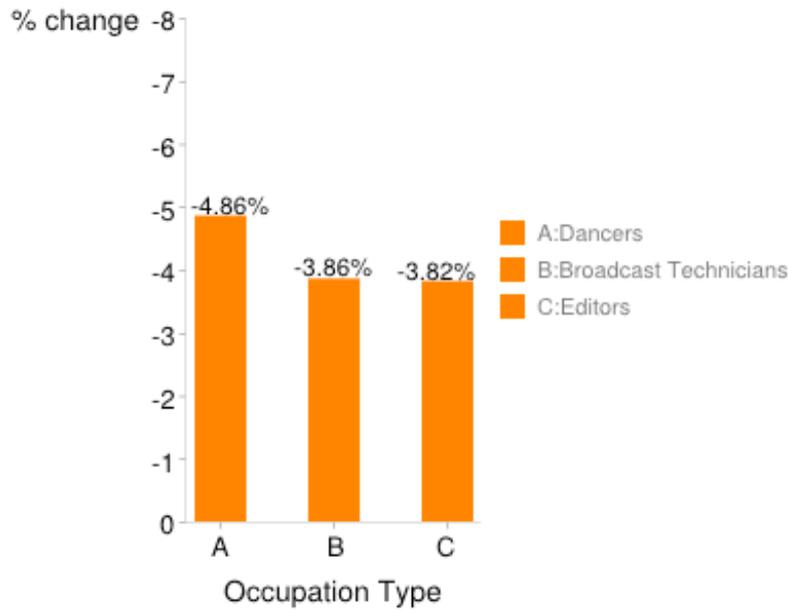
Table #16
City of Seattle Jobs by Occupation 2009-2010

Region: Seattle

Occupation Type	2009 Jobs	2010 Jobs	%Change
Actors	795	768	-3.40
Advertising and Promotions Managers	265	267	0.75
Agents and Business Managers of Artists, Performers, and Athletes	257	252	-1.95
Architects, Except Landscape and Naval	1,390	1,361	-2.09
Art Directors	990	972	-1.82
Audio and Video Equipment Technicians	304	298	-1.97
Broadcast Technicians	259	249	-3.86
Camera Operators, Television, Video, and Motion Picture	269	260	-3.35
Choreographers	124	122	-1.61
Commercial and Industrial Designers	595	610	2.52
Dancers	185	176	-4.86
Directors, Religious Activities	255	263	3.14
Editors	837	805	-3.82
Fashion Designers	511	532	4.11
Film and Video Editors	198	198	0.00
Fine Artists including Painters, Sculptors, and Illustrators	837	817	-2.39
Floral Designers	566	582	2.83
Graphic Designers	1,517	1,530	0.86
Interior Designers	689	706	2.47
Landscape Architects	523	507	-3.06
Librarians	681	681	0.00
Media and Communication Equipment Workers, All Other	198	197	-0.51
Media and Communication Workers, All Other	1,052	1,056	0.38
Multi-Media Artists and Animators	1,162	1,147	-1.29
Music Directors and Composers	1,341	1,305	-2.68
Musical Instrument Repairers and Tuners	40	40	0.00
Musicians and Singers	1,708	1,655	-3.10
Photographers	4,188	4,258	1.67
Producers and Directors	1,036	1,015	-2.03
Public Relations Managers	483	482	-0.21
Public Relations Specialists	1,609	1,617	0.50
Radio and Television Announcers	318	307	-3.46
Set and Exhibit Designers	463	476	2.81
Sound Engineering Technicians	199	193	-3.02
Technical Writers	364	359	-1.37
Writers and Authors	2,981	2,896	-2.85
Total	29,189	28,959	-0.79

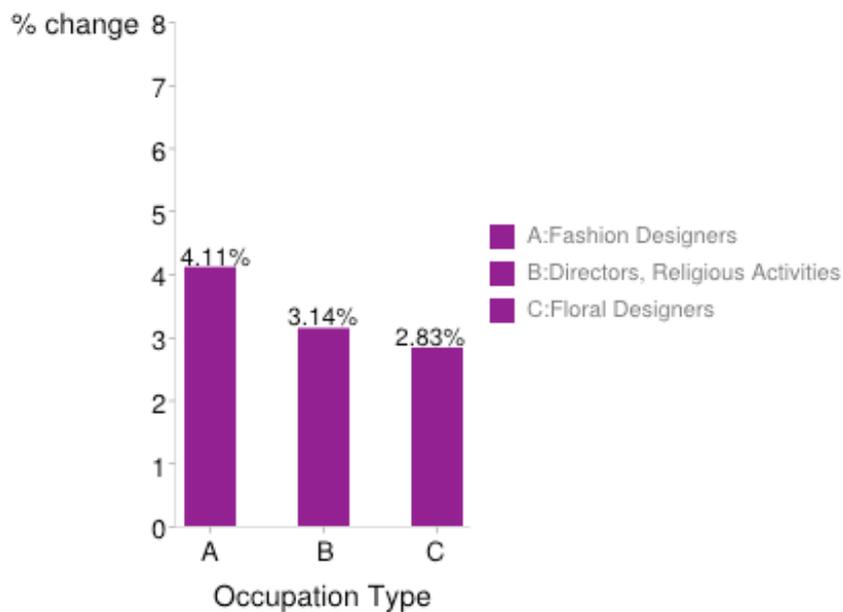
Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #28
Top 3 Negative % Change by Occupation 2009-2010



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #29
Top 3 Positive % Change by Occupation 2009-2010



Source: Economic Modeling Specialists, Inc. Complete Employment

Table #17
City of Seattle Jobs by Location Quotient 2009-2010

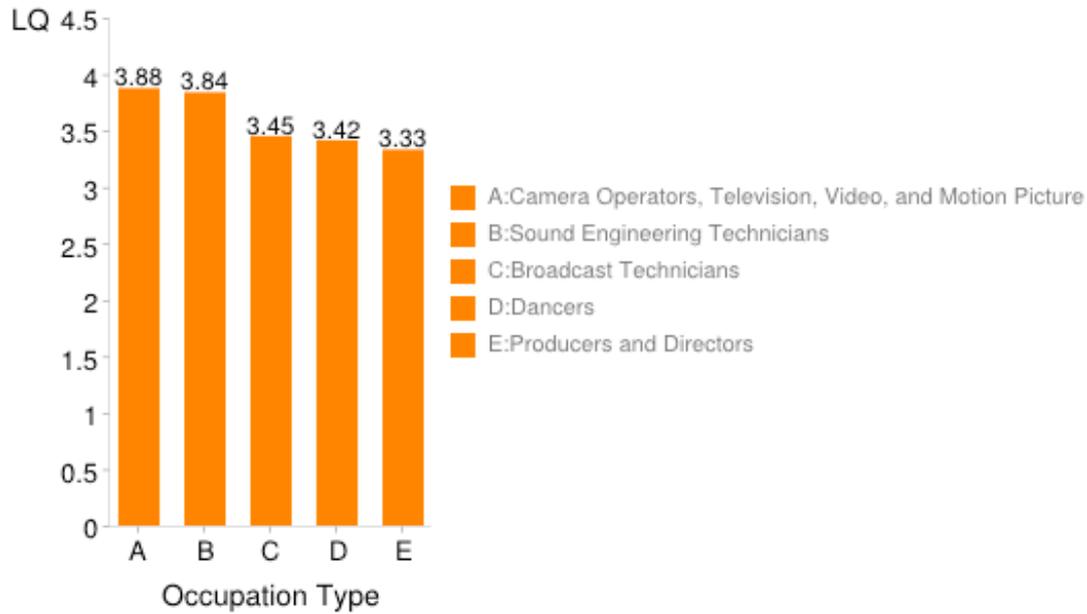
Region: Seattle

Occupation Type	2009 State LQ	2010 State LQ	2009 National LQ	2010 National LQ
Actors	3.18	3.15	3.06	2.95
Advertising and Promotions Managers	2.07	2.09	1.98	2.02
Agents and Business Managers of Artists, Performers, and Athletes	2.27	2.23	1.97	1.90
Architects, Except Landscape and Naval	2.73	2.76	3.71	3.76
Art Directors	2.49	2.48	2.82	2.77
Audio and Video Equipment Technicians	2.75	2.73	2.08	2.05
Broadcast Technicians	3.45	3.42	2.73	2.68
Camera Operators, Television, Video, and Motion Picture	3.88	3.80	3.78	3.68
Choreographers	1.86	1.86	1.88	1.86
Commercial and Industrial Designers	2.26	2.29	2.94	2.99
Dancers	3.42	3.39	3.47	3.33
Directors, Religious Activities	0.86	0.88	0.75	0.76
Editors	2.07	2.05	1.95	1.93
Fashion Designers	2.60	2.63	3.05	3.13
Film and Video Editors	3.26	3.27	2.74	2.77
Fine Artists including Painters, Sculptors, and Illustrators	2.48	2.46	2.90	2.83
Floral Designers	1.76	1.78	2.17	2.24
Graphic Designers	2.15	2.17	2.25	2.27
Interior Designers	2.51	2.54	2.77	2.82
Landscape Architects	2.11	2.10	3.33	3.36
Librarians	1.45	1.46	1.58	1.60
Media and Communication Equipment Workers, All Other	2.76	2.74	3.36	3.31
Media and Communication Workers, All Other	1.88	1.87	2.87	2.86
Multi-Media Artists and Animators	2.36	2.35	3.40	3.35
Music Directors and Composers	2.22	2.19	2.29	2.21
Musical Instrument Repairers and Tuners	1.28	1.26	1.10	1.12
Musicians and Singers	2.37	2.33	2.44	2.36
Photographers	1.62	1.62	1.98	2.00
Producers and Directors	3.33	3.31	2.91	2.87
Public Relations Managers	1.95	1.97	3.00	3.01
Public Relations Specialists	1.98	1.98	2.10	2.11
Radio and Television Announcers	2.97	2.96	2.30	2.28
Set and Exhibit Designers	2.51	2.52	3.14	3.18
Sound Engineering Technicians	3.84	3.83	3.58	3.53
Technical Writers	1.46	1.46	2.33	2.31
Writers and Authors	2.57	2.55	2.91	2.83

Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #30

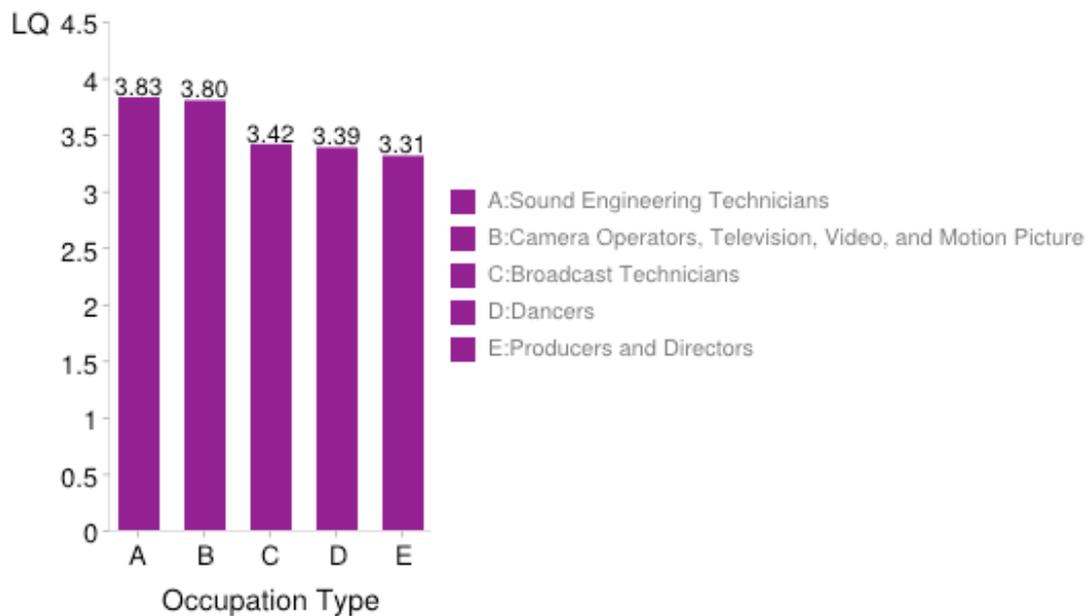
Top 5 Location Quotients by Occupation vs. Statewide Occupations 2009



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #31

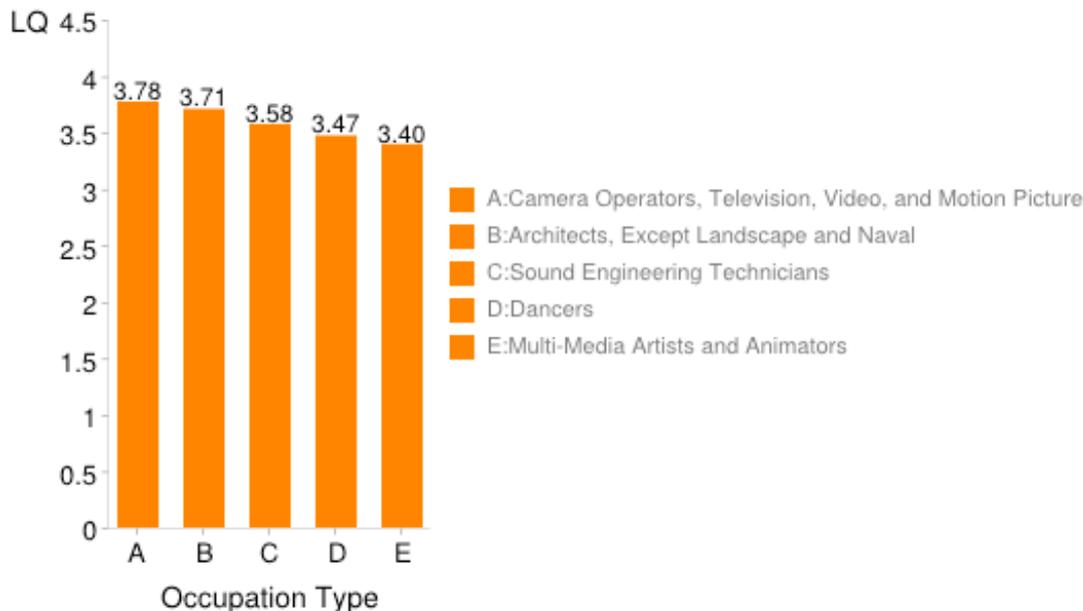
Top 5 Location Quotients by Occupation vs. Statewide Occupations 2010



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #32

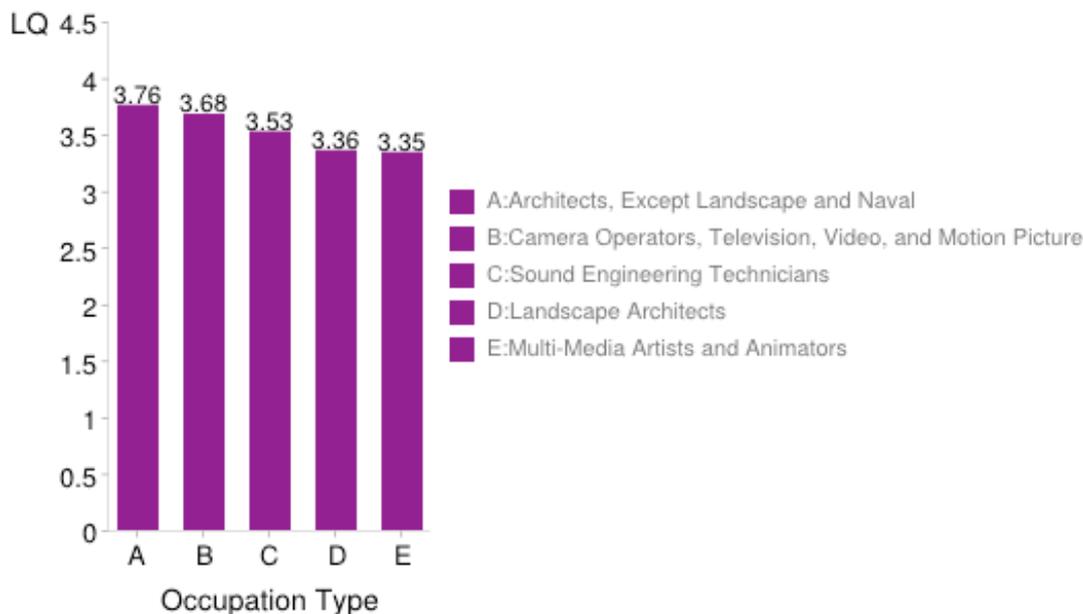
Top 5 Location Quotients by Occupation vs. Nationwide Occupations 2009



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #33

Top 5 Location Quotients by Occupation vs. Nationwide Occupations 2010



Source: Economic Modeling Specialists, Inc. Complete Employment

City of Seattle Non-Profit Arts and Arts-Active Organization Counts 2009-2010

To view detailed information regarding the number of non-profit arts and arts-active organizations located in Seattle, see Tables #18 and #19 and Charts #34 to #37. In 2009, there were 317 non-profit arts and arts-active organizations in Seattle. In 2010, the number of organizations in this category increased to 336. Theater organizations had the largest proportional share of arts organizations, followed by dance organizations and music groups. Cultural and ethnic awareness organizations made up the largest proportional share of the city's arts-active organizations in 2010.

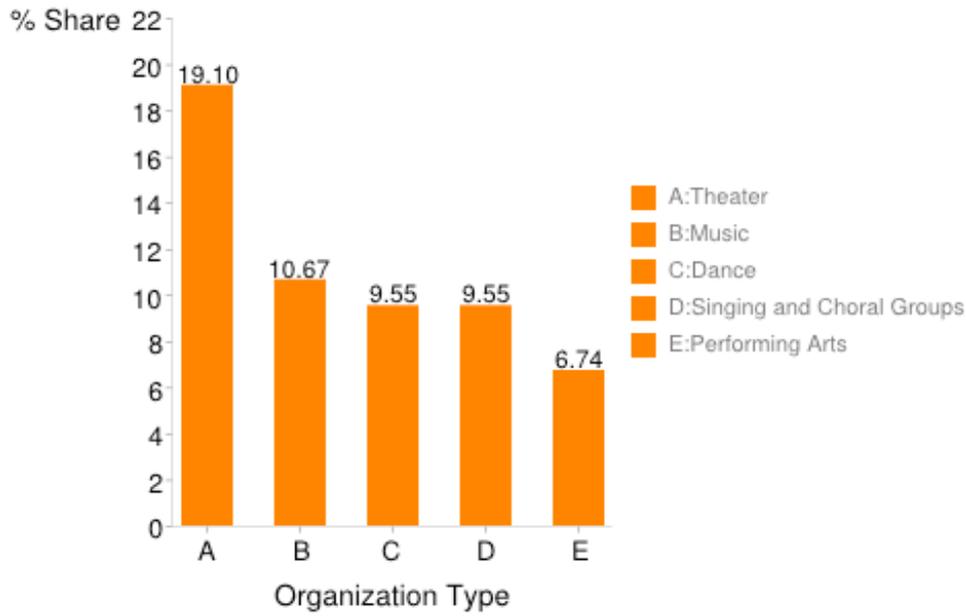
Table #18
City of Seattle Arts Organizations by Type 2009

Region: Seattle

Arts Organizations 2009	Number	Share	Arts-Active Organizations 2009	Number	Share
Art Museums	2	1.12%	Other Arts & Culture Organizations	7	5.04%
Arts & Culture	10	5.62%	Fund Raising & Fund Distribution	3	2.16%
Arts & Humanities Councils & Agencies	5	2.81%	Management & Technical Assistance	0	0.00%
Arts Education	9	5.06%	Professional Societies & Associations	4	2.88%
Arts Services	2	1.12%	Single Organization Support	21	15.11%
Alliances & Advocacy	3	1.69%	Other Arts & Culture Support Organizations	3	2.16%
Ballet	1	0.56%	Children's Museums	1	0.72%
Bands & Ensembles	6	3.37%	Commemorative Events	0	0.00%
Dance	17	9.55%	Community Celebrations	0	0.00%
Film & Video	11	6.18%	Cultural/Ethnic Awareness	29	20.86%
Folk Arts	3	1.69%	Fairs	3	2.16%
Music	19	10.67%	Folk Arts Museums	0	0.00%
Opera	2	1.12%	Historical Organizations	9	6.47%
Performing Arts	12	6.74%	Historical Societies & Historic Preservation	12	8.63%
Performing Arts Centers	6	3.37%	History Museums	5	3.60%
Singing & Choral Groups	17	9.55%	Humanities	12	8.63%
Symphony Orchestras	10	5.62%	Media & Communications	2	1.44%
Theater	34	19.10%	Museums	3	2.16%
Visual Arts	9	5.06%	Natural History & Natural Science Museums	0	0.00%
			Performing Arts School	7	5.04%
			Printing & Publishing	10	7.19%
			Radio	4	2.88%
			Research Institutes & Public Policy Analysis	0	0.00%
			Science & Technology Museums	2	1.44%
			Television	2	1.44%
Totals	178	100%	Totals	139	100%

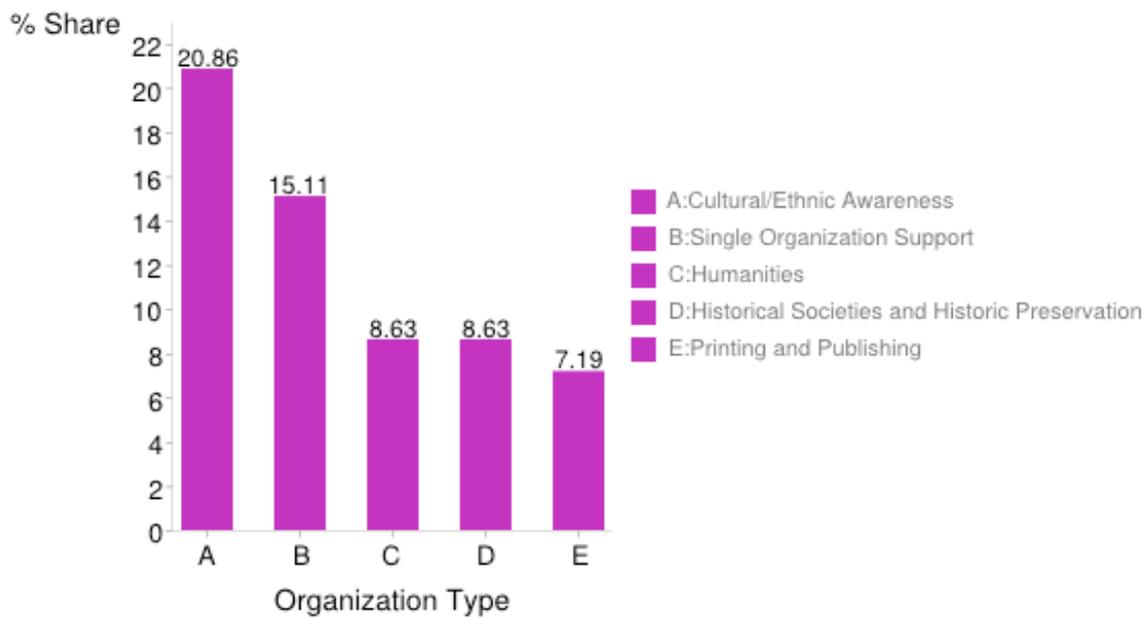
Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #34
Arts Organizations % Share 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #35
Arts-Active Organizations % Share 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

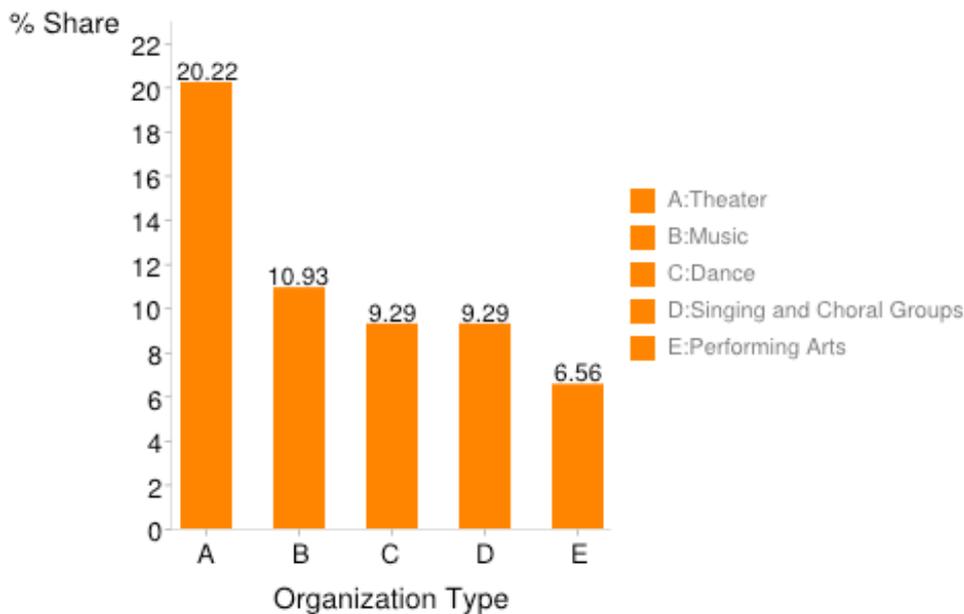
Table #19
City of Seattle Arts Organizations by Type 2010

Region: Seattle

Arts Organizations 2010	Number	Share	Arts-Active Organizations 2010	Number	Share
Art Museums	2	1.09%	Other Arts & Culture Organizations	8	5.23%
Arts & Culture	10	5.46%	Fund Raising & Fund Distribution	3	1.96%
Arts & Humanities Councils & Agencies	6	3.28%	Management & Technical Assistance	0	0.00%
Arts Education	11	6.01%	Professional Societies & Associations	4	2.61%
Arts Services	2	1.09%	Single Organization Support	21	13.73%
Alliances & Advocacy	3	1.64%	Other Arts & Culture Support Organizations	4	2.61%
Ballet	1	0.55%	Children's Museums	1	0.65%
Bands & Ensembles	5	2.73%	Commemorative Events	0	0.00%
Dance	17	9.29%	Community Celebrations	0	0.00%
Film & Video	10	5.46%	Cultural/Ethnic Awareness	31	20.26%
Folk Arts	3	1.64%	Fairs	4	2.61%
Music	20	10.93%	Folk Arts Museums	0	0.00%
Opera	3	1.64%	Historical Organizations	9	5.88%
Performing Arts	12	6.56%	Historical Societies & Historic Preservation	11	7.19%
Performing Arts Centers	5	2.73%	History Museums	6	3.92%
Singing & Choral Groups	17	9.29%	Humanities	14	9.15%
Symphony Orchestras	11	6.01%	Media & Communications	7	4.58%
Theater	37	20.22%	Museums	3	1.96%
Visual Arts	8	4.37%	Natural History & Natural Science Museums	0	0.00%
			Performing Arts School	7	4.58%
			Printing & Publishing	11	7.19%
			Radio	5	3.27%
			Research Institutes & Public Policy Analysis	0	0.00%
			Science & Technology Museums	2	1.31%
			Television	2	1.31%
Totals	183	100%	Totals	153	100%

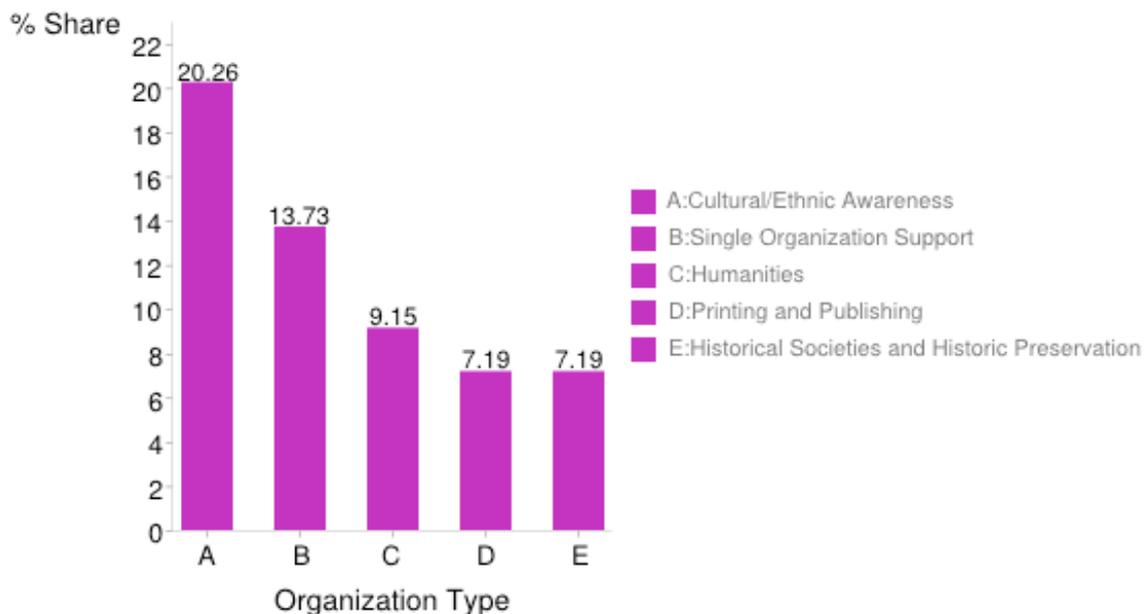
Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #36
Arts Organizations % Share 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #37
Arts-Active Organizations % Share 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

City of Seattle Non-Profit Arts Organization Income and Index Values 2009-2010

Arts organizations are generally qualified within the CVI™ as organizations with a primary mission in presenting or serving media that are traditionally categorized as the arts. These types of organizations include the traditionally subsidized arts, such as visual arts museums, the symphony, the opera, the ballet and the theater. In 2009, \$225.5 million in revenues were generated by non-profit arts organizations within the City of Seattle. In 2010, revenues for non-profit arts organizations increased to \$270.2 million. The greatest proportion of these revenues came from program revenues, gifts, and contributions. The organization revenues measured within this study can be affected by the number of

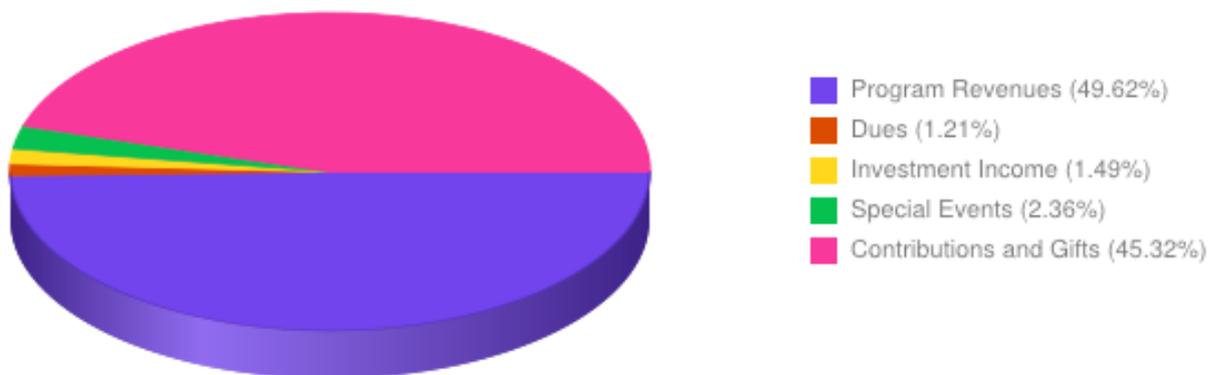
organizations reporting from year to year, categorization and general reporting errors as submitted by individual agencies, disbursements of federal grants, and individual organizations' fundraising efforts, such as capital campaigns. Generally, these fluctuations occur throughout non-profit revenue measurements across the nation as reported in this study. As a result, the annual index values provide a more informative indicator of non-profit organization health than the total revenue figures. However, revenue figures as aggregated within this study provide a substantive approximation of dollar amounts going to non-profit arts organizations within a reporting period.

Table #20
City of Seattle Non-Profit Arts Organizations by Income 2009

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle	\$111,939,058	\$3,363,196	\$5,315,367	\$102,237,466	\$2,728,013	\$225,583,100
Totals	\$111,939,058	\$3,363,196	\$5,315,367	\$102,237,466	\$2,728,013	\$225,583,100

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #38
City of Seattle Non-Profit Arts Organizations by Income 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

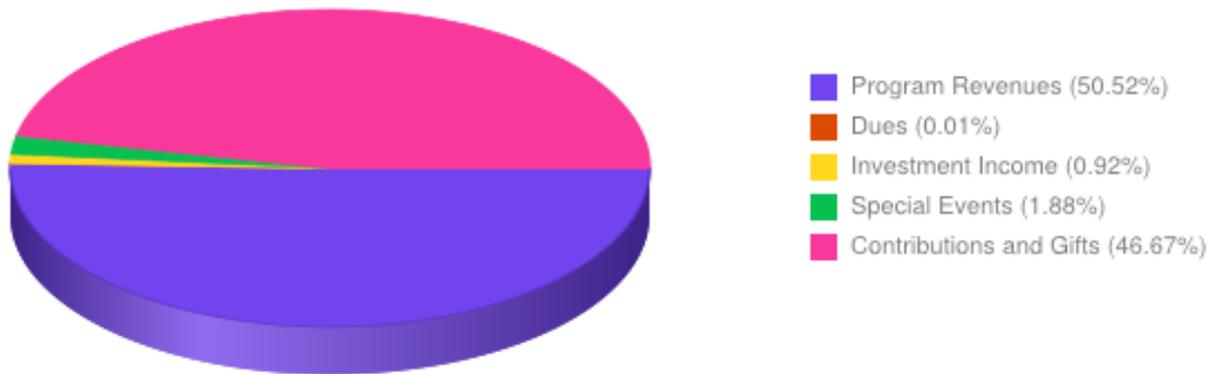
Table #21
City of Seattle Non-Profit Arts Organizations by Income 2010

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle	\$136,506,587	\$2,480,980	\$5,085,743	\$126,104,223	\$25,404	\$270,202,937
Totals	\$136,506,587	\$2,480,980	\$5,085,743	\$126,104,223	\$25,404	\$270,202,937

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #39

City of Seattle Non-Profit Arts Organizations by Income 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Table #22

City of Seattle Non-Profit Arts Organizations by Index 2009

Region	Total Revenues	Per Capita	Index
Seattle	\$225,583,100	275.56	5.67
Totals	\$225,583,100	275.56	5.67

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #40

City of Seattle Non-Profit Arts Organizations by Index 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Table #23

City of Seattle Non-Profit Arts Organizations by Index 2010

Region	Total Revenues	Per Capita	Index
Seattle	\$270,202,937	328.47	7.49
Totals	\$270,202,937	328.47	7.49

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #41
City of Seattle Non-Profit Arts Organizations by Index 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

City of Seattle Non-Profit Arts-Active Organization Income and Index Values 2009-2010

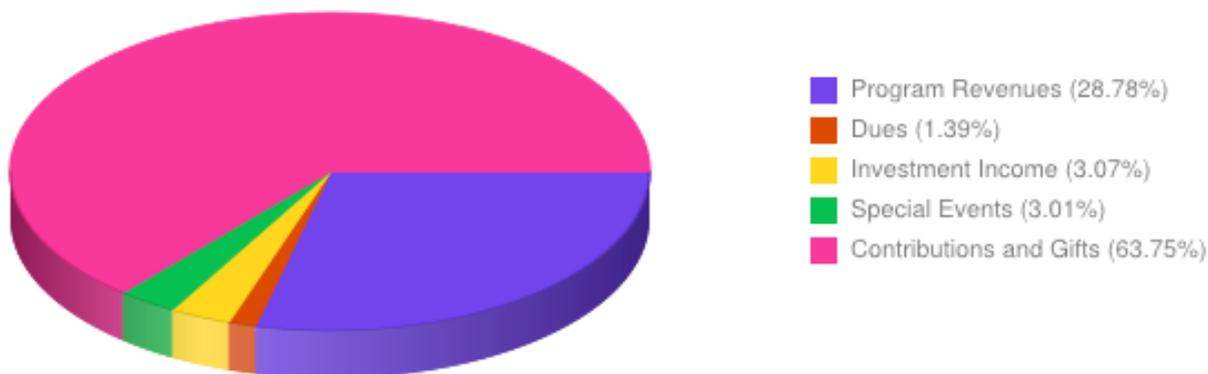
Arts-active organizations are generally qualified within the CVI™ as organizations that do not have primary missions related to serving or presenting the arts, but do conduct a number of activities that can be considered "arts-based." For example, within any history museum, there is a significant amount of arts activity associated with exhibit design. Additionally, there are inherently close ties between humanities, culture, and arts organizations. Between 2009 and 2010, revenues for non-profit arts-active organizations decreased from \$179.7 million to \$145.1 million.

Table #24
City of Seattle Non-Profit Arts-Active Organizations by Income 2009

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle	\$51,717,394	\$5,525,531	\$5,404,384	\$114,579,427	\$2,495,765	\$179,722,501
Totals	\$51,717,394	\$5,525,531	\$5,404,384	\$114,579,427	\$2,495,765	\$179,722,501

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #42
City of Seattle Non-Profit Arts-Active Organizations by Income 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Table #25

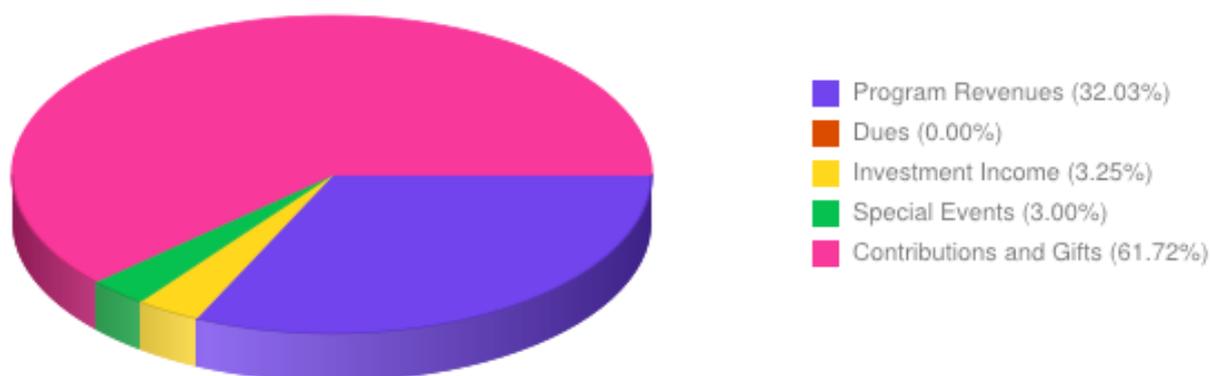
City of Seattle Non-Profit Arts-Active Organizations by Income 2010

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle	\$46,489,819	\$4,717,538	\$4,350,525	\$89,566,060	\$2,241	\$145,126,183
Totals	\$46,489,819	\$4,717,538	\$4,350,525	\$89,566,060	\$2,241	\$145,126,183

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #43

City of Seattle Non-Profit Arts-Active Organizations by Income 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Table #26

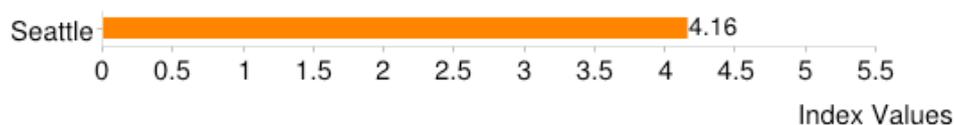
City of Seattle Non-Profit Arts-Active Organizations by Index 2009

Region	Total Revenues	Per Capita	Index
Seattle	\$179,722,501	219.54	4.16
Totals	\$179,722,501	219.54	4.16

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #44

City of Seattle Non-Profit Arts-Active Organizations by Index 2009



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Table #27

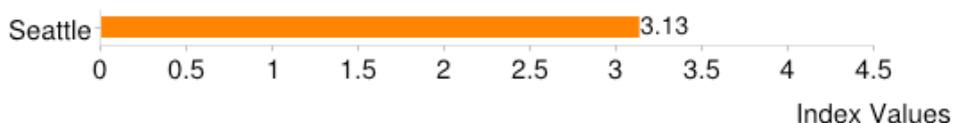
City of Seattle Non-Profit Arts-Active Organizations by Index 2010

Region	Total Revenues	Per Capita	Index
Seattle	\$145,126,183	176.42	3.13
Totals	\$145,126,183	176.42	3.13

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #45

City of Seattle Non-Profit Arts-Active Organizations by Index 2010



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

City of Seattle Photography Store Sales 2009-2010

This category comprises establishments primarily engaged in either retailing new cameras, photographic equipment and photographic supplies or retailing new cameras and photographic equipment in combination with activities such as repair services and film developing (U.S. Census Bureau). Tables #28 and #29 and Charts #46 and #47 summarize sales for these types of businesses within Seattle for 2009 and 2010. In 2010, the city generated \$6.35 million in sales, \$7.73 per capita, and had an index value well above the national average at 1.57.

Table #28

City of Seattle Photography Store Sales 2009

Region	Photography Store Sales	Per Capita	Index
Seattle	\$6,564,000	8.02	2.14
Totals	\$6,564,000	8.02	2.14

Source: Economic Modeling Specialists, Inc.

Chart #46

City of Seattle Photography Store Sales by Index 2009



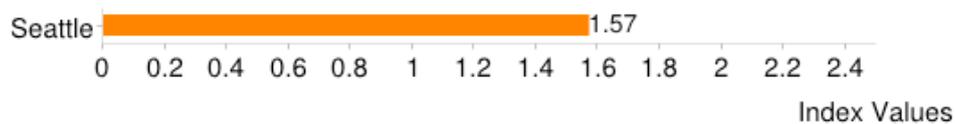
Source: Economic Modeling Specialists, Inc.

Table #29
City of Seattle Photography Store Sales 2010

Region	Photography Store Sales	Per Capita	Index
Seattle	\$6,355,000	7.73	1.57
Totals	\$6,355,000	7.73	1.57

Source: Economic Modeling Specialists, Inc.

Chart #47
City of Seattle Photography Store Sales by Index 2010



Source: Economic Modeling Specialists, Inc.

City of Seattle Musical Instrument Store Sales 2009-2010

This industry comprises establishments primarily engaged in retailing new musical instruments, sheet music and related supplies, or retailing new products in combination with musical instrument repair, rental, or music instruction (U.S. Census Bureau). Tables #30 and #31 along with Charts #48 and #49 summarize sales within these types of businesses in Seattle, which had \$9.89 million in total sales, \$12.03 per capita, and an individual CVI™ value of 1.22 in 2010.

Table #30
City of Seattle Musical Instrument Store Sales 2009

Region	Musical instrument and supplies stores	Per Capita	Index
Seattle	\$11,625,000	14.20	1.50
Totals	\$11,625,000	14.20	1.50

Source: Economic Modeling Specialists, Inc.

Chart #48
City of Seattle Musical Instrument Store Sales by Index 2009



Source: Economic Modeling Specialists, Inc.

Table #31

City of Seattle Musical Instrument Store Sales 2010

Region	Musical instrument and supplies stores	Per Capita	Index
Seattle	\$9,893,000	12.03	1.22
Totals	\$9,893,000	12.03	1.22

Source: Economic Modeling Specialists, Inc.

Chart #49

City of Seattle Musical Instrument Store Sales by Index 2010



Source: Economic Modeling Specialists, Inc.

City of Seattle Book and Record Store Sales 2009-2010

This CVI™ category comprises establishments primarily engaged in retailing new books as well as establishments primarily engaged in retailing new prerecorded audio and video tapes, CDs, and records (U.S. Census Bureau). Tables #32 and #33, along with Charts #50 and #51 summarize sales within these types of businesses within Seattle. In 2010, the City of Seattle generated \$37.7 million in total sales, \$45.88 per capita, and had an individual index value of 1.60.

Table #32

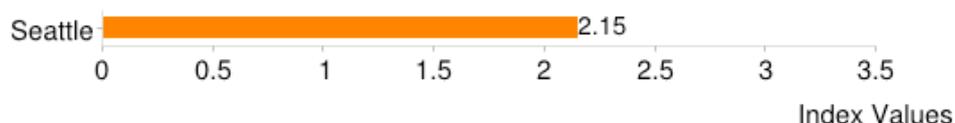
City of Seattle Book and Record Store Sales 2009

Region	Bookstore and Record Store Sales	Per Capita	Index
Seattle	\$46,681,000	57.02	2.15
Totals	\$46,681,000	57.02	2.15

Source: Economic Modeling Specialists, Inc.

Chart #50

City of Seattle Book and Record Store Sales by Index 2009



Source: Economic Modeling Specialists, Inc.

Table #33
City of Seattle Book and Record Store Sales 2010

Region	Bookstore and Record Store Sales	Per Capita	Index
Seattle	\$37,741,000	45.88	1.60
Totals	\$37,741,000	45.88	1.60

Source: Economic Modeling Specialists, Inc.

Chart #51
City of Seattle Book and Record Store Sales by Index 2010



Source: Economic Modeling Specialists, Inc.

City of Seattle Art Dealer Revenues 2009-2010

This category includes establishments primarily engaged in retailing original and limited edition art works (U.S. Census Bureau). Tables #34 and #35 and Charts #52 and #53 summarize sales within these types of businesses in Seattle. The city generated revenues of \$13.9 million, \$16.92 per capita, and had an individual CVI™ value of 1.17.

Table #34
City of Seattle Art Dealer Revenues 2009

Region	Art dealers	Per Capita	Index
Seattle	\$13,674,000	16.70	1.16
Totals	\$13,674,000	16.70	1.16

Source: Economic Modeling Specialists, Inc.

Chart #52
City of Seattle Art Dealer Revenues by Index 2009



Source: Economic Modeling Specialists, Inc.

Table #35
City of Seattle Art Dealer Revenues 2010

Region	Art dealers	Per Capita	Index
Seattle	\$13,917,000	16.92	1.17
Totals	\$13,917,000	16.92	1.17

Source: Economic Modeling Specialists, Inc.

Chart #53
City of Seattle Art Dealer Revenues by Index 2010



Source: Economic Modeling Specialists, Inc.

City of Seattle Independent Artist Revenues 2009-2010

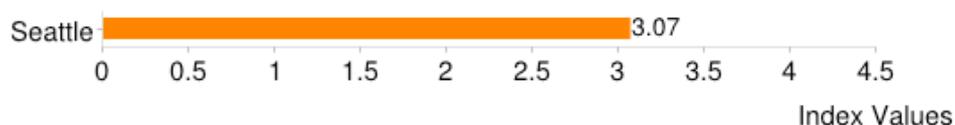
This category includes independent (i.e. freelance) individuals primarily engaged in performing in artistic productions, creating artistic and cultural works or productions, or providing the technical expertise necessary for these productions (U.S. Census Bureau). Tables #36 and #37 as well as Charts #54 and #55 summarize sales within these types of businesses within the city. The City of Seattle generated total revenues of \$240.4 million, \$292.24 per capita, and had a 2010 index value that was above the national average: 2.50.

Table #36
City of Seattle Independent Artist Revenues 2009

Region	Independent artists, writers, and performers	Per Capita	Index
Seattle	\$276,277,000	337.49	3.07
Totals	\$276,277,000	337.49	3.07

Source: Economic Modeling Specialists, Inc.

Chart #54
City of Seattle Independent Artist Revenues by Index 2009



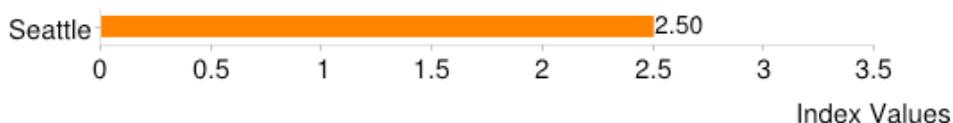
Source: Economic Modeling Specialists, Inc.

Table #37
City of Seattle Independent Artist Revenues 2010

Region	Independent artists, writers, and performers	Per Capita	Index
Seattle	\$240,402,000	292.24	2.50
Totals	\$240,402,000	292.24	2.50

Source: Economic Modeling Specialists, Inc.

Chart #55
City of Seattle Independent Artist Revenues by Index 2010



Source: Economic Modeling Specialists, Inc.

City of Seattle Performing Arts Participation Revenues 2009-2010

This category includes theater companies and dinner theaters, musical groups and artists, and other performing arts companies primarily engaged in producing live theatrical productions (U.S. Census Bureau). Tables #38 and #39 and Charts #56 and #57 summarize sales within these types of businesses in Seattle. The city generated total revenues of \$193.4 million, \$235.17 per capita, and had the highest 2010 individual CVI™ category value of 4.41.

Table #38
City of Seattle Performing Arts Participation Revenues 2009

Region	Performing Arts Participation	Per Capita	Index
Seattle	\$183,478,000	224.13	4.51
Totals	\$183,478,000	224.13	4.51

Source: Economic Modeling Specialists, Inc.

Chart #56
City of Seattle Performing Arts Participation Revenues by Index 2009



Source: Economic Modeling Specialists, Inc.

Table #39
City of Seattle Performing Arts Participation Revenues 2010

Region	Performing Arts Participation	Per Capita	Index
Seattle	\$193,451,000	235.17	4.41
Totals	\$193,451,000	235.17	4.41

Source: Economic Modeling Specialists, Inc.

Chart #57
City of Seattle Performing Arts Participation Revenues by Index 2010



Source: Economic Modeling Specialists, Inc.

Technical Report and Understanding the CVI™

While the informational value of this report is immense, the potential benefit to arts advocacy, planning, and policy-making is equally great. In order to realize the practical value of this research, it is important to review and consider the history of the CVI™ and its differentiation from economic impact studies. Some suggestions for making use of the research are also presented here to encourage immediate application of the research. Finally, the sources of CVI™ data are itemized to provide transparency of the research process.

Developing the Creative Vitality™ Index

The CVI™ was developed in the context of innovations in cultural policy and economic development. The CVI™ was initially conceived to help public sector arts agencies clearly communicate that their work encompasses a much larger segment of creative economic activity than had previously been the case. This was necessary because, beginning in the mid 1960s, when state arts agencies were established and city arts agencies were either founded or expanded, the primary focus of these entities was on the growth of the supply and quality of primarily non-profit-based arts activities.

These entities made great progress in this area. Once the supply and quality of non-profit arts activities was greatly bolstered, however, the public sector funders of the non-profit arts field began to consider how their goals and the work of the non-profit arts were part of a much larger creative system. They also became aware that the non-profit arts and public arts policy depended on the health of that larger system to survive in the present and thrive in the future.

Simultaneous with these developments, practitioners from fields representing for-profit creative activities and occupations began to discuss the creative economy in broad, highly inclusionary terms. The arts field and public sector arts funders embraced this broader concept as reflective of how they envisioned their work—as a stimulative part of an overall creative system and not simply as suppliers of funding to maintain a supply of non-profit-sourced arts opportunities. The CVI™ reflects this broader systems-oriented thinking and reinforces the fact that the non-profit arts and public arts agencies are part of an interdependent whole called “the creative sector.”

The CVI™ grew out of a conversation about whether to undertake an economic impact study

of the arts. The staff leadership of the Washington State Arts Commission and the Seattle Office of Arts & Cultural Affairs, in collaboration with others, explored ways to expand and enrich the economic argument for support of the arts and especially public funding of the arts. In doing so, the group was influenced by two national conversations concerning economic development: the defining of a creative economy and the outlining of the concept of economic development clusters. Those conversations did something the non-profit arts community was very late in doing—they included the related for-profit creative sector in a universe normally reserved for non-profits.

The public value work articulated by Mark Moore also played a role in the development of the CVI™. That work helped the public sector component of the non-profit arts funding community move away from a perspective oriented toward saving the arts to considering ways to be responsive to what citizens wanted in the arts. The approach also worked to shape agency deliverables to reflect their actual value to the public rather than the value arts aficionados considered them to have for the public. One result of this influence was that the CVI™ was developed in a context of thinking in which individuals are assumed to have choices and that, to remain viable, public sector arts funders need to offer choices the public will value and thus select. In this concept of selection is the understanding that choice in the arts ranges outside the non-profit arts and that the public sector arts agency needs to ensure that such choice is available.

The Relationship of the CVI™ to Economic Impact Studies

Although it evolved from a discussion of whether to commission an economic impact study, the CVI™ is not an economic impact study of the arts. Economic impact studies are enumerations of the total economic value and impact of a specific basket of arts activities on the community, taking into account estimates of the ripple effect on jobs and revenues in other non-related industries. The majority of such studies focus on the non-profit art sector and either measure its impact exclusively or introduce measures of the impact of selected for-profit activities in a supplementary manner. The CVI™ utilizes some of the data typically included in arts economic impact studies; however, it draws on many more data streams, and its goal is quite different in that it seeks to provide an indicator of the relative health of the economic elements of the creative economy.

Economic impact studies are rooted in advocacy and generally have as a core purpose the definition of the non-profit arts sector as a meaningful component of the larger economic system. The results of such studies are commonly used to argue for the allocation of scarce budget dollars to the arts because a dollar invested in the arts multiplies many times over and helps nurture a more robust overall economy. These studies have also been used to help the arts compete with other discretionary forms of government spending—and often these other interests have their own economic impact studies. The studies have been used most effectively to counteract the misguided notion that funds invested in the non-profit arts are removed from the economy and thus play no role in building or sustaining it.

Economic impact studies have also been commissioned to call attention to the size and scope of arts and culture as a component of the overall economic activity of an area. Often community leaders and the public are only familiar with one segment of the arts through their personal acquaintance with a single institution or discipline. The economic impact study aggregates information in ways that call attention to the size and scope of a cluster of endeavors that are often considered to be of minor importance in economic terms. As a result, the prestige of the arts and culture community in an area is enhanced, and the ability of the sector to be heard is often increased.

Although the CVI™ can partially address each of the uses to which economic impact studies are employed, it has a different purpose. The CVI™ is about exploring a complex set of relationships and changes in the dynamics of those relationships over time. It is not a

replacement for economic impact studies, but can be a complement to them.

Making Use of the Creative Vitality™ Index

The Creative Vitality™ Index is designed to serve as a tool to inform public policy decision making and to support the work of advocates for the development of the creative economy. Here are some of the major uses of the CVI™: as a definitional tool, the index can be used to call attention to and educate the community at-large concerning the components and dynamics of the creative economy. Of particular significance is the promotion of the concept that the creative economy includes both the for-profit and the non-profit arts-related activities of an area. Many economic impact studies centered on the arts have focused almost entirely on the non-profit sector, and the inclusion of for-profit activities is, for many, a new conceptualization of the role of the arts in an economy. This approach locates all arts and arts-related creative activities in a continuum of creative activities.

The index can serve as a source of information for advocacy messaging. Individuals engaged in advocacy on behalf of the creative economy as a whole or elements of it can use the index to do some of the following:

Call the attention of the public to significant changes in the creative economy ecosystem. For example, if contributions from private foundations drop substantially in a year and three major architectural firms leave the area, advocates for a healthy creative economy can call attention to those factors as negative elements that will affect an overall ecosystem. Similarly, if non-profit arts groups at the same time experience increases in income from individuals and there are substantial increases in employment within other major creative occupations such as graphic design and advertising, the negative impact of the events noted above may be cushioned or alleviated altogether.

Underscore the economic relationships between the for-profit sector and the non-profit sector and make the point that a healthy non-profit arts sector is important to the development of a healthy for-profit sector.

Advocate for improvements to the allocation of resources or the creation of policies that will increase the index values through the expansion of the role of a creative economy in a region.

Serve as a framework upon which to define and build a creative coalition. With the components of the index setting forth a vision for a creative community rather than a non-profit arts community, those who wish to build coalitions to influence change for the benefit of the development of the creative economy have a broader and deeper platform from which to begin the conversation.

Benchmark an area of endeavor and lay the groundwork for the improvement of one or more aspects of the creative economy. The index can serve as an initial diagnostic tool to create a baseline and then can be used to measure progress in that area. Elected officials and civic leaders can use the index as a starting point for discussing ways in which an area's local economy can be enriched through the development of the creative-economy segment of that community.

More on the CVI™ Data Sources

Index data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics and Economic Modeling Specialists, Inc. (EMSI).

The Urban Institute's National Center for Charitable Statistics aggregates information from the Internal Revenue Service's 990 forms. The forms are required to be submitted by

non-profit 501(c) organizations with annual gross receipts of \$25,000 or more. Organizations with more than \$25,000 but less than \$250,000 in annual gross receipts can file a 990 EZ form that collects less information. The CVI™ uses the information contained in the 990 forms to identify changes in charitable giving in an area. These numbers are the best available but are not absolute. Some numbers may not be reported because of errors made in the completion of the form. These include nested fund transfers within larger fund allocations that include the arts in a significant way but are not broken out and/or the failure to capture data because an organization is either not required to file a 990 or does not file the full 990 form, thus limiting the level of data available.

Economic Modeling Specialists, Inc.'s (EMSI) expertise is centered on regional economics, data analysis, programming, and design so that it can provide the best available products and services for regional decision makers. In an effort to present the most complete possible picture of local economies, EMSI estimates jobs and earnings for all workers using Bureau of Labor Statistics data, data from the U.S. Bureau of Economic Analysis, and information from the U.S. Census Bureau. Because the number of non-covered workers in a given area can be large, job figures from EMSI will often be much larger than those in state LMI data. In order to estimate occupation employment numbers for a region, EMSI first calculates industry employment, then uses regionalized staffing patterns for every industry and applies the staffing patterns to the jobs by industry employment data in order to convert industries to occupations. EMSI bases occupation data on industry data because it is generally more reliable and is always published at the county level, whereas occupation data is only published by Occupational Employment Statistics (OES) region (usually 4-6 economically similar counties). Occupation employment data includes proprietors and self-employed workers. EMSI uses nearly 90 federal, state and private sources including the U.S. Department of Commerce, the U.S. Department of Labor, The U.S. Department of Education, the U.S. Department of Housing and Urban Development, The U.S. Department of Health and Human Services, the U.S. Postal Service, and the Internal Revenue Service. (Partially Reprinted from www.economicmodeling.com)

Getting More Out of the CVI™

WESTAF's research and development team is committed to delivering the highest quality research in broadly accessible formats. Please visit cvi.westaf.org to learn more about the CVI™ and how it can be additionally useful.