



Seattle Office of Arts and Culture 2012 Report

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.

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Section Two: 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.

Important to note is that this report includes select City of Seattle ZIP codes and other ZIP codes located within the Seattle Metro area. These ZIP codes were included by WESTAF at

the request of the City of Seattle. This set of ZIP codes, while defining an area larger than the city itself, provides a comprehensive understanding of the creative economy health of the Seattle Metro Area. Keep in mind that the Seattle Metro Area Region which is defined by a set of ZIP codes is different than the Seattle Metropolitan Statistical Area, which includes King, Snohomish, and Pierce Counties. The population estimates in this report are higher than the actual population of the City of Seattle because we define the Seattle Metro Area by a set of ZIP codes, and City population estimates are defined by Census tracts.

Seattle Metro Area Data Highlights:

In 2012, the Seattle Metro Area outperformed the State of Washington, the Pacific Northwest region, the Western States region, and the Seattle MSA in all eight categories measured by the CVI™. This area also surpassed the Portland Metropolitan Statistical Area (MSA) in seven of those categories. The Seattle Metro Area's performing arts participation revenues and non-profit arts organization revenues fared well compared to the above-mentioned geographies. There were 325 non-profit arts and arts-active organizations within the Seattle Metro Area, and these organizations generated more than \$207 million in revenues in 2012.

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, International (EMSI). The totality of data from these streams is presented in the following section. The following are select data points in this region for 2011:

- In comparison to the United States, the overall CVI™ for the Seattle Metro Area increased from 2.93 in 2011 to 3.14 in 2012.
- Non-profit arts organizations generated \$226 million in revenues, and non-profit arts-active organizations generated \$145.3 million in income.
- There were 329 non-profit arts and arts-active organizations in the Seattle Metro Area.
- Independent artists in the region generated more than \$286 million in revenues.
- When compared to the nation, the Seattle Metro Area had an index value of 4.58 in performing arts participation revenues.

Section 3: Report Details

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.

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Seattle Metro Area Creative Vitality Index by Year

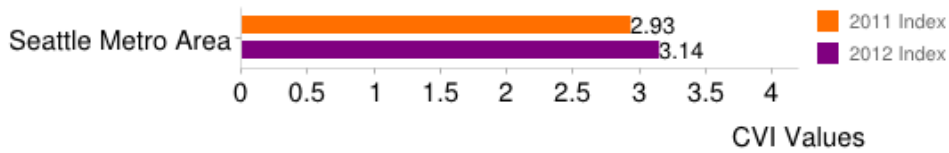
Table #1 and Chart #1 represent the total CVI™ values for the aggregated ZIP codes within the Seattle Metro Area for the years 2011 and 2012. The Seattle Metro Area’s 2011 overall CVI™ value of 2.93 for the area increased to 3.14 in 2012. Changes in index values should be considered alongside general 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
Seattle Metro Area CVI™ 2011-2012

Region	Index 2011	Index 2012
Seattle Metro Area	2.93	3.14
Totals	2.93	3.14

Source: WESTAF

Chart #1
Comparative CVI™



Source: WESTAF

Comparative CVI™ for 2011 and 2012

Table #2 and Chart #2 represent the total CVI™ values for the Seattle Metro Area, Los Angeles County, San Francisco County, Denver County, Multnomah County, and King County for 2011 and 2012. In 2012, San Francisco County had the top overall index value of 5.62, while the Seattle Metro Area had the second highest CVI™ value of 3.14. To view the CVI™ values for all geographies included in this comparison, see Table #2.

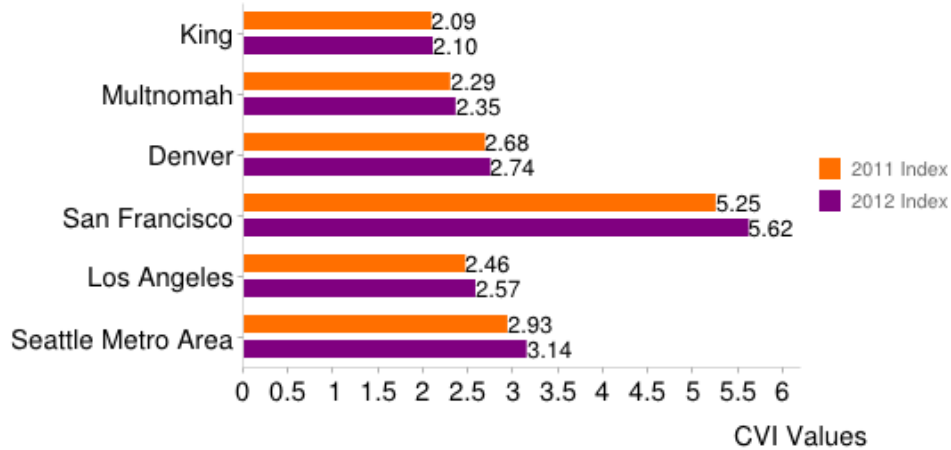
A note on CVI™ values: population density and regional sensitivity are important here. The CVI™ measures the concentration of creative economic activities within a geographic area. While concentration rates, and thus index values, can be affected by changes in the size of the region being studied, CVI™ 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™ of Six Areas 2011-2012

Region	Index 2011	Index 2012
Seattle Metro Area	2.93	3.14
Los Angeles	2.46	2.57
San Francisco	5.25	5.62
Denver	2.68	2.74
Multnomah	2.29	2.35
King	2.09	2.10
Totals	2.59	2.71

Source: WESTAF

Chart #2
Comparative CVI™



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. the United States 2012

Table #3 and Charts #3 through #4 provide the CVI™ values for the Seattle Metro Area in comparison to the United States in 2012. The index value of the region increased from 2.93 in 2011 to 3.14 in 2012. This area outperformed the United States in all categories measured by the CVI™, and non-profit arts organization revenue had the area's highest individual index value of 6.22 in 2011 to 3.14 in 2012. This region had index values greater than 2.00 in four of the eight CVI™ categories. art gallery and individual artist sales had the area's lowest 2012 individual index value of 0.79.

Table #3
Seattle Metro Area CVI™ vs. the United States 2012

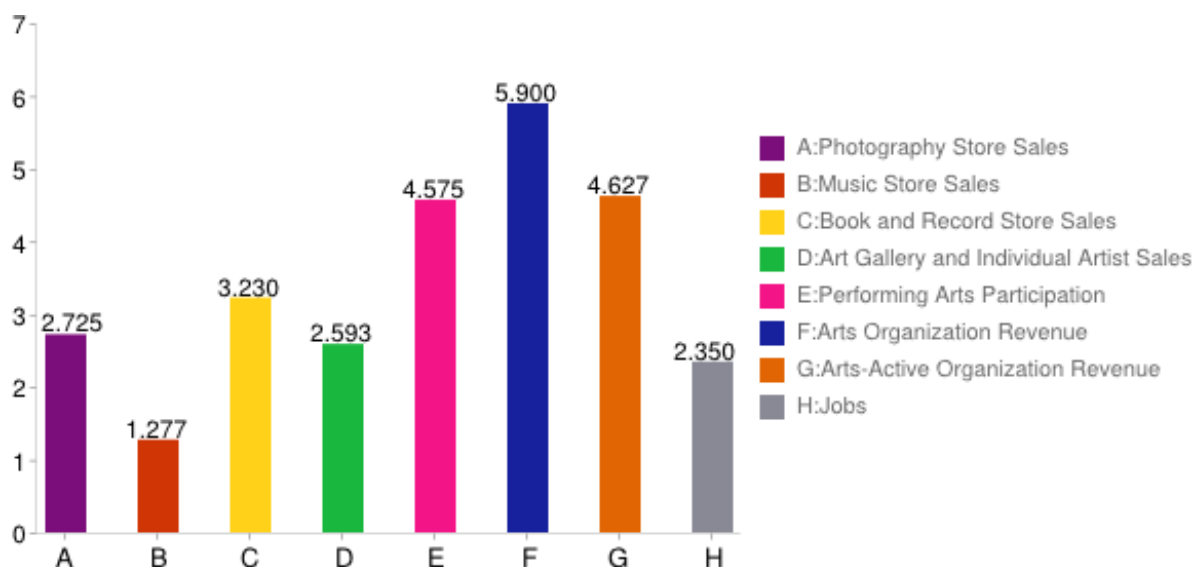
Region A: Seattle Metro Area

Region B: United States

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	314,644,387	
Industry Data			
Photography Store Sales	\$11,045,000	\$1,475,516,000	2.725
Music Store Sales	\$11,547,000	\$3,292,403,000	1.277
Book and Record Store Sales	\$81,789,000	\$9,217,571,000	3.230
Art Gallery and Individual Artist Sales	\$305,550,000	\$42,891,311,000	2.593
Performing Arts Participation	\$222,748,000	\$17,722,350,000	4.575
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$14,125,244,769	5.900
Arts-Active Organization Revenue	\$207,226,623	\$16,303,269,625	4.627
Occupation Data			
Total Jobs	30,724	4,759,511	2.350
Total CVI: 3.144			

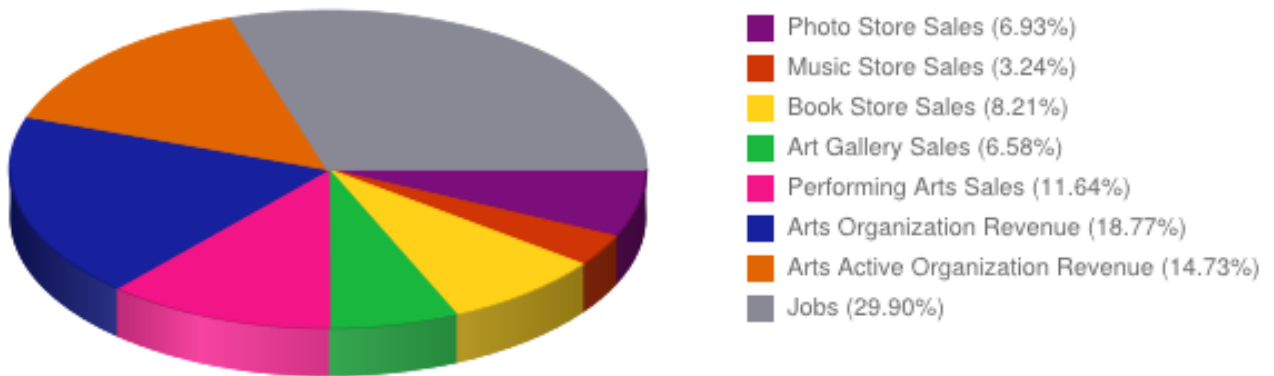
Source: WESTAF

Chart #3
CVI™ Values by Category 2012



Source: WESTAF

Chart #4
Contributions to the CVI™ after Weighting Inputs 2012



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. Western States 2012

Please see Table #4 and Charts #5 and #6 to view summarized CVI™ data for the Seattle Metro Area in comparison to the Western States Region. The Western States Region includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming. In 2012, the Seattle Metro Area surpassed the Western States Region in all eight categories measured by the CVI™, which contributed to a strong overall index value of 2.76. Photography store sales, book and record store sales, performing arts participation revenues, non-profit arts organization revenues, non-profit arts-active organization revenues, and jobs linked to the creative economy all had individual index values above 2.00 in this comparison.

Table #4
Seattle Metro Area CVI™ vs. Western States 2012

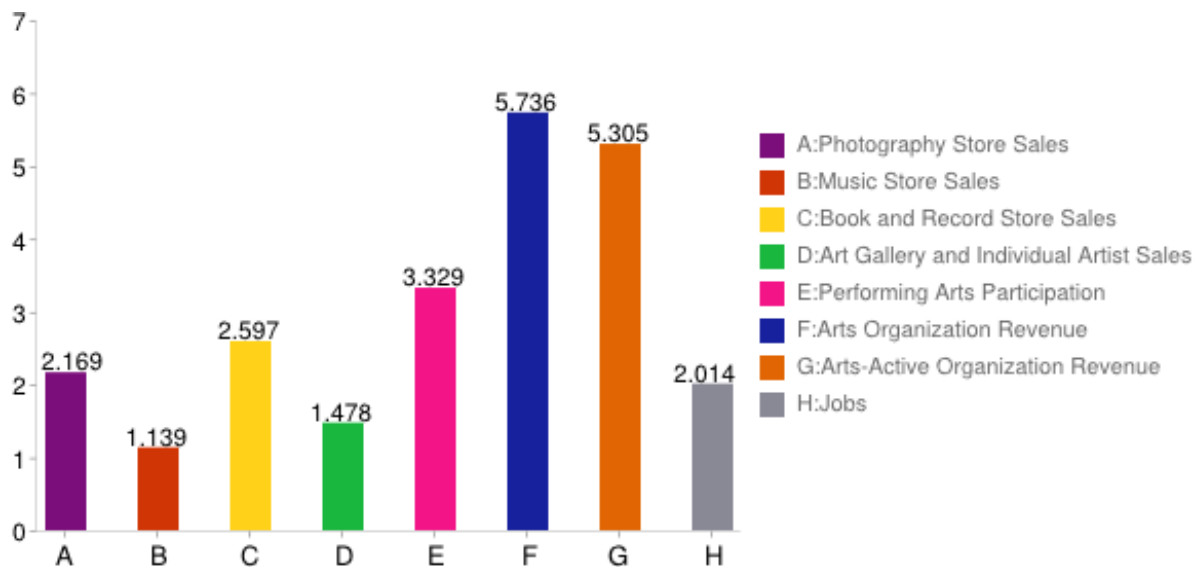
Region A: Seattle Metro Area

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

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	73,587,550	
Industry Data			
Photography Store Sales	\$11,045,000	\$433,600,000	2.169
Music Store Sales	\$11,547,000	\$863,240,000	1.139
Book and Record Store Sales	\$81,789,000	\$2,681,324,000	2.597
Art Gallery and Individual Artist Sales	\$305,550,000	\$17,602,104,000	1.478
Performing Arts Participation	\$222,748,000	\$5,696,168,000	3.329
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$3,397,706,774	5.736
Arts-Active Organization Revenue	\$207,226,623	\$3,325,434,908	5.305
Occupation Data			
Total Jobs	30,724	1,298,496	2.014
Total CVI: 2.768			

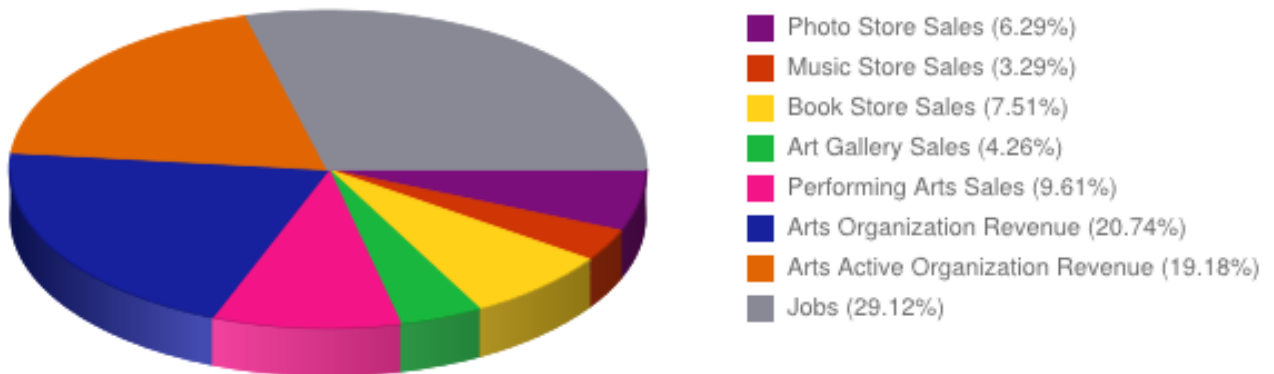
Source: WESTAF

Chart #5
CVI™ Values by Category 2012



Source: WESTAF

Chart #6
Contributions to the CVI™ after Weighting Inputs 2012



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. Pacific Northwest 2012

A comparison of the Seattle Metro Area and the Pacific Northwest Region, which includes Oregon and Washington State, is shown in Table #5 and Charts #6 and #7. The Seattle Metro Area outperformed the Pacific Northwest Region in every CVI™ category in 2012, which resulted in the above-average overall index value of 3.11 for the region. Non-profit arts organization revenues had the region's highest individual index value of 5.67, followed by performing arts participation revenues, and non-profit arts-active organization revenues.

Table #5
Seattle Metro Area CVI™ vs. the Pacific Northwest 2012

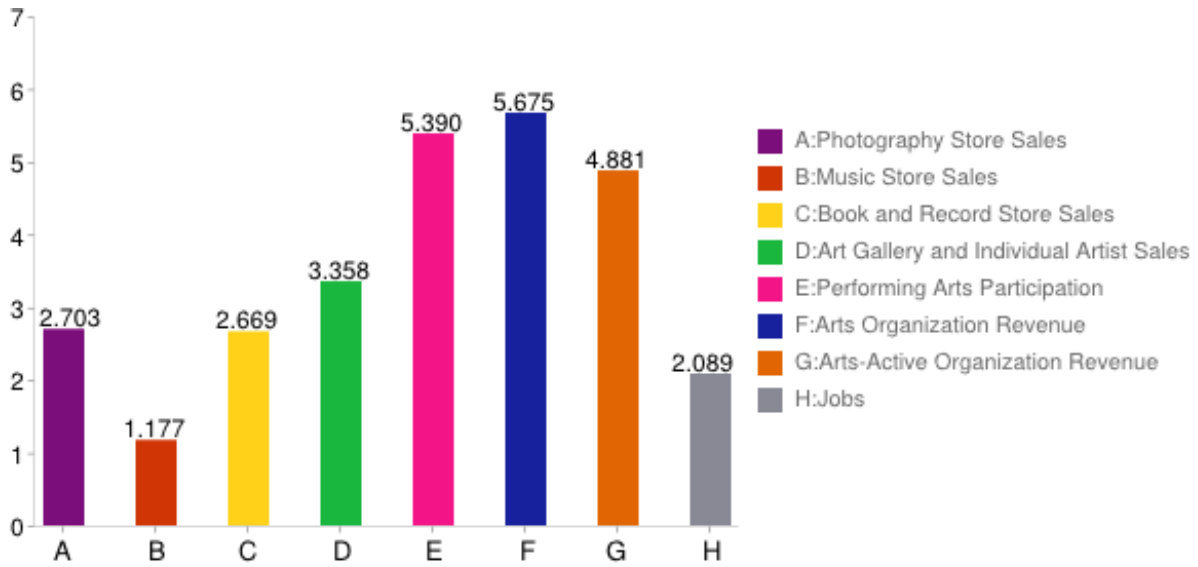
Region A: Seattle Metro Area

Region B: Oregon, Washington

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	10,821,649	
Industry Data			
Photography Store Sales	\$11,045,000	\$51,163,000	2.703
Music Store Sales	\$11,547,000	\$122,786,000	1.177
Book and Record Store Sales	\$81,789,000	\$383,619,000	2.669
Art Gallery and Individual Artist Sales	\$305,550,000	\$1,139,140,000	3.358
Performing Arts Participation	\$222,748,000	\$517,425,000	5.390
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$504,991,495	5.675
Arts-Active Organization Revenue	\$207,226,623	\$531,578,094	4.881
Occupation Data			
Total Jobs	30,724	184,172	2.089
Total CVI: 3.116			

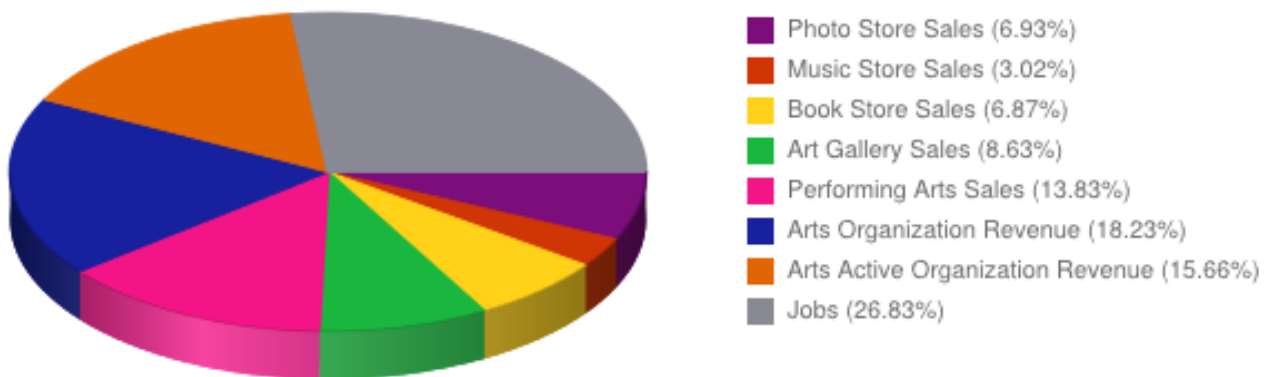
Source: WESTAF

Chart #7
CVI™ Values by Category 2012



Source: WESTAF

Chart #8
Contributions to the CVI™ after Weighting Inputs 2012



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. the State of Washington 2012

Detailed information regarding this comparison appears in Table #6 and Charts #9 and #10. In this comparison, the area had individual index values higher than 2.00 in seven of the eight categories measured by the CVI™, and an overall CVI™ value of 3.08 in 2012. Non-profit arts organization revenues had the area's highest individual index value in this comparison: 5.16.

Table #6
Seattle Metro Area CVI™ vs. Washington 2012

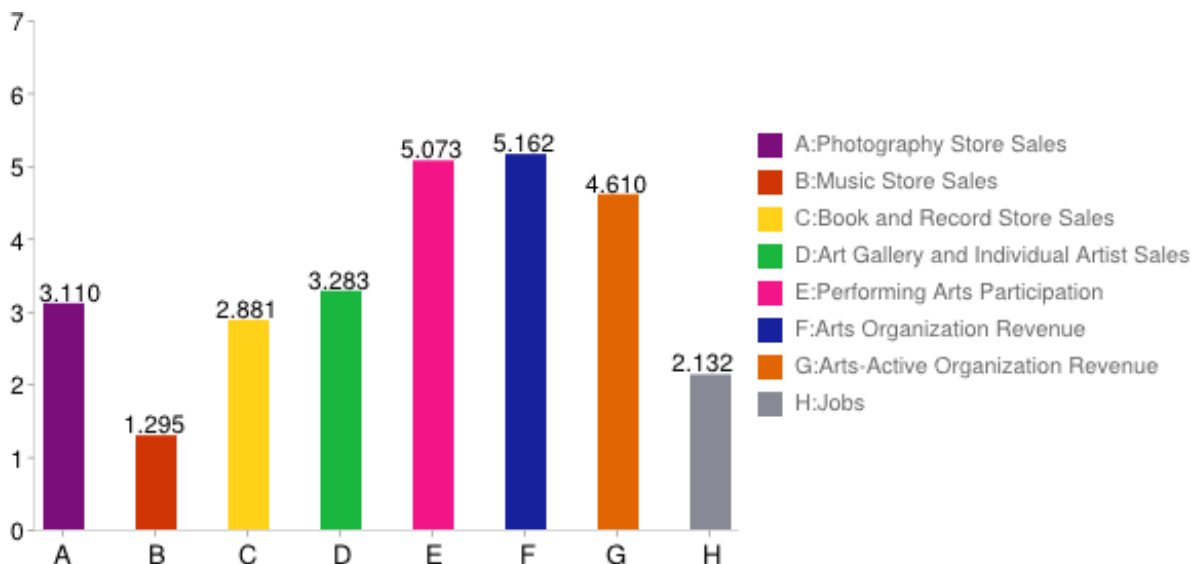
Region A: Seattle Metro Area

Region B: Washington

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	6,910,453	
Industry Data			
Photography Store Sales	\$11,045,000	\$28,397,000	3.110
Music Store Sales	\$11,547,000	\$71,285,000	1.295
Book and Record Store Sales	\$81,789,000	\$226,928,000	2.881
Art Gallery and Individual Artist Sales	\$305,550,000	\$744,014,000	3.283
Performing Arts Participation	\$222,748,000	\$351,062,000	5.073
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$354,554,058	5.162
Arts-Active Organization Revenue	\$207,226,623	\$359,366,607	4.610
Occupation Data			
Total Jobs	30,724	115,208	2.132
Total CVI: 3.082			

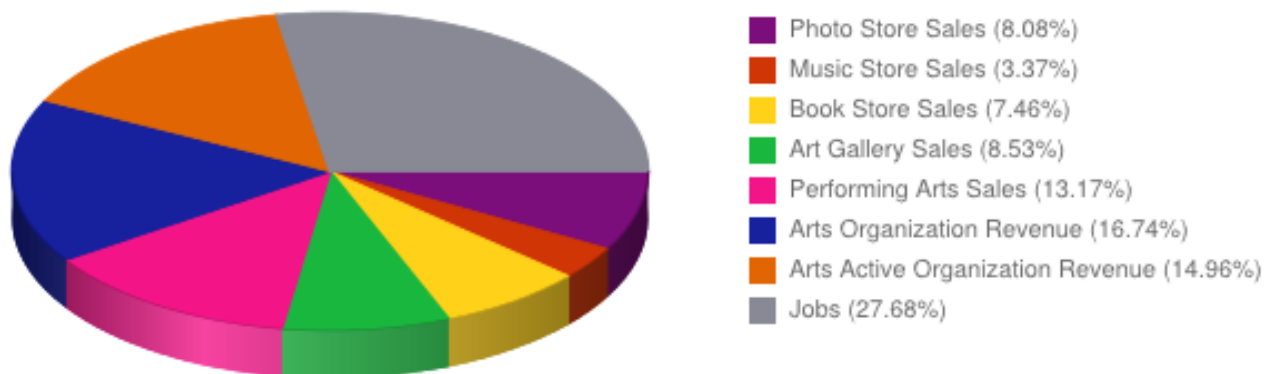
Source: WESTAF

Chart #9
CVI™ Values by Category 2012



Source: WESTAF

Chart #10
Contributions to the CVI™ after Weighting Inputs 2012



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. the Portland MSA 2012

CVI™ data for this region in comparison to the Portland MSA is provided in Table #7 and Charts #11 and #12. The Seattle Metro Area surpassed the Portland MSA in seven of the eight categories measured by the CVI™. The only category with an index value below 1.00 in this comparison was music store sales, which had a 2012 index value of 0.86. Performing arts participation revenues and non-profit arts organization revenues had the region's two highest individual 2012 CVI™ values when compared to the Portland MSA.

Table #7
Seattle Metro Area CVI™ vs. the Portland MSA 2012

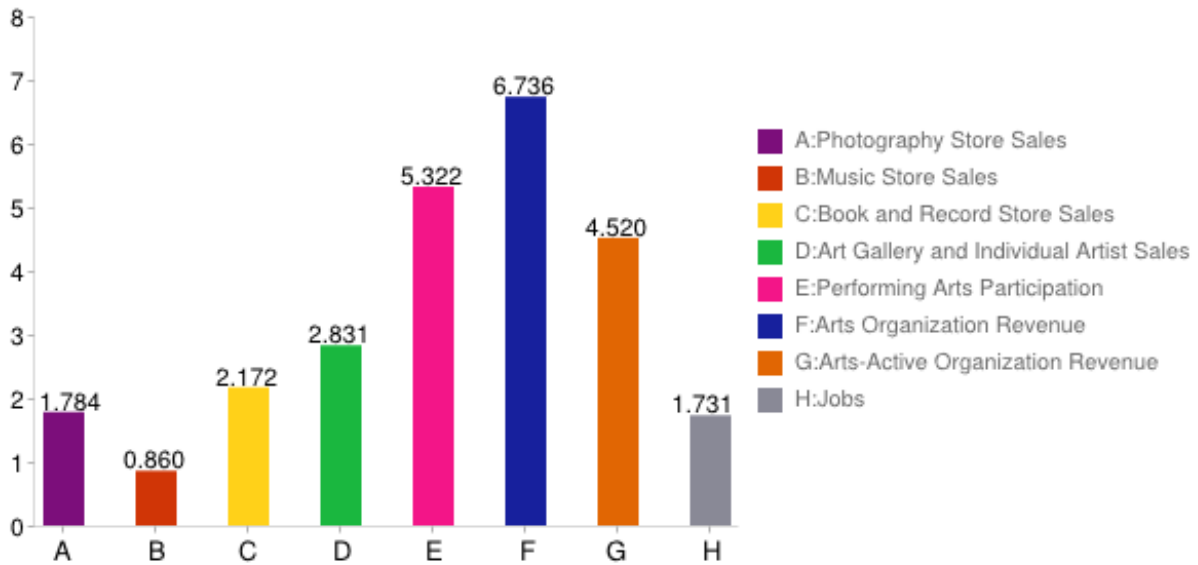
Region A: Seattle Metro Area

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

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	2,292,547	
Industry Data			
Photography Store Sales	\$11,045,000	\$16,417,000	1.784
Music Store Sales	\$11,547,000	\$35,619,000	0.860
Book and Record Store Sales	\$81,789,000	\$99,862,000	2.172
Art Gallery and Individual Artist Sales	\$305,550,000	\$286,266,000	2.831
Performing Arts Participation	\$222,748,000	\$111,014,000	5.322
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$90,132,064	6.736
Arts-Active Organization Revenue	\$207,226,623	\$121,596,345	4.520
Occupation Data			
Total Jobs	30,724	47,072	1.731
Total CVI: 2.856			

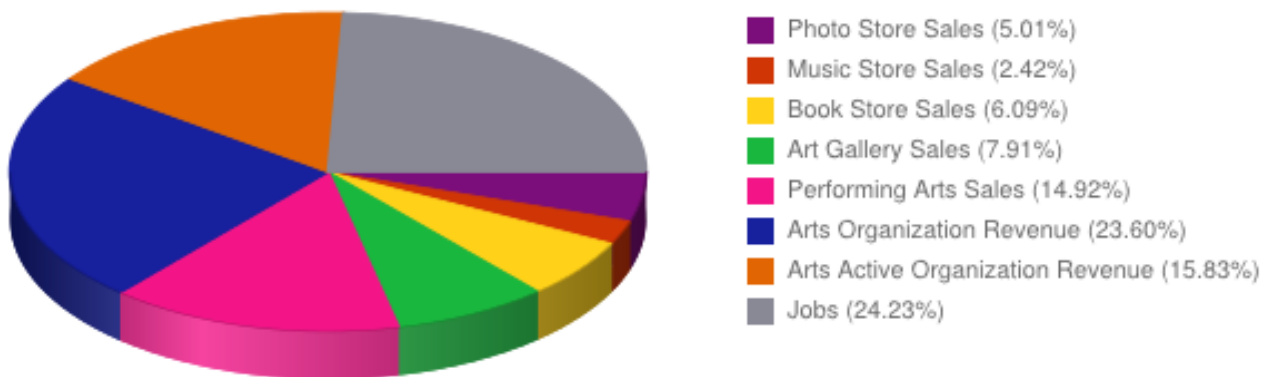
Source: WESTAF

Chart #11
CVI™ Values by Category 2012



Source: WESTAF

Chart #12
Contributions to the CVI™ after Weighting Inputs 2012



Source: WESTAF

Seattle Metro Area CVI™ Values and Calculations vs. the Seattle MSA 2012

Table #8 and Charts #13 through #14 provide CVI™ data for the Seattle Metro Area in comparison to the Seattle MSA. The Seattle MSA is comprised of King, Pierce, and Snohomish counties. In 2012, the area's overall index value was 2.14 in this comparison, and it outperformed the Seattle MSA in all eight categories measured by the CVI™.

Table #8
Seattle Metro Area CVI™ vs. the Seattle MSA 2012

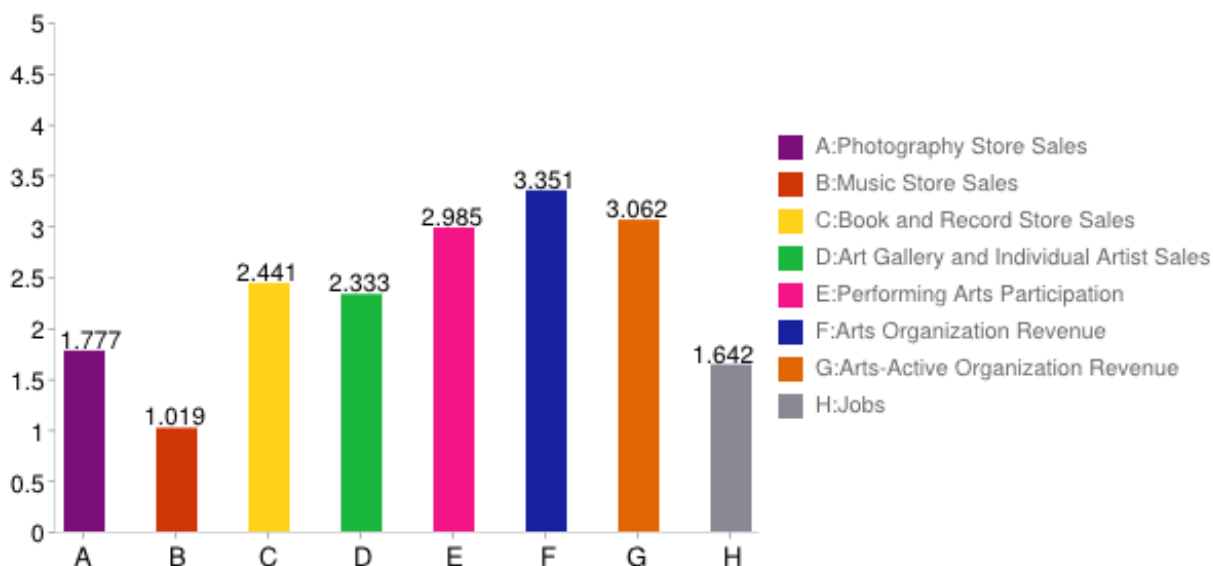
Region A: Seattle Metro Area

Region B: King, Pierce, Snohomish

Description	Region A	Region B	Categorical Index
Year - 2012			
Population	864,375	3,537,547	
Industry Data			
Photography Store Sales	\$11,045,000	\$25,438,000	1.777
Music Store Sales	\$11,547,000	\$46,365,000	1.019
Book and Record Store Sales	\$81,789,000	\$137,144,000	2.441
Art Gallery and Individual Artist Sales	\$305,550,000	\$535,930,000	2.333
Performing Arts Participation	\$222,748,000	\$305,451,000	2.985
Non Profit Data			
Arts Organization Revenue	\$228,926,562	\$279,550,503	3.351
Arts-Active Organization Revenue	\$207,226,623	\$276,946,358	3.062
Occupation Data			
Total Jobs	30,724	76,583	1.642
Total CVI : 2.143			

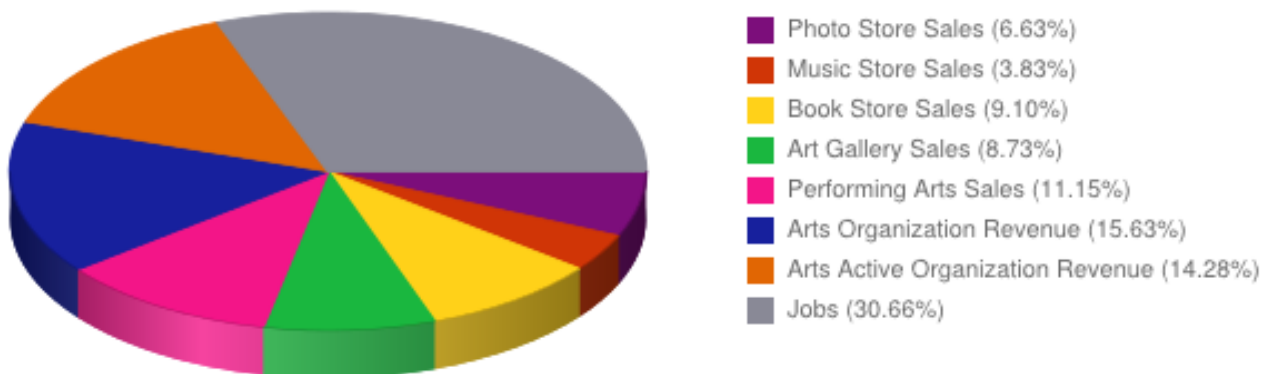
Source: WESTAF

Chart #13
CVI™ Values by Category 2012



Source: WESTAF

Chart #14
Contributions to the CVI™ after Weighting Inputs 2012



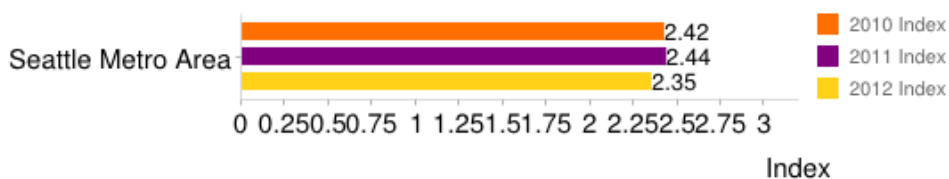
Source: WESTAF

Table #9
Seattle Metro Area Occupational Index 2010-2012

Region	2010 Jobs	2011 Jobs	2012 Jobs	#Change	%Change	2010 Index	2011 Index	2012 Index
Seattle Metro Area	28,959	30,998	30,724	1,765	6.09%	2.42	2.44	2.35
Totals	28,959	30,998	30,724	1,765	6.09%	2.42	2.44	2.35

Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #15
All Occupations, All Counties Index



Source: Economic Modeling Specialists, Inc. Complete Employment

Table #10
Seattle Metro Area Creative Jobs by Occupation 2011-2012

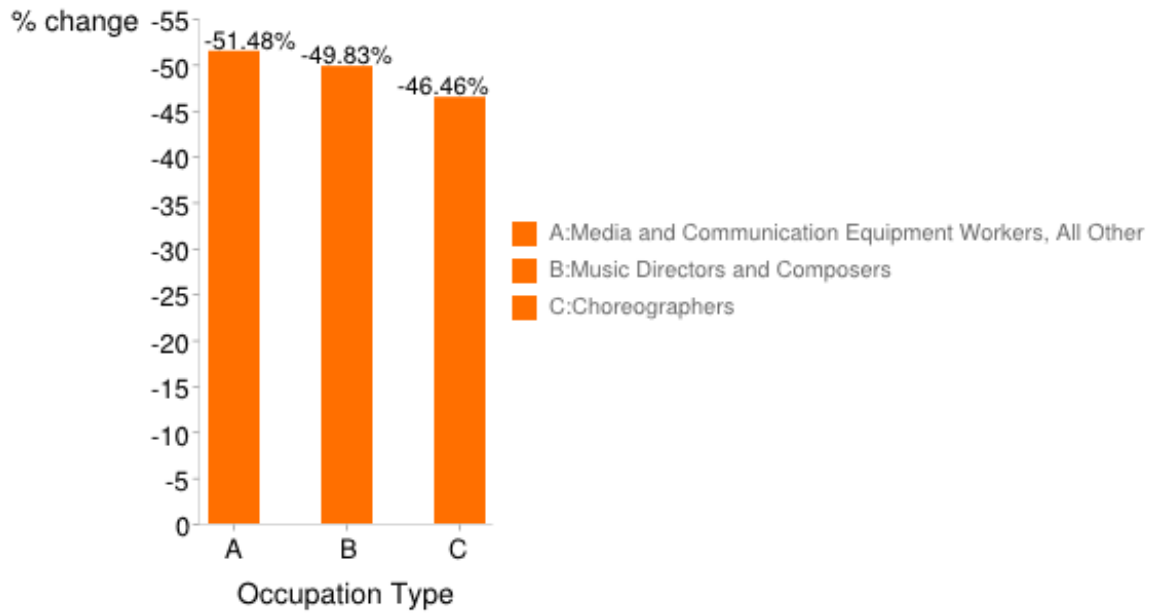
Regions: Seattle Metro Area

Occupation Type	2011 Jobs	2012 Jobs	%Change
Actors	575	720	25.22
Advertising and Promotions Managers	319	285	-10.66
Agents and Business Managers of Artists, Performers, and Athletes	268	264	-1.49
Architects, Except Landscape and Naval	1,602	1,685	5.18
Art Directors	1,420	1,408	-0.85
Audio and Video Equipment Technicians	347	413	19.02
Broadcast Technicians	277	277	0.00
Camera Operators, Television, Video, and Motion Picture	262	306	16.79
Choreographers	99	53	-46.46
Commercial and Industrial Designers	435	365	-16.09
Dancers	148	190	28.38
Directors, Religious Activities	219	241	10.05
Editors	828	1,106	33.57
Fashion Designers	240	237	-1.25
Film and Video Editors	165	245	48.48
Fine Artists including Painters, Sculptors, and Illustrators	416	627	50.72
Floral Designers	292	281	-3.77
Graphic Designers	2,901	2,993	3.17
Interior Designers	727	1,343	84.73
Landscape Architects	368	303	-17.66
Librarians	670	545	-18.66
Media and Communication Equipment Workers, All Other	169	82	-51.48
Media and Communication Workers, All Other	733	495	-32.47
Multi-Media Artists and Animators	1,453	1,245	-14.32
Music Directors and Composers	602	302	-49.83
Musical Instrument Repairers and Tuners	30	101	236.67
Musicians and Singers	3,073	2,962	-3.61
Photographers	5,400	4,758	-11.89
Producers and Directors	785	810	3.18
Public Relations Managers	500	561	12.20
Public Relations Specialists	1,750	1,751	0.06
Radio and Television Announcers	553	382	-30.92
Set and Exhibit Designers	128	105	-17.97
Sound Engineering Technicians	160	201	25.63
Technical Writers	303	351	15.84
Writers and Authors	2,781	2,731	-1.80
Total	30,998	30,724	-0.88

Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #16

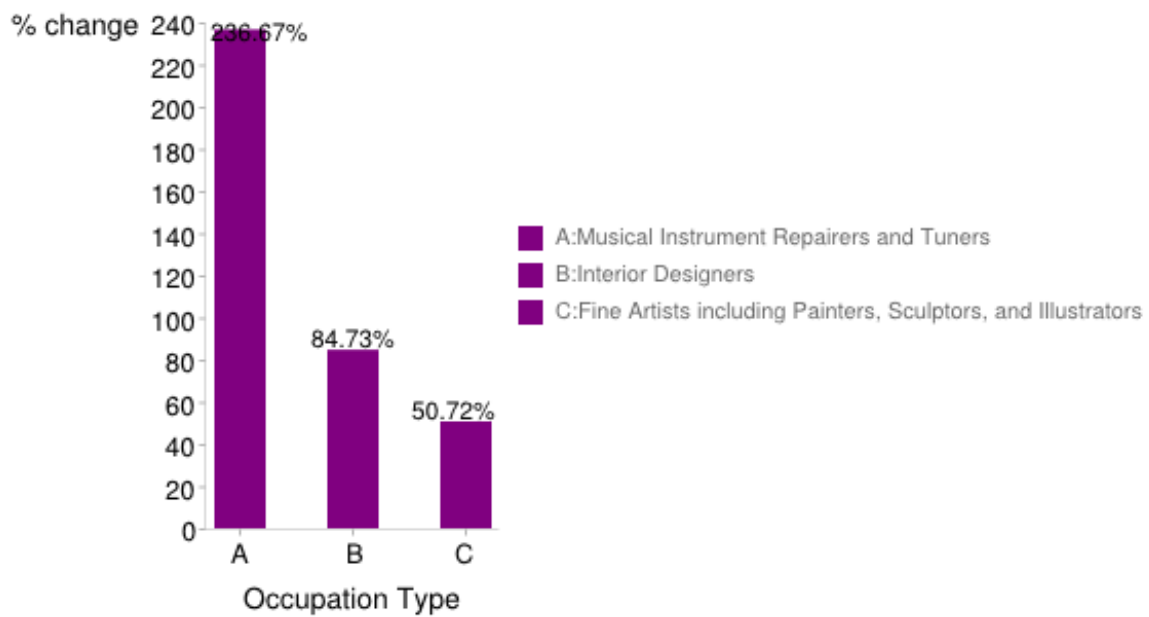
Top 3 Negative % Change by Occupation 2011-2012



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #17

Top 3 Positive % Change by Occupation 2011-2012



Source: Economic Modeling Specialists, Inc. Complete Employment

Table #11

Seattle Metro Area Creative Jobs by Location Quotient 2011-2012

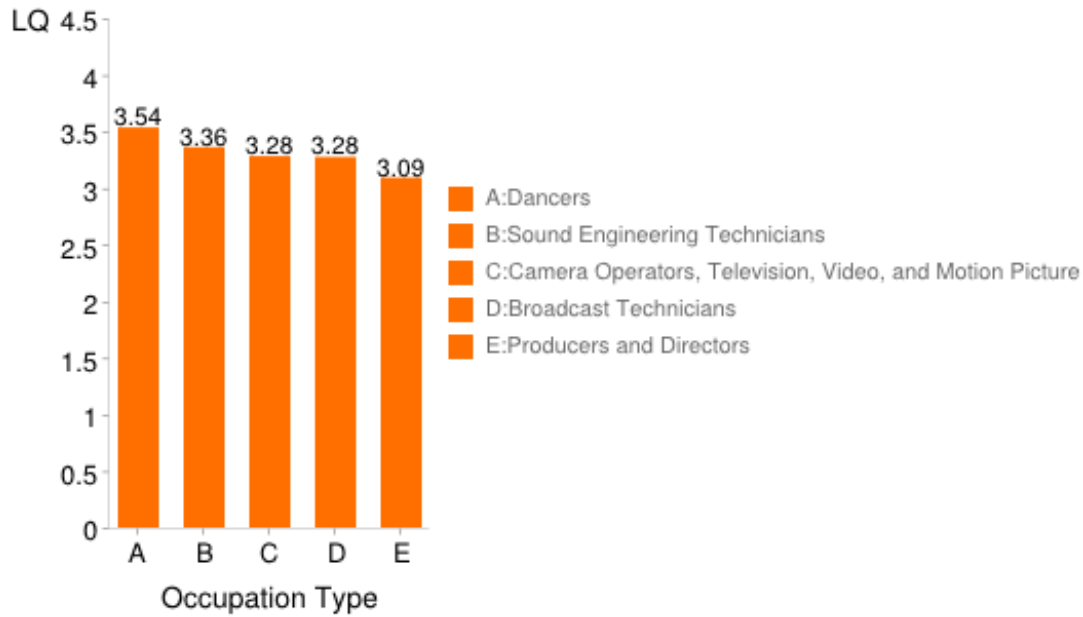
Region: Seattle Metro Area

Occupation Type	2011 State LQ	2012 State LQ	2011 National LQ	2012 National LQ
Actors	3.04	2.63	2.65	2.02
Advertising and Promotions Managers	2.15	2.55	2.12	2.39
Agents and Business Managers of Artists, Performers, and Athletes	1.87	1.95	1.60	1.64
Architects, Except Landscape and Naval	2.64	2.61	3.63	3.79
Art Directors	2.34	2.40	2.72	2.66
Audio and Video Equipment Technicians	2.51	2.54	1.99	2.07
Broadcast Technicians	3.28	3.86	2.66	3.03
Camera Operators, Television, Video, and Motion Picture	3.28	3.27	3.23	3.47
Choreographers	1.64	1.54	1.64	1.21
Commercial and Industrial Designers	2.26	1.94	2.98	2.21
Dancers	3.54	2.17	3.24	1.96
Directors, Religious Activities	0.83	0.79	0.72	0.67
Editors	2.11	1.94	2.05	2.01
Fashion Designers	3.07	2.88	3.00	3.05
Film and Video Editors	2.83	2.98	2.31	2.61
Fine Artists including Painters, Sculptors, and Illustrators	2.33	2.06	2.57	2.50
Floral Designers	1.14	1.19	1.21	1.08
Graphic Designers	2.37	2.30	2.82	2.67
Interior Designers	2.83	2.70	3.28	3.52
Landscape Architects	2.38	2.39	4.66	3.96
Librarians	1.48	1.29	1.63	1.39
Media and Communication Equipment Workers, All Other	2.49	2.06	3.02	1.50
Media and Communication Workers, All Other	2.33	2.34	4.16	3.42
Multi-Media Artists and Animators	2.17	2.02	3.00	3.17
Music Directors and Composers	1.74	1.53	1.66	1.22
Musical Instrument Repairers and Tuners	1.32	1.36	1.14	1.34
Musicians and Singers	2.31	2.29	2.40	2.38
Photographers	1.84	1.79	2.27	2.12
Producers and Directors	3.09	2.89	2.54	2.18
Public Relations Managers	2.01	2.27	2.89	3.57
Public Relations Specialists	2.02	2.27	2.14	2.41
Radio and Television Announcers	2.74	2.79	2.43	2.39
Set and Exhibit Designers	2.83	2.38	2.77	2.05
Sound Engineering Technicians	3.36	3.10	2.96	2.80
Technical Writers	1.35	1.33	2.21	1.89
Writers and Authors	2.33	2.31	2.58	2.50

Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #18

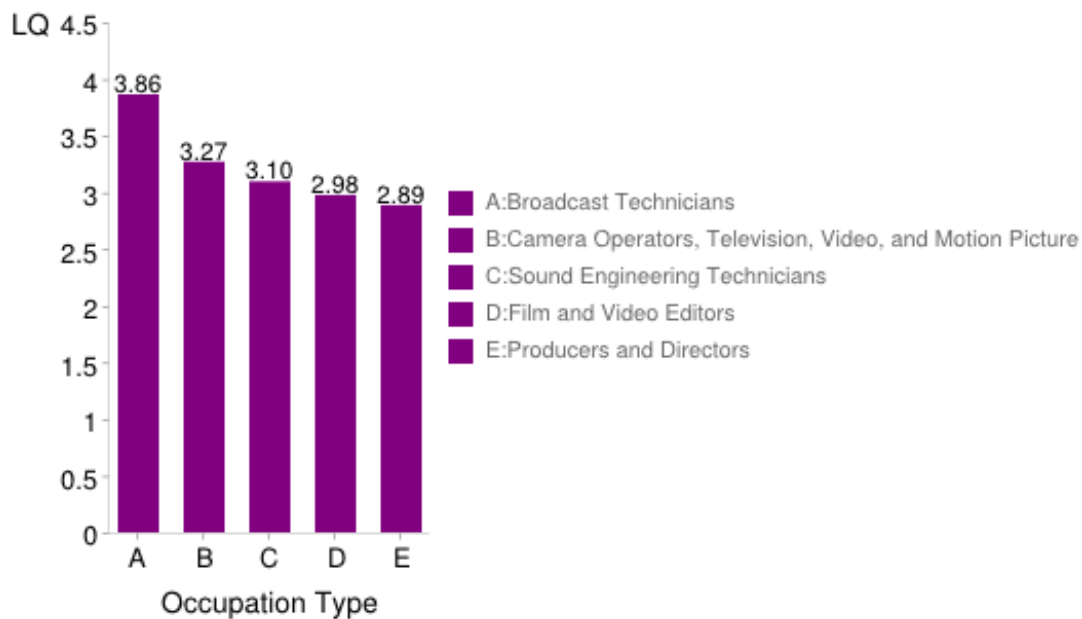
Top 5 Location Quotients by Occupation vs. Statewide Occupations 2011



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #19

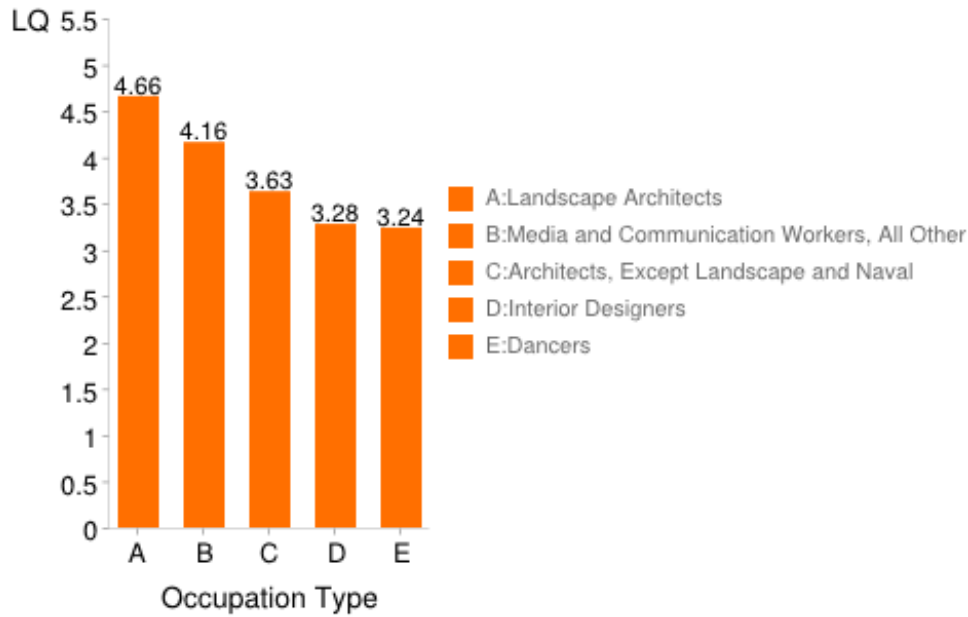
Top 5 Location Quotients by Occupation vs. Statewide Occupations 2012



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #20

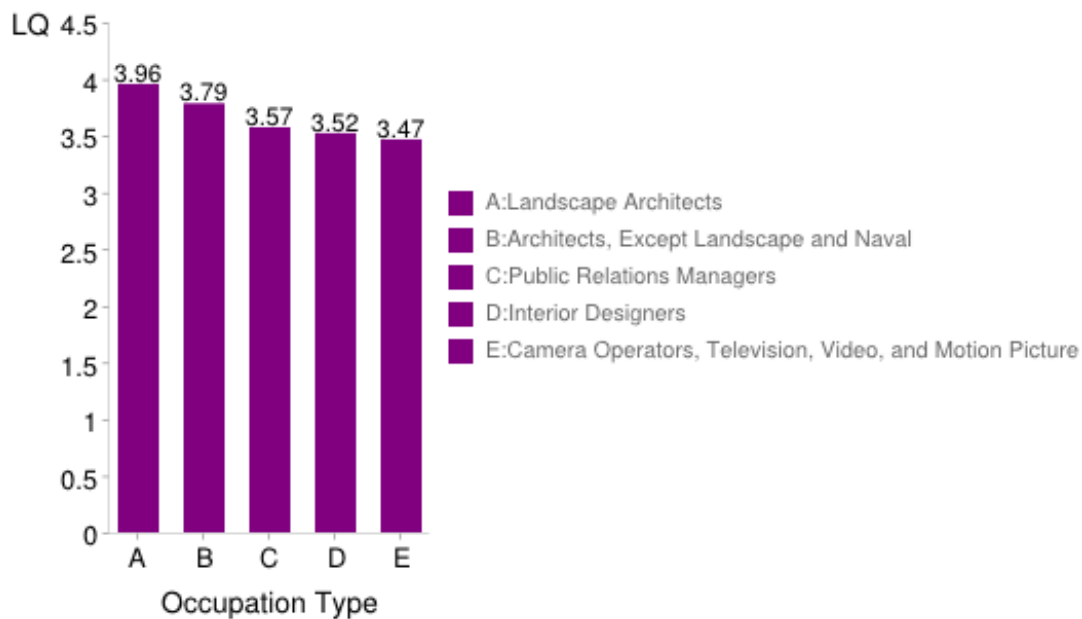
Top 5 Location Quotients by Occupation vs. Nationwide Occupations 2011



Source: Economic Modeling Specialists, Inc. Complete Employment

Chart #21

Top 5 Location Quotients by Occupation vs. Nationwide Occupations 2012



Source: Economic Modeling Specialists, Inc. Complete Employment

Seattle Metro Area Non-Profit Arts and Arts-Active Organization Counts 2012

To view detailed information regarding the number of non-profit arts and arts-active organizations located in Seattle, see Table #12 and Charts #22 and #23. In 2012, there were 325 non-profit arts and arts-active organizations in the Seattle Metro Area. Theater organizations had the largest proportional share of arts organizations, followed by music and dance organizations. Cultural and ethnic awareness organizations made up the largest proportional share of the area's arts-active organizations in 2012.

Table #12

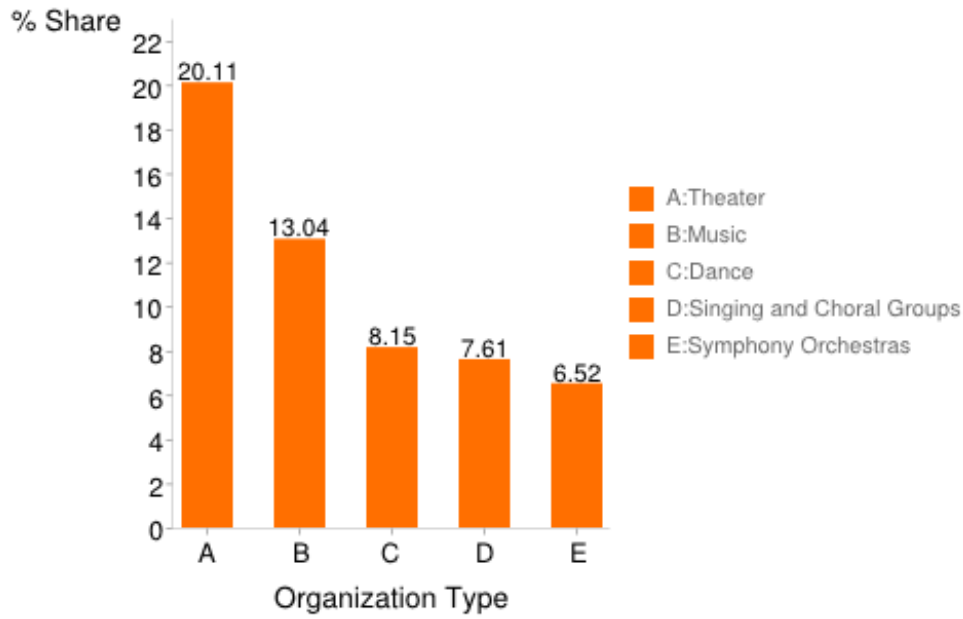
Seattle Metro Area Non-Profit Arts and Arts-Active Organizations by Type 2012

Region: Seattle Metro Area

Arts Organizations 2012	Number	Share	Arts-Active Organizations 2012	Number	Share
Art Museums	2	1.09%	Other Arts & Culture Organizations	7	4.96%
Arts & Culture	9	4.89%	Fund Raising & Fund Distribution	4	2.84%
Arts & Humanities Councils & Agencies	6	3.26%	Management & Technical Assistance	0	0.00%
Arts Education	11	5.98%	Professional Societies & Associations	2	1.42%
Arts Services	2	1.09%	Single Organization Support	22	15.60%
Alliances & Advocacy	3	1.63%	Other Arts & Culture Support Organizations	3	2.13%
Ballet	1	0.54%	Children's Museums	1	0.71%
Bands & Ensembles	6	3.26%	Commemorative Events	0	0.00%
Dance	15	8.15%	Community Celebrations	0	0.00%
Film & Video	10	5.43%	Cultural/Ethnic Awareness	24	17.02%
Folk Arts	4	2.17%	Fairs	2	1.42%
Music	24	13.04%	Folk Arts Museums	0	0.00%
Opera	2	1.09%	Historical Organizations	9	6.38%
Performing Arts	11	5.98%	Historical Societies & Historic Preservation	12	8.51%
Performing Arts Centers	5	2.72%	History Museums	4	2.84%
Singing & Choral Groups	14	7.61%	Humanities	12	8.51%
Symphony Orchestras	12	6.52%	Media & Communications	6	4.26%
Theater	37	20.11%	Museums	4	2.84%
Visual Arts	10	5.43%	Natural History & Natural Science Museums	0	0.00%
			Performing Arts School	7	4.96%
			Printing & Publishing	10	7.09%
			Radio	6	4.26%
			Research Institutes & Public Policy Analysis	1	0.71%
			Science & Technology Museums	1	0.71%
			Television	4	2.84%
Totals	184	100%	Totals	141	100%

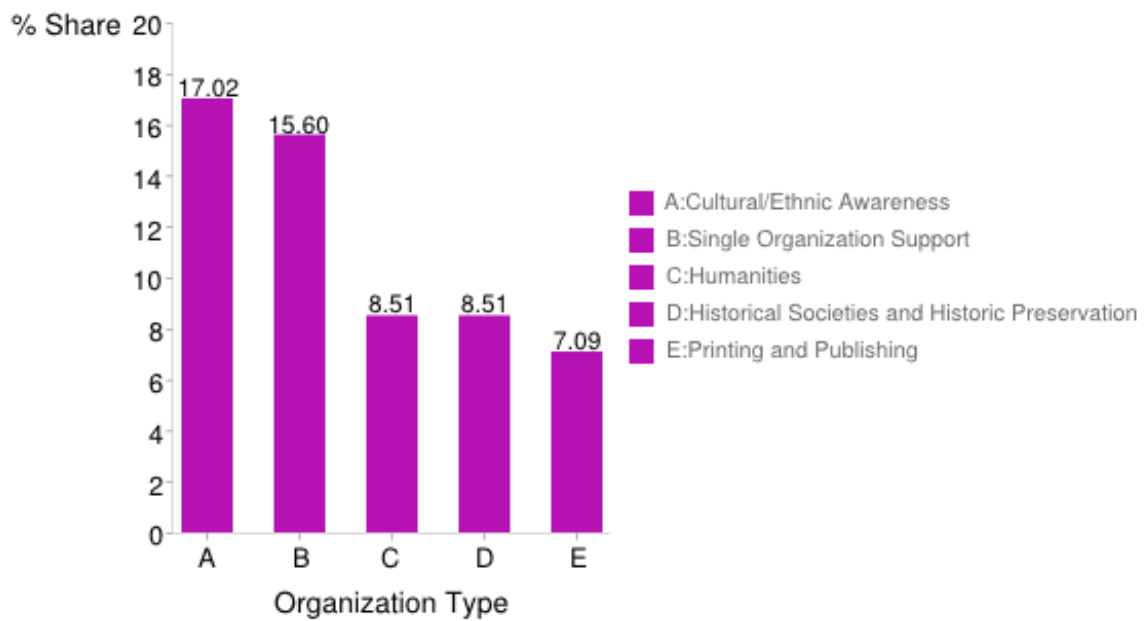
Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations

Chart #22
Arts Organizations % Share 2012



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

Chart #23
Arts-Active Organizations % Share 2012



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

Table #13

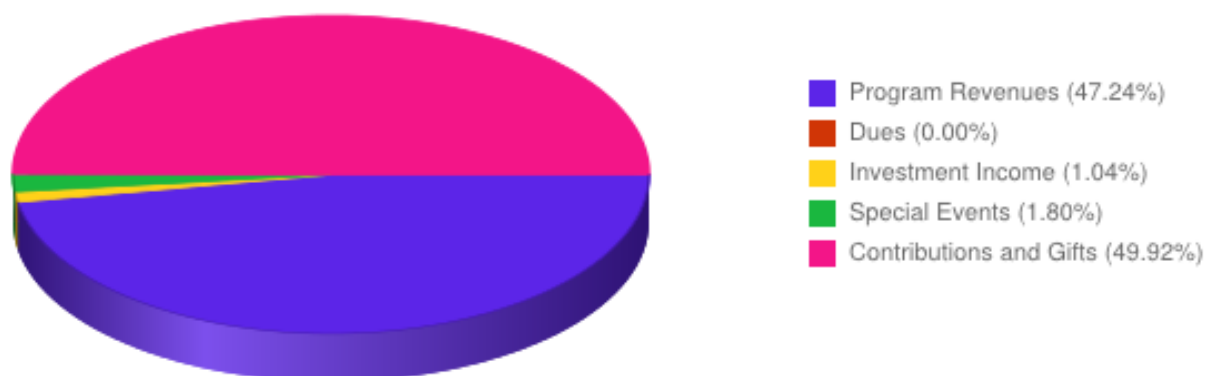
Seattle Metro Area Non-Profit Arts Organizations by Income 2012

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle Metro Area	\$108,149,590	\$2,384,249	\$4,110,841	\$114,281,882	\$0	\$228,926,562
Totals	\$108,149,590	\$2,384,249	\$4,110,841	\$114,281,882	\$0	\$228,926,562

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Chart #24

Non-Profit Arts Organization Income 2012



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Table #14

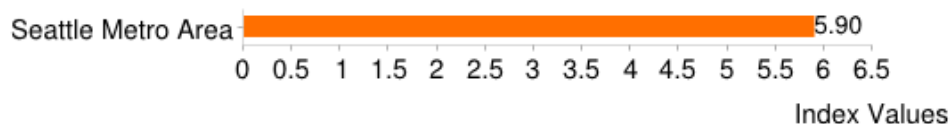
Seattle Metro Area Non-Profit Arts Organizations by Index 2012

Region	Total Revenues	Per Capita	Index
Seattle Metro Area	\$228,926,562	264.85	5.90
Totals	\$228,926,562	264.85	5.90

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Chart #25

Non-Profit Arts Organizations Index 2012



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Table #15

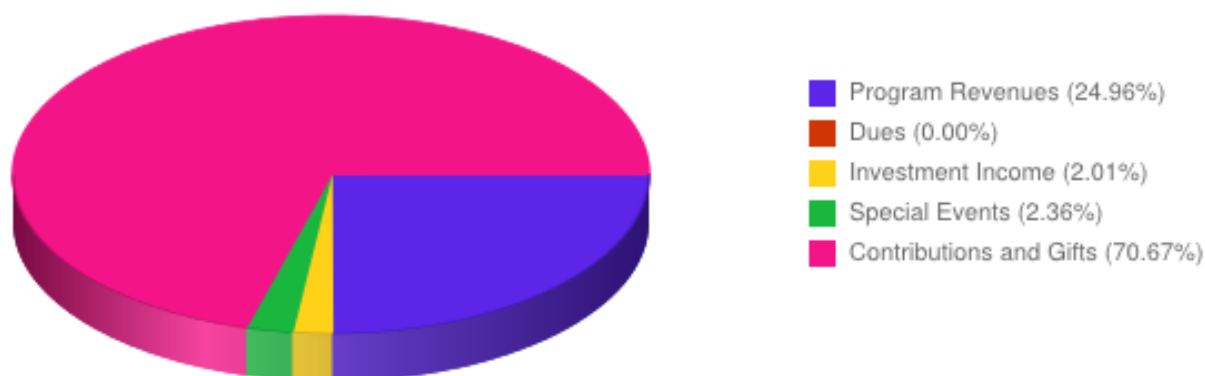
Seattle Metro Area Non-Profit Arts-Active Organizations by Income 2012

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Seattle Metro Area	\$51,729,344	\$4,158,453	\$4,896,868	\$146,441,958	\$0	\$207,226,623
Totals	\$51,729,344	\$4,158,453	\$4,896,868	\$146,441,958	\$0	\$207,226,623

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Organizations. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Chart #26

Non-Profit Arts-Active Organization Income 2012



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Seattle Metro Area Non-Profit Arts-Active Organization Revenue 2012

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. Non-profit arts-active organizations generated \$207.2 million in revenue within the Seattle Metro Area in 2012.

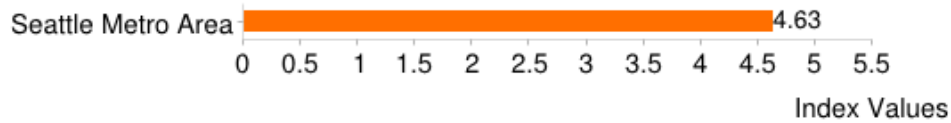
Table #16

Seattle Metro Area Non-Profit Arts-Active Organizations by Index 2012

Region	Total Revenues	Per Capita	Index
Seattle Metro Area	\$207,226,623	239.74	4.63
Totals	\$207,226,623	239.74	4.63

Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Chart #27
Non-Profit Arts-Active Organizations Index 2012



Source: National Center for Charitable Statistics, Core PC Database for Arts, Culture and Humanities Org. The IRS changed the reporting of DUES on Form 990 and is now captured in the Program Revenues category.

Seattle Metro Area Photography Store Sales 2012

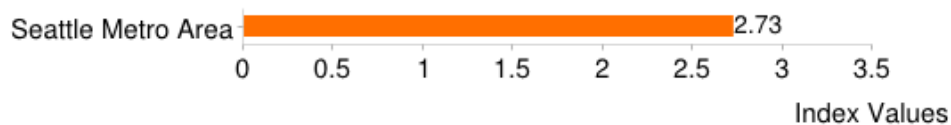
This category comprises establishments primarily engaged in either retailing new cameras, photographic equipment and photographic supplies or retailing new cameras and photographic equipment in combination with activities such as repair services and film developing (U.S. Census Bureau). Table #17 and Chart #28 summarize sales for these types of businesses within this region for 2012. In 2012, photography store sales in the region generated \$11 million in total sales, \$12.78 per capita, and had an index value well above the national average: 2.73.

Table #17
Seattle Metro Area Photography Store Sales 2012

Region	Photography Store Sales	Per Capita	Index
Seattle Metro Area	\$11,045,000	12.78	2.73
Totals	\$11,045,000	12.78	2.73

Source: Economic Modeling Specialists, Inc.

Chart #28
Photography Store Sales Index 2012



Source: Economic Modeling Specialists, Inc.

Seattle Metro Area Music Store Sales 2012

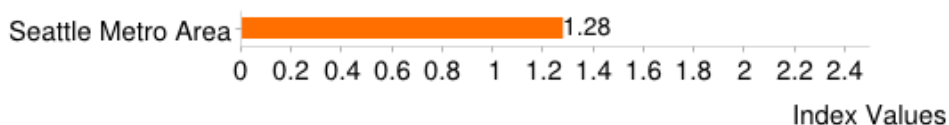
This industry comprises establishments primarily engaged in retailing new musical instruments, sheet music and related supplies, or retailing new products in combination with musical instrument repair, rental, or music instruction (U.S. Census Bureau). Table #18 and Chart #29 summarize sales within these types of businesses in Seattle Metro Area, which generated \$11.5 million in total sales, \$13.36 per capita, and had an individual CVI™ value of 1.28 in 2012.

Table #18
Seattle Metro Area Music Store Sales 2012

Region	Music Store Sales	Per Capita	Index
Seattle Metro Area	\$11,547,000	13.36	1.28
Totals	\$11,547,000	13.36	1.28

Source: Economic Modeling Specialists, Inc.

Chart #29
Music Store Sales Index 2012



Source: Economic Modeling Specialists, Inc.

Seattle Metro Area Book and Record Store Sales 2012

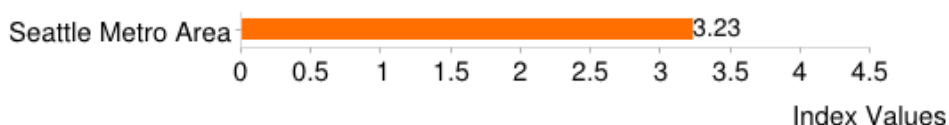
This CVI™ category comprises establishments primarily engaged in retailing new books as well as establishments primarily engaged in retailing new prerecorded audio and video tapes, CDs, and records (U.S. Census Bureau). Tables #19 and Chart #30 summarize sales within these types of businesses within the Seattle Metro Area. In 2012, book and record stores in the region generated \$81.7 million in total sales, \$94.62 per capita, and had an individual index value of 3.23.

Table #19
Seattle Metro Area Book and Record Store Sales 2012

Region	Bookstore and Record Store Sales	Per Capita	Index
Seattle Metro Area	\$81,789,000	94.62	3.23
Totals	\$81,789,000	94.62	3.23

Source: Economic Modeling Specialists, Inc.

Chart #30
Bookstore and Record Store Sales Index 2012



Source: Economic Modeling Specialists, Inc.

Seattle Metro Area Art Dealer Revenues 2012

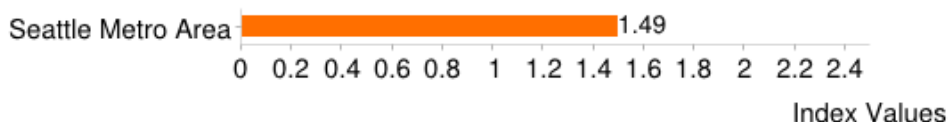
This category includes establishments primarily engaged in retailing original and limited edition artworks (U.S. Census Bureau). Table #20 and Chart #31 summarize sales within these types of businesses in the metro region. Art dealers in the region generated revenues of \$18.5 million, \$21.51 per capita, and had an individual CVI™ value of 1.49 in 2012.

Table #20
Seattle Metro Area Art Dealer Revenues by Index 2012

Region	Art dealers	Per Capita	Index
Seattle Metro Area	\$18,589,000	21.51	1.49
Totals	\$18,589,000	21.51	1.49

Source: Economic Modeling Specialists, Inc.

Chart #31
Art dealers Sales Index 2012



Source: Economic Modeling Specialists, Inc.

Seattle Metro Area Independent Artist Revenues 2012

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). Table #21 and Chart #32 summarize sales within these types of businesses within the region. Independent artists generated total revenues of \$286.9 million, \$331.99 per capita, and had a 2012 index value well above the national average: 2.72.

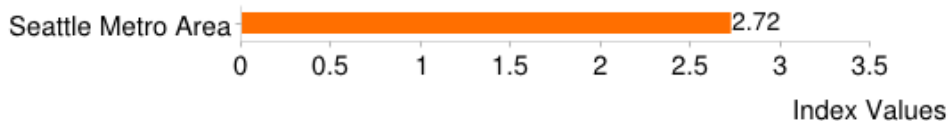
Table #21
Seattle Metro Area Independent Artist Revenues by Index 2012

Region	Independent artists, writers, and performers	Per Capita	Index
Seattle Metro Area	\$286,961,000	331.99	2.72
Totals	\$286,961,000	331.99	2.72

Source: Economic Modeling Specialists, Inc.

Chart #32

Independent artists, writers, and performers Sales Index 2012



Source: Economic Modeling Specialists, Inc.

Seattle Metro Area Performing Arts Participation Revenues 2011

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). Table #22 and Chart #33 summarize sales within these types of businesses in this region. Performing arts participation generated total revenues of \$222.7 million, \$257.70 per capita, and a 2012 individual CVI™ category value of 4.58.

Table #22

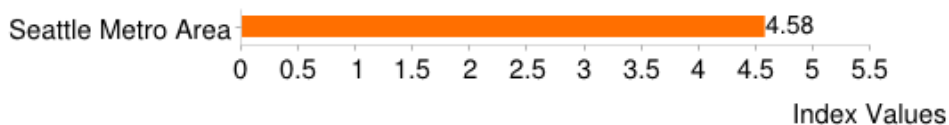
Seattle Metro Area Performing Arts Participation Revenues 2012

Region	Performing Arts Participation	Per Capita	Index
Seattle Metro Area	\$222,748,000	257.70	4.58
Totals	\$222,748,000	257.70	4.58

Source: Economic Modeling Specialists, Inc.

Chart #33

Performing Arts Participation Index 2012



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.

