# Future of Arts and Culture Project: Phase One Segment Assessment

Sponsored By:

Snohomish County Arts Commission

Prepared By:

Better City

THE FUTURE OF ARTS AND CULTURE PROJECT

# Future of Arts and Culture Project: Phase One Segment Assessment

Written by:

**Mone't Roberts**, Director of Community Engagement | Better City

**Carson Beck**, Data Analyst | Better City

**Eric Gibson**, Director of Strategic Analysis | Better City

**Annique Bennett**, Communications Specialist | Department of Conservation and Natural Resources

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# Terms & Acronyms

**BEA**—Bureau of Economic Analysis.

**County or the County**—When capitalized, this term refers Snohomish County.

**Commission**—When capitalized, this term refers to the Snohomish County Arts Commission.

**Seattle Metropolitan Arts and Culture Watershed**—Also called the "Region" is made up of counties bordering King County that contribute to at least one percent of the King County workforce.

**Segment**—The targeted set of industry sub-categories that were chosen to understand the impacts and opportunities for businesses in Snohomish County.

**GDP**—Gross Domestic Product. A measure of the total dollar value of goods and services produced by a given region in a specified amount of time (often measured in years).

**Input-Output (I-O)**—An econometric modelling approach that represents the interdependencies between different sectors of a national economy or different regional economies by measuring the flows of goods, services, and workers between industries.

**KPI**—Key Progress Indicator.

**NAICS**—North American Industry Classification System. A classification system by which businesses are categorized into different industries clusters.

**Price Parity Multiplier** — A methodology by which prices can be accurately compared when adjusting for the local cost of living. The US average is equal to 100.

# Forward

Per SCC 2.94 The Snohomish County Arts Commission was created by the Snohomish County Council in July 2004 to 1) advocate for the arts as a part of Snohomish County's culture; 2) recommend an annual arts program; 3) recommend criteria for selection of any artist or art work to be funded through the arts program; 4) provide reports on recommended acquisitions of artwork; 5) recommend the public site(s) for installation or performance of public art; 6) advise on maintenance, conservation, etc.; 7) make funding recommendations for specific works of art; 8) seek private or public donations and grants for the arts program; and 9) provide an annual written report describing the commission's activities and the arts program.

As a community of artists, musicians, writers, and non-profits, county arts commissioners were among the disproportionately impacted by the economic shocks of the Pandemic in 2020 and 2021. Recognizing that actions to build resiliency are actions of recovery, commissioners created a vision and mission to prioritize their service.

> *We envision a world where artists have meaningful opportunities to create. Art education and artistic exchange are a cornerstone of community development and cultural engagement.*
>
> *Mission: The Snohomish County Arts Commission promotes artistic diversity, expands access to arts education, supports local artists, and encourages an understanding of cultural expression. Through the arts' ability to foster empathy and respect, communities grow and become closer to each other and their environment.*
>
> *-Snohomish County Arts Commission Mission / Vision / Purpose*

The Future of Arts and Culture Project, Industry Segment Assessment builds resilience through recovery by publishing verifiable information about Snohomish County's industries of arts and culture. If this report is successful, its contents will be evangelized by cultural creators, agencies, organizations, and allies seeking public policies that advance a rich future of arts and culture in Snohomish County.

# Executive Summary

The Future of Arts and Culture Project: Phase One Segment Assessment follows the recommendations of the Puget Sound Regional Council's *Arts and Culture Economic Recovery Plan* to coordinate efforts, resources, and programs to better support artists, musicians, filmmakers, restauranteurs, and other creators in the period following the coronavirus pandemic.

Occurring concurrently with the State of Washington's Creative Economy Strategic Plan, this assessment benchmarks Snohomish County's progress against the concerted efforts for recovery taken at all levels of government: local, regional, and state.

The main goals of this document are as follows:

1) Define the County's businesses within specific and herein defined arts and culture industries, (referred throughout the document as "the Segment")
2) Understand the impacts of the coronavirus pandemic on the Segment;
3) Prioritize business types most in need of publicly funded programs of support;
4) Establish key performance indicators (KPIs) to show meaningful change over time;
5) Establish KPI baseline comparisons relative to the Seattle Metropolitan Arts and Culture Watershed, and peer counties across the nation;
6) Evaluate trends and preferences of a growing population about Arts and Culture and the ability of the County to meet these demands now and in the future.

Goal six is partially addressed through the analysis of two county-wide surveys (see section on Survey Results, starting on page 44). Initial survey findings are intended to point to areas of further study by the County, Commission, public agencies, and non-profit interests.

Defining culinary, beverage and performing arts (music, theater, dance and visual), is difficult because federal, state, and regional definitions of the Segment differ, see Appendix I: NAICS Codes used in local definitions of the Arts and Culture / Creative Economy. Additionally, the creative tech sector often overshadows the data of other businesses in the creative arts, leading to a misperception of performance and speed of recovery. To examine and address the needs of these businesses, this document first establishes a County-specific definition for the Segment. With this definition, the Segment is thoroughly examined through a variety of methods:

- a workforce and establishment analysis to understand Segment growth and recovery (Pg. 10);
- a regional analysis to understand the role the Segment within the broader region (Pg. 17);

- national benchmarking to compare performance metrics versus similar counties (Pg. 25);
- an analysis of consumer behaviors to local sites, venues, and downtown centers (Pg. 32); and
- an initial analysis of the demand- and supply-side opportunities by using primary data generated by two surveys written and distributed specifically for this first phase of the Futures of Arts and Culture Project (Pg. 44).

## Key Findings and Recommendations

This document establishes the importance of the Arts and Culture Segment to Snohomish County's economy and the positive returns that are realized through strategic investment in the Segment. It then describes the significant negative impacts that were experienced by Segment businesses, as well as the need for additional public support to help the Segment recover from the Coronavirus pandemic and government-mandated shutdown of venues, stores, and restaurants. This need is verified using consumer behaviors analysis, providing evidence for the estimated drop in Arts and Culture consumption during the pandemic and the continuing lagging recovery of the Segment.

Finally, the document describes several opportunities identified by two surveys: a Resident/Visitor Survey that analyzes the potential gaps in arts and culture offering, and a Creator Survey that analyzes the current and ongoing needs of local business owners and employees.

It is recommended that the findings and opportunities identified in this report are supported and leveraged in future phases with leaders and staff from Snohomish County and its municipalities, partners, funding agencies, and local businesses. This will not only verify the data shown in this report but will allow for the documentation of municipal-level needs that can be further addressed at the County level.

To track the progress of the industry as it continues its recover, the County has developed the Future of Arts and Culture Industry Dashboard tool available at: [https://www.snocoarts.org/future-of-arts-culture-project](https://www.snocoarts.org/future-of-arts-culture-project). This tool will be updated regularly throughout the duration of the Future of Arts and Culture project.

## Acknowledgements

The Future of Arts and Culture Project: Phase One Segment Assessment was funded with percent for art funds, and facilitated by the County Department of Conservation and Natural Resources, Parks and Recreation Communications staff; Arts Commissioners; and project collaborators of the Cultural Arts Network (SNO CAN!); the County Offices of Economic Development; Planning and Development Services; Long-range Planning; and the Economic Alliance.

The participants listed below reviewed and identified key trends across the Segment, gave insights into the community engagement tools that were used to gather feedback

across the County, and provided direction for this assessment and the larger Futures Project.

Snohomish County Arts Commissioners:

- **Kate MacKenzie** | Outreach and Education Committee Chair | District 5
- **Kari Johnson** | Marketing and Events Committee Chair | At Large
- **Nicole Ng-A-Qui** | Commission Chair | At Large
- **David Lotz** | Grants and Funding | District 2
- **Colin Cole** | Acquisitions Committee | District 3
- **Lia Blanchard** | Marketing and Events Committee | District 1

Snohomish County Department of Conservation and Natural Resources | Parks and Recreation

- **Tom Teigen |** Director
- **Sharon Swan** | Parks and Recreation Division Director
- **Jeremy Husby |** Parks and Recreation Division Director (former)
- **Annique Bennett** | Communications Specialist | Arts Programs

Snohomish County Department of Planning and Development Services

- **Michael Saponaro** |Senior Long-range Planner
- **James Henry Jennings** | Long-Range Planner
- **Jacob Lambert** | Communications Specialist

Snohomish County Office of Economic Development

- **A Boungjaktha** | Senior Executive Management Analyst
- **James Henderson** | Economic Development

Special thanks to

- **Shannon Halberstadt** | State of Washington Commerce Department | Creative Sector Lead
- **Wendy Poischbeg** | Economic Alliance of Snohomish County
- **Snohomish County Cultural Arts Network (Sno CAN!)**
- **Tyler Chism |** Director of Placemaking

# Introduction

Modern-day Snohomish County spans over 2,000 square miles. Each of the 20 cities and towns in the County has distinct arts and culture. Both urban and rural communities have businesses and employees that create hand-crafted, self-made, and non-commodifiable goods and services. One cannot re-create the experience of artisan coffee and local baked goods in a historic downtown on a crisp fall morning, nor recreate the impressions of local life visiting family farms, dining in seafood cafés, and shopping at niche street festivals. The arts and culture offerings in Snohomish County make it unlike any other place in the world.

While it is well understood that a skilled workforce is drawn to arts and culture lifestyle amenities, the arts and culture segment itself is not well understood. Standardized federal and state data sources about labor and employment are ambiguous or too onerous to utilize across government levels and even within the County itself. Because of a lack of common definition is available, a definition needed to be borrowed or identified for the specific needs of the Future of Arts and Culture Project.

The Bureau of Economic Analysis (BEA) has a robust definition, the Arts and Culture Production Satellite Account, which can be used at the National and State levels. Using this definition, the BEA estimates the Creative Economy comprised approximately 10.3 percent of Washington's Gross Domestic Product in 2020. It also made up an estimated five percent of the State's total employment.[1]

Because of Arts and Culture's importance at the state level (in terms of wages, employment, and value-add) this Segment will continue to experience significant investment in the coming years. Therefore, the Arts and Culture Segment is important for Snohomish County to understand and weave into its strategic initiatives. It will be critical to understand growth and change within this Segment.

The purpose of this document is to create a definition for the Arts and Culture Segment to understand how it is faring—especially in terms of its recovery—and what opportunities exist to make the Segment more resilient into the future.

[1] Source: Bureau of Economic Analysis, Arts and Cultural Production Satellite Account (ACPSA) statistics, 2020.

# How are the economics of the Arts and Culture Segment Defined?

Measuring economic activity of any industry segment is a technical and specialized task. Reporting agencies and governments often use the North American Industry Classification System (NAICS) to classify, query, and measure economic activities of industry sectors across the United States, Canada, and Mexico.

Quantifying economic activities of Arts and Culture in particular is challenging because the industries themselves are hard to define. Arts and Culture products are valued for being non-standardized, one-of-a-kind, and are often experiential in nature. Further, businesses in Arts and Culture tend to be small and, with many viewed as luxury goods, are highly impacted by market conditions.

The 50 NAICS codes selected for this study capture the Arts and Culture industry sub-categories disproportionately impacted by the Pandemic in Snohomish County. Key economic conditions and trends for these categories are what local practitioners should use to track Arts and Culture Segment changes over time. While not a perfect way to categorize smaller Arts and Culture businesses (some businesses in the codes selected are mismatches for the intended outcomes), an important part of the decision-making process to arrive at this definition was to ensure that the process can be replicated and tracked over time (an online dashboard tool was created for this purpose and is available to businesses and partners for the duration of the Futures Project). It is important to note, however, that the 50 NAICS codes selected for this Assessment differ from other definitions of Arts and Culture.

### How the Definitions of Arts and Culture are Used in this Assessment

The NAICS codes selected for Arts and Culture are selected according to the needs of the reporting agency. The Bureau of Economic Analysis (federal), Washington State Arts Commission (state), and the Puget Sound Regional Council (region), each use different NAICS codes to categorize Arts and Culture businesses, sometimes referred to as the “Creative Sector.”

This Assessment refers to these agency definitions where possible, but in various instances, industry NAICs code subsets and segments were too broad (and in other instances too narrow) to capture the businesses Snohomish County would like to target.

For example, the BEA Arts and Culture Production Satellite Account (ACPSA) uses NAICS codes found here: [bea.gov/data/special-topics/arts-and-culture.](https://bea.gov/data/special-topics/arts-and-culture) Though useable and very useful at the state level (especially for comparing across states and against national data), the methodologies used for detailed drill downs are too cumbersome to be practical for use at the County level.

The 74 NAICS used by the Washington State Arts Commission defines the Creative Sector statewide. This definition is the basis for many of the statistics and reports about Arts and Culture businesses at the state level (http://choosewashingtonstate.com/why-washington/our-key-sectors/creative-economy/). However, this definition includes several tech-based industry subcategories (i.e., software design and development) that experienced very strong growth during the Pandemic, making it a poor fit for use in this report, which focuses heavily on industry sub-categories that were harmed by the Pandemic.

The 11 NAICS and partial estimates of other codes combined with report-specific survey data used by the Puget Sound Regional Council (PSRC) Arts and Culture Economic Recovery Strategic Plan (BERK Consulting 2022) was another potential definition to be used in this report. However, much of the industry data generated in that report used primary data, making it difficult to replicate on a regular basis that could allow for tracking changes over time. Additionally, the definition used was too narrow for the intended purpose of the Futures of Arts and Culture Project.

Therefore, none of the definitions provided above were used in this report. Instead, 50 NAICS codes were selected by County staff and Arts Commissioners with guidance from Better City to capture a broad enough set of the Creative Sector to understand the tangible economic impacts and needs of the arts and culture industry yet were narrow enough to capture Arts and Culture businesses most vulnerable to sudden economic shocks.

A full list of the 50 NAICS codes that comprise this new local definition are shown in Table 1.

Note: Defined within this section, “Segment” is capitalized as a reminder to the reader of its distinction from the other definitions of “Arts and Culture”, the “Creative Sector”, or other colloquial terms used when discussing the industry. If another definition of arts and culture or the creative economy is used in the report (this will often occur when describing the results and findings of other studies using said definitions) the organizational source will be provided, and the terms will **NOT** be capitalized.

Table 1—List of NAICS Codes used to define the Arts and Culture Segment in Snohomish County

| # | NAICS CODE (6-digit) | NAME |
|---|---|---|
| 1 | 312120 | Breweries |
| 2 | 312130 | Beverage, wines and brandies, manufacturing |
| 3 | 312140 | Distilleries, distilling |
| 4 | 327112 | Vitreous china, fine earthenware, and other pottery product manufacturing |
| 5 | 327212 | Other pressed and blown glass and glassware manufacturing |
| 6 | 339910 | Jewelry and silverware manufacturing |
| 7 | 339911 | Jewelry manufacturing (except costume) |
| 8 | 339912 | Silverware and holloware |
| 9 | 339913 | Jeweler's material & lapidary |
| 10 | 339914 | Costume jewelry manufacturing |
| 11 | 451130 | Sewing, needlework, and piece goods stores |
| 12 | 451140 | Musical instrument and supplies stores |
| 13 | 451211 | Book stores |
| 14 | 453110 | Florists |
| 15 | 453920 | Art dealers |
| 16 | 511110 | Newspaper publishers |
| 17 | 511120 | Periodical publishers |
| 18 | 511130 | Book publishers |
| 19 | 512110 | Motion picture and video production |
| 20 | 512120 | Motion picture and video distribution |
| 21 | 512132 | Drive-in motion picture theaters |
| 22 | 512199 | Other motion picture and video industries |
| 23 | 512210 | Record production |
| 24 | 512230 | Music publishers |
| 25 | 512240 | Sound recording studios |
| 26 | 512290 | Other sound recording industries |
| 27 | 515112 | Radio stations |
| 28 | 515210 | Record production |
| 29 | 519120 | Libraries and archives |
| 30 | 541310 | Architectural services |
| 31 | 541320 | Landscape architectural services |
| 32 | 541410 | Interior design services |
| 33 | 541430 | Graphic design services |
| 34 | 541490 | Other specialized design services |
| 35 | 541921 | Photography studios, portrait |
| 36 | 541922 | Commercial photography |
| 37 | 611511 | Cosmetology and barber schools |
| 38 | 611610 | Fine arts schools |
| 39 | 711110 | Theater companies and dinner theaters |
| 40 | 711120 | Dance companies |
| 41 | 711130 | Musical groups and artists |
| 42 | 711190 | Other performing arts companies |
| 43 | 711310 | Promoters of performing arts, sports, and similar events with facilities |
| 44 | 711320 | Promoters of performing arts, sports, and similar events without facilities |
| 45 | 711510 | Independent artists, writers, and performers |
| 46 | 712110 | Museums |
| 47 | 712120 | Historical sites |
| 48 | 712130 | Zoos and botanical gardens |
| 49 | 712190 | Nature parks and other similar institutions |
| 50 | 812921 | Photofinishing laboratories (except one-hour) |

## References and Reports Used in this Assessment

To fit within the state and regional recovery strategy recommendations, and to provide a comparative analysis of previous research into the Arts and Culture Segment, the Futures of Arts and Culture Phase One Segment Assessment references the following reports:

- Washington State Creative Economy: Economic Model and Ecosystem Analysis | October 1, 2022, WESTAF (Draft)
- State of Washington Creative Economy Working Definition | July 15, 2022, WESTAF (Draft)
- Arts and Culture Labor Force Dynamics Analysis | June 29, 2022, PSRC and BERK Consulting
- Arts and Culture Economic Recovery Plan | June 3, 2022, PSRC
- Arts and Culture Economic Recovery Strategy | March 10, 2022, Puget Sound Regional Council (PSRC)
- Seattle NorthCountry True PNW Sept. Q3 Performance Review | 2021 | True Pacific Northwest (PNW)
- Economic Research and Analysis Report: City of Bellevue Creative Economy Strategy | 2017 | Creative Edge Bellevue and MDM Insights

# Profile of the Arts and Culture Segment: Workforce

This section analyzes Snohomish County's Arts and Culture workforce trends to understand the Segment's growth before and after the Coronavirus Pandemic. It also estimates the impact of the Pandemic, as well as the Segment's trajectory of recovery. The Segment experienced strong growth before the Pandemic and showed signs of recovery into 2021. However, the recovery is slow, which raises concerns around financial sustainability for businesses and employees.

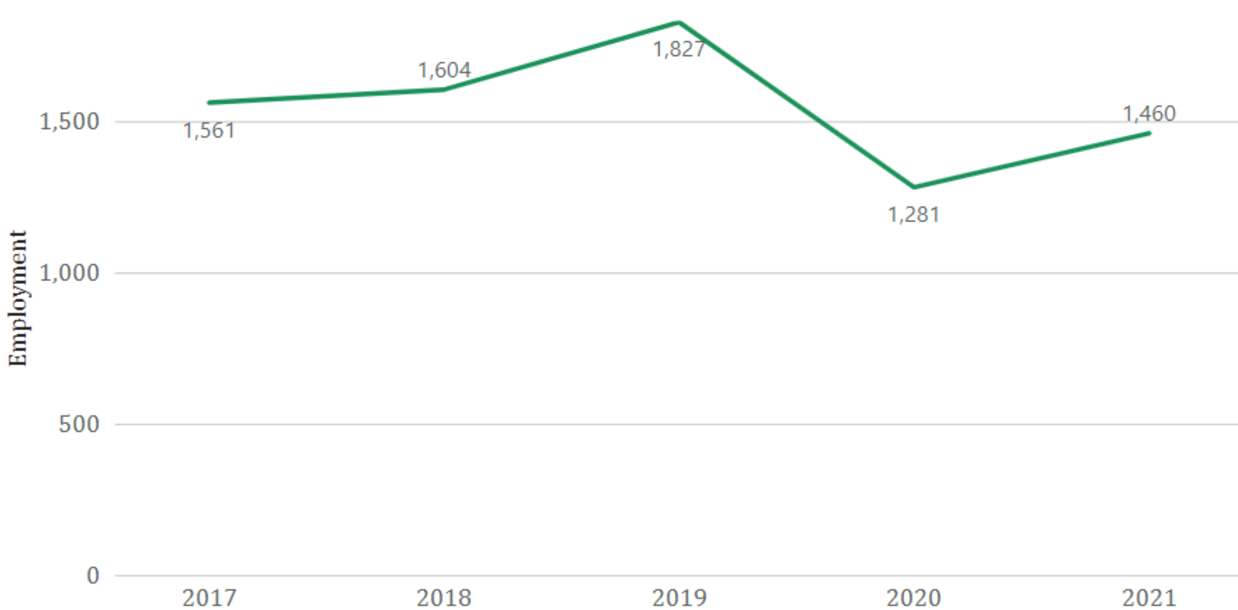
### Snohomish County Arts and Culture Employment

Losses to the Segment are greater than the estimated 26 percent Arts and Culture loss estimated for the Puget Sound Region as a whole (BERK, 2022). The Segment lost approximately 30 percent of its workforce between 2019 and 2020 (compared to the average workforce loss of six percent for the county as a whole).

Between 2017 and 2019, Segment employment experienced a growth rate of 8.5 percent per year, approximately 9.5 times faster than the County's total employment growth over the same period. Between 2020 and 2021, the Arts and Culture Segment's workforce recovered by 14 percent – a stunning 70 times faster than the County's Arts and Culture workforce.

However, if employment recovery continues at that annual rate, the County's employment will not return to its pre-pandemic level for an estimated two years and will be approximately 960 workers behind where it would have been if the Pandemic did not occur.

Chart 1—Snohomish County Arts and Culture Segment Employment Growth (2017-2019)



### Snohomish County Arts and Culture Segment Wages

The Segment experienced stable growth between 2017 and 2019, increasing at an annual rate of 1.6 percent per year. However, between 2017 and 2021, the average wage per employee showed a downward trend (see Chart 2). The Pandemic reduced total Segment's wages by approximately 10 percent in a single year, erasing an estimated six years of growth.

The Segment experienced a strong rebound in 2021, bolstered by federal and local assistance programs, such as the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) in 2020, the American Rescue Plan Act in 2021, Artists Trust Relief Fund, and the National Endowment for the Arts' Arts Organizations Fund, to name a few. It is very likely that the wage recovery seen in 2021 was caused in large part by these assistance programs.

Chart 2——Snohomish County Total Annual Wages (2017-2021)

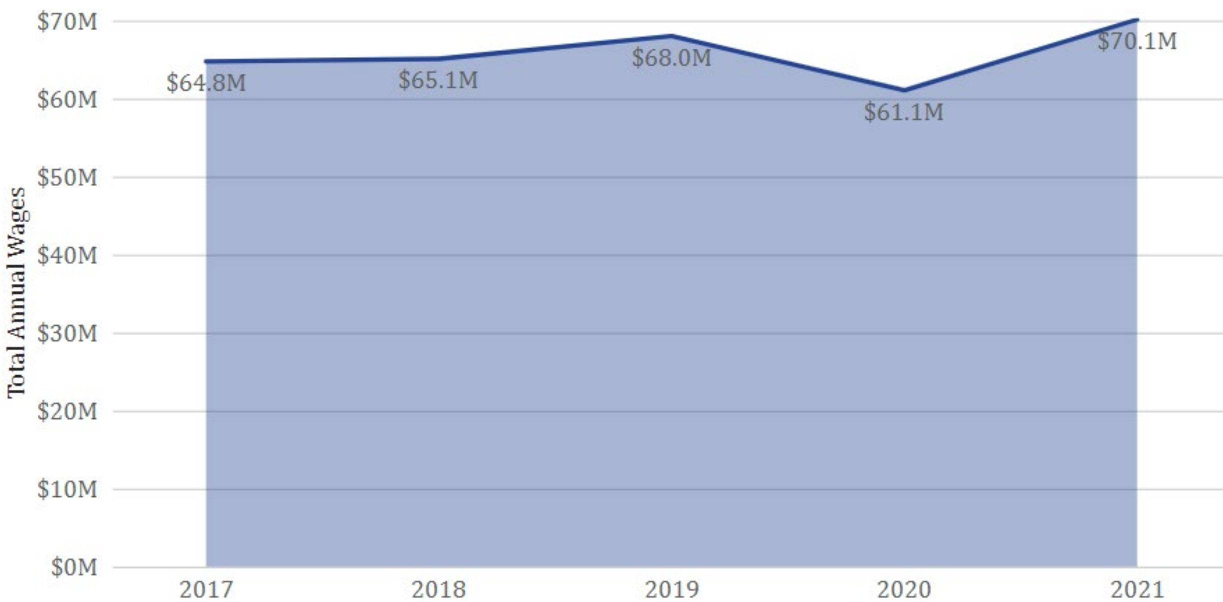
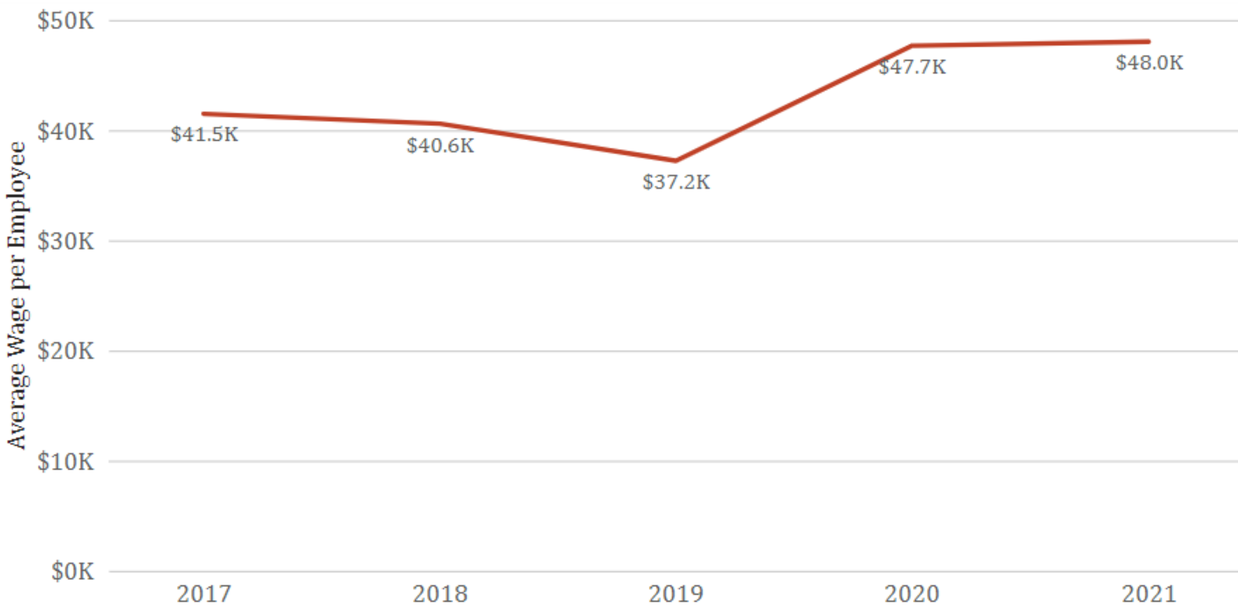


Chart 3—Snohomish County Average Wage per Employee (2017-2021)




Combining the trends from Charts 1-3, there is evidence that the Segment was growing before the Pandemic but was doing so with a bias toward entry-level and lower-paying positions.

The Pandemic forced the Segment's businesses to re-evaluate their employment decisions, leading to a significant number of layoffs. When employees were added back in 2020 and 2021, business innovations increased the number of employees while also keeping wages high. This should lead to a more resilient Segment with better wages and higher efficiency per worker.

Key Metric: Track Segment average wages and employment counts to see if recovery is happening at the top or bottom of the pay scales for the employer businesses.

## Non-Employer Businesses in Snohomish County

Per census bureau estimates, 89 percent of all Snohomish County Arts and Culture Segment's businesses are small non-employer businesses (family owned and operated, solopreneur, and freelance creators, to name a few). This is slightly higher than the Washington share of 87 percent of Arts and Culture Segment.

Support for Arts and Culture Segment non-employer businesses in Snohomish County is of particular urgency, because some Segment sub-categories in the BEA Arts and Culture Satellite Account show non-employer business shares as high as 98 percent, (see Table 2, but note that non-employer data is not available at the six-digit NAICS code level, so not all of the Segment's codes are included in the Phase One Segment Assessment).

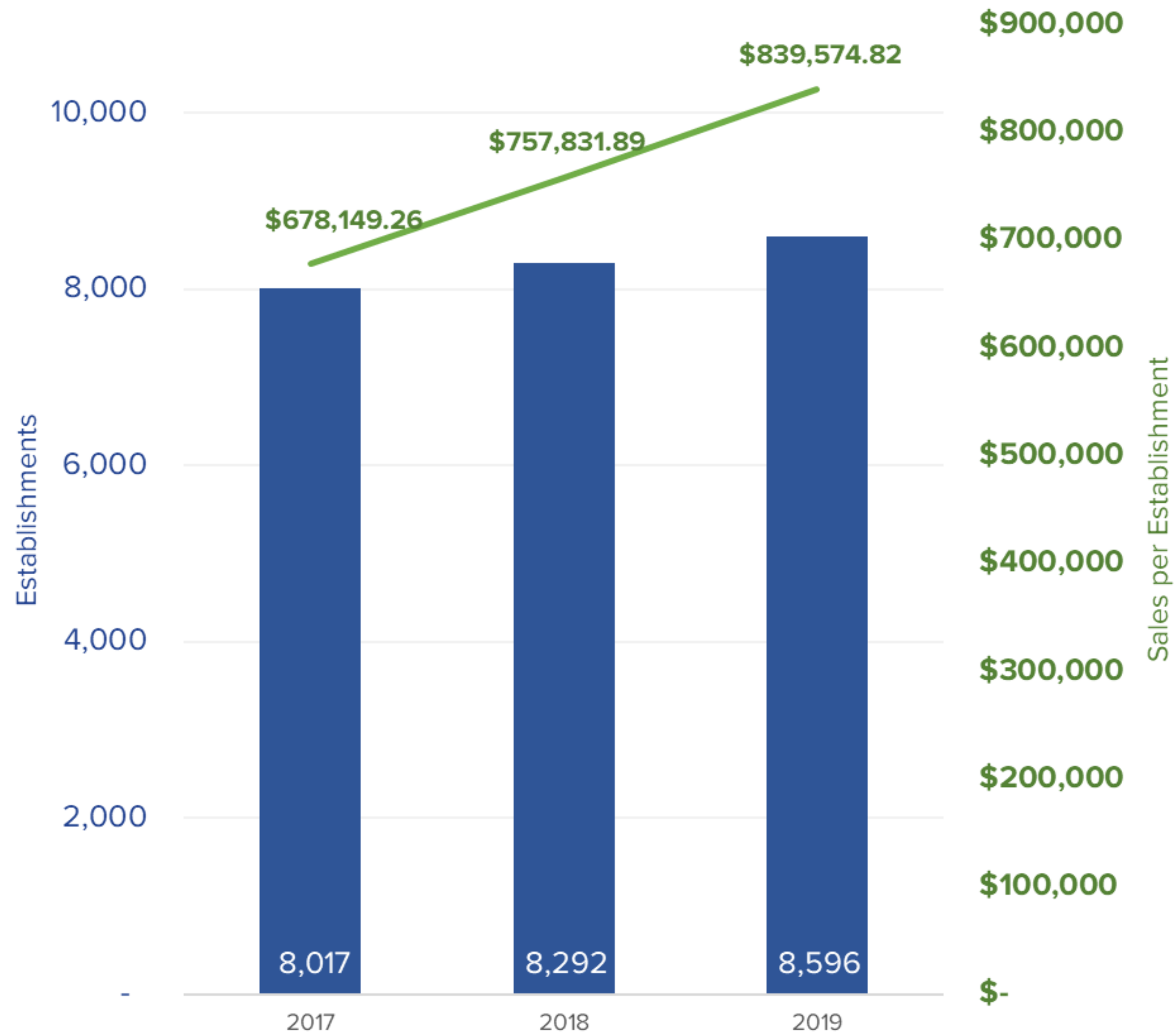
Table 2—Snohomish County Share of Non-employer Businesses by NAICS Code

| 2017 4-digit NAICS Code | 2017 NAICS Code Description | Total Establishments | Non-employer Establishments | % of Total |
|---|---|---|---|---|
| **3272** | Glass and Glass Product Manufacturing | 19 | 15 | 78.9% |
| **3399** | Other Miscellaneous Manufacturing | 263 | 217 | 82.5% |
| **4511** | Sporting Goods, Hobby, and Musical Instrument Stores | 249 | 148 | 59.4% |
| **4512** | Book Stores and News Dealers | 42 | 30 | 71.4% |
| **4539** | Other Miscellaneous Store Retailers | 465 | 283 | 60.9% |
| **5121** | Motion Picture and Video Industries | 242 | 224 | 92.6% |
| **5122** | Sound Recording Industries | 88 | 80 | 90.9% |
| **5191** | Other Information Services | 146 | 119 | 81.5% |
| **5413** | Architectural, Engineering, and Related Services | 901 | 597 | 66.3% |
| **5414** | Specialized Design Services | 696 | 630 | 90.5% |
| **5419** | Other Professional, Scientific, and Technical Services | 2,589 | 2,411 | 93.1% |
| **7111** | Performing Arts Companies | 177 | 168 | 94.9% |
| **7113** | Promoters of Performing Arts, Sports, and Similar Events | 137 | 127 | 92.7% |
| **7115** | Independent Artists, Writers, and Performers | 2,083 | 2,047 | 98.3% |
| **7121** | Museums, Historical Sites, and Similar Institutions | 14 | 5 | 35.7% |
| **8129** | Other Personal Services | 1,576 | 1,431 | 90.8% |

As shown in Chart 4, County non-employer businesses were experiencing 3.6 percent growth per year between 2017 and 2019. Sales per establishment increased at an annual rate of 9.3 percent per year over the period, meaning that new businesses in the county were generating new wealth and driving growth in the Segment as a whole, not taking from the same addressable market.

According to the PSRC *Arts and Culture Labor Force Dynamics Analysis* (Berk, 2022), non-employer businesses struggled significantly during the pandemic in the region, but have experienced signs of recovery, with revenues up four percent from 2020 to 2021. It is expected that non-employer business data will follow employer business trends that showed a sharp drop in 2020 but experienced a slight recovery in 2021.

Chart 4—Snohomish County Total Businesses / Sales per Establishment for Non-employer Businesses (2017-2019)




## Economic Impacts

According to the State of Washington, the largest industry sector in the Arts and Culture Segment by GDP is creative technology. Despite being excluded from the County Arts and Culture Segment definition, these industries are recognized for their economic impact.

The Arts and Culture Segment increases earnings, supports job and income growth in other industries, due to backward and forward linkages within local economies.
For example, breweries, bakeries, and bookshops provide places for workers and residents places to gather and support other businesses nearby.

Table 3 shows estimated input-output impacts in three categories in Snohomish County: Sales, Jobs, and Earnings. This input-output analysis shows how a single dollar spent in any of the 50 NAICs Codes contributes to the overall county economy. Rows highlighted in green produce on average higher multipliers than other county industries.

Methodology: *Sales multipliers are determined by using Lightcast's gravitational flows multi-regional social account matrix model (MR-SAM), 6-digit NAICS codes were matched to the county Arts and Culture Segment 5-digit NAICS definition (it is not a one-to-one match with the NAICS codes used to generate the Segment). Only 43 NAICS matched the Lightcast estimates and were available for this analysis.*

Table 3 below, shows three categories in the Snohomish County economy for Sales, Jobs, and Earnings and show how a single dollar spent in any of the 43 NAICs contributes to the economy.

Lightcast's regional multipliers show how a one-unit increase in each industry of the Segment sales, jobs, and earnings) will impact the general economy. For example, one dollar in new sales in the 312120 NAICS code (Breweries) will generate an estimated .507 dollars in additional sales throughout the county, for a total economic impact of $1.507 in sales. Similarly, adding a job in the breweries sector will add an additional .815 jobs in other industries for a total of 1.815 jobs created.

The Arts and Culture industry subcategories highlighted in orange produce on average higher multipliers than the average County industry.

Key Takeaway**:** Overall, 29 of the 40-matching county NAICS codes had above-average multiplier in at least one category. Eight of the NAICS codes had above-average multipliers in all three categories. This justifies investment in these Segment, as well as their broader impacts on the County's economy.

Table 3—Total Sales, Jobs and Earnings (Lightcast's Regional Multipliers by NAICS Code)

| NAICS | Industry | Total Sales | Total Jobs | Total Earnings |
|---|---|---|---|---|
| 312120 | Breweries | 1.507 | 1.815 | 2.324 |
| 312140 | Distilleries | 1.594 | 2.337 | 3.728 |
| 512110 | Motion Picture and Video Production | 1.501 | 2.150 | 1.613 |
| 512120 | Motion Picture and Video Distribution | 1.500 | 1.741 | 1.618 |
| 512132 | Drive-In Motion Picture Theaters | 1.503 | 1.638 | 1.637 |
| 512199 | Other Motion Picture and Video Industries | 1.503 | 1.587 | 1.630 |
| 512290 | Other Sound Recording Industries | 1.578 | 1.580 | 2.015 |
| 515210 | Cable and Other Subscription Programming | 1.470 | 1.771 | 2.135 |
| 327212 | Other Pressed and Blown Glass and Glassware Manufacturing | 1.480 | 1.126 | 1.568 |
| 511130 | Book Publishers | 1.494 | 1.182 | 1.691 |
| 512230 | Music Publishers | 1.576 | 1.413 | 1.988 |
| 512240 | Sound Recording Studios | 1.577 | 1.281 | 2.006 |
| 711130 | Musical Groups and Artists | 1.571 | 1.360 | 1.525 |

| NAICS | Industry | Total Sales | Total Jobs | Total Earnings |
|---|---|---|---|---|
| **711190** | Other Performing Arts Companies | 1.571 | 1.372 | 1.530 |
| **711310** | Promoters of Performing Arts, Sports, and Similar Events with Facilities | 1.639 | 1.517 | 1.706 |
| **711320** | Promoters of Performing Arts, Sports, and Similar Events without Facilities | 1.640 | 1.494 | 1.711 |
| **312130** | Wineries | 1.422 | 1.559 | 1.548 |
| **451130** | Sewing, Needlework, and Piece Goods Stores | 1.556 | 1.166 | 1.500 |
| **451140** | Musical Instrument and Supplies Stores | 1.552 | 1.292 | 1.494 |
| **451211** | Book Stores | 1.549 | 1.222 | 1.487 |
| **453110** | Florists | 1.553 | 1.200 | 1.494 |
| **453920** | Art Dealers | 1.544 | 1.230 | 1.474 |
| **519120** | Libraries and Archives | 1.519 | 1.044 | 1.363 |
| **611511** | Cosmetology and Barber Schools | 1.478 | 1.177 | 1.288 |
| **611610** | Fine Arts Schools | 1.467 | 1.090 | 1.280 |
| **711110** | Theater Companies and Dinner Theaters | 1.567 | 1.474 | 1.517 |
| **711120** | Dance Companies | 1.569 | 1.348 | 1.519 |
| **712110** | Museums | 1.577 | 1.529 | 1.450 |
| **712130** | Zoos and Botanical Gardens | 1.581 | 1.426 | 1.457 |
| **712190** | Nature Parks and Other Similar Institutions | 1.591 | 1.118 | 1.466 |
| **339910** | Jewelry and Silverware Manufacturing | 1.375 | 1.135 | 1.415 |
| **511110** | Newspaper Publishers | 1.399 | 1.111 | 1.254 |
| **511120** | Periodical Publishers | 1.437 | 1.329 | 1.316 |
| **515112** | Radio Stations | 1.358 | 1.234 | 1.420 |
| **541310** | Architectural Services | 1.433 | 1.399 | 1.307 |
| **541320** | Landscape Architectural Services | 1.437 | 1.211 | 1.310 |
| **541410** | Interior Design Services | 1.390 | 1.113 | 1.206 |
| **541430** | Graphic Design Services | 1.392 | 1.159 | 1.207 |
| **541490** | Other Specialized Design Services | 1.388 | 1.119 | 1.204 |
| **541921** | Photography Studios, Portrait | 1.439 | 1.077 | 1.305 |
| **541922** | Commercial Photography | 1.437 | 1.202 | 1.302 |
| **711510** | Independent Artists, Writers, and Performers | 1.307 | 1.028 | 1.130 |
| **812921** | Photofinishing Laboratories (except One-Hour) | 1.391 | 1.136 | 1.227 |

# Comparison: The Seattle Metropolitan Arts and Culture Watershed

This section creates a Seattle Metropolitan Arts and Culture Watershed, "the Watershed", to compare and measure Segment change over time. Proximity and employment share are the qualifiers for membership in the Watershed.

Watershed comparisons set benchmarks for employment, wages, and non-employer statistics to show changes in the 50 NAICS Codes. Monitoring each of these metrics will show key changes to Snohomish County Arts and Culture Segment over time.

### Watershed Comparison Methodology

Snohomish, Kitsap, Pierce, and Thurston Counties are members in the Watershed because each contribute to at least one percent or more of King County's total jobs (see Table 4), providing a proxy measure for economic connectedness. Replicating Segment and Workforce methodology, the Watershed counties were each analyzed for employment, wage, and non-employer business statistics, the points for comparison.

Table 4 shows how each of the county members of the Watershed contribute to at least one percent or more of King County's total jobs to demonstrate connectedness.

Map 1—Seattle Metropolitan Arts and Culture Watershed

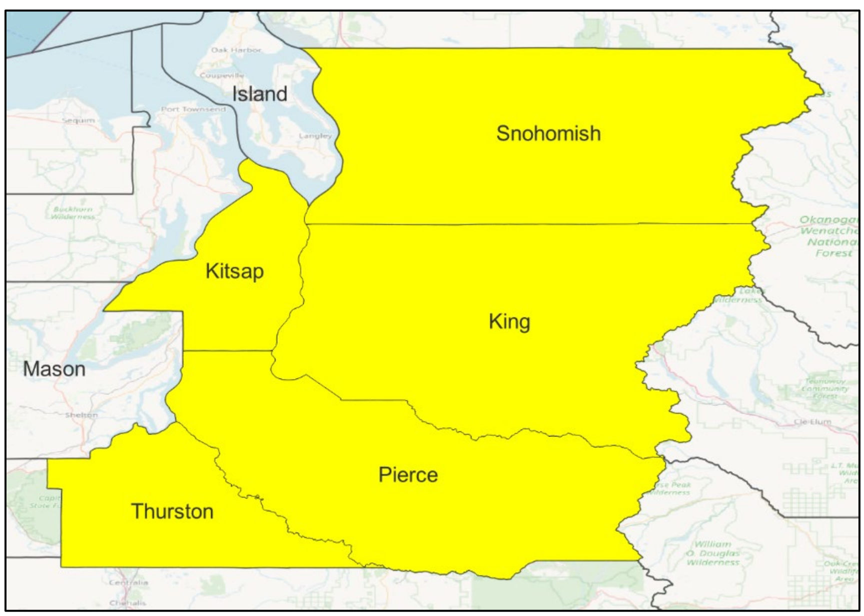


Table 4—Share of King County Workers by Home County

| Worker's Home County | Count | Share |
| --- | --- | --- |
| King County | 902,917 | 65.4% |
| **Snohomish County** | **173,586** | **12.6%** |
| Pierce County | 136,996 | 9.9% |
| Kitsap County | 27,426 | 2.0% |
| Thurston County | 16,567 | 1.2% |
| Other Counties | 122,371 | 8.7% |

SOURCE: U.S. Census Bureau, Longitudinal Employer-Household Dynamics, 2019 Data (All Jobs); does not equal 100 due to rounding.

### Watershed Comparison: Employment and Wages

Chart 5 shows the total number of Arts and Culture Segment employees in each county of the Watershed by year. Snohomish County experienced a similar pattern to its Watershed peers, with a decrease in employment in 2020 and signs of recovery in 2021.

King County suffered the greatest employment loss in the Watershed and remained 4,000 workers short of its 2021 pre-pandemic level. Since its Segment were not as affected as King County, Snohomish County's share of total Arts and Culture Segment's jobs increased from 5.1 percent in 2017 to 5.4 percent in 2021. Similarly, Snohomish and King counties were the only counties that experienced employment recovery in 2021 for the Segment: Kitsap, Pierce, and Thurston counties all had flat employment levels between 2020 and 2021.

Chart 5—Arts and Culture employment by County and Year (Watershed)

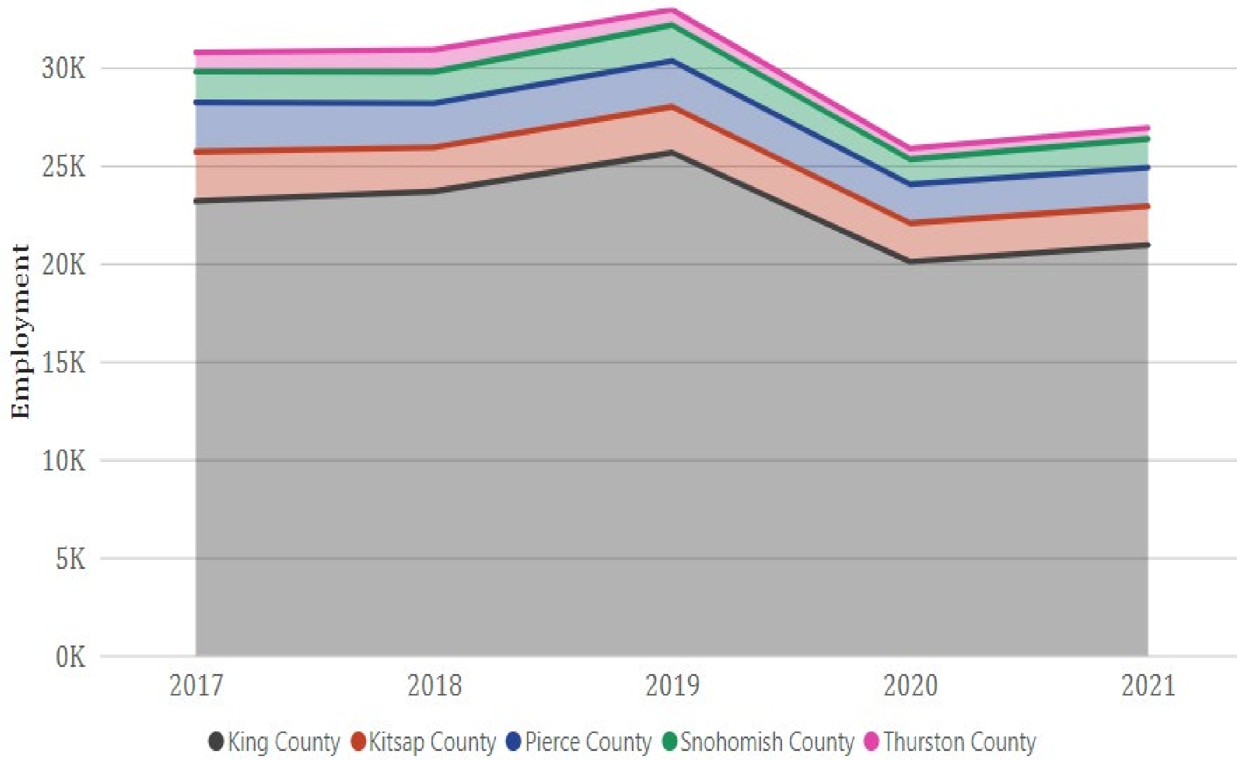
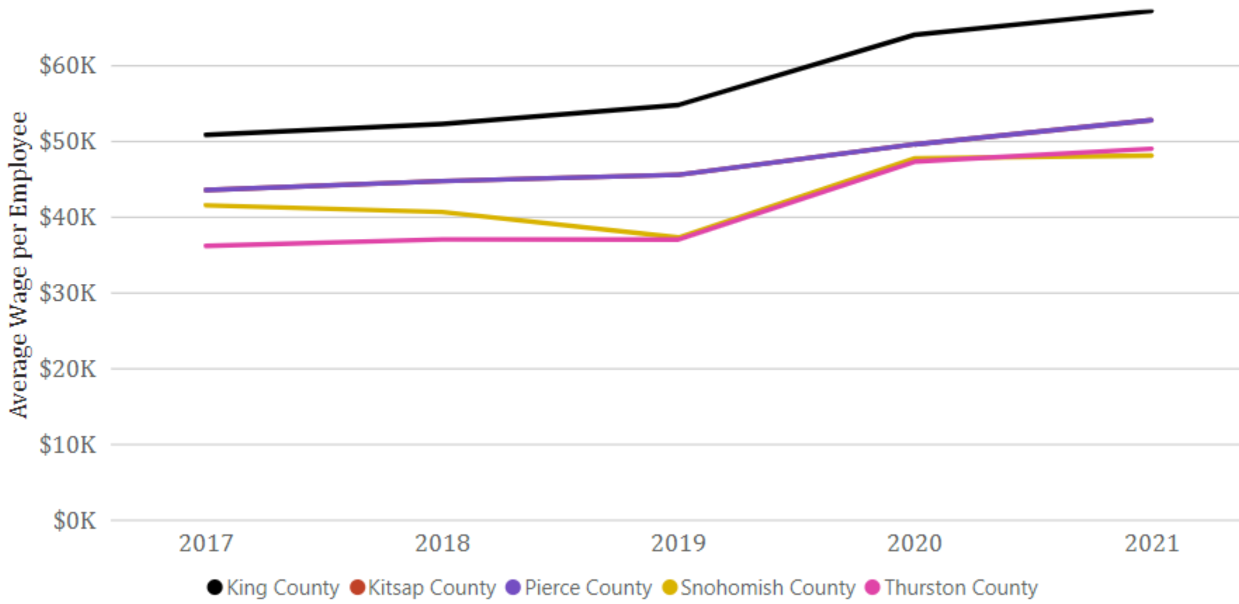



Chart 6 shows the average wage per the Segment's employees in each of the Watershed counties. King County's wages are approximately 33 percent higher than the average for the other counties, evidence for how central King County is to the Segment at the regional level.

The Arts and Culture Segment in Snohomish County pays the lowest wages in the Watershed. In 2021, Snohomish County paid $900 per year less than Thurston County, its closest peer. County Segment wages kept pace with the Pierce County wage average of $41K per year in 2017, but in 2021, fell behind all its Watershed peers.

Chart 6—Average Wage per Employee by County and Year (Watershed)

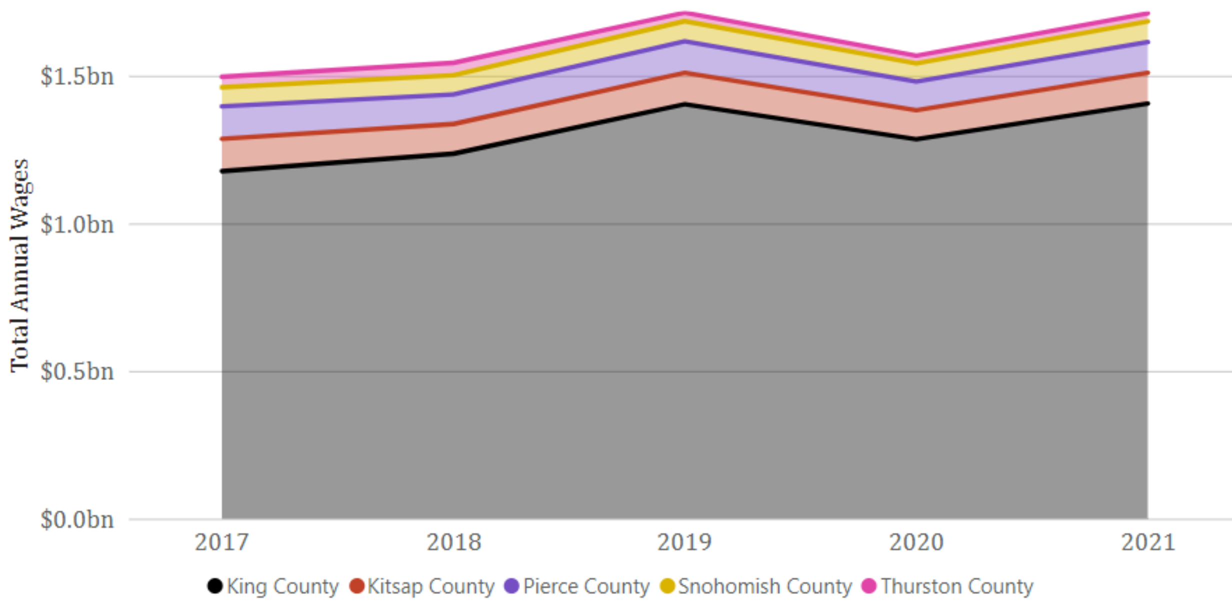



Total wages in the Watershed experienced an average annual growth rate of 3.6 percent per year between 2017 and 2021 (see Chart 7), on par with the Snohomish County Arts and Culture Segment wage growth.

Key takeaways for counties in the Watershed are similar to Snohomish County Segment findings: While there were fewer employees in 2021 than before the Pandemic, remaining employees are enjoying higher wages.

Key Benchmark: Increases to both employment and wages are key indicators of Segment recovery and future improvement.

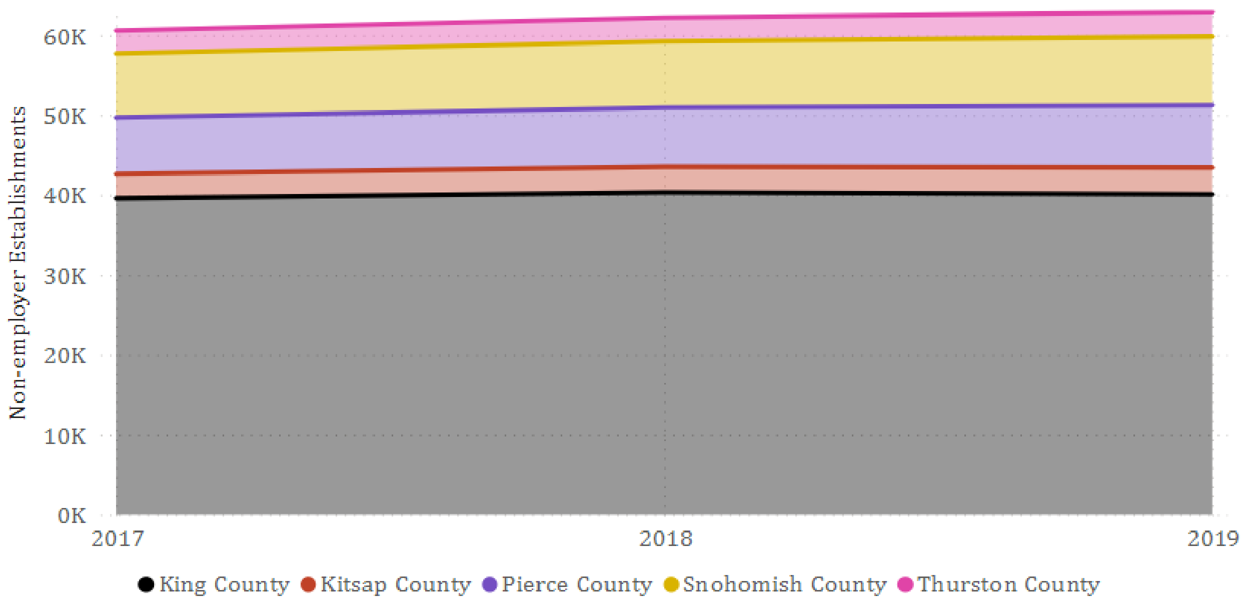
Chart 7—Total Annual Wages by County and Year (Watershed)




## Watershed Comparison: Share of Non-employer Establishments

Non-employer establishments are often small, and operated by families, without paid employees. While every county has significantly more non-employer establishments than employer businesses, Snohomish County claims an estimated 13 percent of the non-employer establishments in the Watershed (more than double its share of employer businesses). The county also has a larger number of non-employer establishments than every county except for King County (see Chart 8). As was the case with the Snohomish County analysis, the data are only available until 2019, so the impact of the Pandemic is not represented in the chart.

Chart 8—Non-employer establishments by County and Year (Watershed)




## Watershed Comparison: Cultural Venues

In order to measure and venues across the Watershed, a blunt tool was created using Google business reviews as a proxy for visitation, enjoyment, and engagement. For each county, the total number of reviews and average rating were multiplied to calculate an **average venue score**, and then that score was multiplied by the number of venues in each county to arrive at a **total score**. This is a very blunt approach but helps to understand the Arts and Culture asset capital for the counties. Using this methodology, Snohomish County ranks third for its total venue score in the Watershed. While Snohomish and Pierce counties had the same number of identified venues, Pierce had higher engagement with its venues. The average rating of Snohomish County venues is high at 4.63 percent, second to only Kitsap County at 4.66 percent Table 5.

Table 5—Attendance and Engagement Scores by County (Watershed)

| County | Average Rating | Number of Reviews | Number of Venues | Average Venue Score | Total Score | Ranked Score |
|---|---|---|---|---|---|---|
| King County | 4.63 | 218,255 | 43 | 23,157 | 42,930,759 | 1 |
| Pierce County | 4.59 | 49,408 | 15 | 15,153 | 3,404,211 | 2 |
| **Snohomish County** | **4.63** | **13,196** | **15** | **4,033** | **915,802** | **3** |
| Thurston County | 4.61 | 9,947 | 7 | 6,613 | 321,288 | 4 |
| Kitsap County | 4.66 | 5,973 | 11 | 2,531 | 306,425 | 5 |

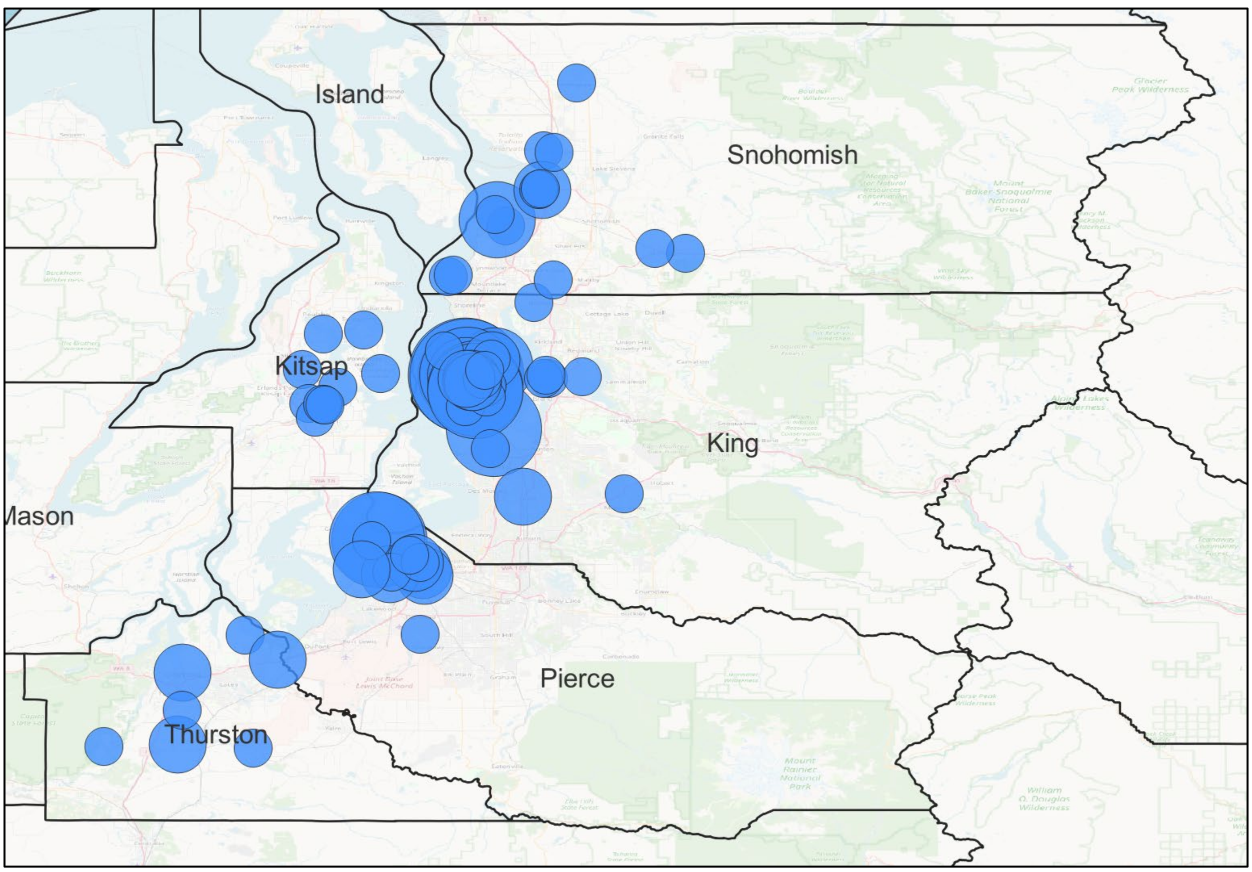
SOURCE: Google Maps, Google Reviews, Better City

Map 2 shows a more detailed view of the cultural venues in the Watershed analysis. These are mapped out in clusters and relative locations in each county. Bubble size increases with higher scores (note that attendance is the primary driver of bubble size, with the average rating being used as a multiplier).

The arts and culture venues in Snohomish County are not as concentrated as other counties with large populations. Pierce County has the same number of venues as Snohomish, but as shown in the map, Pierce is more similar to King than Snohomish for ratings and attendance. In other words, the distributed nature of Snohomish's venues may be preventing the clustering benefits that seem to be present with other Watershed counties.

Key Benchmark: Track improvements to the County's venue scores and work to increase engagement for local venues.

Map 2—Dispersion of Arts and Culture Venues throughout the Watershed




## Watershed Comparison: Public Agency Support

The counties analyzed in the Watershed show some variation in terms of public agency approach, support and policy for cultural assets, venues, and creators. The Cultural venues in Snohomish County are underperforming compared to others in the Seattle Metropolitan Watershed and peer counties across the country. Future phases should explore and detail what resources are in place that led Pierce, Kitsap and Thurston County to outperform Snohomish County.

Topics for future investigation are suggested below:

1. **County Arts Program / County Funded Arts Organization –** How does each county structure and staff arts programs and/or organizational support?
2. **County Percent for Art / Lodging Tax Investments** —What does each county provide for Segment business funding?
3. **County Funded Work/Live Programs—**Are there statutes in place that provide support/assistance to artists (such as living spaces)?
4. **County Strategic Arts and Culture Plans** – are there Recovery and Resiliency Plans that target Segment businesses?

Table 6—Public Support Options by County (Watershed)

| County | County Arts Program / County Arts Org | County Percent for Art / Lodging Taxes | A&C Statutes/Programs |
|---|---|---|---|
| **Snohomish County** | ✓ | ✓ | ✓ |
| King County | ✓ | ✓ | ✓ |
| Pierce County | ✓ | ✓ | ✓ |
| Kitsap County | | | ✓ |
| Thurston County | | | |

**Key Watershed Comparison Benchmarks to Monitor:**

Snohomish County plays a minor role in the Seattle Metropolitan Arts and Culture Watershed, and has:

- The second smallest Segment of the five counties
- The lowest average annual wage
- Above average costs of living and home values
- Under performing cultural venues

# Comparison: National Peer Counties

All United States counties were filtered for three peer criteria that required 75 and 150 percent of Snohomish County population, density, and median household income (the margins are not symmetric to add some bias toward larger communities since Snohomish County is anticipated to grow in population and density over the next 30 years).

### National Peer County Comparison Methodology

All of the nation's counties were inventoried and filtered based on four criteria. Each county must have been 1) within 75 and 150 percent of the county's population, 2) density, and 3) median household income (the margins are not symmetric to add some bias toward larger communities). If a county was within the given margins for the first three categories, a final subjective filter was added to 4) ensure that the comparable county was an "edge community", meaning that the county was neighboring a large metropolitan county with a major city (to capture similar dynamics as is being experienced between Snohomish and King counties). The edge community filter selects counties that are of similar size to Snohomish County and are next to a county with a major city, like Seattle.

Table 7 shows the six Snohomish County peer counties. Peers provide crucial benchmark indicators to monitor employment and wages; cost of living; and rankings of arts and culture venues.

Table 7—Counties used in the National Comparison

| County Name | Population | Pop. Density (/Sq Mi) | Median Household Income (2021) | Neighboring Metro County / City |
|---|---|---|---|---|
| Worcester County, MA | 862,029 | 570.8 | $84,952 | Suffolk County / Boston |
| Ventura County, CA | 839,784 | 455.9 | $96,454 | Los Angeles County |
| **Snohomish County, WA** | **833,540** | **399.6** | **$100,042** | **King County / Seattle** |
| San Joaquin County, CA | 789,410 | 567.1 | $80,681 | San Francisco County |
| El Paso County, CO | 737,867 | 347.0 | $79,427 | Denver County |
| Utah County, UT | 684,986 | 341.9 | $86,781 | Salt Lake County |
| Williamson County, TX | 643,026 | 575.1 | $96,073 | Travis County (Austin) |

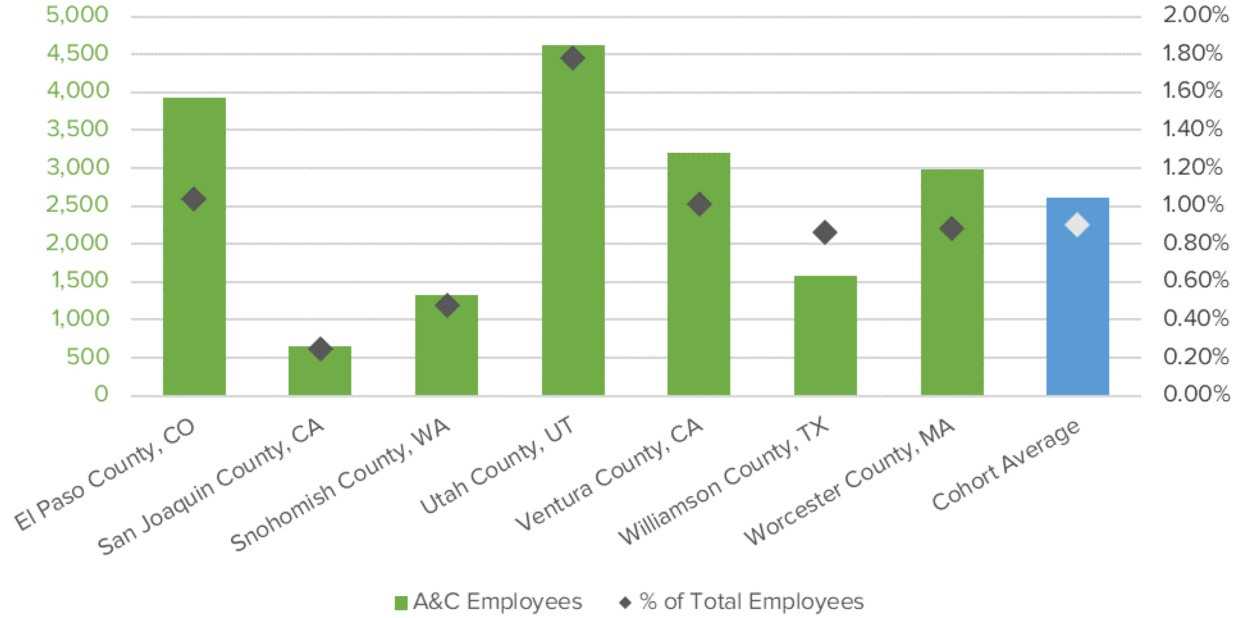
SOURCE: US Census Bureau, TIGERlines Shapefiles

### National Peer County Comparison: Employment

Snohomish County leads its peer counties with the highest median household income. However, while its robust manufacturing, health care, and service sectors show notable economic gains, its Arts and Culture industries fall significantly behind five of the six peer counties. Snohomish County is behind its cohort in actual Arts and Culture Segment employment, and in employment shares relative to total County employment (see Chart 9).

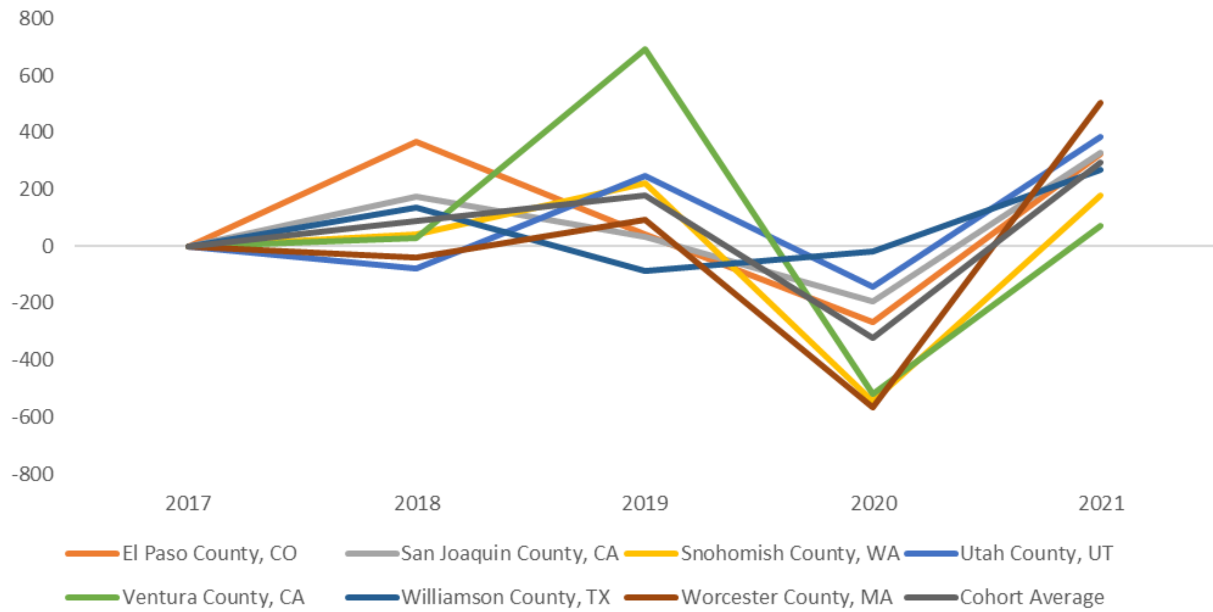
**Key Benchmark:** Snohomish County will need to double employment in the Segment to reach the 2,500-employment average of its six peer counties.

Chart 9—Employment Count and Share of Total Employment (2021)




The arts and culture industry growth in Snohomish County is the slowest of nearly all of its six peer counties. The County also lost a larger share of arts and culture industry employees in 2020, and recovery is behind most of its peer counties (see Chart 10).

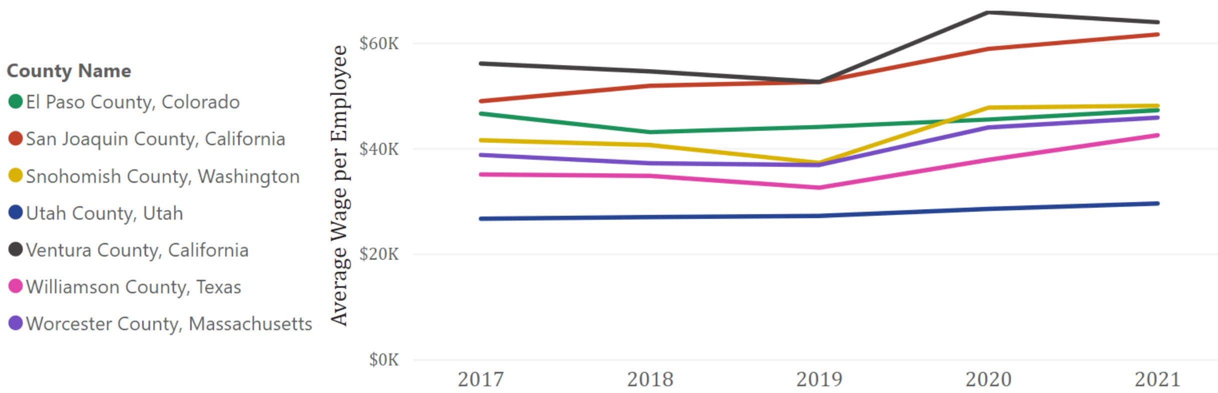
Chart 10—Employment Gains and Losses by County and Year (National Comparison)




## National Peer County Comparison: Wages

The arts and culture industries of Snohomish County saw gains in wages from 2017 to 2021. While San Joaquin County, California provides an average wage $13K greater than Snohomish County, Snohomish County provides the third-best wages for Arts and Culture employees, holding a close wage per employee average within its cohort (see Chart 11) across the comparison counties.

Chart 11—Average Wage per Employee (National Comparison)




Adjusted wages for 2021 are shown in Table 8 and show cost of living differences between Snohomish County and the comparisons, using the 2020 US price averages as a base metric. When adjusted for regional pricing, the gap between the California peer counties and the others shrinks significantly. With this adjustment, Snohomish County drops to fourth in its peer group.

Table 8—Cost-of-living-adjusted A&C Wage by County

| County | 2021 Unadjusted Wage | Price Parity Multiplier (US Avg = 100) | 2021 Adjusted Wage |
|---|---|---|---|
| Ventura County, CA | $63,867 | 110.38 | $57,861.41 |
| San Joaquin County, CA | $61,558 | 110.38 | $55,769.15 |
| El Paso County, CO | $47,194 | 102.87 | $45,879.56 |
| **Snohomish County, WA** | **$48,039** | **107.36** | **$44,746.55** |
| Williamson County, TX | $42,447 | 99.54 | $42,641.91 |
| Worcester County, MA | $45,797 | 107.44 | $42,624.95 |
| Utah County, UT | $29,488 | 95.32 | $30,935.66 |

Source: U.S. Bureau of Economic Analysis, Regional Price by State, 2020

**Key Benchmark:** Snohomish County should maintain or improve its adjusted wages position for the Segment.

### National Peer County Arts and Culture Venue Comparisons

Score totals driven by the average number of social media reviews a venue receives, ranks Snohomish County arts and culture venues fourth among its six peer counties.

Like the Watershed comparison, Snohomish County venues receive only 53 percent of the average number of reviews per venue, but the County average score per venue is equal to the cohort average (see Table 9).

Future phases should include outreach and audit of county peers to inventory if public funding is increasing awareness of cultural venues.

Table 9—Attendance and Engagement Scores by County (National)

| County | Average Rating | Total # of Reviews | Total # of Venues | Average Venue Score | Total Score | Ranked Total Score |
|---|---|---|---|---|---|---|
| Utah County, UT | 4.68 | 75,832 | 15 | 23,834 | 5,323,406 | 1 |
| El Paso County, CO | 4.62 | 31,995 | 11 | 13,592 | 1,625,346 | 2 |
| Worchester County, MA | 4.59 | 20,840 | 15 | 6,357 | 1,433,792 | 3 |
| **Snohomish County** | **4.61** | **13,666** | **15** | **4,154** | **944,321** | **4** |
| Ventura County, CA | 4.63 | 8,181 | 11 | 3,408 | 416,412 | 5 |
| Williamson County, TX | 4.58 | 8,267 | 6 | 6,467 | 227,343 | 6 |
| San Joaquin County, CA | 4.58 | 7,899 | 6 | 6,007 | 217,223 | 7 |

**Key Benchmark:** Coordinated marketing and promotions between the County Destination Management Office and arts and culture venues receiving Lodging Tax support from the County, should target closing this gap.

### National Peer County Public Agency Support Comparison

Table 10 shows the same criteria for evaluation that was used in the Watershed analysis. With the controls for population, density, and wages used to generate the comparison for peer counties, the relationship between venue performance and public support is more supported than what could be done using the Watershed analysis. The counties with low public support for Arts and Culture have 1) fewer venues and 2) lower venue scores.

Table 10—Public Support Options by Peer County (National)

| Counties | Arts/Culture Commission | Funding by Gov. | Laws supporting activities and venues |
|---|---|---|---|
| **Snohomish County** | ✓ | ✓ | ✓ |
| **Worchester County, MA** | ✓ | ✓ | ✓ |
| **San Joaquin County, CA** | | | ✓ |
| **Ventura County, CA** | *State level only* | *State level only* | |
| **El Paso County, CO** | ✓ | ✓ | ✓ |
| **Utah County, UT** | *State level only* | *State level only* | *State level only* |
| **Williamson County, TX** | *State level only* | | |

# Consumer Behaviors

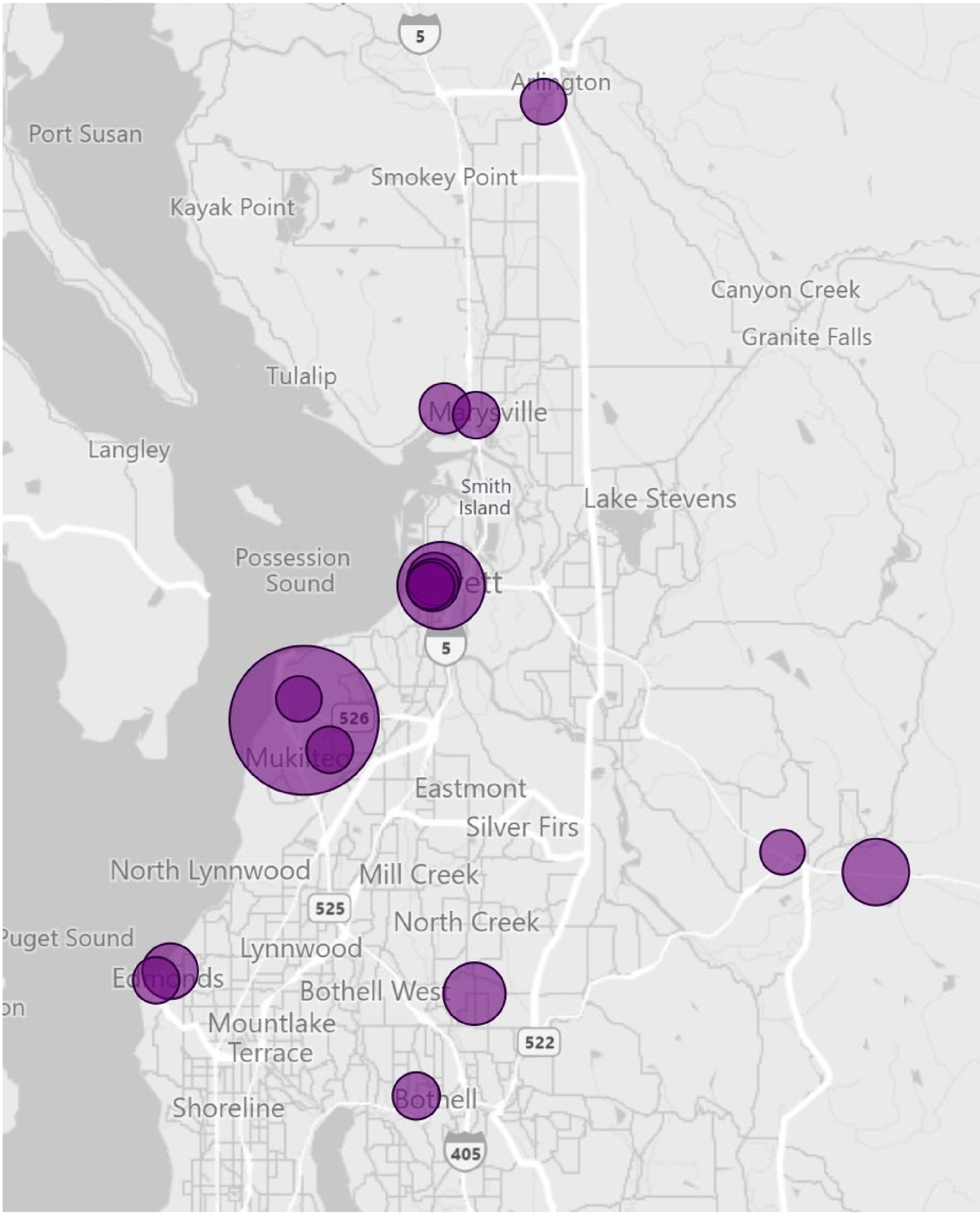
This section utilizes data from Datafy, a vendor that provides visitation and event analytics for the Seattle NorthCountry destination, as well as behavior insights from aggregated data from more than 225 million devices, to understand visitation trends for Arts and Culture Segment sites throughout Snohomish County.

This analysis is supplied from geo-boundaried Points of Interest (POIs). Most charts are aggregated to show trends in total visitation for the Arts and Culture Segment, rather than to specific POIs. The date and visitor filters used for each chart are provided. The following 11 POIs were used for this analysis:

- Northshore Performing Arts Center
- Edmonds Performing Arts Centre
- Everett Historic Theater
- Future of Flight
- Hibulb Cultural Center
- Japanese Gulch Trailhead (A & B)
- Marysville Opera House
- Shack Arts Center
- Stillaguamish Valley Pioneer Museum
- Village Theater
- Western Heritage Center

Note: The Everett Arena is intentionally left off the list because it skews data from other, smaller cultural venues.

Map 3—POIs used in Consumer Behaviors Analysis



## Visitation to Arts and Culture Venues

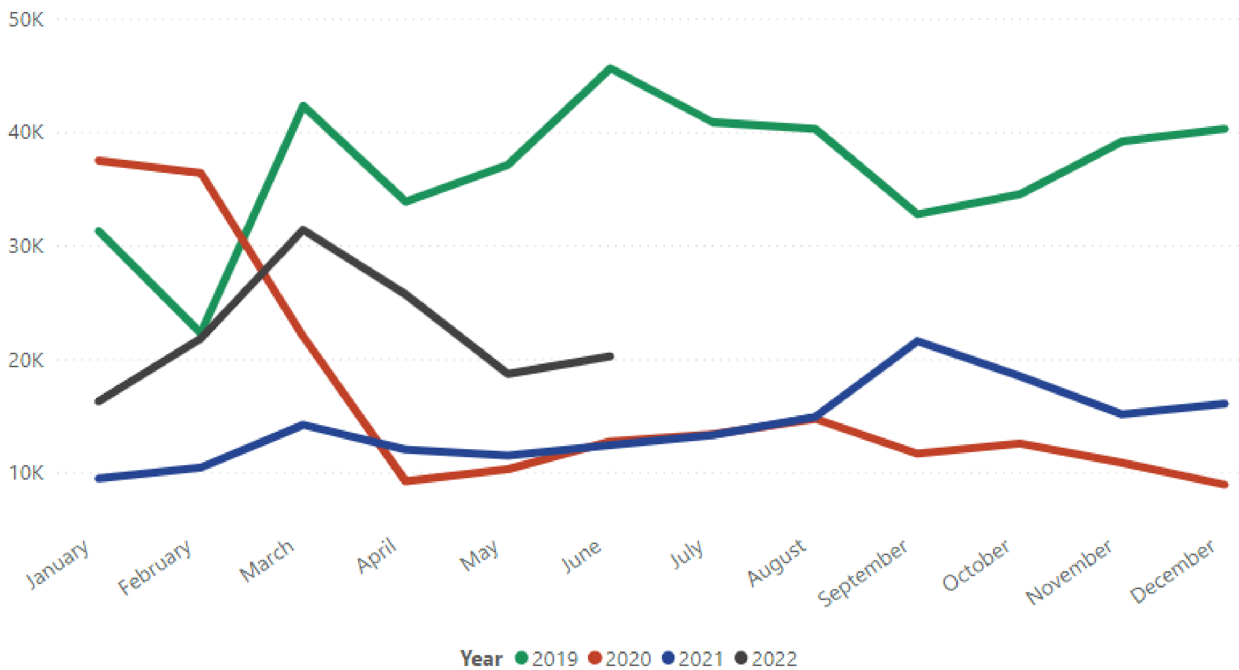
### Regional Market (1 to 50 Miles)

This section analyzes the behavior of people who live within a 50-mile radius of the POIs.[2] However, a one-mile buffer has been added to each POI to ensure that those who live very close to cultural venues, and who aren't visiting, are not counted in the estimate.

Chart 12 shows the aggregated visitation from January 2019 to the end of June 2022 (the most recent data available). The economic impact of the Pandemic started in March 2020 (the red line). Using 2019 (the green line) as a base year, evidence suggests that the Regional Visitor market has yet to recover to pre-pandemic levels.

It is unknown if the regional visitor market will continue to recover, or if reduced visitation will provide a new baseline, remains to be seen. However, any theory that there was latent demand that would surge as venues opened is fully debunked by these data.

Chart 12—Regional Visitation (2019-Jun 2022), 11 POIs

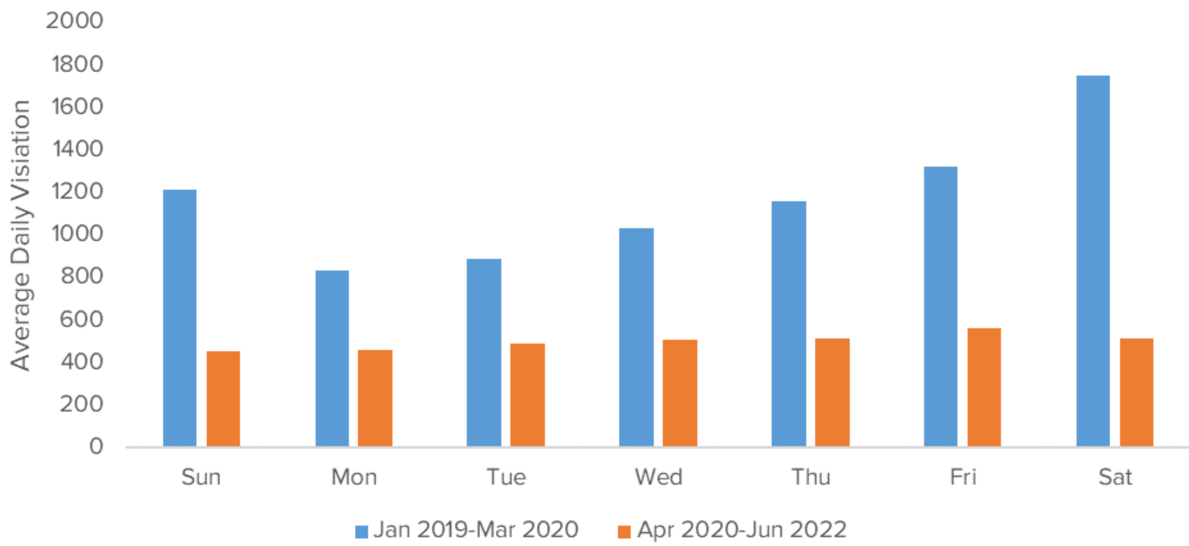



It is important to see when the loss of regional visitation occurred. As shown in Chart 13, before the Pandemic, 2019 the regional market showed a continued increase from Monday to the weekend, with Saturdays as the strongest performing day (an average of 1,752 people attended the 11 POIs each week).

[2] Note: the data is collected for each POI individually and then summed up to calculate total visitation.

However, with Pandemic shutdowns, average daily regional visitation remains flat throughout the week. The weekends are no longer the strong performers that can support cultural venues through slower weekdays. It is estimated that weekdays are 73 percent recovered from their pre-pandemic averages (as of June 2022), while weekends are 48 percent recovered. The weekends seem to be a prime target for recovery and should be a primary focus for rebuilding regional visitation as part of the recovery initiative.

Chart 13—Average Daily Regional Visitation by Weekday Comparison

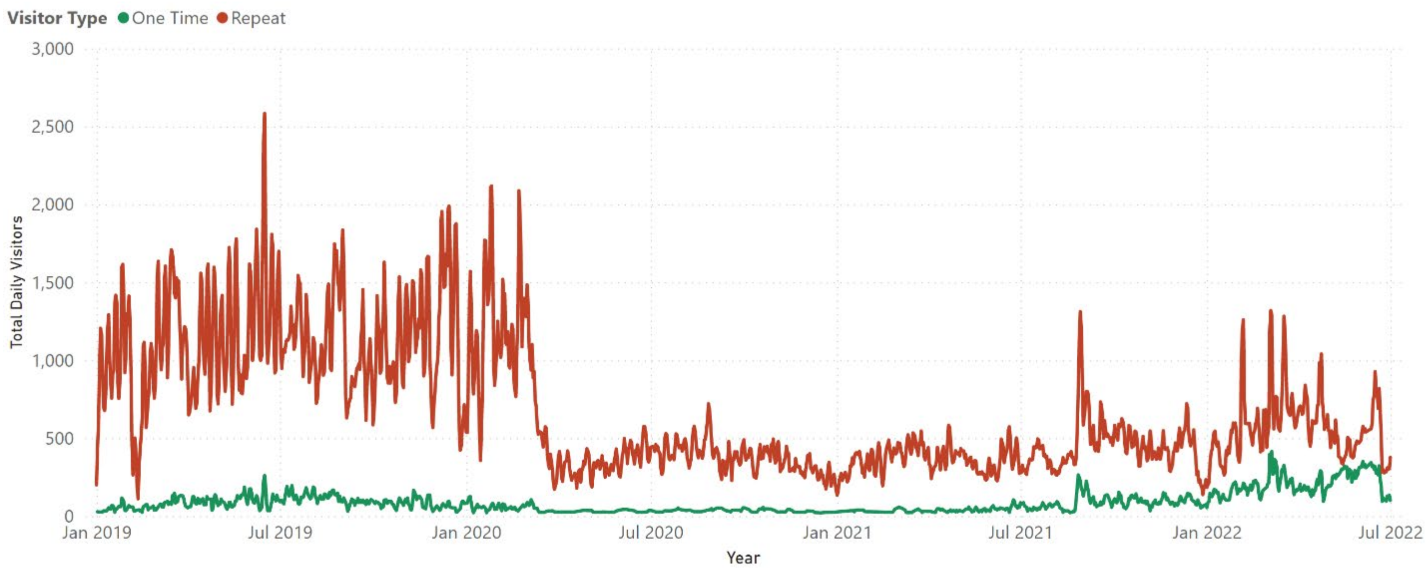



An additional shift in consumer behavior is shown in Chart 14. Previous regional repeat visitors (those who have gone to a particular venue multiple times between 2019 and 2022[3]) accounted for a steep drop in visitation to venues after the Pandemic started.

Fortunately, there is an increase in regional visitation starting in late-2021 that continues into 2022, so there is evidence regional visitors are returning to the POIs, but not to pre-Pandemic POI regional levels. Numbers of one-time regional visitors are increasing, and are exceeding visitation compared to the pre-pandemic levels. This may be attributable to staying closer to home (i.e., “staycations”).

[3] A repeat visitor in one venue is counted as a repeat visitor for the aggregated venues. A visitor doesn’t need to be a repeat at all venues to be considered in this chart.

Chart 14—One-time vs Repeat Visitation, 2019-Jul 2022

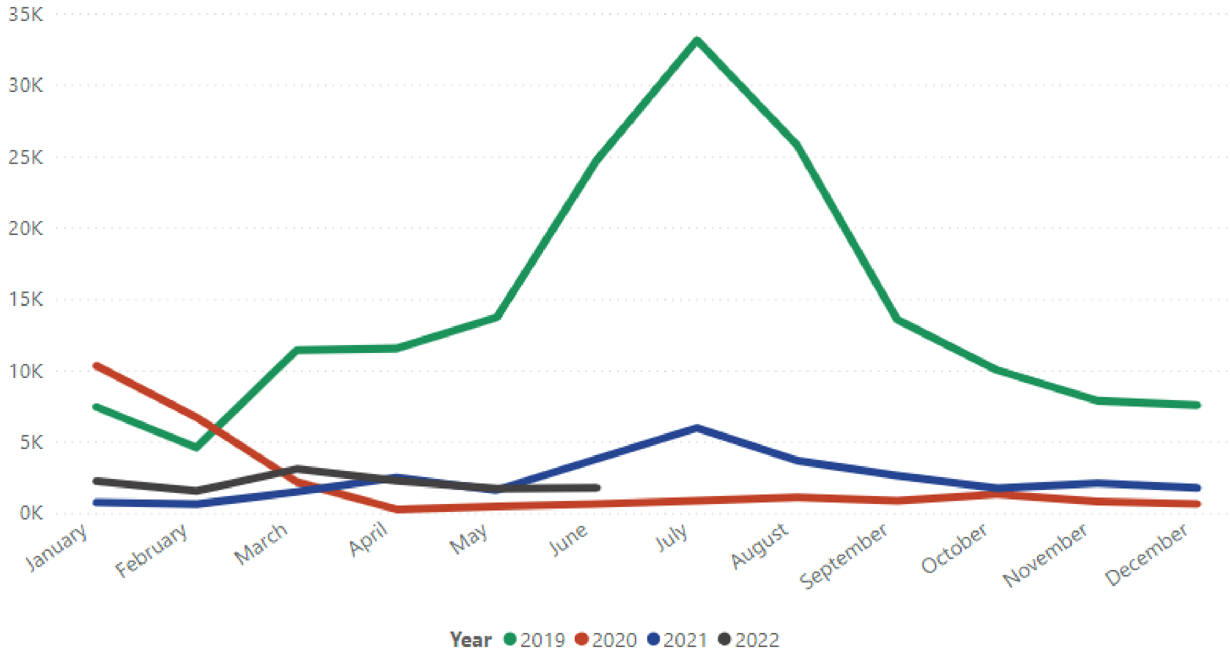



**Key Takeaway:** Regional visitors are key to sustained recovery for cultural venues. Resources, staffing, and other forms of support for venues during recovery should be a priority.

### Extra-regional Market (50+ miles)

Visitation to the 11 venues from visitors beyond the 50-mile radii shows a strong seasonality for arts and culture tourism activities (see Chart 15). In 2019, July experienced more than double the average visitation for any given month, with the Future of Flight Boeing Tour as the main driver of total visitation (representing more than 80 percent of POI visits in July). However, as shown in Chart 15, this level of visitation has yet to return. The lowest points in 2019 are close to the highest for the combined sites in 2021.

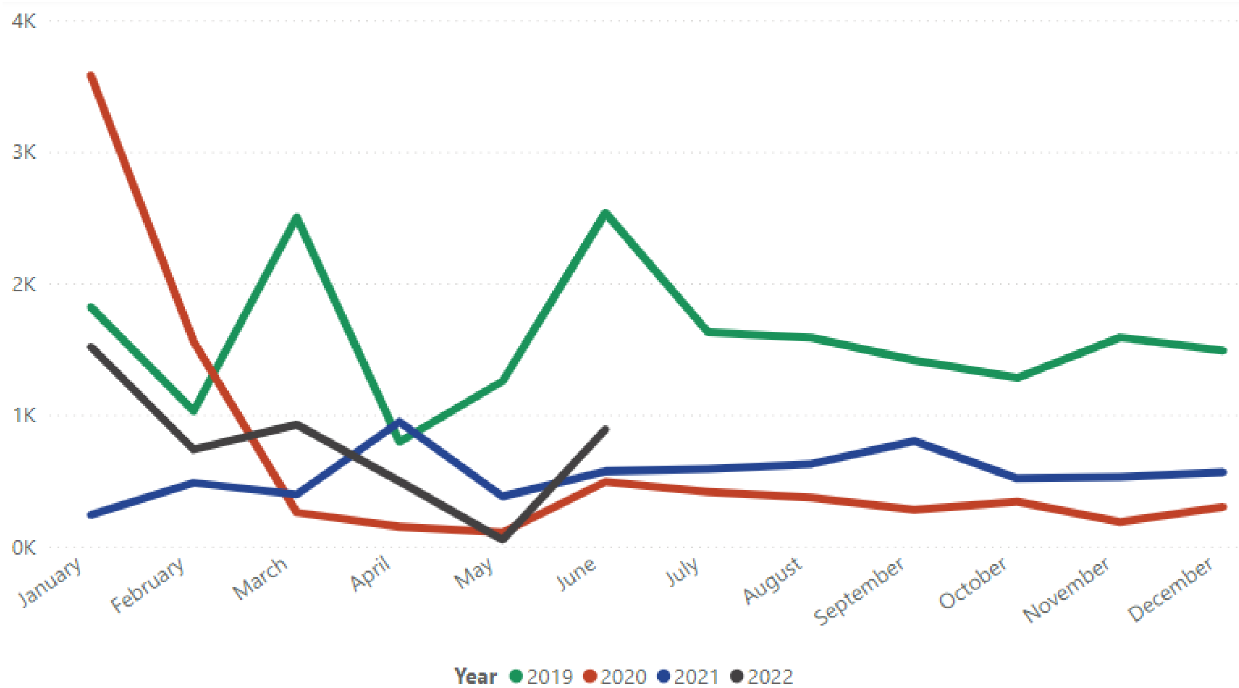
Chart 15—Extra-regional visitation (2019-June 2022)




Because the Future of Flight Boeing Tour skews the data for extra-regional visitation, a selection of just the performing arts venues was analyzed to better understand how that product type is doing as a driver of tourism (see Chart 16).

Using an average of the most recent four years, extra-regional visitors make up approximately 10 percent of total visitors to performance venues. As with visitation to the Watershed venues, there is still a gap in visitation to reach pre-pandemic levels.

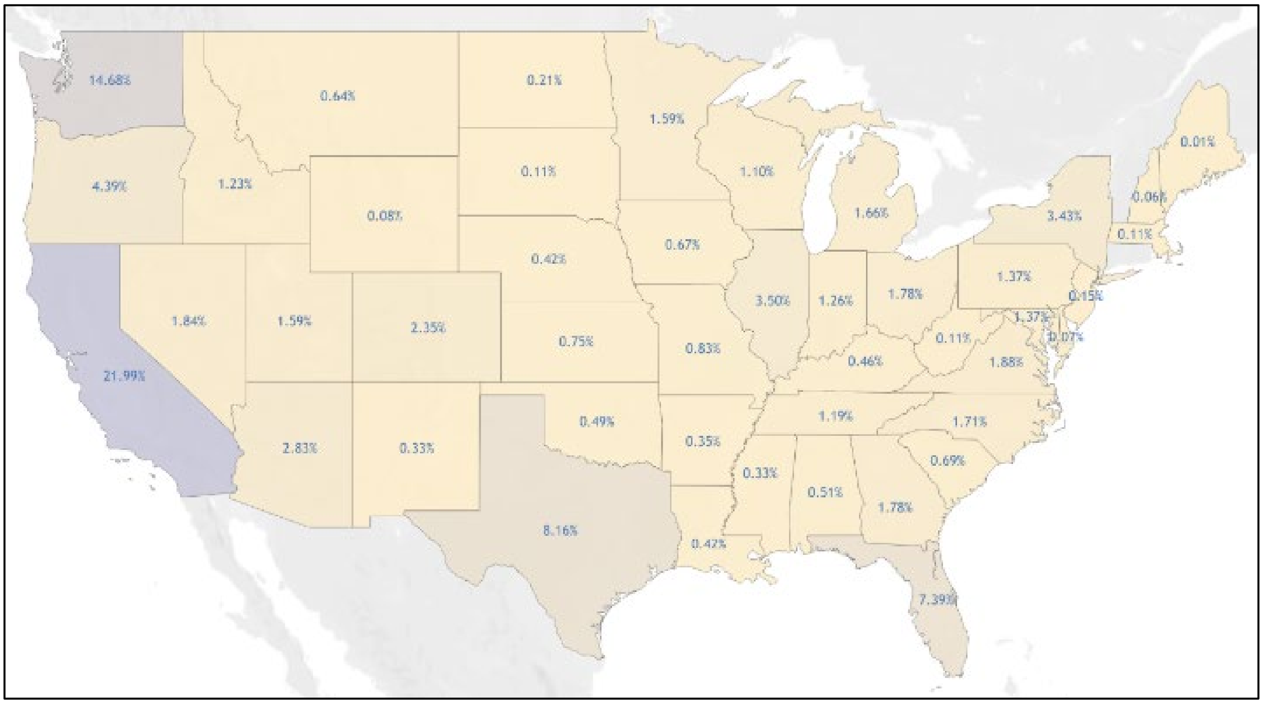
Chart 16—Extra-regional Visitation: Performing Arts Venues




Venues Included: Northshore PA, Edmonds PA, Everett Historic Theater, Marysville Opera House, Village Theater

Map 4 provides some granularity on how the home state of visitors influenced national visitation behaviors. For example, visitation from the State of Washington accounted for 14.68 percent of total extra-regional visits between 01/2019-03/2020 and was more than 41 percent of total visits between 04/2020 to 06/2022. California, Texas, and Florida made up significant shares of visits before the Pandemic but contributed much less to the total in the period after March 2020.

Map 4—Change in Share of Extra-regional Visitation by State



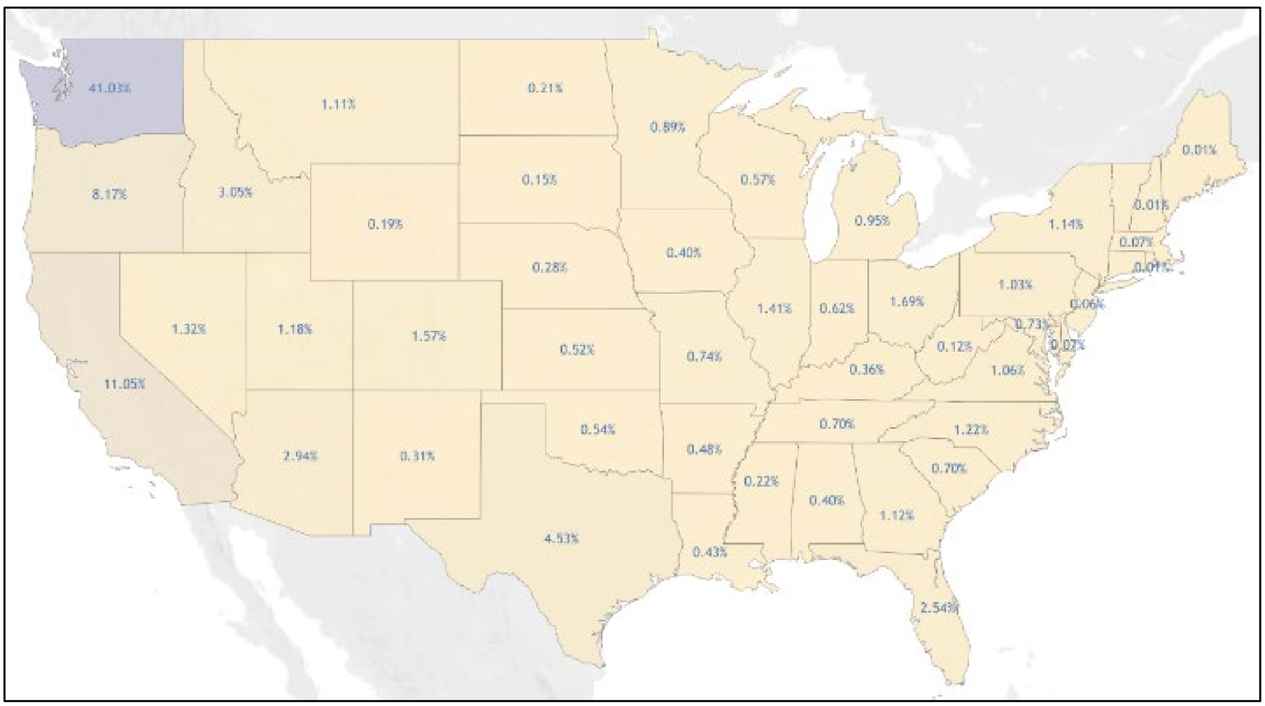
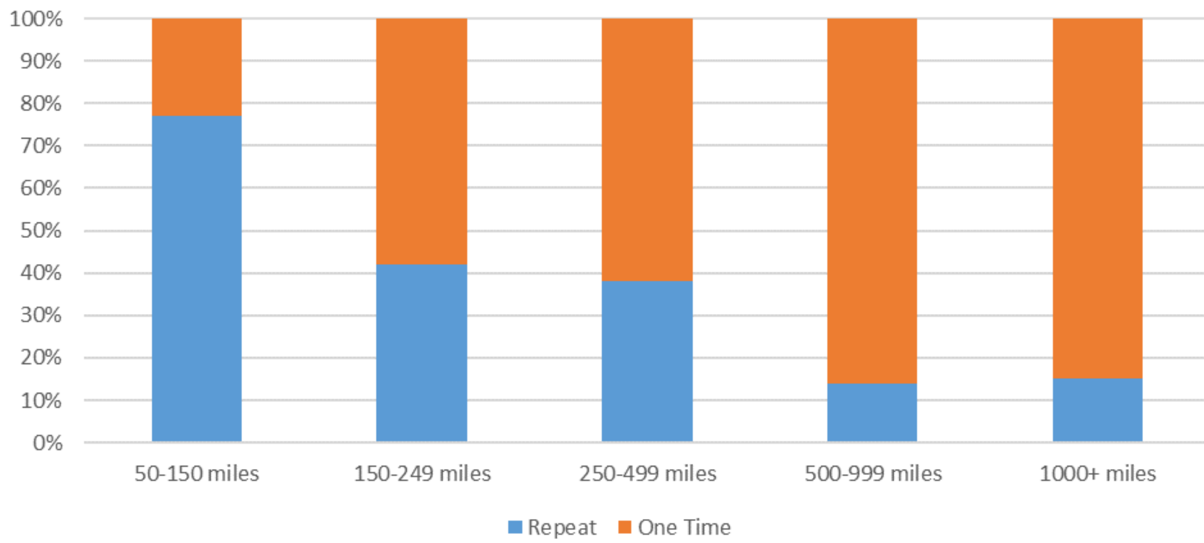



Chart 17 shows the shares of one-time, extra-regional visitors versus repeat visitors for various distance groupings. As should be expected from gravity model theory, repeat visitation appears to be a function of distance to venues: the closer a visitor lives to a cultural asset, the more likely they are to engage with the property.

Chart 17—Repeat vs One-time Visitors by Distance from Venue




This analysis provides strong evidence for the dependence on the Arts and Culture Segment on the local market. **93 percent of visitation to cultural venues come from people who live within 50 miles of the venue**. Most of the decrease in visitation comes from a drop in regional visitation, not from decreased extra-regional visitation (50+ miles away or farther).

Table 11—Regional versus National Visitation

| | 1-50 Miles (Regional Visitors) | 51+ Miles (Extra-regional Visitors) |
|---|---|---|
| **Visitor Days Spent** | 771,255 | 55,567 |
| **% of Total** | 93.3% | 6.7% |

**Key Benchmark:** For cultural venue recovery, build back regional visitors (1 to 50 miles) rather than targeting extra-regional, markets of 50+ miles or more).

### Visitor Districts / Downtown Visitation

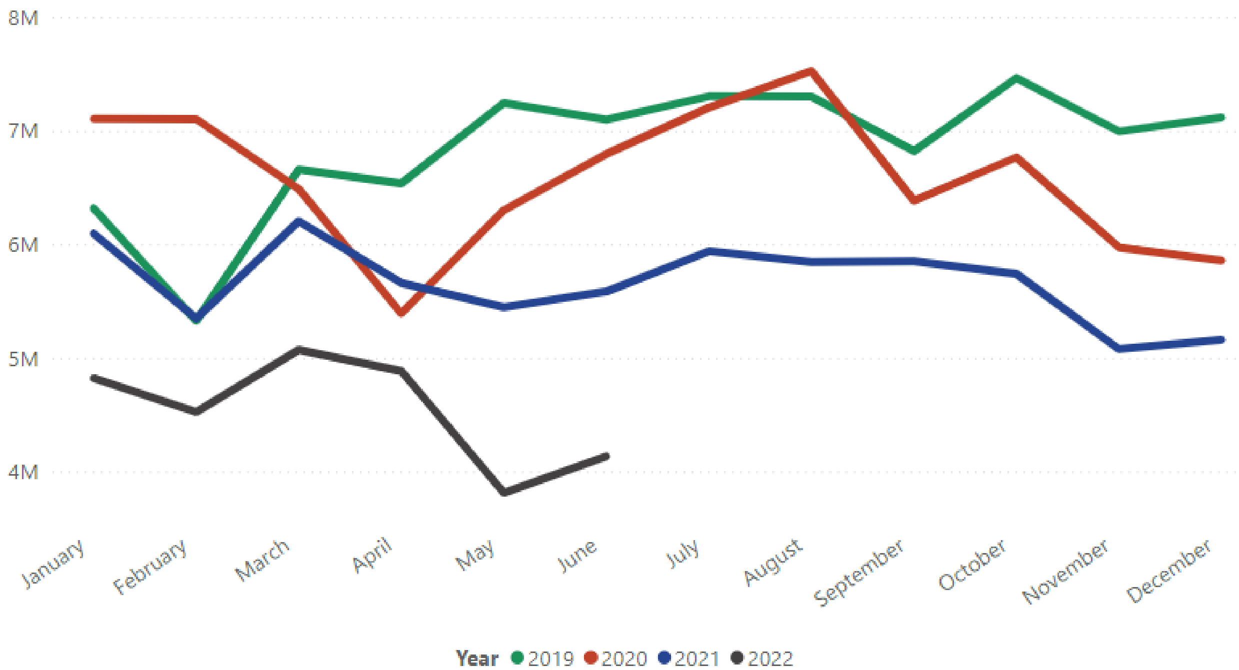
While performing arts venues, cultural sites, and attractions show visitation to specific properties, most Arts and Culture Segment business, such as food, beverage and artisan craft products are located in municipal downtown districts and retail centers. To capture visitation to Segment businesses, an analysis of downtowns / retail districts as Arts and Culture Segment POIs were conducted for the following cities and towns:

- Arlington
- Bothell
- Darrington
- Edmonds
- Everett
- Granite Falls
- Index
- Lake Stevens
- Marysville
- Monroe
- Mukilteo
- Snohomish
- Stanwood
- Sultan

#### Regional Market (1-50 miles)

The study of downtown visitor districts or retail centers as Arts and Culture Segment Points of Interest, reveals much different visitation trends than from standalone venues. The visitor district POIs experienced a short decline between February and April 2020, but quickly recovered, and even exceeded the pre-pandemic base levels (see Chart 18). However, downtown visitor districts have experienced a gradual decline since, with the lowest levels of visitation in the first half of 2022, an average of 60 percent lower than the average visitation levels in the comparable first halves of the preceding three years.

Chart 18—Regional Downtown Visitation (2019-2022)




**Key Benchmark:** Expand arts and culture attractions and activities in downtown areas to attract customers to shop in Industries businesses.

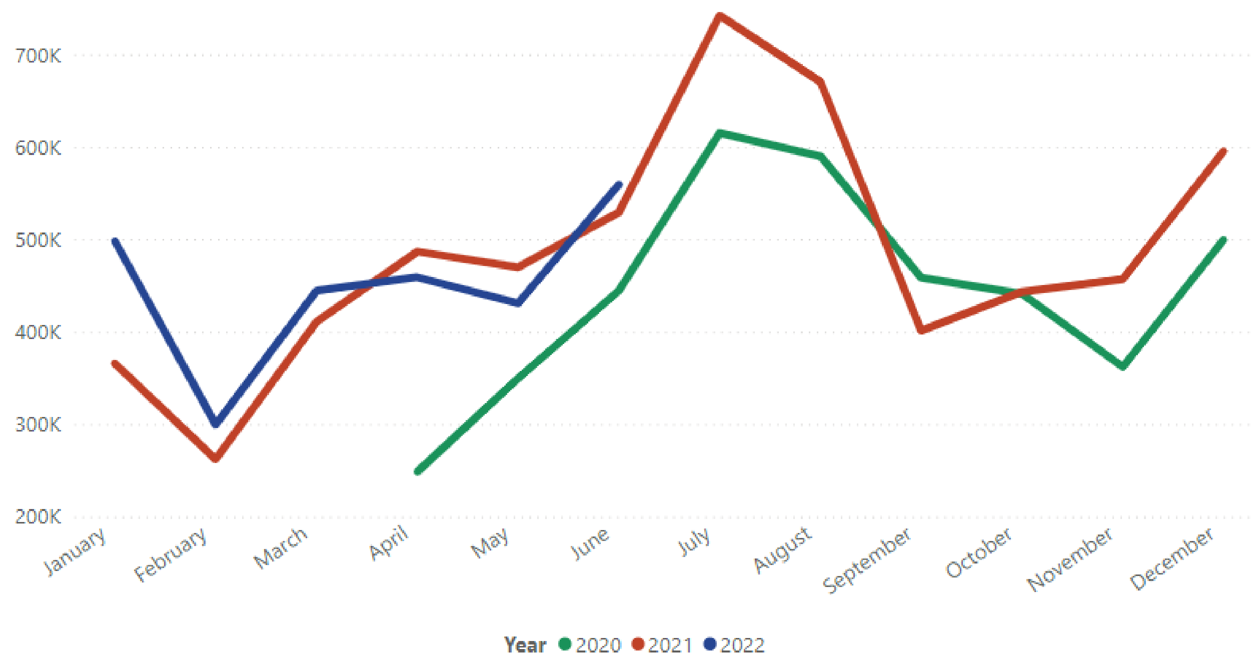
### Extra-regional Market (51+ Miles)

Visitation trends from those traveling 50 miles or more to a downtown visitor district (assumed Arts and Culture Segment POIs), show estimated recovery at 81.5 percent, while cultural venues (excluding Future of Flight[4]) show an estimated recovery rate of 31.8 percent.

Tourism into downtown visitor districts continues to show seasonal highs in July and December, a positive for Segment creators selling artisan food, beverage and original, one-of-a-kind products.

[4] Recovery was calculated by using the average visitation of 2019 to the average of 2020-YTD2022.

Chart 19—Extra-regional Downtown Visitation (2019-2022)




**Key Takeaway:** Cultural venues and Arts and Culture Industries businesses should focus cross-marketing in downtown visitation districts to boost the return of regional visitors to the venues.

# Survey Responses

The secondary data collected and described in the previous sections of the document captured trends and insights for what happened to the Arts and Culture businesses before, during, and after the pandemic. However, it is also important to understand the forward-looking needs and desires so the County can begin the groundwork for the future phases of the Future of Arts. To achieve this understanding, two county-wide surveys were conducted. In addition to the surveys, other tools and resources related to the project were added to an engagement site between September and November 2022.

The first survey was a Resident and Regional Visitor Survey. It asked questions about the consumer demand for Arts and Culture experiences and products to identify possible service gap opportunities, as well as insights into the current perception of the County's arts and culture products and experiences. The second, named the Creator Survey, asked about the supply side of the Segment to understand issues impacting creators' needs, business potential and sustainability.

This section details some of the key findings from each survey, along with crosstabulations, where appropriate, to better understand each segment. It is not a full report of each question, but rather a curated description of the insights gained from the broader survey. As such, not all responses will be included in this report. However, the full list of survey questions used for each of the surveys are available in Appendix III: All Survey Questions.

### Resident/Visitor Survey

The Resident and Visitor survey consisted of 14 questions that asked people who live, work, and visit Snohomish County about their consumption preferences for arts and culture services and amenities.

The intent of this survey was to understand where people consume arts and culture experiences, products, and services; how much they spend; what gaps exist in the local market; and to explore topics of future municipal placemaking and event priorities in local cities and towns the County Arts Commission can advocate for. Over 400 survey responses were received. However, every question was optional, so the actual number of responses for each question is provided.

The Resident and Regional Visitor Survey responses came from a diverse sample of Snohomish County, with representation from various communities and socio-demographics. The characteristics of the survey respondents are shown in Chart 20 through Chart 22.

Chart 20—Q10: Where do you live? (n=398)

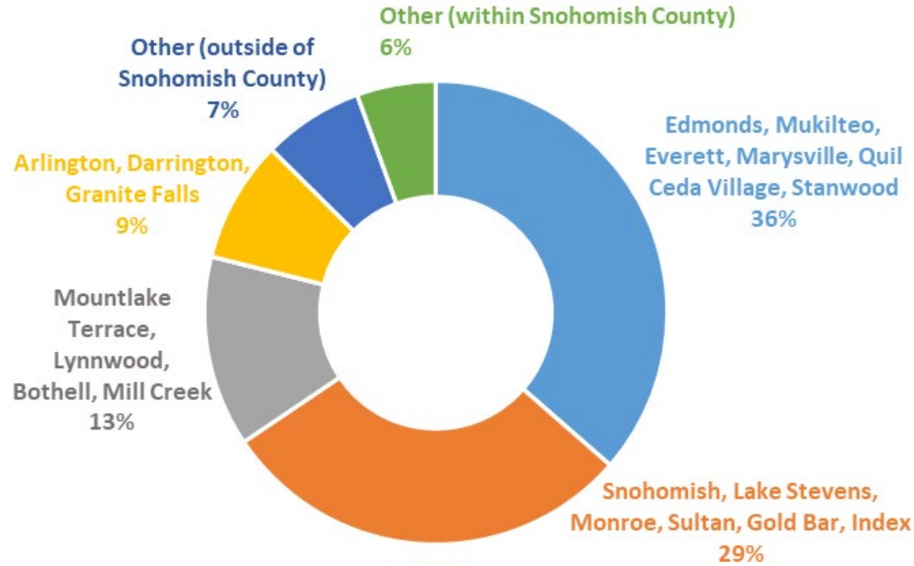



Chart 21—Q9: How do you identify? (n=394)

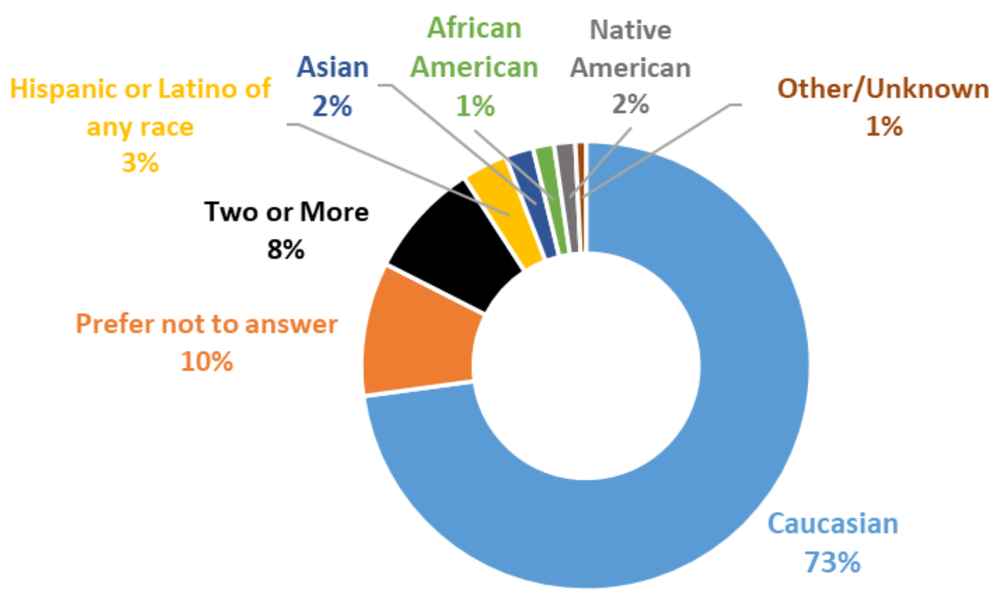
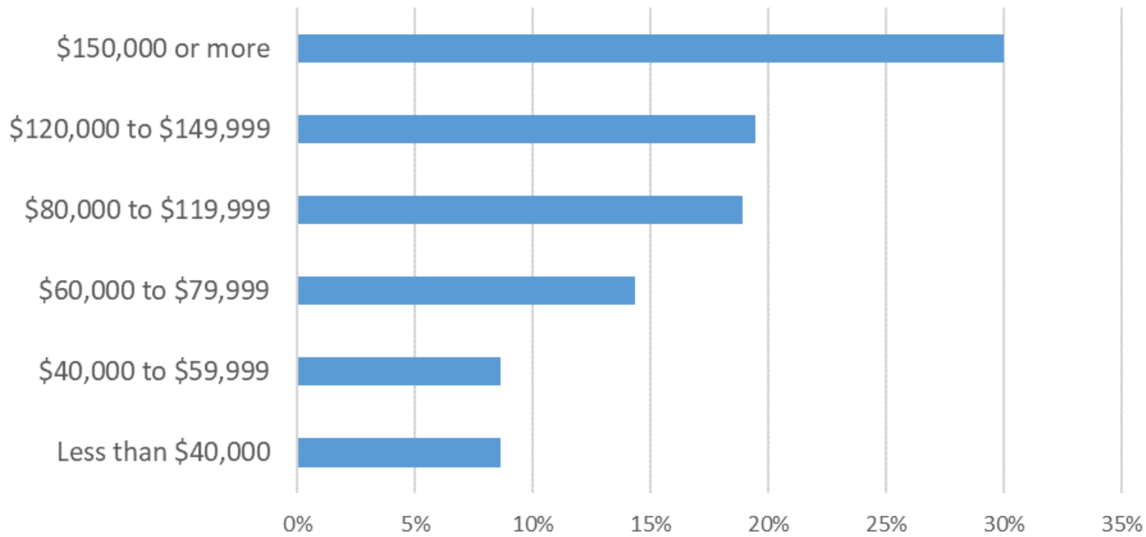


Chart 22—Q13: What is your total household income? (n=370)




The first question asked respondents to prioritize the benefits of Arts and Culture. The top options focused on community and inclusivity (public gathering spaces and cultural diversity, equity, and inclusion). Business and economic concerns ranked second (made up of three options with thriving cultural districts, small business impacts, and school/graduation rates). Social connections (ideas and dialogue within the community and participation and volunteerism) represented the lowest aggregated priorities.

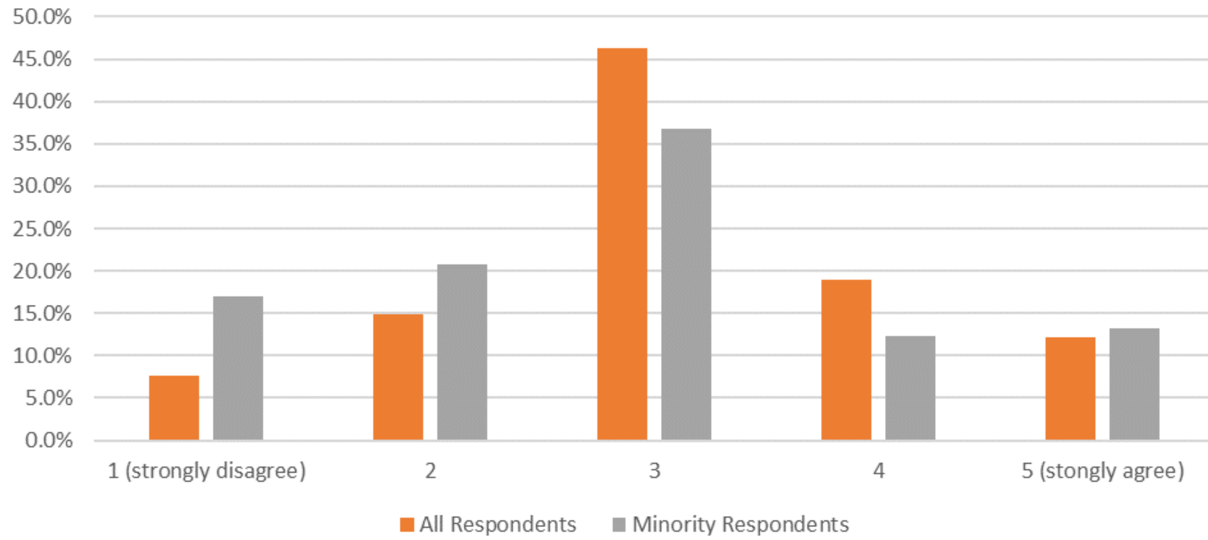
Chart 23—Q1: Communities rich with arts and culture experience the following benefits. Please prioritize these from greatest (1) to least (5). Average of each option shown. (n=324)


The second question asked the respondents if they agreed with the phrase "I feel welcomed by the public arts and culture offerings in Snohomish County because they include a diverse array of social thoughts, ethnicities, and lifestyles."

While the largest share of the community felt neutral regarding the phrase, there was a slightly positive sentiment in general (average of 3.1). Approximately 1 in 3 respondents agreed to the phrase and 1 in 5 disagreed with it.

Negative sentiment increased slightly when looking only at minority groups, with an average score of 2.83. Approximately 37 percent of minority respondents disagreed with the phrase. However, a more negative sentiment toward the prompt was not universal to minority groups: the share of people who responded with "strongly agree" was similar to the general population.

Chart 24—Q2: Do you agree with the following statement "I feel welcomed by the public arts and culture offerings in Snohomish County because they include a diverse array of social thoughts, ethnicities, and lifestyles."? (n=378)




The next question asked respondents how often they participated in Arts and Culture Segment activities in the last three years. They were allowed to select an option for each event type. For weekly events, the largest number of respondents selected “visits to parks, playgrounds, town centers, cultural and historic sites” followed by “Shopping for hand-crafted specialty foods, beverages, home/garden wares, clothing, etc.”. Segment engagement with Residents and Regional Visitors should be a recovery strategy to artistic and cultural identity reflective of each city and town.

Monthly experiences replicated the shopping and entertainment options and added the cultural venues captured in the Consumer Behaviors section of this report. It verifies that these venues are monthly, not weekly attractions (this is also consistent with the refresh rate of these venues’ offerings; a museum will hold special collections for a month or two, plays will run for several weeks at a time, etc.). This group is the financial underpinning of the sustainability and economic viability of these venues.

Annual experiences were highest among cultural venues, ethnic celebrations, and live commercial events. Since “cultural venues…” shows high participation in both the monthly and annually columns, there is evidence that there are attendees that are less engaged who could be reached through targeted marketing. The other categories show that “demonstrations, workshops and classes” as well as “ethnic celebrations, events, and gatherings” are quite popular among respondents.

“Outdoor sports” and “Cosplay, LARPing, tabletop games” each had consistent participation across all times, indicating that these make up a consistent part of the arts and culture experience (with regular as well as irregular participation) regardless of consumer preferences.

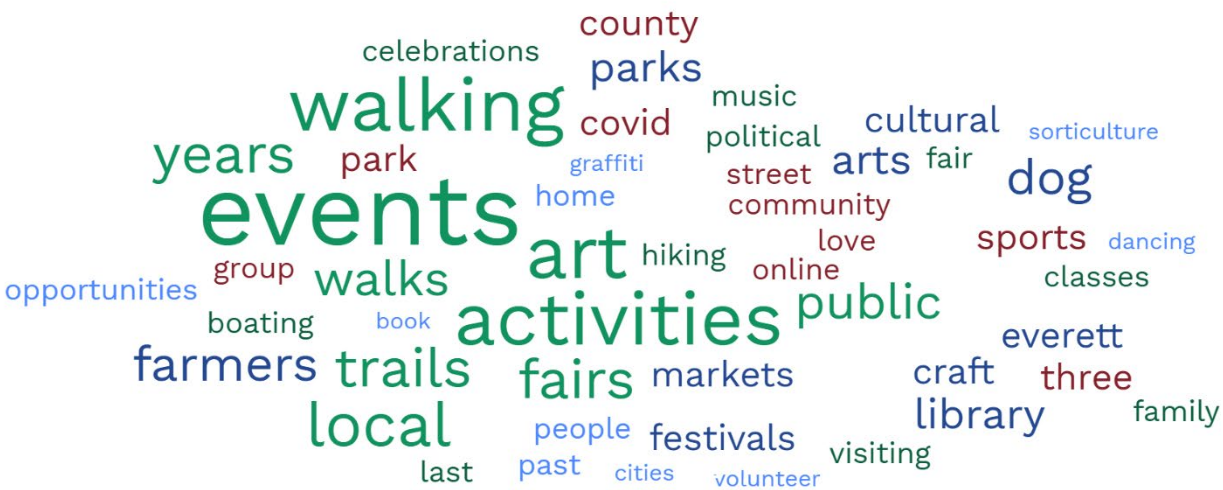
Chart 25—Q4: Over the last three years, how often have you participated in the following activities? (n=397)

| | Weekly | Monthly | Annually | Never |
|---|---|---|---|---|
| Costume play (Cosplay), Live Action Role Playing (LARP), tabletop games | 22 | 28 | 54 | 22 |
| Cultural venues and interactive museums (history, heritage, science, art, industrial, etc.) | 17 | 119 | 221 | 17 |
| Demonstrations, workshops, and classes (fiber arts, gardening, pottery, photography, etc.) | 18 | 81 | 193 | 18 |
| Esports, video game competitions | 2 | 9 | 18 | 2 |
| Ethnic celebrations, events, and gatherings | 9 | 59 | 213 | 9 |
| Homesteading seminars and classes (equestrian, animal husbandry, brewing, preserving, foraging, farming, tiny house living, etc.) | 11 | 19 | 112 | 11 |
| Live commercial events (concerts, circus, wrestling, racing, monster trucks, etc.) | 7 | 80 | 213 | 7 |
| Live independent or community performances (dance, readings, music, theater, etc.) | 25 | 142 | 172 | 25 |
| Other activities not mentioned above | 59 | 39 | 24 | 59 |
| Outdoor recreation classes and conventions (hunting, fishing, firearms, RVs, motorsports, etc.) | 11 | 27 | 90 | 11 |
| Outdoor sports (horseback riding, frisbee games, fishing, climbing, hunting, bird watching, etc.) | 59 | 92 | 103 | 59 |
| Shopping for hand-crafted specialty foods, beverages, home/garden wares, clothing, etc. | 86 | 191 | 95 | 86 |
| Shopping in fine arts galleries, boutique retail stores, etc. | 46 | 174 | 128 | 46 |
| Visits to parks, playgrounds, town centers, cultural and historic sites | 157 | 170 | 61 | 157 |

Other categories not listed in the chart above are shown in Chart 26. It is important to note that the responses above are highly impacted by conditions of the Pandemic (several respondents added in the “other” option that their behaviors had changed and that they would have responded differently if the question included a larger time horizon to include pre-pandemic behavior).

There is likely some latent demand for participation at cultural venues that were closed or participants didn’t feel safe attending even if they were open. This provides some evidence for a latent demand that will return as the pandemic continues to lose its social- and health-related impacts on consumers’ decisions about where and how often they will participate in Arts and Culture Segment activities. However, repeat Regional Visitors that are mainstay customers are slow to return.

Chart 26—Q5: Word cloud of Other Activities not shown in Chart (n=95)




Respondents were asked to describe how much of their arts and culture consumption took place in Snohomish County. The largest share said “some”, indicative of the role that the County plays in the Arts and Culture Watershed. Of those who said “some”, 53 percent went to King County for most of their consumption. Of those who said “half”, King County was also the top location for their consumption.

Overall, respondents chose Snohomish County as their top lcoation for Arts and Culture Industy consumption, but King County was a close second (only 0.8 percentage points behind Snohomish County).

Chart 27— Q6: Of the activities you participate in above, how much arts and culture do you participate in, here in Snohomish County? (n=393)

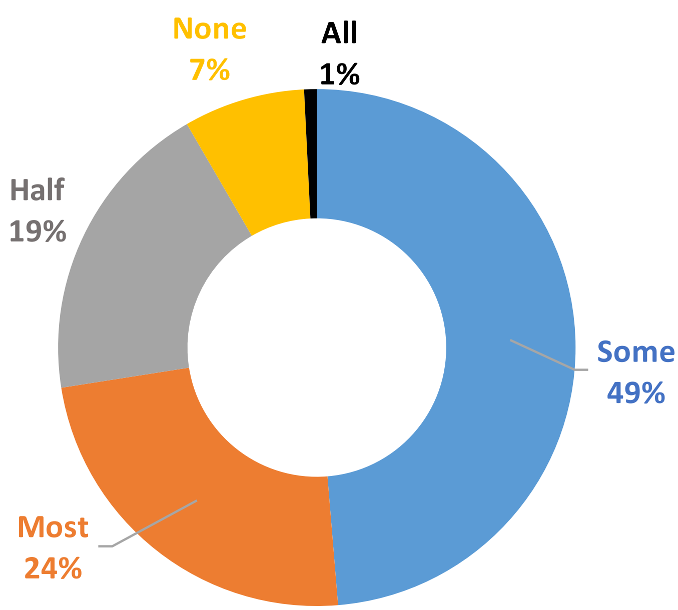
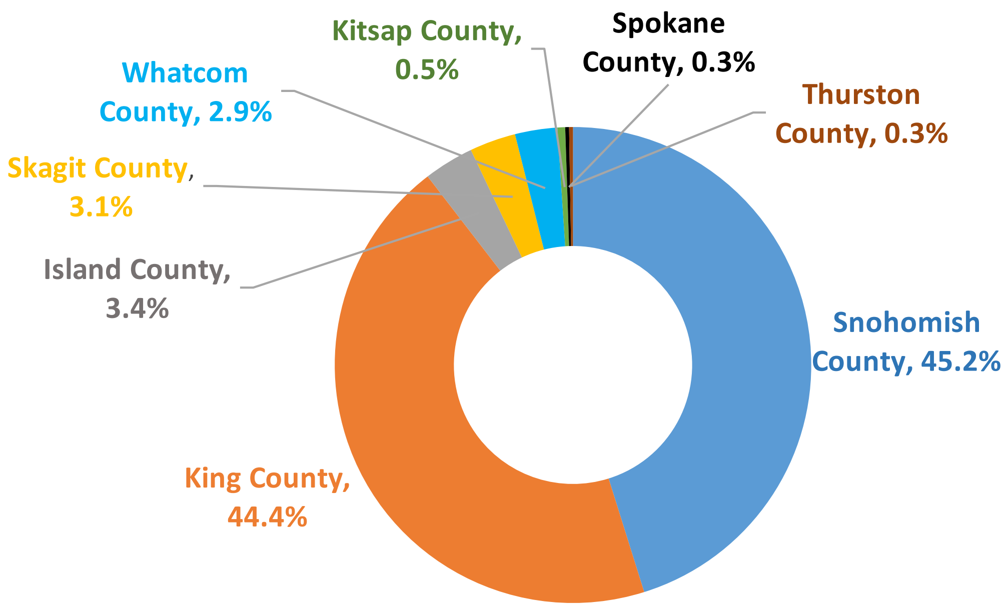


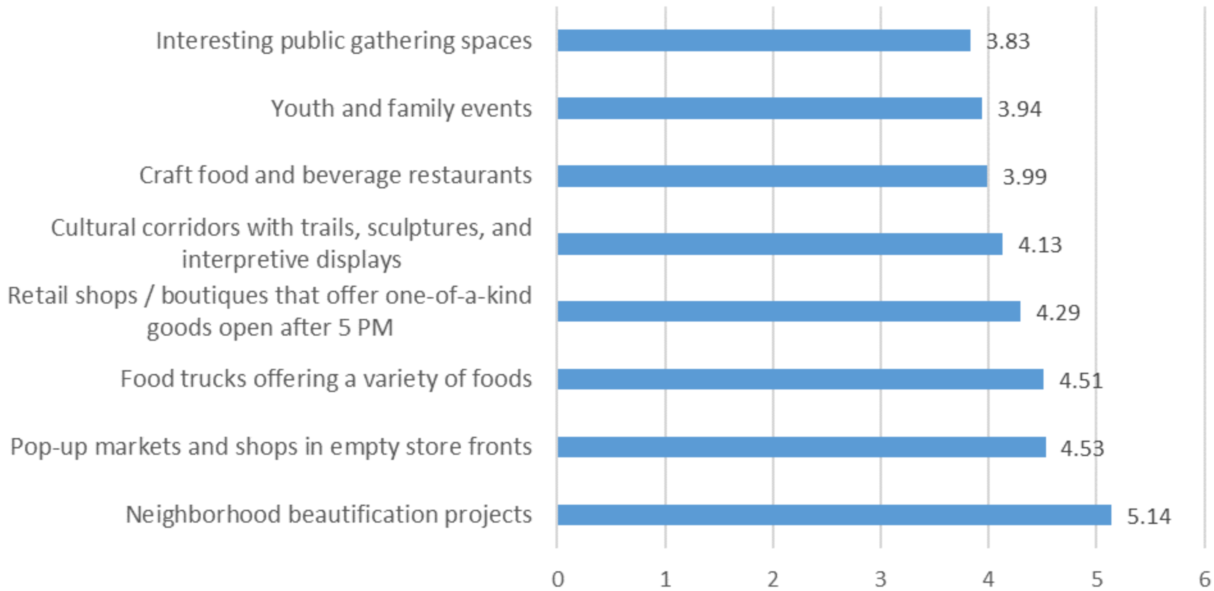
Chart 28— Q7: Select the county you go to MOST for arts and culture events and activities. (n=396)




Respondents were asked to rank options based on the following prompt: *The list below features activities commonly used to stimulate arts and culture in communities. Please priorities these activities, as applicable, to stimulate arts and culture in your community (highest to lowest).* The option with the lowest score represents the aggregated top choice among respondents.

Similar to responses from, gathering spaces was the top choice. Additional offerings, such as events, restaurants, and cultural corridors were close alternatives (a few points from the top choice). Overall, there is much less variation between these options (with scores between 3.8 and 5.1), indicating possible indifference from the respondents as a whole.

Chart 29—Q8: The list below features activities commonly used to stimulate arts and culture in communities. Please priorities these activities, as applicable, to stimulate arts and culture in your community. (n=305)




The next question asked about how much money respondents spend on Arts and Culture. $500 or more was selected by 41% of the respondents (Chart 30). The second- and third-largest categories are the next largest-spending categories as well, in order from greatest to least.

This is evidence of consumers' ability and propensity to consume offerings of arts and culture, even if representing a larger portion of their budget ($500 or more per year).

As shown in Table 12, there is a correlation between household income and amount spent, but the relationship is not strong, and suggests that only those with high household incomes are spending larger amounts of their money on arts and culture offerings; $500+ per year was the most common amount for all income levels except for those with a household income of less than $40K per year.

Chart 30—Q10: On average how much do you think you spend on music productions, theatre, dance, sporting events, festivals, shows, etc. within the greater Puget Sound region per year? (n=387)

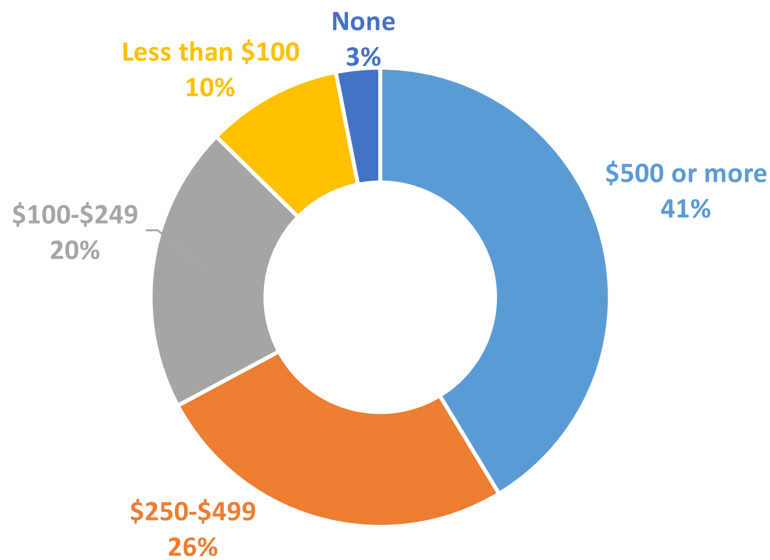



Table 12— Q10: crosstabulation by Income Level (n=398)

| Row Labels | $500 or more | $250-$499 | Less than $100 | None |
|---|---|---|---|---|
| **$150,000 or more** | 67 | 26 | 1 | 1 |
| **$120,000 to $149,999** | 30 | 29 | 2 | 0 |
| **$80,000 to $119,999** | 27 | 14 | 11 | 2 |
| **$60,000 to $79,999** | 16 | 14 | 8 | 1 |
| **$40,000 to $59,999** | 11 | 6 | 4 | 2 |
| **Less than $40,000** | 4 | 6 | 12 | 3 |

The Resident and Regional Visitor survey responses reveal key findings that will be important for an Arts and Culture economic recovery strategy:

1) Respondents are most interested in public gathering spaces and view that as a top priority for improving the County's Arts and Culture offerings
2) Respondents go almost exclusively to Snohomish and King counties for Arts and Culture participation, with a slight preference for Snohomish County
3) Respondents showed an inelastic demand for arts and culture activities, with small variation in spend among income groups

## Creator Survey

The Creators survey consisted of 35 questions geared toward creators who work within the Arts and Culture Segment, own creative businesses, or participate as freelancers within Snohomish County.

Questions asked about challenges, earnings, size of workforce, type of work, and needs. The intent of this survey was to identify the resources needed to support and sustain Arts and Culture Segment creators, 89 percent of which are non-employer business, what gaps exist for their business needs compared to larger organizations, and what the County's priorities should be. Eighty-one (81) survey responses were analyzed. Each question was optional, so the estimated number of responses is provided next to each chart.

There are a variety of creators represented in the survey. The top responses included "Other" (19 percent of respondents), Painter (15 percent) and event producer (11 percent). The other categories are shown in Chart 32.

Chart 31— Q3: Which of the following best matches your business/occupation? (n=81)

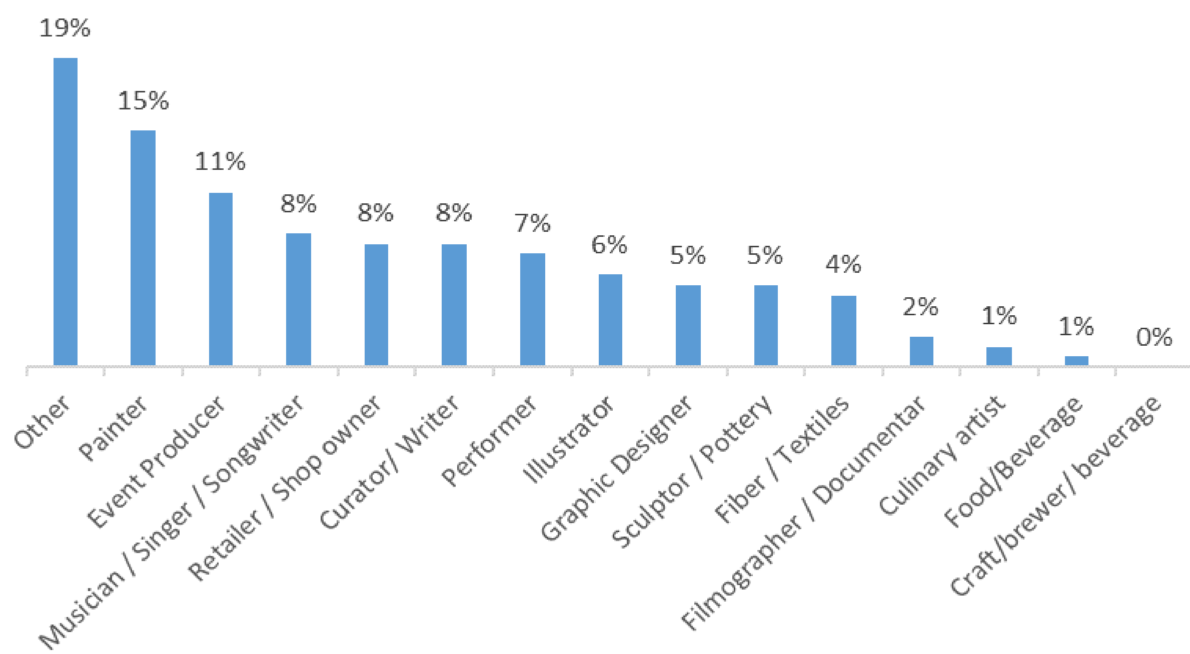
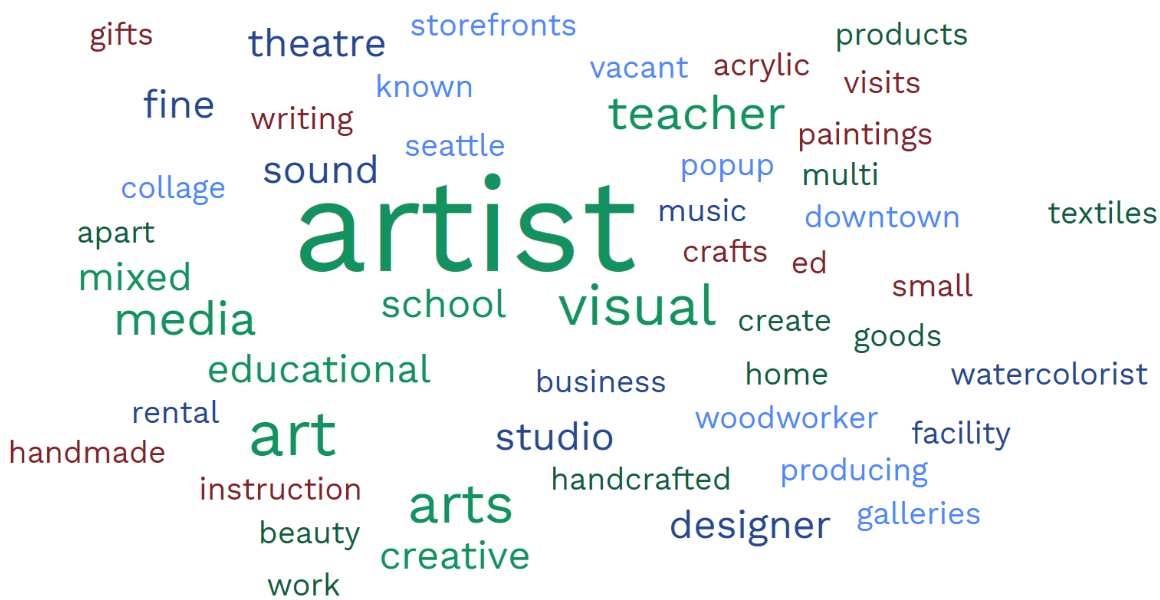
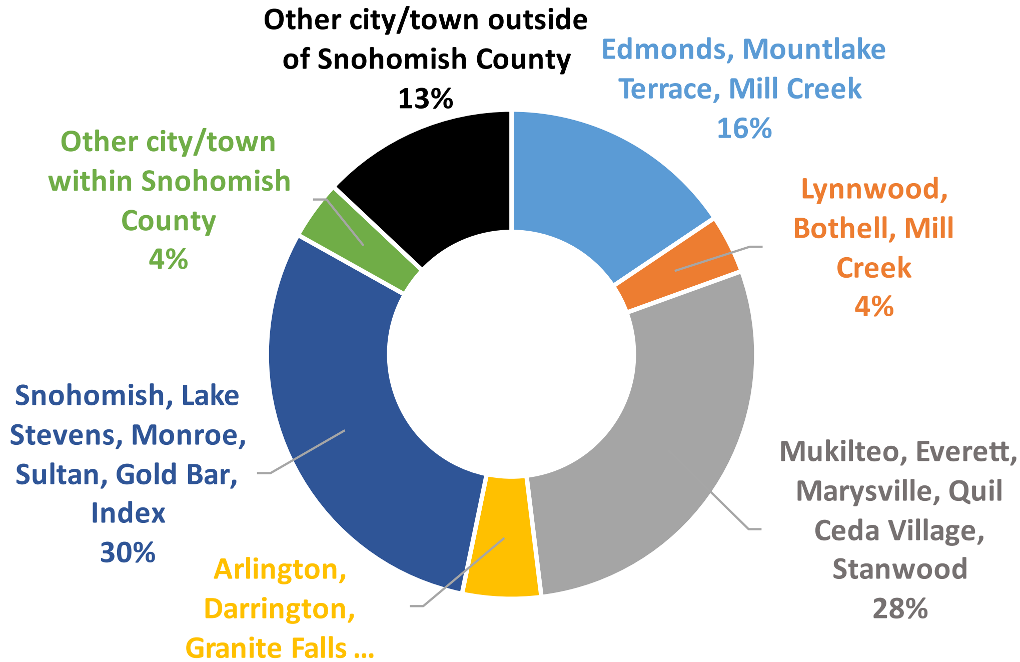


Chart 32—Q3: Word Cloud of “Other” business/occupation categories (n=16)




The Creator survey respondents represent various communities within or around Snohomish County. 87% of the respondents have businesses located within the county. Of the 10 survey respondents who are outside of the county, four creators are considering relocating to Snohomish County. The business locations of the survey respondents are shown in Chart 33.

Chart 33—Q25: Where is your business located (n=77)



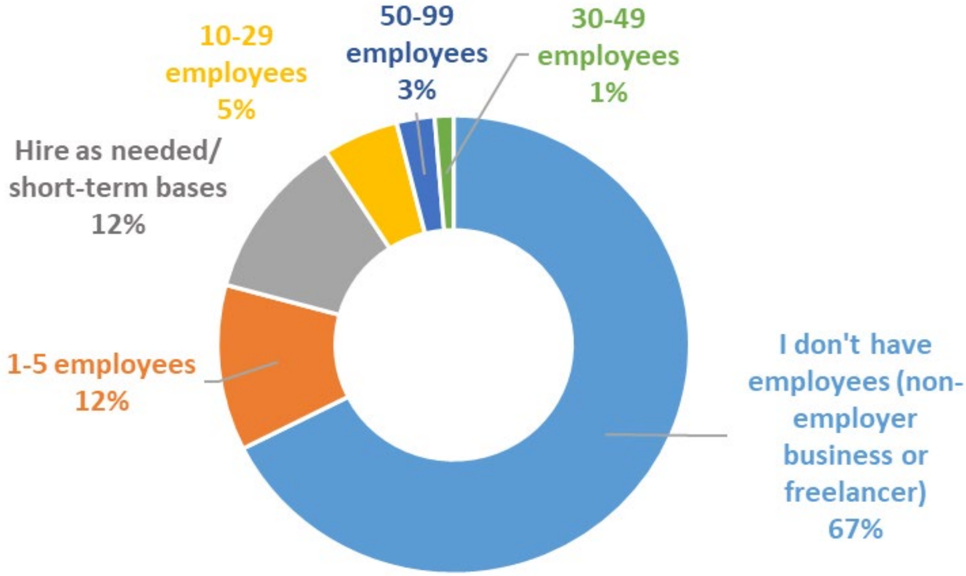

Respondents captured in the Creators Survey have a high correlation with the targeted 50 NAICS codes used to define Segment of Arts and Culture in Snohomish County, meaning findings from this section can be generalized using the economic analyses described in the previous sections.

Approximately 67 percent of the respondents were non-employer establishments (compared to the estimated 87 percent share determined from the Segment and Workforce Analysis). 12 percent of respondents were small businesses with five or fewer employees, with the same share representing businesses that only hire as needed.

The remaining nine percent of respondents represented larger organizations with at least 10 employees (see Chart 34). Breaking down this group further, 75% of non-employee respondents operate an out-of-home business, 11% are online only, and 8% have brick and mortar locations.

**Key Takeaway:** Creator Survey respondents do not have a physical brick and mortar / physical presence in the County.

Chart 34—Q28: How large is your organization's workforce (full-time equivalent working on Arts and Culture directly)?



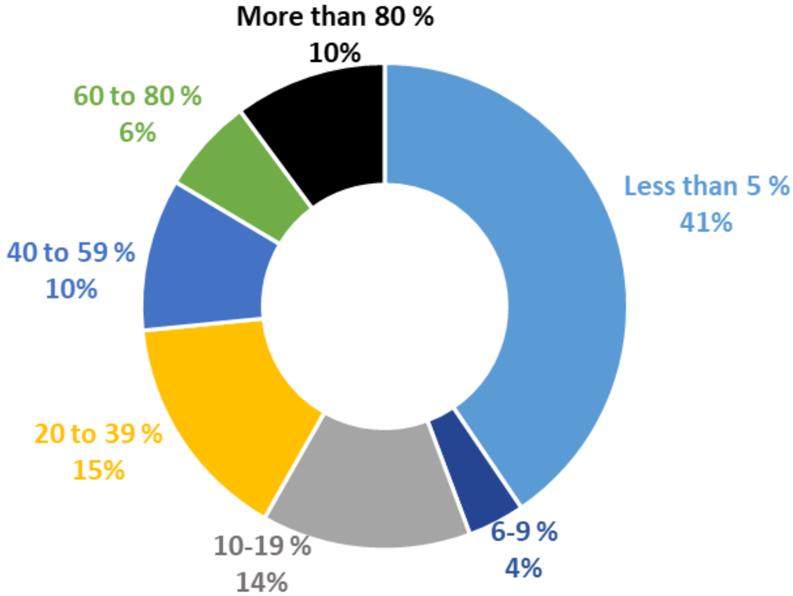

Creative pursuits can sometimes play a small role in household income, with many using arts and culture as a creative outlet, or hobby. This is supported by the survey findings, with 41 percent of respondents saying that their income contributed to less than five percent of total household income (this income amount is especially high for non-employer creators and represents 48 percent of non-employer respondents, compared to 12 percent of employer respondents where it makes up 5 percent or less of their total household income).

For a large share of the respondents (41 percent) income represents 20 or more percent of the household's total income (see Chart 35). Focusing efforts on two types of businesses is most auspicious moving forward: employers generally, as well as non-employer businesses make up a larger share of their household income.

These groups represent Creators who are most engaged in their work and receiving returns on their investments (ROI).

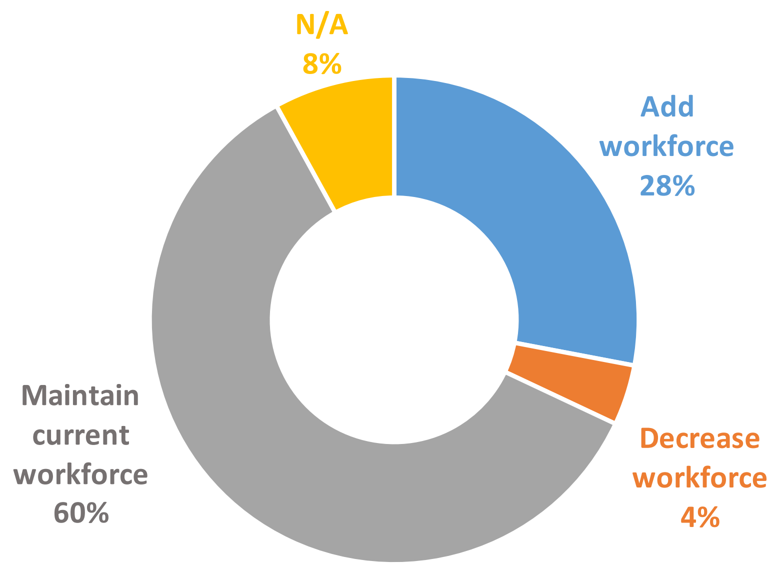
**Key Takeaway:** The County should identify and support those ready to scale their business, expand their workforce (or begin hiring if non-employers), and generate new wealth in the local economy.

Chart 35—A&C Income as a percentage of Household Income



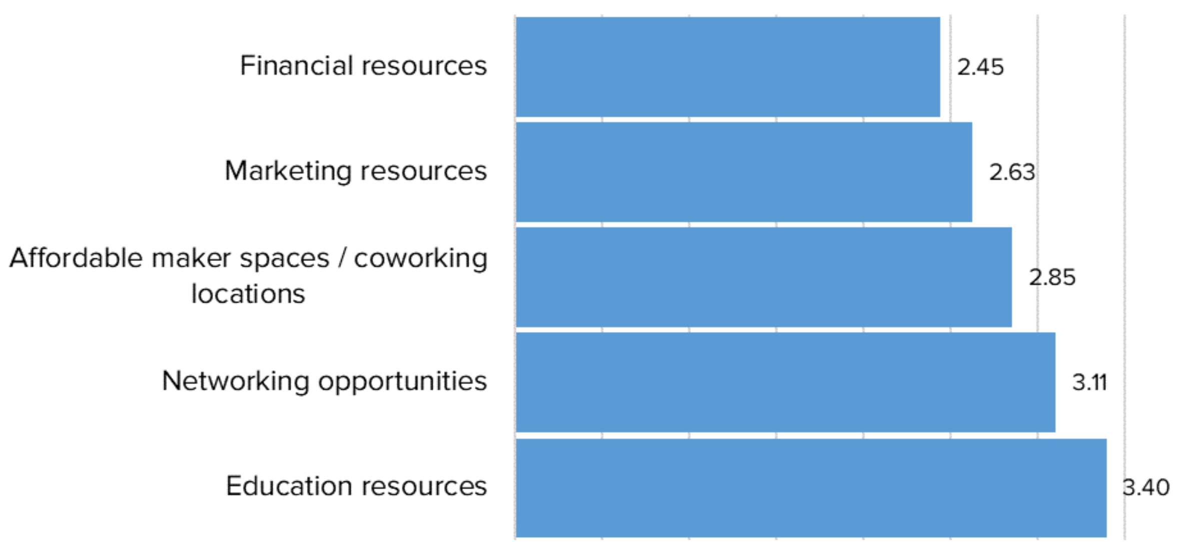

Employer creatives are more likely to add to the workforce sooner than solopreneurs. 28% of A&C employers believe they will add workforce in the next year compared to the five out of 51 solopreneur respondents. The contributions that employee-based creatives make to the Segment is also higher. Only 12% of creatives with employees are making less than 5% of their household income compared to the 48% of solopreneurs. The county should invest in A&C employers who want to scale as this will help increase employment and revenue in the Segment.

Chart 36—Employer Creatives Workforce Desires (Q29 Employers Only)



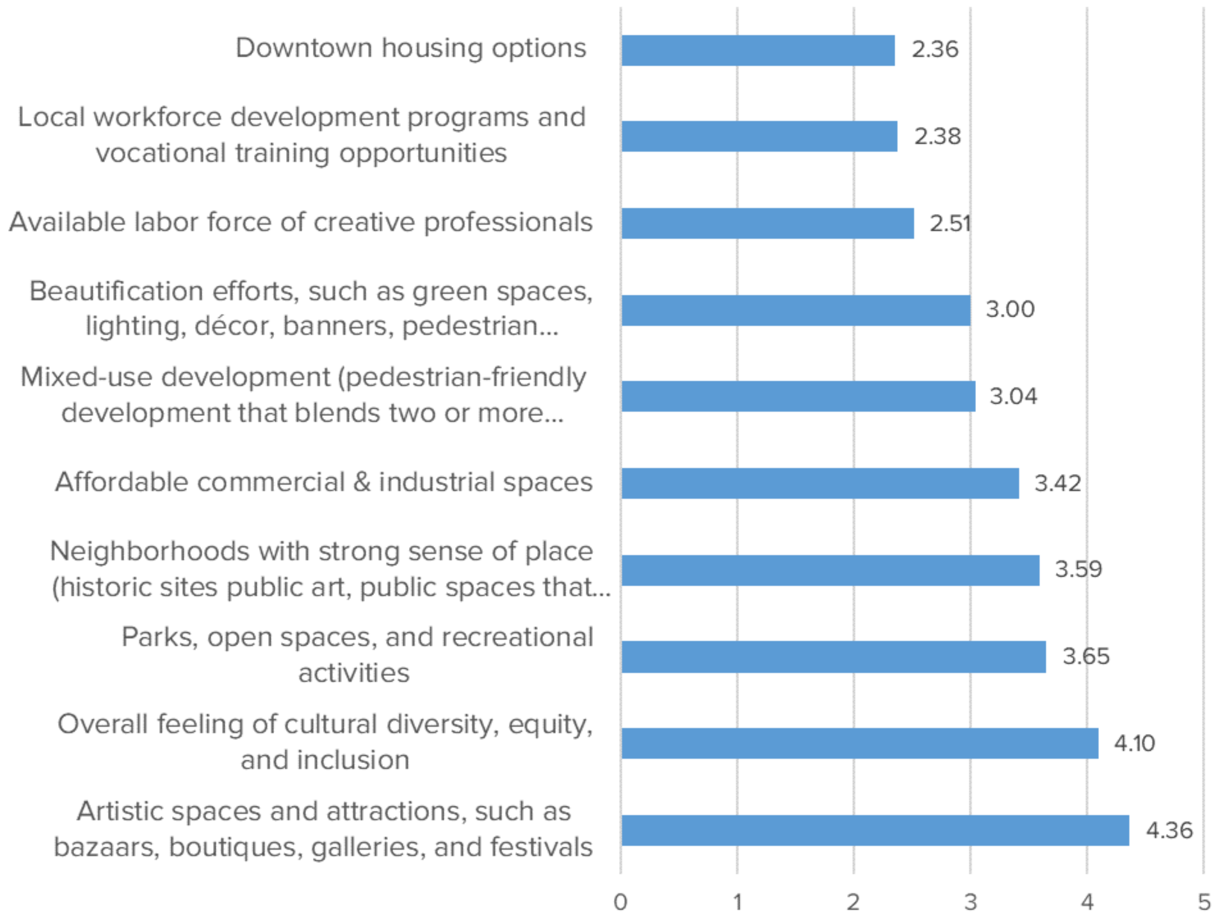

When asked what the County and related organizations should do to enhance the growth of Arts and Culture Segment, Creators ranked financial resources as their highest priority (see Chart 37). When broken down by type, although, non-employer businesses declared marketing resources as a slightly higher priority (avg. of 2.65) than financial resources (avg. of 2.67). For employer businesses, financial resources are a much higher priority than any other option provided.

Chart 37—Q5. What should the County and related organizations (i.e., Snohomish Cultural Arts Network) invest in to grow arts and culture in Snohomish County? (From least to greatest)



Amongst survey respondents, policies that enhance spaces of creativity (attractions, festivals, boutiques, and galleries) and that contribute to overall belonging and diversity, ranked highest (see Chart 38). However, this was not the main priority for all groups. Non-employer businesses had a higher prioritization of downtown housing options than employer-based creators.

Chart 38—Q32: Please rate what creative placemaking policies would be most important to retain or expand your business in Snohomish County.

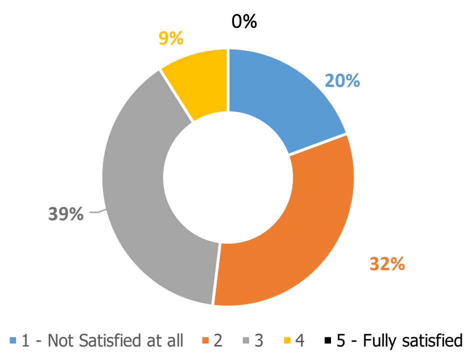



A large portion of the Creators survey (Q6-Q11) asked about overall satisfaction and resource availability in various categories. Overall, respondents were unsatisfied with current opportunities and suggested a lack of proper financial resources, training, and support services (see Chart 39).

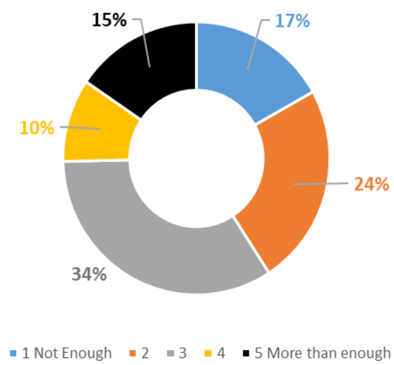
The type of Creator business compared to their income helps delineate where needs exist for the survey respondents: 32 percent of respondents that identify as out-of-home business report that their role in the creative economy makes up less than five percent of their household income, whereas nine percent identify of the same group report that it makes up 60 percent or more of their household income.

Chart 39—Q6-Q11: Satisfaction and Resource Availability

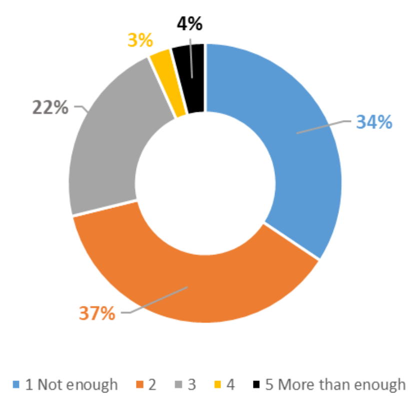
Q6: I am satisfied with the current opportunities for arts and culture workers and businesses within Snohomish County.



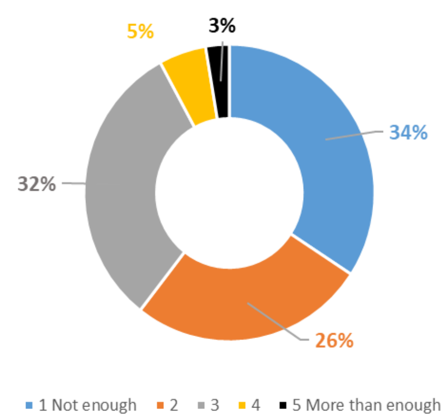

Q7: My business has access to the workforce needed to perform to the best of its ability.



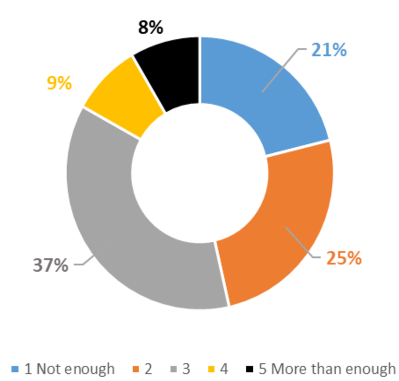

Q8: My business has access to the funding resources needed to perform to the best of its ability.



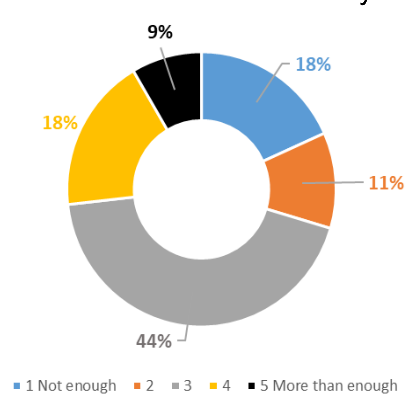

Q9: My business has access to support services needed to perform to the best of its ability.




Q10: My business has access to the training needed to perform to the best of its ability.

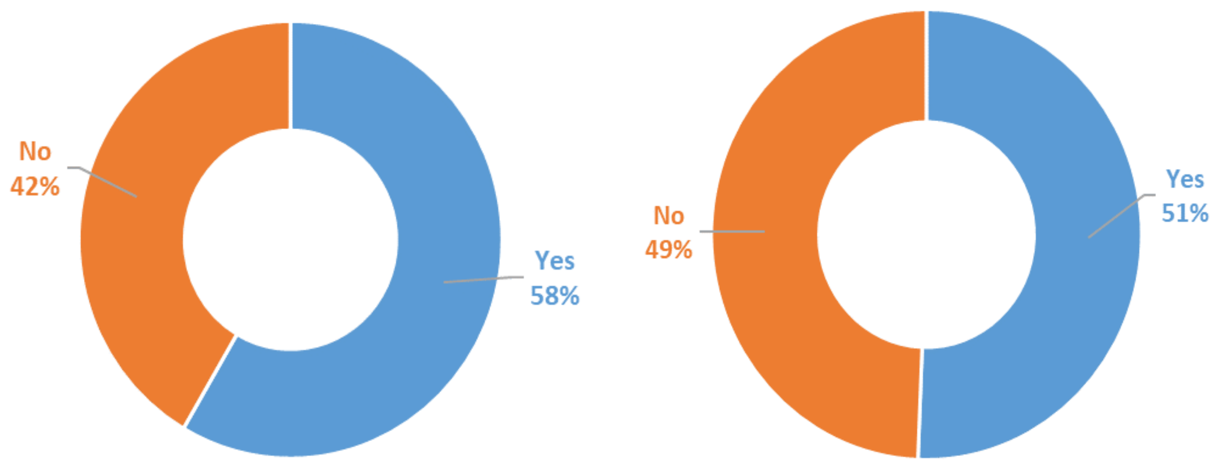



Q11: My business has access to the materials/ supplies needed to perform to the best of its ability.



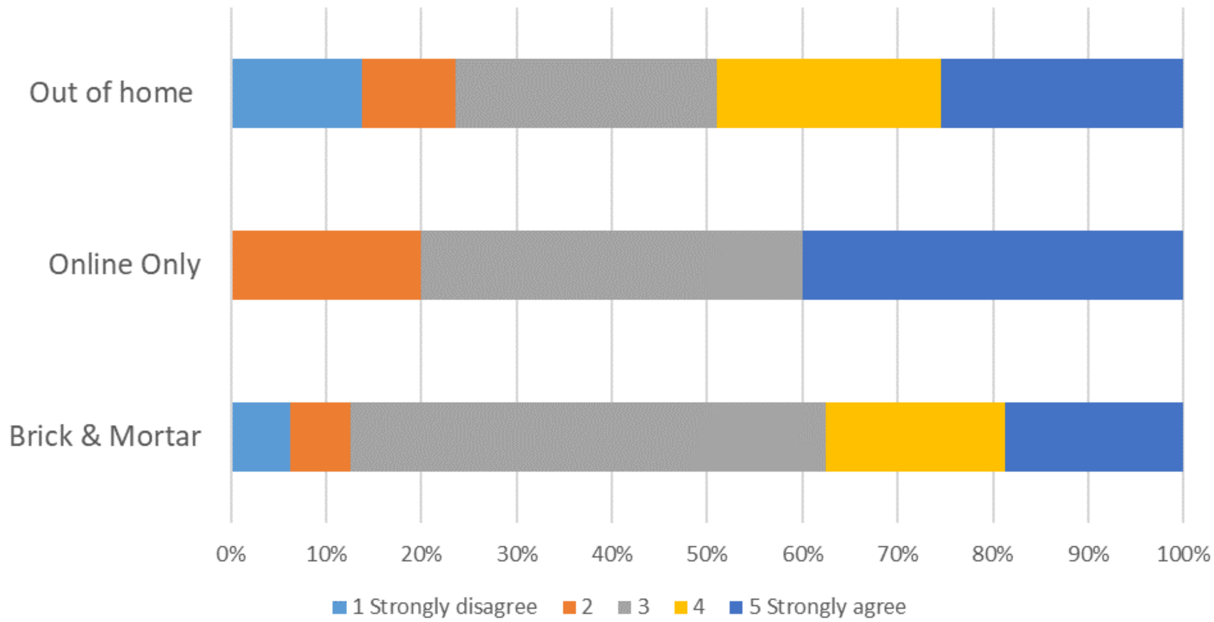
Income and resources both yield the retention of Arts and Culture workers and support the sustainability of the Segment. 58% of creators deem their creative income necessary for their financial survival, and 51% identify their work as a creator as their primary source income.

Chart 40—Q20: Is your creative economy income necessary for your financial survival? (Left, n=77) and Q17: Is your current role in the creative economy your primary source of employment? (Right, n=79)



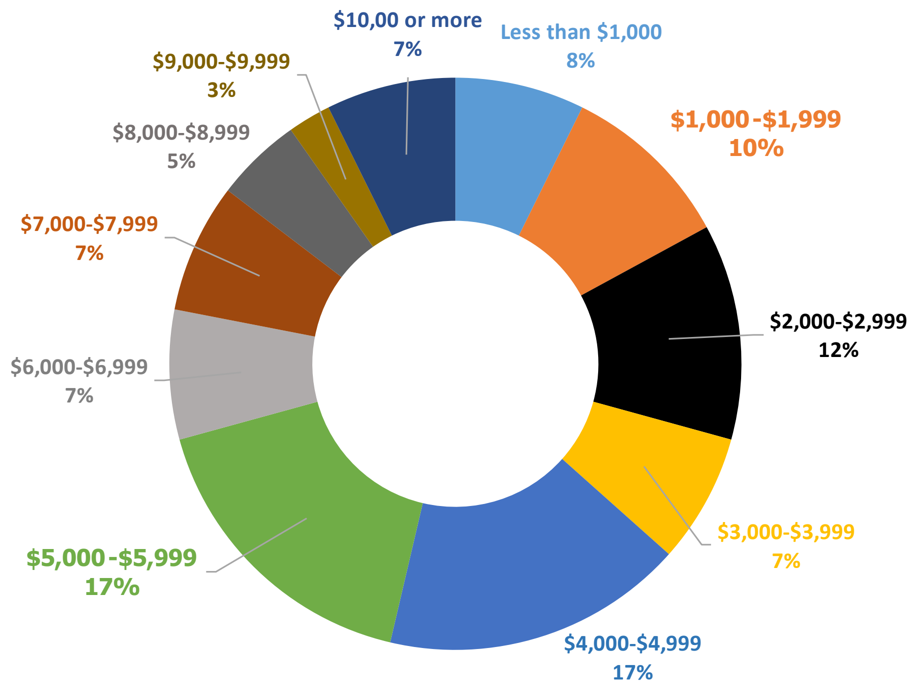

Financial needs differ across businesses, with online-only businesses showing much greater impacts on a Creator's ability to participate in the creative economy due to their income. Overall, 47 percent of all Creators feel that their income is a constraint on their ability to more fully participate in the creative economy.

Chart 41—Q16: My ability to earn income in my current role in the creative economy is limiting my participation in the arts and culture Segment.



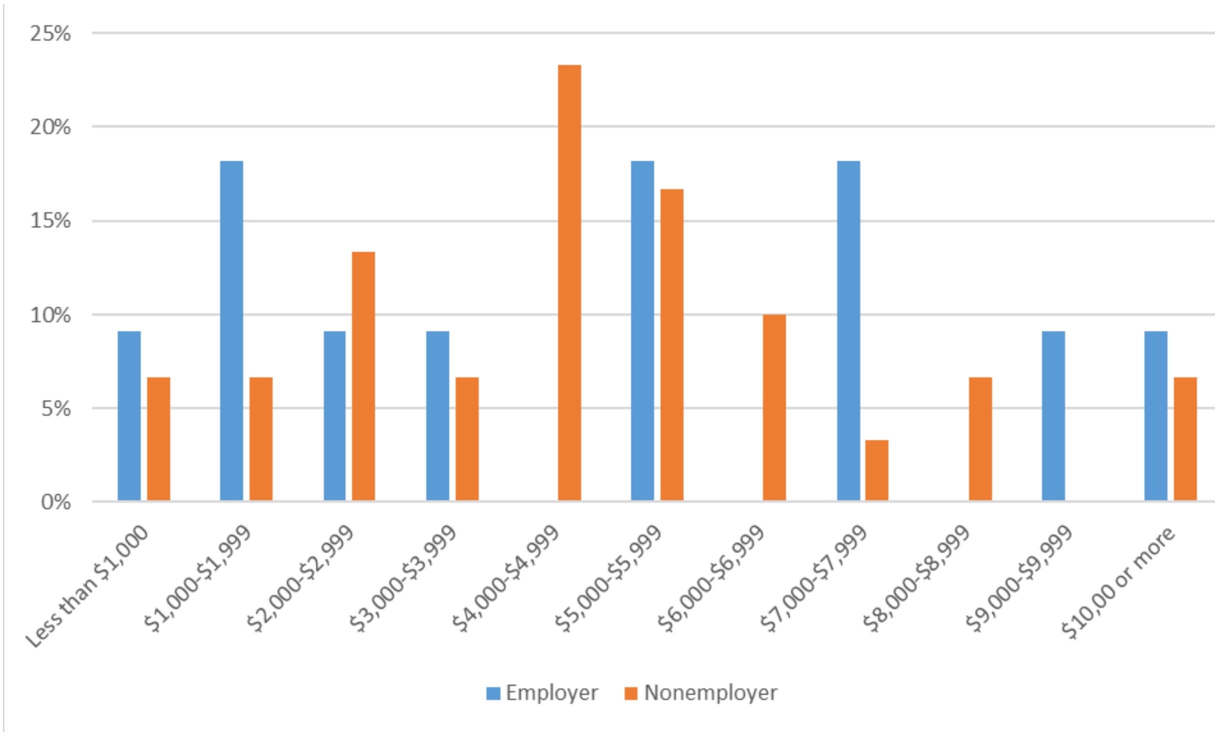

One of the survey questions asked creators who are currently participating in the Arts and Culture Segment as a secondary source of income, how much they would need to earn per month to convert it into a primary source of income. The spread was very high, however, there are a few Creators that are very close to being able to convert their creative pursuit into their primary source of income (18 percent require less than $2K per month to make the transition). There are quite a few Creators who, with just a little bit of training and/or financial investment, could become full-time Creators.

Chart 42—Q18: If it is your secondary source of income, how much more would you need to earn per month to make it a primary source of income?




Looking at the income-replacement needs is different for employers and non-employers. Based on the cross-tabulation of replacement needs by type, employers are more likely to convert into primary income (see Chart 43). The County should focus on this group in particular to add new jobs to the Arts and Culture Segment.

Chart 43—Q18 cross-tabulation: Employer Vs. Non-Employer Businesses by Income Required to Convert to Primary Source of Income




Key findings from the Creator Survey identify the needs, gaps and priorities of those who participated. Marketing and financial resources were ranked as most important.

Overall, satisfaction with financial resources, training, and support services are low. Artists feel personal income and finances limit their ability to participate in the Segment of Arts and Culture. The county should find ways to stimulate Segment income, increase marketing resources and training, enhance artistic spaces with the help of local Creators, and further connect Creators not just with networks but engagement opportunities that can yield contracts and help them grow and scale their businesses.

# Findings and Recommendations

This document had several stated goals for the Snohomish County Arts Commission, Department of Conservation and Natural Resources, and municipal and county leaders:

1) Define the County's businesses within specific and herein defined arts and culture industries, (referred throughout the document as "the Segment")
2) Understand the impacts of the coronavirus pandemic on the Segment;
3) Prioritize business types most in need of publicly funded programs of support;
4) Establish key performance indicators (KPIs) to show meaningful change over time;
5) Establish KPI baseline comparisons relative to the Seattle Metropolitan Arts and Culture Watershed, and peer counties across the nation;
6) Evaluate trends and preferences of a growing population with regard to Arts and Culture and the ability of the County to meet these demands now and in the future.

The 50 NAICS codes and methods of measuring them are lynchpin to benchmarking, tracking progress, and measuring outcomes for the Segment. The County has not had a way to do this before. As the project continues, the underlying public data used to generate this report will be updated and available to businesses, elected officials, government staff, and other partners. Prior to this report, the size of the non-employer business type, representing 87 percent of all Arts and Culture Segment's employment, was unknown. This information creates a clear target for those most in need.

The new definition of the Segment was used to analyze growth over time, especially the trends in recovery as the economic impacts of the Coronavirus Pandemic settle, and the Segment return to steady state levels. However, due to the severe economic impacts to the Segment as a whole, the market is changing; employers are lowering employment numbers but increasing wages, and non-employer businesses are seizing opportunities to grow the market.

On the consumer side, Resident and Regional Visitation is now identified as a market that sustains cultural venues, showing slow but consistent recovery (although what the new level of demand will be is yet to be certain and having a "full return" to visitation is not guaranteed).

The role of Snohomish County within the Seattle Metropolitan Arts and Culture Watershed is quite small, with King County able to drive a majority of the employment and wages earned in the Segment. Snohomish County is small even when compared to other similar counties across the nation, having fewer employees and a smaller share of total jobs than would be expected given its size and population.

This is evidence that the County has room for growth in the Segment. However, distances between cities, towns and their cultural venues challenges the County to reach a critical mass and to enjoy Arts and Culture Segment of scale.

The behavioral analysis revealed some insights into recovery and preferences. Local venues are supported significantly by residents and regional visitors, and their drop in attendance impacts venue recovery significantly. Working to get these residents and regional visitors back into municipal performance venues will be important for the venues' financial sustainability.

The Resident/Regional Visitor Survey showed that respondents considered public gathering spaces a top quality-of-life priority. Snohomish and King counties are preferred locations to consume arts and culture, with a slight preference for Snohomish County overall. Respondents showed an inelastic demand for arts and culture activities, with small variation in spend across income groups.

The Creator Survey validated the size of the non-employer business class. It also showed a strong need for supporting resources (such as financial and marketing resources). There are two groups that would benefit most from this type of support: employer businesses and non-employer businesses where a large share of their income comes from their creative endeavors (those who are most invested and have an interest in scalability). Finding ways to assist these two groups will drive the greatest returns and should be a primary focus area for the Arts and Culture Strategy.

These findings of the Futures Phase One Segment Assessment inventory and characterize the strengths and weaknesses of the Segment, and unique opportunities to roadmap in Phase 2. Phase One will facilitate new dialog between potential partners in the following areas to garner support, develop strategies, and outline new programs that can address the findings from Phase one:

- State, regional, county, and municipal leaders and staff
- Non-profits, such as Chambers of Commerce, Artist Collectives, and fundraising groups
- Foundations and other art financial support organizations,
- For-profit stakeholders and businesses

The County Arts Commission Mission that inspired the Future of Arts and Culture Project is suited for two functional roles: Segment advocacy and collaborative programming. A cross-functional approach will be necessary to organize and develop recovery and resiliency strategies that are actionable at the local level. Outreach and coordination are needed for future phases.

Findings of the Assessment should serve as basis for a strategic plan of action to help stakeholders memorialize findings and goals for arts and culture in Snohomish County. The Cultural Arts Network (agencies, non-profits, educational institutions, creators) and allies are key to evangelizing report content and continuing outreach and engagement.

The analysis tools used in the workforce and industry section of the report are available at https://www.snocoarts.org/future-of-arts-culture-project and can be used by project participants, partners, and other interested parties (the tools have interactive filters so users can explore the data, even down to the NAICS sub-category level). The tool will be updated from time to time as new data become available and will remain open for the duration of the Future of Arts and Culture Project.

Any other questions and/or inquiries regarding the project and its current status can be found at the Snohomish Arts Commission website (https://www.snocoarts.org/) and by reaching out to the project County contact: Annique.Bennett@snoco.org.

## Appendix I: NAICS Codes used in local definitions of the Arts and Culture / Creative Economy

| NAICS Code | Industry Sub-Category Name | State of Washington (Creative Economy) | Puget Sound Regional Council (Berk Study) | Snohomish County Arts and Culture (Futures Project) |
|---|---|---|---|---|
| **238150** | Glass and glazing contractors | X | | |
| **238340** | Tile and terrazzo contractors | X | | |
| **238390** | Other building finishing contractors | X | | |
| **311340** | Non-chocolate confectionery manufacturing | X | | |
| **312120** | Breweries | X | | X |
| **312130** | Beverage, wines and brandies, manufacturing | X | | X |
| **312140** | Distilleries, distilling | X | | X |
| **323111** | Commercial gravure printing | X | | |
| **323113** | Commercial screen printing | X | | |
| **323117** | Books printing | X | | |
| **323120** | Support activities for printing | X | | |
| **327110** | Pottery, ceramics, and plumbing fixture manufacturing | X | | |
| **327112** | Vitreous china, fine earthenware, and other pottery product manufacturing | | | X |
| **327212** | Other pressed and blown glass and glassware manufacturing | X | | X |
| **327215** | Glass Product Manufacturing Made of Purchased Glass | | X | |
| **332323** | Ornamental and architectural metal work manufacturing | X | | |
| **337212** | Custom architectural woodwork and millwork manufacturing | X | | |
| **339910** | Jewelry and silverware manufacturing | X | | X |
| **339911** | Jewelry manufacturing (except costume) | | | X |
| **339912** | Silverware and holloware | | | X |
| **339913** | Jeweler's material & lapidary | | | X |
| **339914** | Costume jewelry manufacturing | | | X |
| **339992** | Musical instrument manufacturing | X | | |
| **424920** | Book, periodical, and newspaper merchant wholesalers | X | | |
| **451130** | Sewing, needlework, and piece goods stores | X | | X |
| **451140** | Musical instrument and supplies stores | X | | X |

| NAICS Code | Industry Sub-Category Name | State of Washington (Creative Economy) | Puget Sound Regional Council (Berk Study) | Snohomish County Arts and Culture (Futures Project) |
|---|---|---|---|---|
| **451211** | Book Stores | | | X |
| **453110** | Florists | X | | X |
| **453220** | Gift, Novelty, and Souvenir Stores | | X | |
| **453920** | Art dealers | X | X | X |
| **453998** | All Other Miscellaneous Store Retailers | | X | |
| **454110** | Electronic Shopping and Mail-Order Houses | X | | |
| **511110** | Newspaper publishers | X | | X |
| **511120** | Periodical publishers | X | | X |
| **511130** | Book publishers | X | | X |
| **511140** | Directory and Mailing List Publishers | X | | |
| **511191** | Greeting card publishers | X | | |
| **511199** | All other publishers | X | | |
| **511210** | Software publishers | X | X | |
| **512110** | Motion picture and video production | X | X | X |
| **512120** | Motion picture and video distribution | X | X | X |
| **512131** | Motion picture theaters (except drive-Ins) | X | X | |
| **512132** | Drive-in motion picture theaters | X | X | X |
| **512191** | Teleproduction and other postproduction services | X | X | |
| **512199** | Other motion picture and video industries | X | X | X |
| **512230** | Music publishers | X | | X |
| **512240** | Sound recording studios | X | X | X |
| **512250** | Record Production and Distribution | X | | |
| **512290** | Other sound recording industries | X | | X |
| **515111** | Radio networks | X | | |
| **515112** | Radio stations | X | X | X |
| **515120** | Television broadcasting | X | | X |
| **515210** | Cable and other subscription programming | X | | |
| **519110** | News syndicates | X | | |
| **519120** | Libraries and Archives | | | X |
| **519130** | Internet publishing and web search portals | X | | |
| **531312** | Nonresidential Property Managers | | X | |
| **541310** | Architectural services | X | | X |

| NAICS Code | Industry Sub-Category Name | State of Washington (Creative Economy) | Puget Sound Regional Council (Berk Study) | Snohomish County Arts and Culture (Futures Project) |
|---|---|---|---|---|
| **541320** | Landscape architectural services | X | | X |
| **541340** | Drafting services | X | | |
| **541410** | Interior design services | X | | X |
| **541420** | Industrial design services | X | | |
| **541430** | Graphic design services | X | | X |
| **541490** | Other specialized design services | X | | X |
| **514921** | Photography studios, portrait | | | X |
| **541922** | Commercial photography | | | X |
| **541511** | Custom computer programming services | X | | |
| **541720** | Research and Development in the Social Sciences and Humanities | | X | |
| **541810** | Advertising agencies | X | | |
| **541820** | Public relations agencies | X | | |
| **541830** | Media buying agencies | X | | |
| **541840** | Media representatives | X | | |
| **541850** | Display advertising | X | | |
| **541860** | Direct mail advertising | X | | |
| **541870** | Advertising Material Distribution Services | X | | |
| **541890** | Other services related to advertising | X | | |
| **541921** | Photography studios, portrait | X | | |
| **541922** | Commercial photography | X | | |
| **541990** | All Other Professional, Scientific, and Technical Services | | X | |
| **611110** | Elementary and Secondary Schools | | X | |
| **611310** | Colleges, Universities, and Professional Schools | | X | |
| **611511** | Cosmetology and Barber Schools | | | X |
| **611610** | Fine Arts Schools | | X | X |
| **611691** | Exam Preparation and Tutoring | | X | |
| **611699** | All Other Miscellaneous Schools and Instruction | | X | |
| **624410** | Child Day Care Services | | X | |
| **711110** | Theater companies and dinner theaters | X | X | X |
| **711120** | Dance companies | X | X | X |
| **711130** | Musical groups and artists | X | X | X |

| NAICS Code | Industry Sub-Category Name | State of Washington (Creative Economy) | Puget Sound Regional Council (Berk Study) | Snohomish County Arts and Culture (Futures Project) |
|---|---|---|---|---|
| **711190** | Other performing arts companies | X | X | X |
| **711310** | Promoters of performing arts, sports, and similar events with facilities | X | X | X |
| **711320** | Promoters of performing arts, sports, and similar events without facilities | X | X | X |
| **711410** | Agents and managers for artists, athletes, entertainers, and other public figures | X | X | |
| **711510** | Independent artists, writers, and performers | X | X | X |
| **712110** | Museums | | X | X |
| **712120** | Historical Sites | | X | X |
| **712130** | Zoos and Botanical Gardens | | X | X |
| **712190** | Nature Parks and Other Similar Institutions | | X | X |
| **713990** | All Other Amusement and Recreation Industries | | X | |
| **722310** | Food Service Contractors | | X | |
| **722320** | Caterers | X | | |
| **811420** | Reupholstery and furniture repair | X | | |
| **812921** | Photofinishing laboratories (except one-hour) | | | X |
| **813211** | Grantmaking Foundations | | X | |
| **813219** | Other Grantmaking and Giving Services | | X | |
| **813410** | Civic and Social Organizations | | X | |
| **813990** | Other Similar Organizations (except Business, Professional, Labor, and Political Organizations) | | X | |
| **926110** | Administration of General Economic Programs | | X | |

## Appendix II: Venues and Sites used in Regional and National Comparisons

### Regional Comparison

| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **Snohomish County** | Hibulb Cultural Center & Natural History Preserve | 4.8 | 364 |
| **Snohomish County** | Cascadia Art Museum | 4.7 | 141 |
| **Snohomish County** | Museum of Flight Restoration Center & Reserve Collection | 4.6 | 157 |
| **Snohomish County** | Boeing Future of Flight | 4.6 | 6182 |
| **Snohomish County** | The Reptile Zoo | 4.7 | 1295 |
| **Snohomish County** | Angel of the Winds Arena | 4.4 | 2660 |
| **Snohomish County** | Edmonds Performing Arts Centre | 4.6 | 680 |
| **Snohomish County** | Everett Historic Theater | 4.6 | 480 |
| **Snohomish County** | Japanese Gulch Trailhead | 4.6 | 95 |
| **Snohomish County** | Maryville Opera House | 4.6 | 146 |
| **Snohomish County** | Schack Art Center | 4.8 | 177 |
| **Snohomish County** | Stillaguamish Valley Pioneer Museum | 4.5 | 90 |
| **Snohomish County** | Village Theater | 4.8 | 505 |
| **Snohomish County** | Western Heritage Center | 4.6 | 36 |
| **Snohomish & King** | Northshore Preforming Arts Center | 4.5 | 188 |
| **King County** | Hindu Temple & Cultural Center | 4.7 | 1045 |
| **King County** | Seattle Center | 4.6 | 37071 |
| **King County** | Klondike Gold Rush National Historical Park | 4.7 | 279 |
| **King County** | National Nordic Museum | 4.6 | 1331 |
| **King County** | Chihuly Garden and Glass Art Museum | 4.7 | 16624 |
| **King County** | Museum of History & Industry (MOHAI) | 4.6 | 1606 |
| **King County** | Olympic Sculpture Park | 4.5 | 7633 |
| **King County** | Space Needle | 4.6 | 39519 |
| **King County** | Sky View Observatory - Columbia Center | 4.7 | 2687 |
| **King County** | Smith Tower | 4.6 | 2482 |
| **King County** | Duwamish Longhouse and Cultural Center | 4.8 | 269 |
| **King County** | Washington Park Arboretum | 4.8 | 6494 |
| **King County** | Museum of Pop Culture | 3.6 | 14354 |
| **King County** | Wing Luke Museum of the Asian Pacific American Experience | 4.7 | 520 |
| **King County** | The Museum of Flight | 4.8 | 12066 |
| **King County** | Seattle Art Museum | 4.6 | 5011 |
| **King County** | Pacific Science Center | 4.6 | 5592 |
| **King County** | Bell Harbor International Conference Center | 4.4 | 352 |
| **King County** | McCaw Hall | 4.7 | 1904 |
| **King County** | accesso ShoWare Center | 4.5 | 3425 |
| **King County** | Climate Pledge Arena | 4.5 | 4124 |

| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **King County** | Lumen Field | 4.6 | 14949 |
| **King County** | T-Mobile Park | 4.7 | 18272 |
| **King County** | Husky Stadium | 4.7 | 2648 |
| **King County** | Alaska Airlines Arena at Hec Edmundson Pavilion | 4.6 | 811 |
| **King County** | Japanese Cultural & Community Center of WA | 4.6 | 52 |
| **King County** | National Nordic Museum | 4.6 | 1342 |
| **King County** | Klondike Gold Rush National Historical Park | 4.6 | 1070 |
| **King County** | Duwamish Longhouse and Cultural Center | 4.8 | 274 |
| **King County** | Langston | 4.7 | 306 |
| **King County** | Centilia Cultural Center | 4.6 | 59 |
| **King County** | Dimitriou's Jazz Alley | 4.8 | 2265 |
| **King County** | The Showbox | 4.6 | 3042 |
| **King County** | The Triple Door | 4.5 | 1862 |
| **King County** | Neumos | 4.5 | 1472 |
| **King County** | The Crocodile | 4.4 | 1962 |
| **King County** | Seattle Asian Art Museum | 4.6 | 498 |
| **King County** | Theatre At Meydenbauer Center | 4.5 | 233 |
| **King County** | Bellevue Youth Theatre | 4.7 | 159 |
| **King County** | Bellevue Arts Museum | 4.1 | 508 |
| **King County** | KidsQuest Children's Museum | 4.6 | 1376 |
| **King County** | The Creative Arts Center (Maple Valley) | 4 | 5 |
| **King County** | Highline SeaTac Botanical Gardens | 4.6 | 702 |
| **Kitsap County** | Kitsap County Fairgrounds & Events Center | 4.4 | 1038 |
| **Kitsap County** | Kitsap Conference Center at Bremerton Harborside | 4.5 | 128 |
| **Kitsap County** | U.S. Naval Undersea Museum | 4.8 | 917 |
| **Kitsap County** | Bainbridge Island Museum of Art | 4.6 | 322 |
| **Kitsap County** | Illahee State Park | 4.6 | 959 |
| **Kitsap County** | Bloedel Reserve | 4.8 | 1370 |
| **Kitsap County** | The Charleston | 4.7 | 210 |
| **Kitsap County** | Western Washington Center for the Arts | 4.7 | 8.2 |
| **Kitsap County** | Roxy Theatre | 4.7 | 170 |
| **Kitsap County** | Kitsap History Museum | 4.8 | 53 |
| **Kitsap County** | USS Turner Joy | 4.7 | 798 |
| **Pierce County** | Washington State History Museum | 4.6 | 1114 |
| **Pierce County** | Children's Museum of Tacoma | 4.6 | 1558 |
| **Pierce County** | Museum of Glass | 4.5 | 3156 |
| **Pierce County** | Tacoma Art Museum | 4.6 | 1152 |
| **Pierce County** | Point Defiance Park | 4.7 | 13724 |
| **Pierce County** | LeMay - America’s Car Museum | 4.7 | 3140 |

| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **Pierce County** | Sprinker Recreation Center | 4.5 | 1215 |
| **Pierce County** | Point Defiance Zoo & Aquarium | 4.5 | 12186 |
| **Pierce County** | Cheney Stadium | 4.6 | 3028 |
| **Pierce County** | Wright Park | 4.6 | 3347 |
| **Pierce County** | Fort Nisqually Living History Museum | 4.5 | 814 |
| **Pierce County** | Tacoma Nature Center | 4.7 | 633 |
| **Pierce County** | Titlow Park | 4.6 | 3205 |
| **Pierce County** | Thea's Park | 4.5 | 571 |
| **Pierce County** | Tacoma Chinese Reconciliation Park | 4.7 | 565 |
| **Thurston County** | Tolmie State Park | 4.6 | 1151 |
| **Thurston County** | Millersylvania State Park | 4.5 | 2072 |
| **Thurston County** | Hands On Children's Museum | 4.8 | 2238 |
| **Thurston County** | Billy Frank Jr. Nisqually National Wildlife Refuge | 4.7 | 3483 |
| **Thurston County** | Mima Mounds Natural Area Preserve | 4.5 | 512 |
| **Thurston County** | Monarch Sculpture Park and Art Center | 4.6 | 283 |
| **Thurston County** | Olympic Flight Museum | 4.6 | 208 |

## National Comparison

| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **Snohomish County, WA** | Hibulb Cultural Center & Natural History Preserve | 4.8 | 364 |
| **Snohomish County, WA** | Cascadia Art Museum | 4.7 | 141 |
| **Snohomish County, WA** | Museum of Flight Restoration Center & Reserve Collection | 4.6 | 157 |
| **Snohomish County, WA** | Boeing Future of Flight | 4.6 | 6182 |
| **Snohomish County, WA** | The Reptile Zoo | 4.7 | 1295 |
| **Snohomish County, WA** | Angel of the Winds Arena | 4.4 | 2660 |
| **Snohomish County, WA** | Northshore Preforming Arts Center | 4.5 | 188 |
| **Snohomish County, WA** | Edmonds Performing Arts Centre | 4.6 | 680 |
| **Snohomish County, WA** | Everett Historic Theater | 4.6 | 480 |
| **Snohomish County, WA** | Japanese Gulch Trailhead | 4.6 | 95 |
| **Snohomish County, WA** | Maryville Opera House | 4.6 | 146 |
| **Snohomish County, WA** | Schack Art Center | 4.8 | 177 |
| **Snohomish County, WA** | Stillaguamish Valley Pioneer Museum | 4.5 | 90 |
| **Snohomish County, WA** | Village Theater | 4.8 | 505 |
| **Snohomish County, WA** | Western Heritage Center | 4.6 | 36 |
| **Worchester County, MA** | Worchester Art Museum | 4.7 | 1191 |
| **Worchester County, MA** | DCU Center | 4.3 | 2470 |
| **Worchester County, MA** | Polar Park | 4.7 | 1094 |
| **Worchester County, MA** | New England Botanic Garden at Tower Hill | 4.7 | 2559 |
| **Worchester County, MA** | EcoTarium | 4.5 | 1752 |
| **Worchester County, MA** | Mechanics Hall | 4.8 | 807 |
| **Worchester County, MA** | Worcester Historical Museum | 4.4 | 34 |
| **Worchester County, MA** | Cascading Waters | 4.4 | 234 |
| **Worchester County, MA** | Massachusetts Vietnam Veterans Memorial | 4.7 | 553 |
| **Worchester County, MA** | Green Hill Park | 4.6 | 1925 |
| **Worchester County, MA** | Elm Park | 4.6 | 2116 |
| **Worchester County, MA** | The Hanover Theatre and Conservatory for the Performing Arts | 4.8 | 276 |
| **Worchester County, MA** | Worcester Common | 4.3 | 962 |
| **Worchester County, MA** | Old Sturbridge Village | 4.7 | 3552 |
| **Worchester County, MA** | ArtsWorcester | 4.8 | 48 |

| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **San Joaquin County, CA** | Stockton Arena | 4.5 | 2458 |
| **San Joaquin County, CA** | Stadium Center Shopping Mall | 4.2 | 1965 |
| **San Joaquin County, CA** | Micke Grove Regional Park (zoo) | 4.5 | 1621 |
| **San Joaquin County, CA** | San Joaquin County Historical Museum | 4.6 | 53 |
| **San Joaquin County, CA** | Haggin Museum | 4.7 | 120 |
| **San Joaquin County, CA** | Wat Dhammararam Buddhist Temple | 4.6 | 329 |
| **Ventura County, CA** | Ventura Harbor Village | 4.5 | 2096 |
| **Ventura County, CA** | Marina Park | 4.7 | 2532 |
| **Ventura County, CA** | Mission Basilica San Buenaventura 1782 | 4.6 | 1083 |
| **Ventura County, CA** | Ventura County Fairgrounds and Event Center | 4.4 | 1739 |
| **Ventura County, CA** | Olivas Adobe Historic Park | 4.6 | 212 |
| **Ventura County, CA** | The Robert J. Lagomarsino Visitor Center at Channel Islands National Park | 4.8 | 480 |
| **Ventura County, CA** | Museum of Ventura County | 4.5 | 198 |
| **Ventura County, CA** | The Murphy Auto Museum | 4.6 | 145 |
| **Ventura County, CA** | US Navy Seabee Museum | 4.9 | 295 |
| **Ventura County, CA** | Museum of Ventura County's Agriculture Museum | 4.6 | 135 |
| **Ventura County, CA** | Mullin Automotive Museum | 4.8 | 148 |
| **El Paso County, CO** | Falcon Stadium | 4.4 | 1214 |
| **El Paso County, CO** | Paint Mines Interpretive Park | 4.7 | 1908 |
| **El Paso County, CO** | Colorado Springs Pioneers Museum | 4.7 | 1761 |
| **El Paso County, CO** | Cheyenne Mountain Zoo | 4.8 | 18378 |
| **El Paso County, CO** | The Broadmoor Seven Falls | 4.4 | 4991 |
| **El Paso County, CO** | The Broadmoor Manitou and Pikes Peak Cog Railway | 4.4 | 2822 |
| **El Paso County, CO** | The Broadmoor World Arena | 4.4 | 2895 |
| **El Paso County, CO** | First & Main Town Center | 4.4 | 6406 |
| **El Paso County, CO** | Garden of the Gods Visitor & Nature Center | 4.8 | 43218 |
| **El Paso County, CO** | Miramont Castle Museum | 4.4 | 1305 |
| **El Paso County, CO** | National Museum of World War II Aviation | 4.9 | 1159 |
| **Utah County, UT** | Thanksgiving Point | 4.6 | 6996 |
| **Utah County, UT** | Evermore Park | 4.5 | 2932 |
| **Utah County, UT** | LaVelle Edwards Stadium | 4.7 | 2314 |
| **Utah County, UT** | de Jong Concert Hall | 4.8 | 30 |
| **Utah County, UT** | Bean Life Science Museum | 4.8 | 1496 |

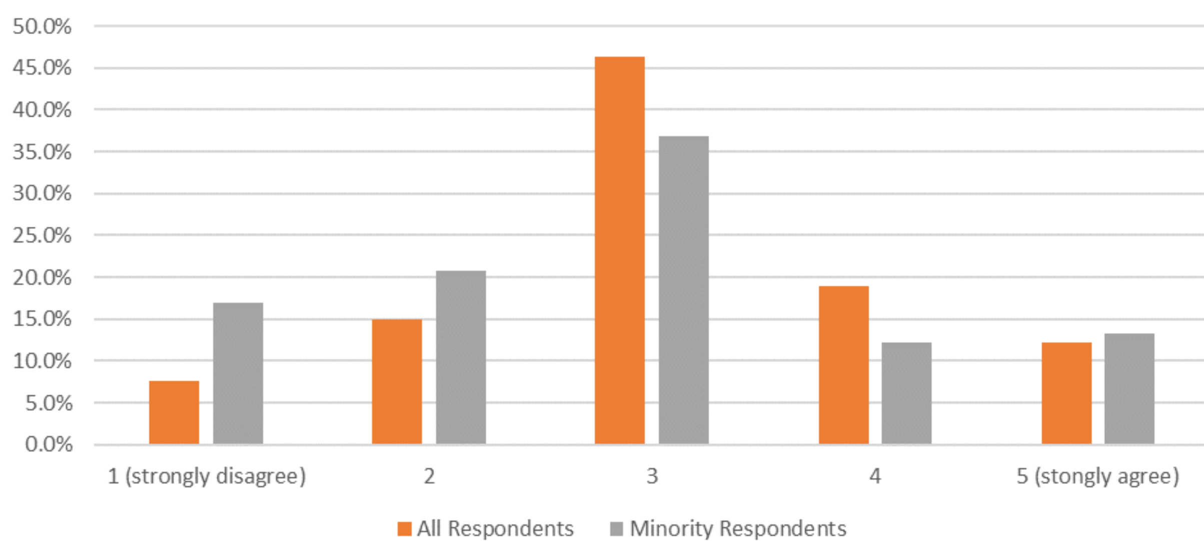
| County | Venue | Rating | # of Reviews |
|---|---|---|---|
| **Utah County, UT** | BYU Museum of Paleontology | 4.6 | 446 |
| **Utah County, UT** | Brigham Young University Museum of Art (MOA) | 4.8 | 1456 |
| **Utah County, UT** | Provo City Center Temple | 4.9 | 1950 |
| **Utah County, UT** | Provo Utah Temple | 4.9 | 1861 |
| **Utah County, UT** | J. Willard Marriott Center (MC) | 4.7 | 1368 |
| **Utah County, UT** | Covey Center for the Arts | 4.6 | 782 |
| **Utah County, UT** | Provo Pioneer Village | 4.6 | 137 |
| **Utah County, UT** | Museum of Mormon Mexican History | 4.6 | 47 |
| **Utah County, UT** | Provo Daughters of Utah Pioneers Museum | 4.8 | 9 |
| **Utah County, UT** | BYU's Museum of Peoples and Cultures | 4.3 | 103 |
| **Williamson County, TX** | Old Settlers Park | 4.7 | 4849 |
| **Williamson County, TX** | Dell Diamond | 4.7 | 3011 |
| **Williamson County, TX** | The Williamson Museum | 4.7 | 83 |
| **Williamson County, TX** | Georgetown Art Center | 4.4 | 40 |
| **Williamson County, TX** | Rodney And Mary Klett Performing Art Center | 4.7 | 181 |
| **Williamson County, TX** | Alma Thomas Fine Arts Center | 4.6 | 74 |

## Appendix III: All Survey Questions and Responses

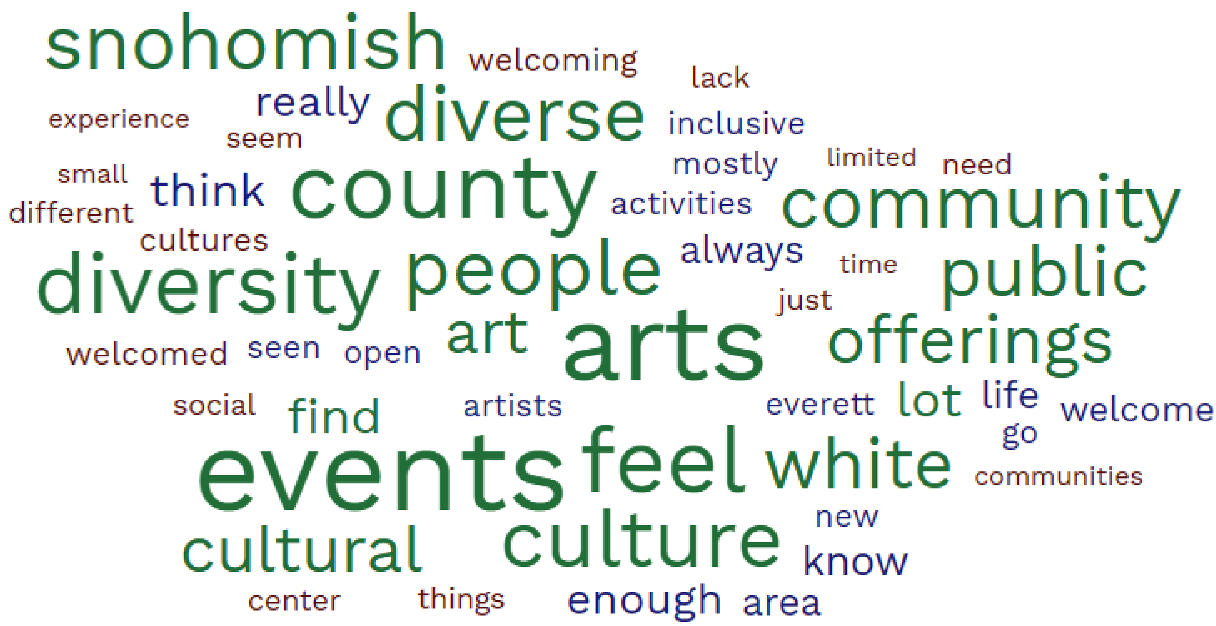
### Resident/Visitor Survey

1. Communities rich with arts and culture experience the following benefits. Please prioritize these. (n=324)


2. I feel welcomed by the public arts and culture offerings in Snohomish County because they include a diverse array of social thoughts, ethnicities, and lifestyles. (n=369)



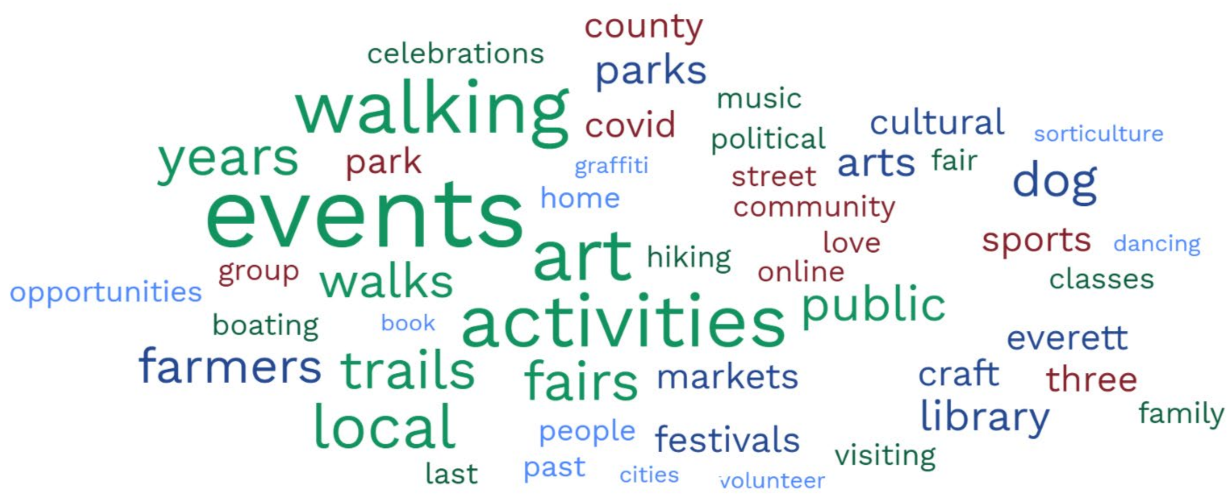
Please share why. (n=198)



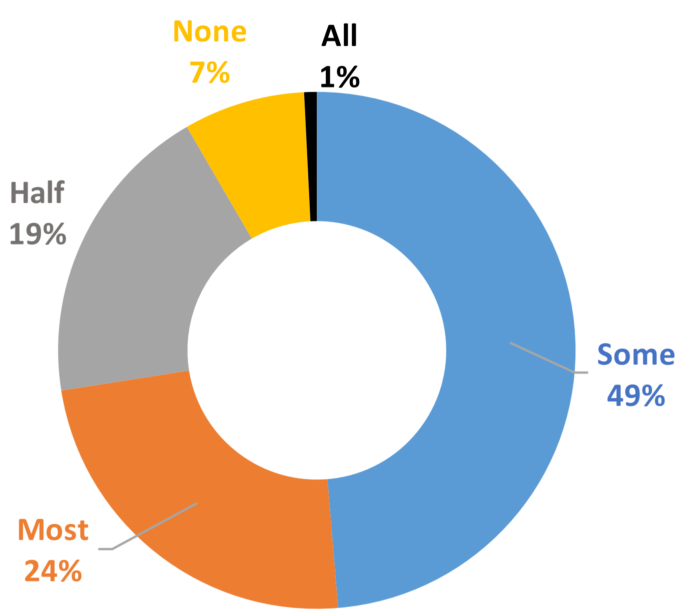

3. Over the last three years, how often have you participated in the following activities? (n=397)

| | Weekly | Monthly | Annually | Never |
|---|---|---|---|---|
| Costume play (Cosplay), Live Action Role Playing (LARP), tabletop games | 22 | 28 | 54 | 22 |
| Cultural venues and interactive museums (history, heritage, science, art, industrial, etc.) | 17 | 119 | 221 | 17 |
| Demonstrations, workshops, and classes (fiber arts, gardening, pottery, photography, etc.) | 18 | 81 | 193 | 18 |
| Esports, video game competitions | 2 | 9 | 18 | 2 |
| Ethnic celebrations, events, and gatherings | 9 | 59 | 213 | 9 |
| Homesteading seminars and classes (equestrian, animal husbandry, brewing, preserving, foraging, farming, tiny house living, etc.) | 11 | 19 | 112 | 11 |
| Live commercial events (concerts, circus, wrestling, racing, monster trucks, etc.) | 7 | 80 | 213 | 7 |
| Live independent or community performances (dance, readings, music, theater, etc.) | 25 | 142 | 172 | 25 |
| Other activities not mentioned above | 59 | 39 | 24 | 59 |
| Outdoor recreation classes and conventions (hunting, fishing, firearms, RVs, motorsports, etc.) | 11 | 27 | 90 | 11 |
| Outdoor sports (horseback riding, frisbee games, fishing, climbing, hunting, bird watching, etc.) | 59 | 92 | 103 | 59 |
| Shopping for hand-crafted specialty foods, beverages, home/garden wares, clothing, etc. | 86 | 191 | 95 | 86 |
| Shopping in fine arts galleries, boutique retail stores, etc. | 46 | 174 | 128 | 46 |
| Visits to parks, playgrounds, town centers, cultural and historic sites | 157 | 170 | 61 | 157 |

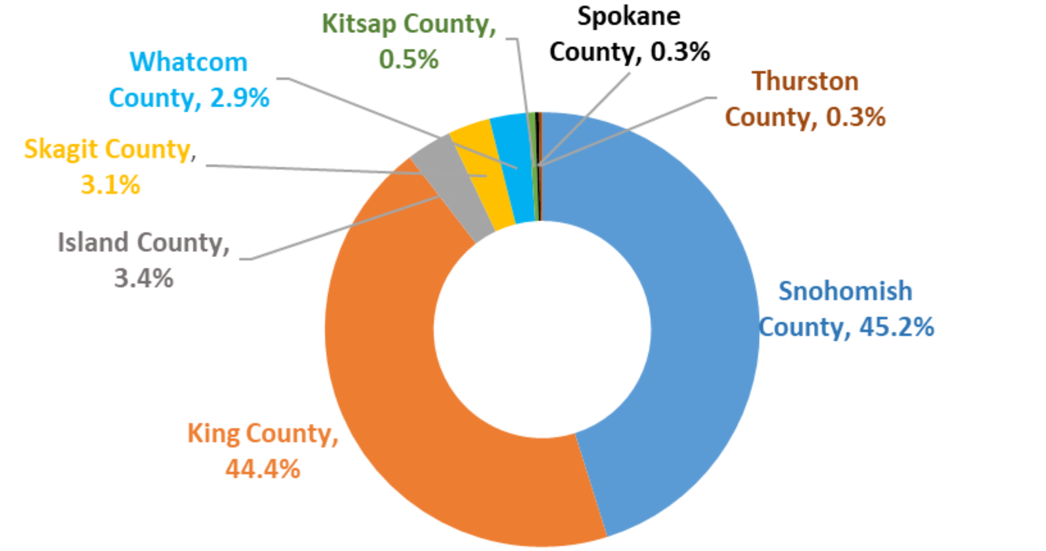
If you chose “other activity” above, please describe. (n=96)



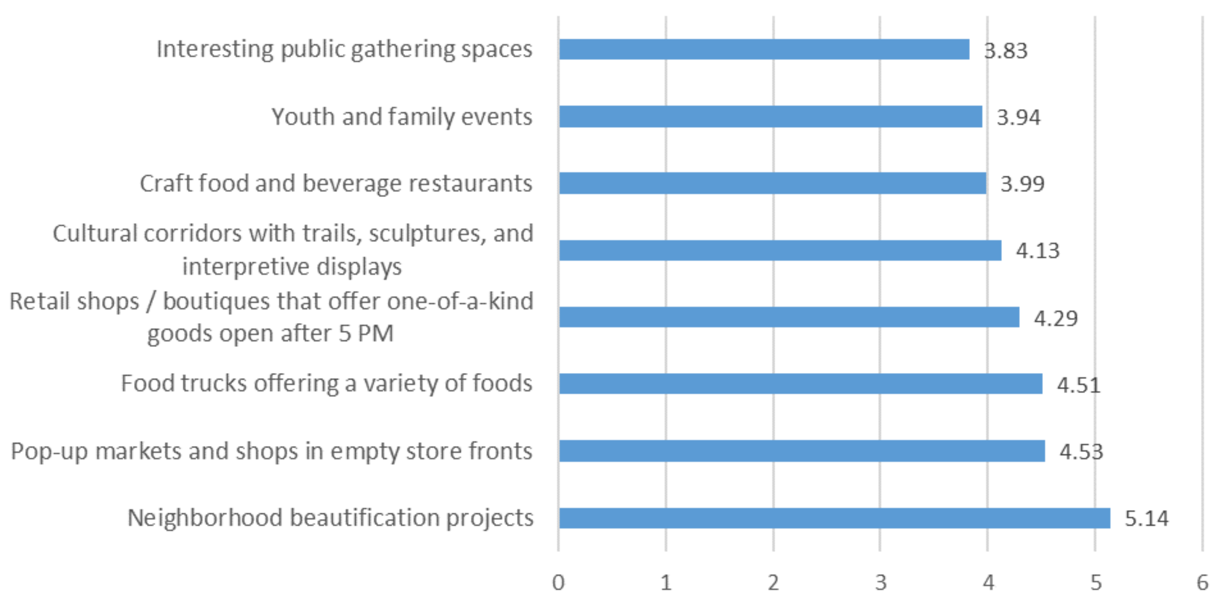

4. Of the activities you participate in above, how much arts and culture do you participate in, here in Snohomish County? (n=393)



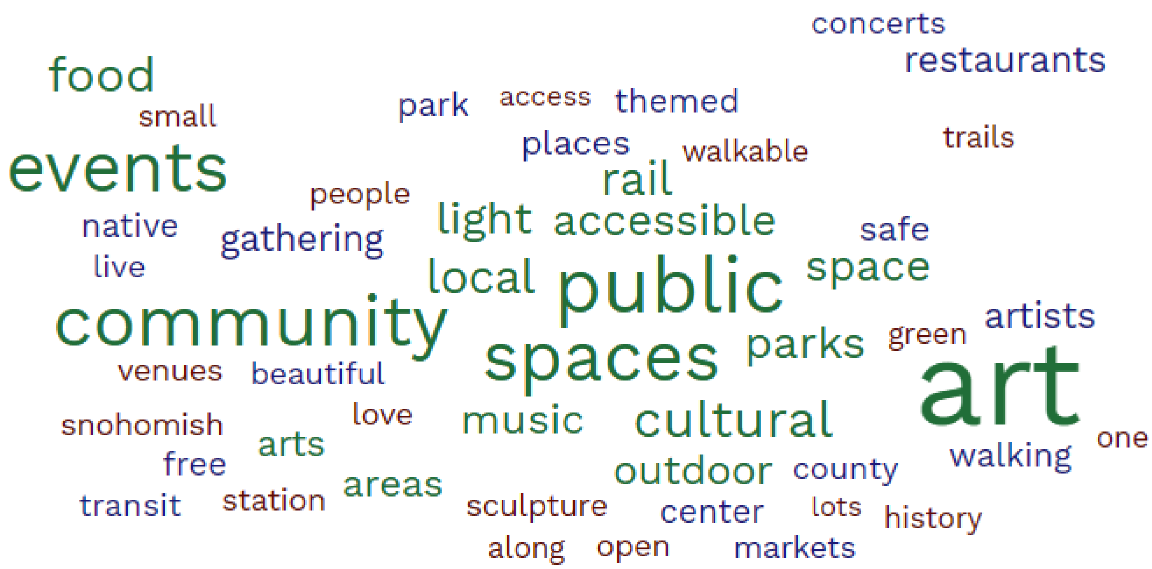
5. Select the country you go to MOST for arts and culture events and activities. (n=383)



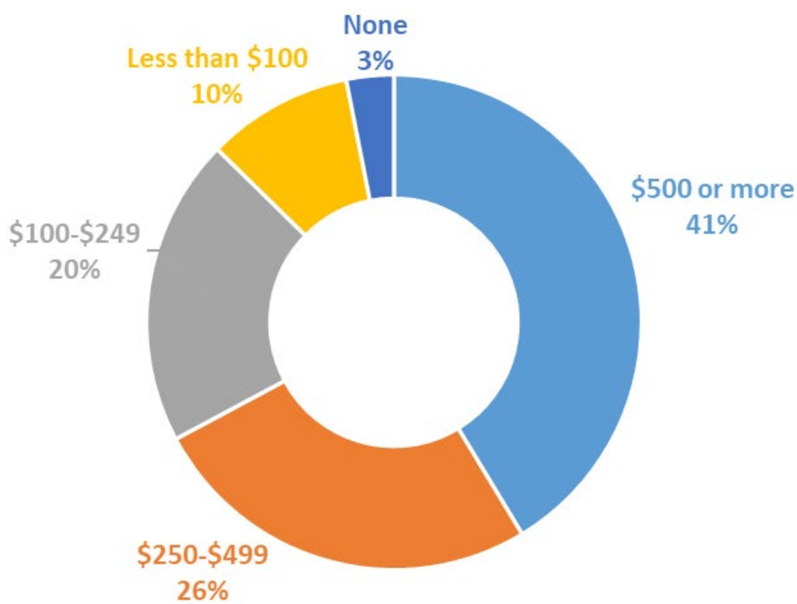

6. The list below features activities commonly used to stimulate arts and culture in communities. Please prioritize these activities, as applicable, to stimulate arts and culture in your community. (n=305)



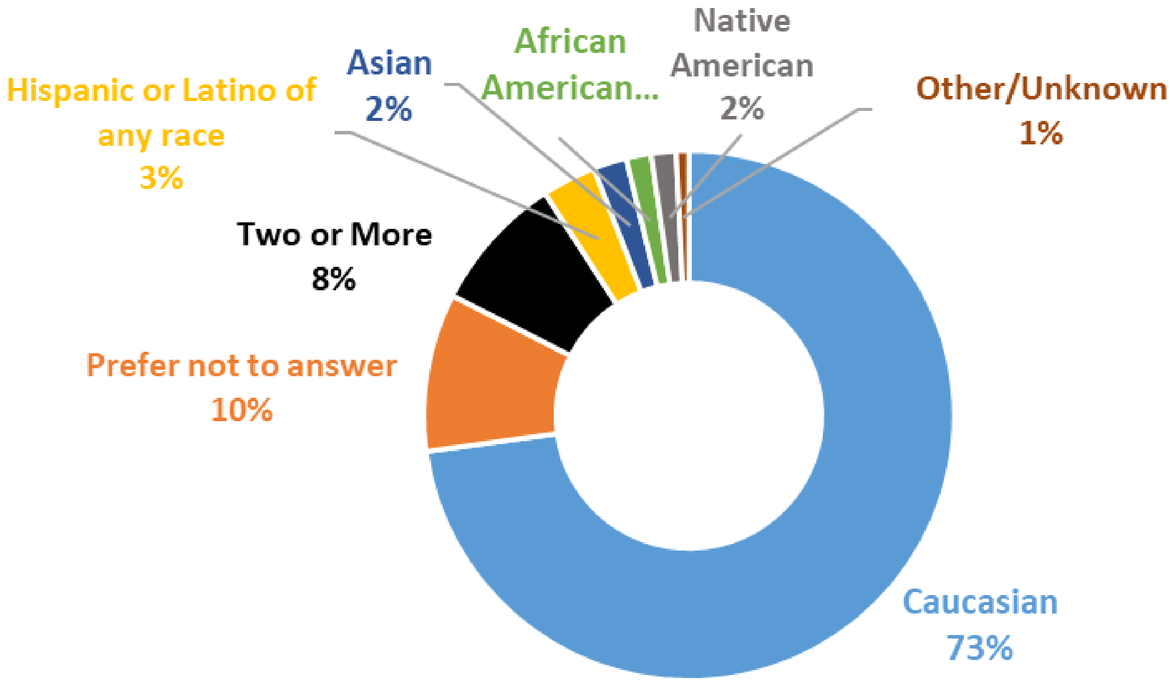
7. Are there any creative features or amenities that you would like to see in Snohomish County's light rail communities? (n=211)



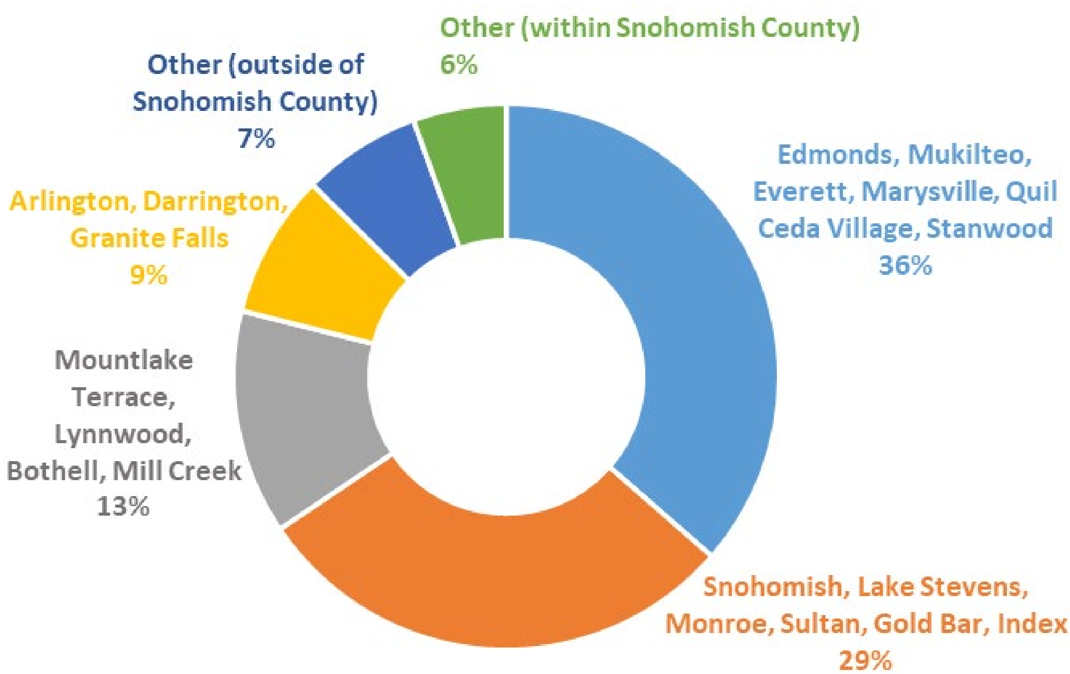

8. On average how much do you think you spend on music productions, theatre, dance, sporting events, festivals, shows, etc. within the greater Puget Sound region per year? (n=387)



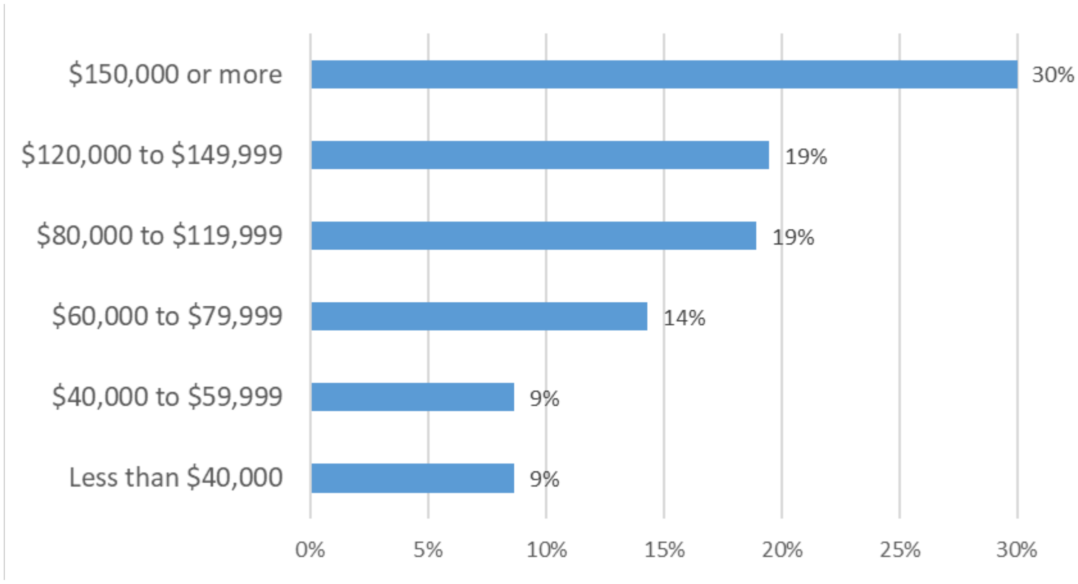
9. How do you identify? (n=394)



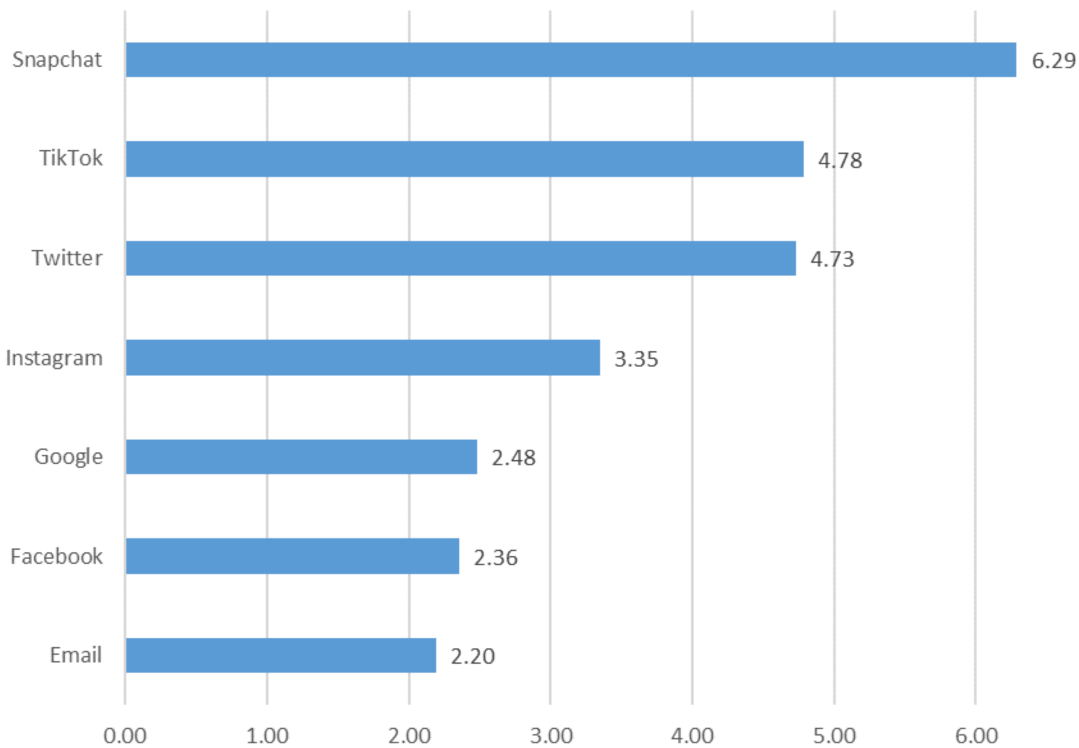

10. Where do you live? (n=398)



11. What is your total household income? (n=370)

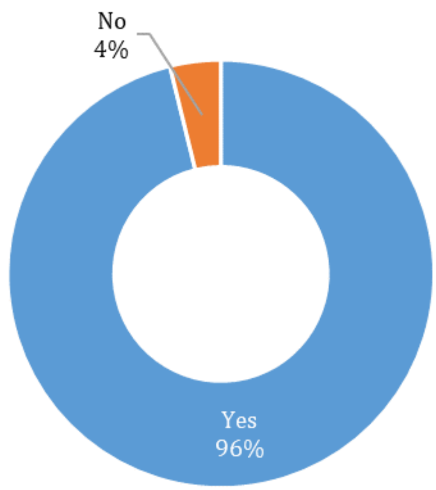



12. Rank the following based on how much time you spend on each platform per month. (n=322)

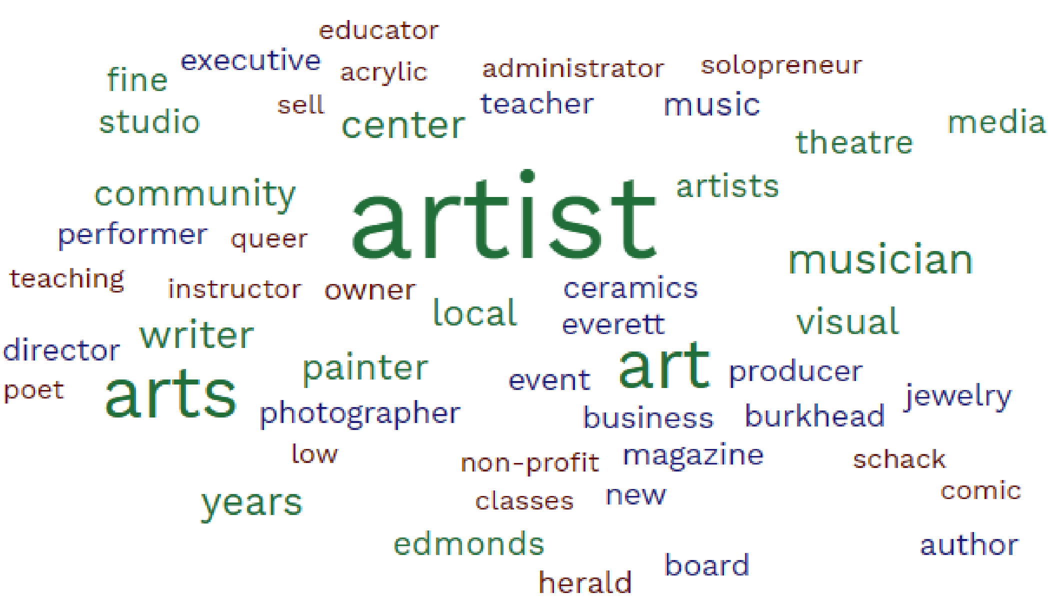


## Creator Survey

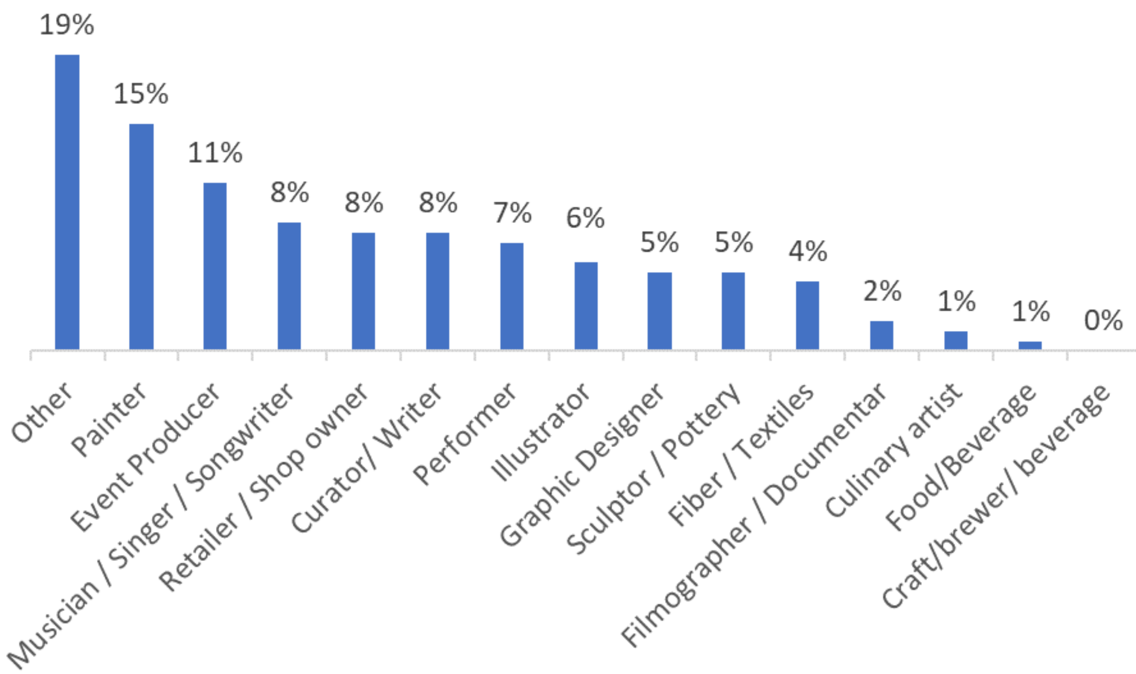
1. Are you a culture maker, artistic creator, cultural business, staffer, volunteer, and/or solopreneur generating income in the County's Creative Economy? (n=78)



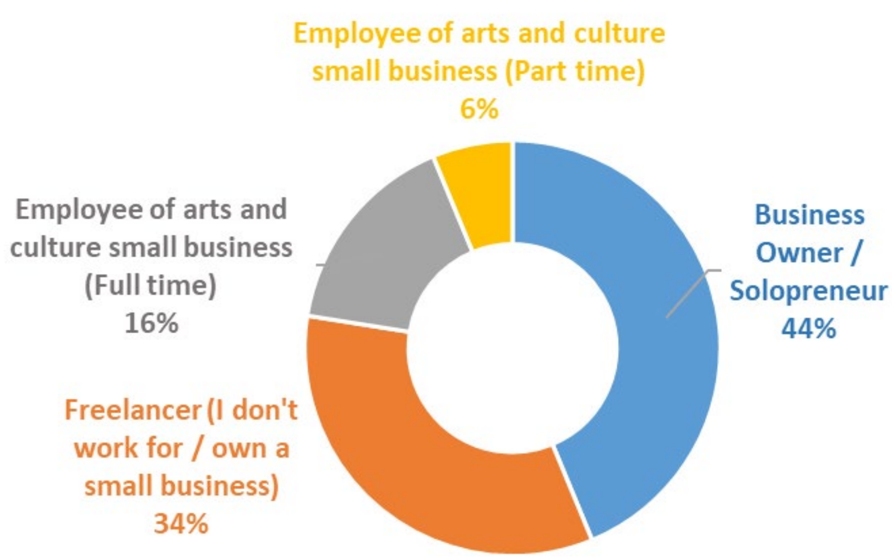

2. How do you identify in the creative economy? (n=76)



3. Which of the following best matches your business/occupation? (n=81)

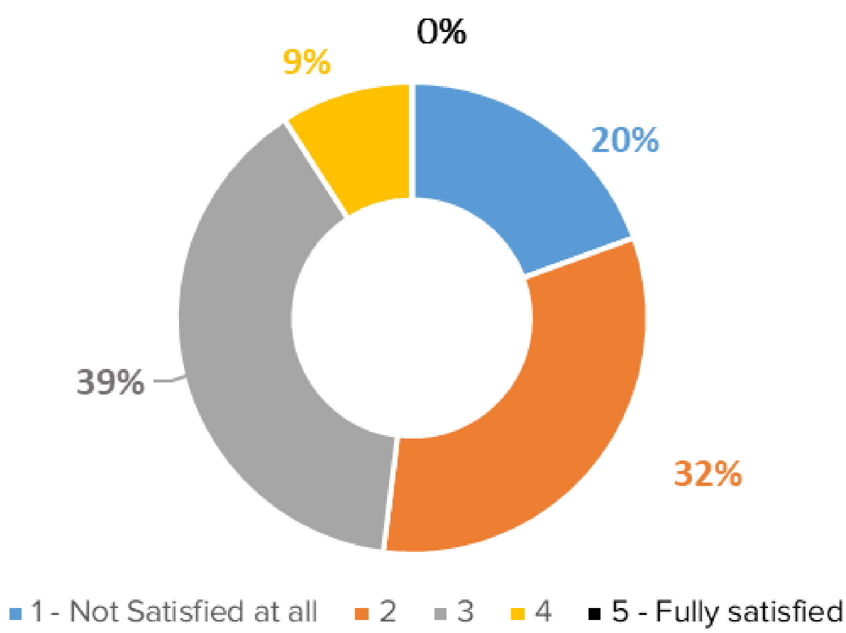



4. What is your current role in the creative economy? (n=80)

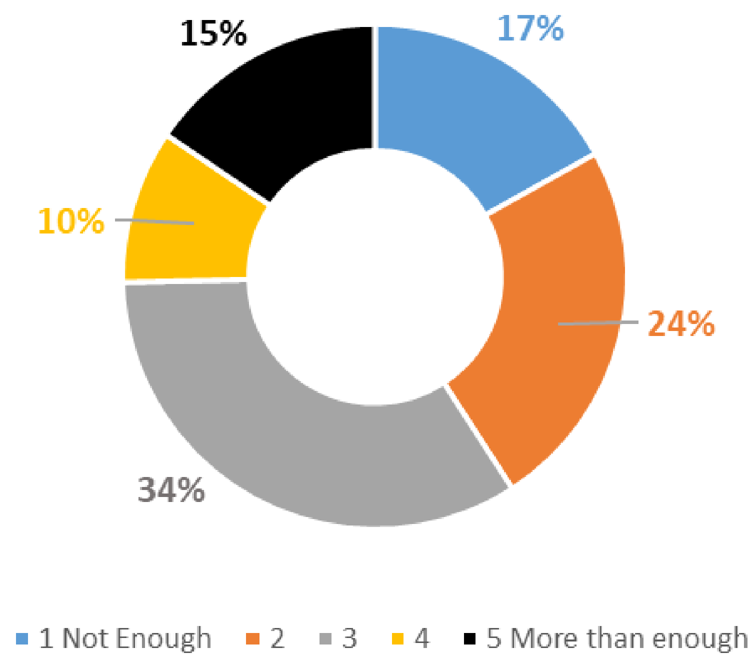


5. What should the County and related organizations (Snohomish Cultural Arts Network) invest in to grow arts and culture in Snohomish County? (n=67)

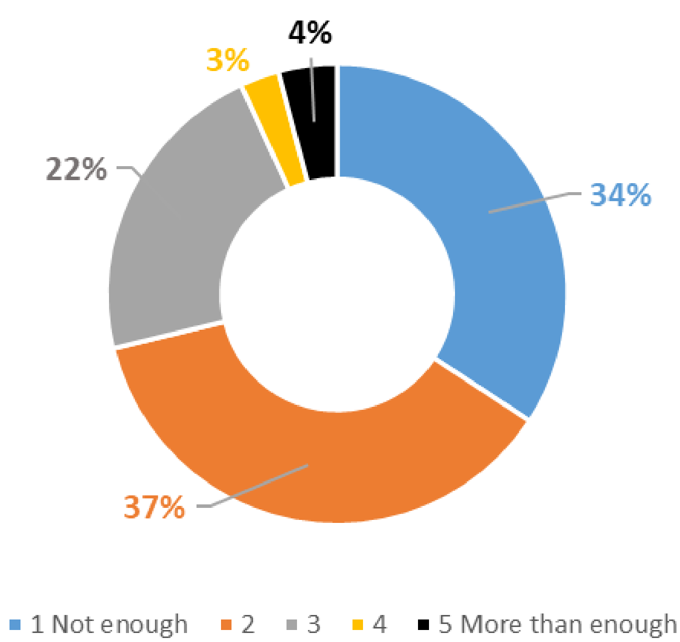

6. I am satisfied with the current opportunities for arts and culture workers and businesses within Snohomish County. (n=77)



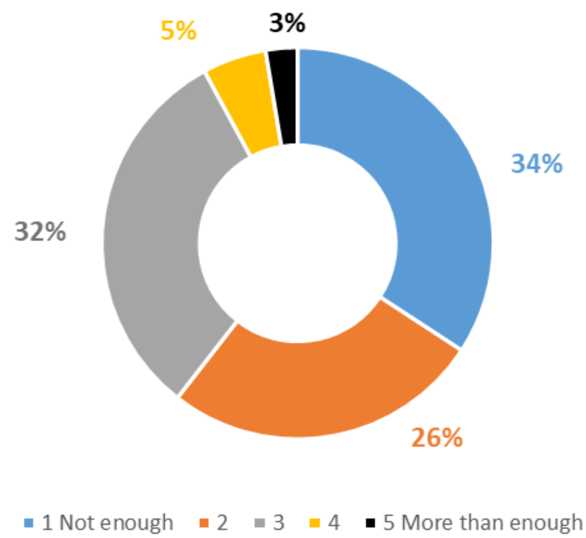
7. My business has access to the workforce needed to perform to the best of its ability. (n=71)



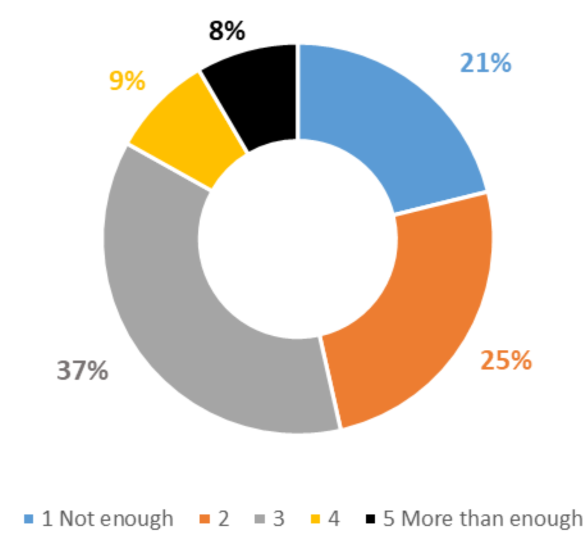

8. My business has access to the funding resources needed to perform to the best of its ability. (n= 73)



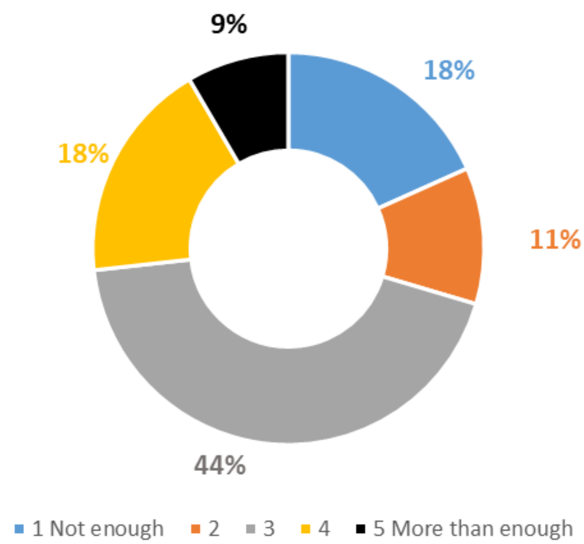
9. My business has access to support services needed to perform to the best of its ability. (n=76)



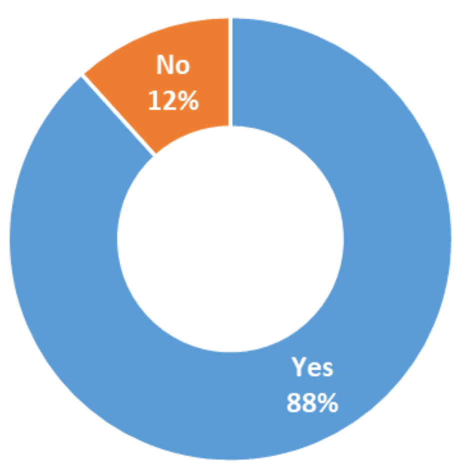

10. My business has access to the training needed to perform to the best of its ability. (n=71)



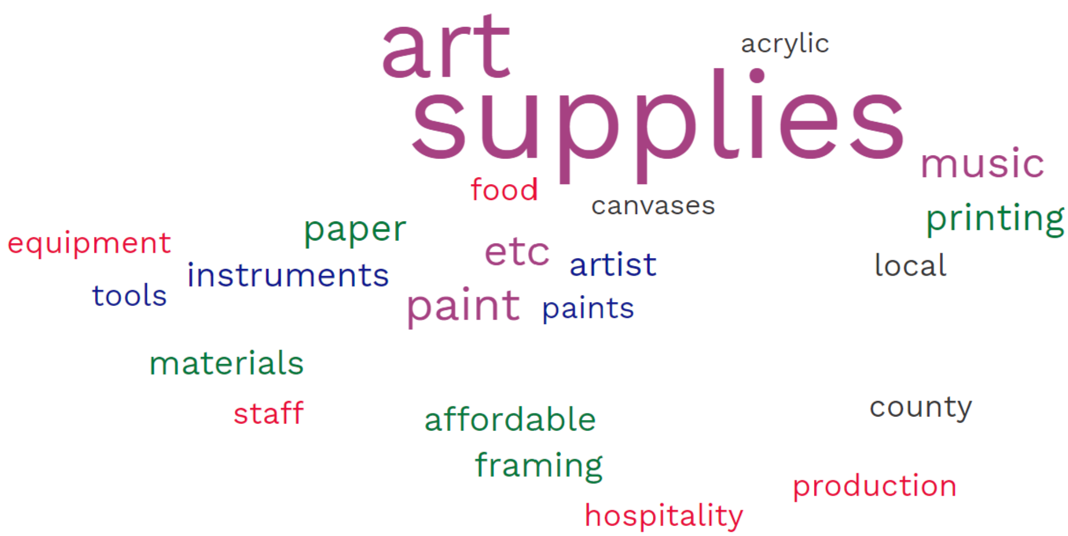
11. My business has access to the materials/ supplies needed to perform to the best of its ability. (n=71)



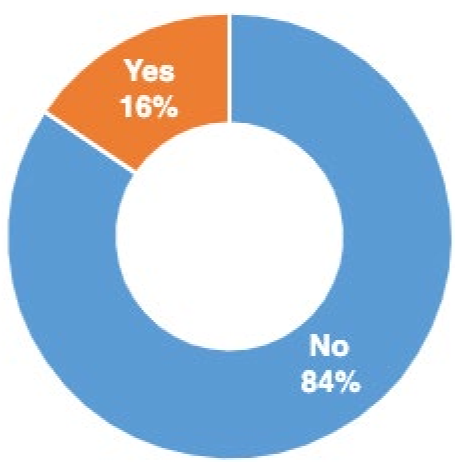

12. Would you prefer to purchase your material/supply locally? (n=77)



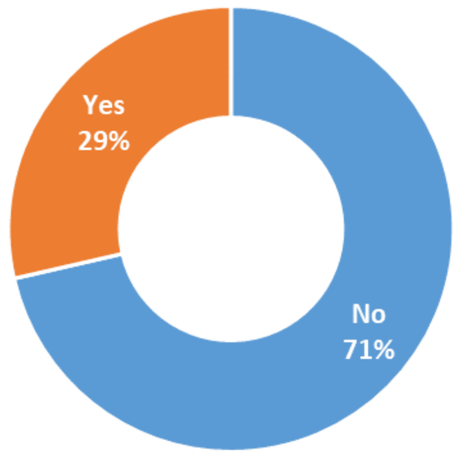
13. If you said yes, what materials/supplies would you like? (n=61)



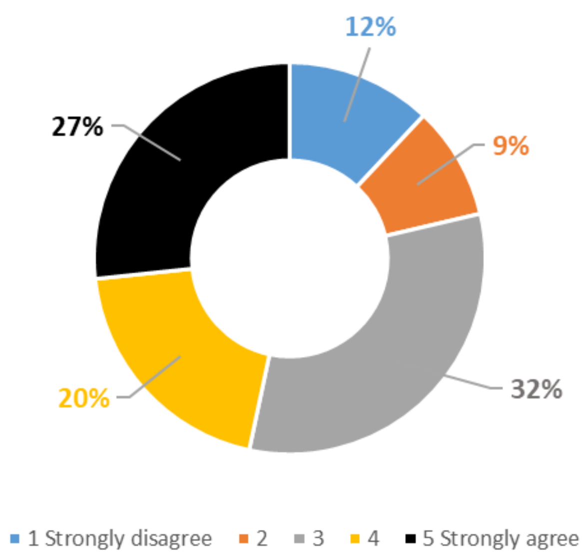

14. Do you have to rely on child/elderly care in order to do your job? (n=77)



15. Are you a retiree who is pursuing arts and culture as a business or secondary source of income? (n=77)

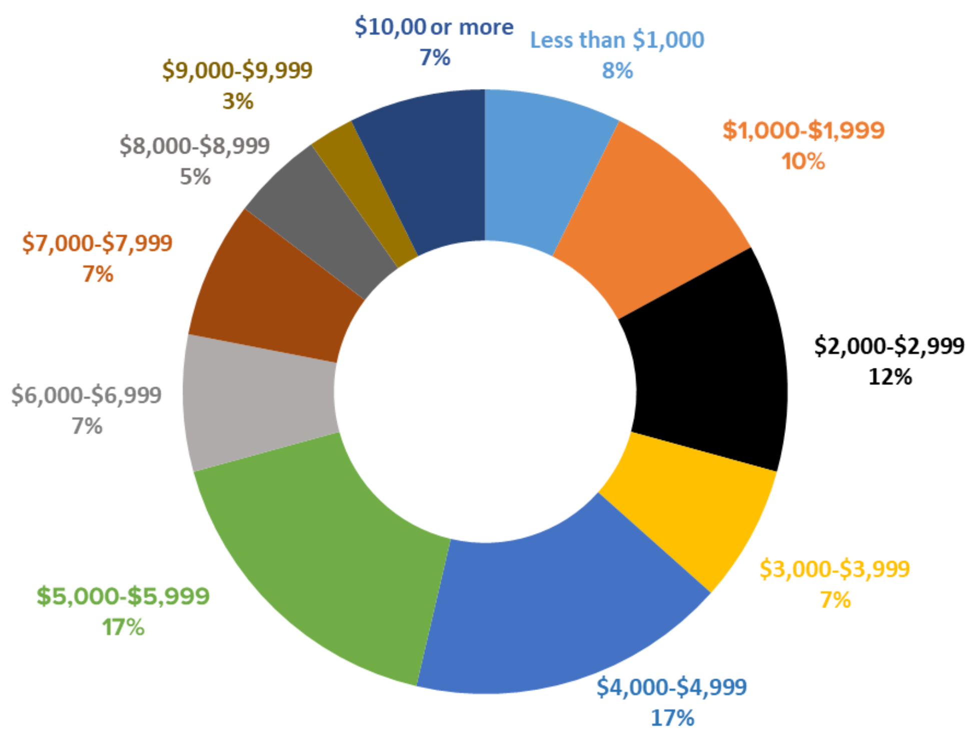



16. My ability to earn income in my current role in the creative economy is limiting my participation in the arts and culture industry. (n=75)

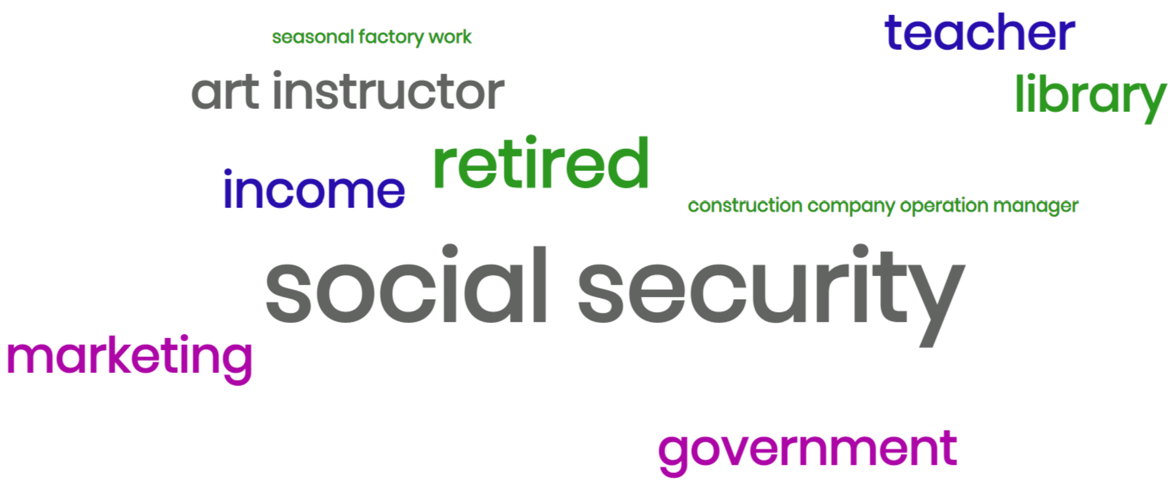


17. Is your current role in the creative economy your primary source of employment? (n=79)

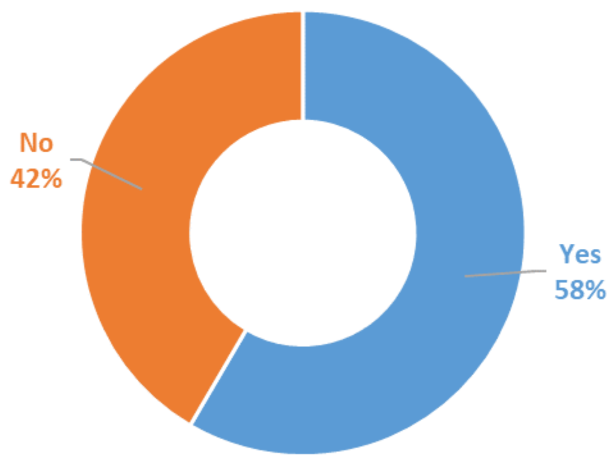

18. If it is your secondary source of income, how much more would you need to earn per month to make it a primary source of income? (n=41)



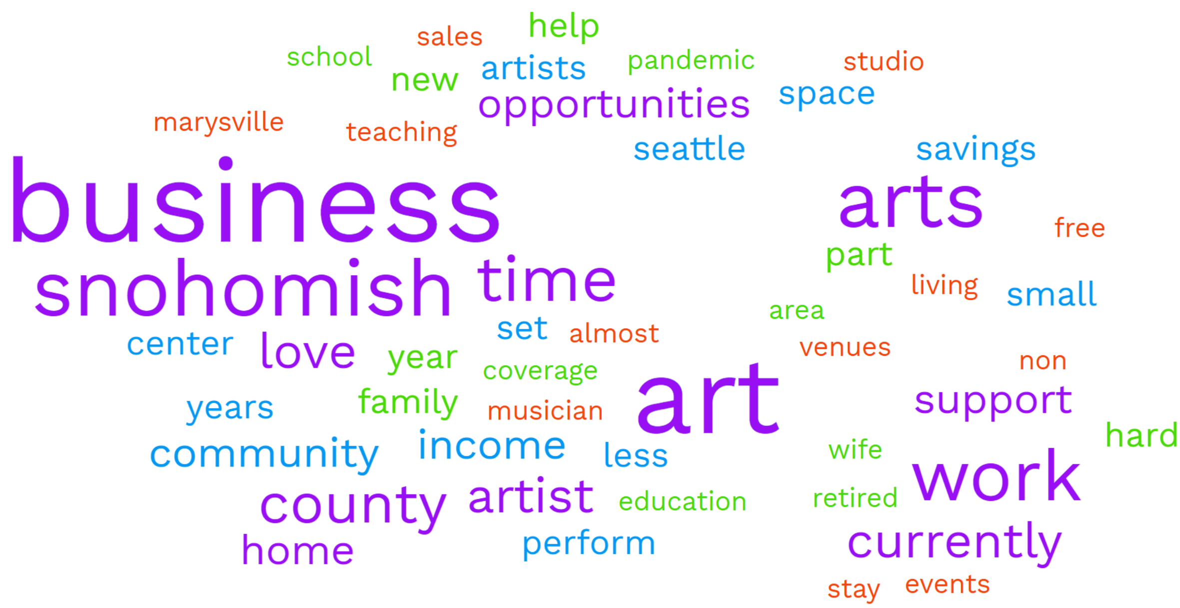
19. If you answered no, please describe your primary source of employment. (n=35)



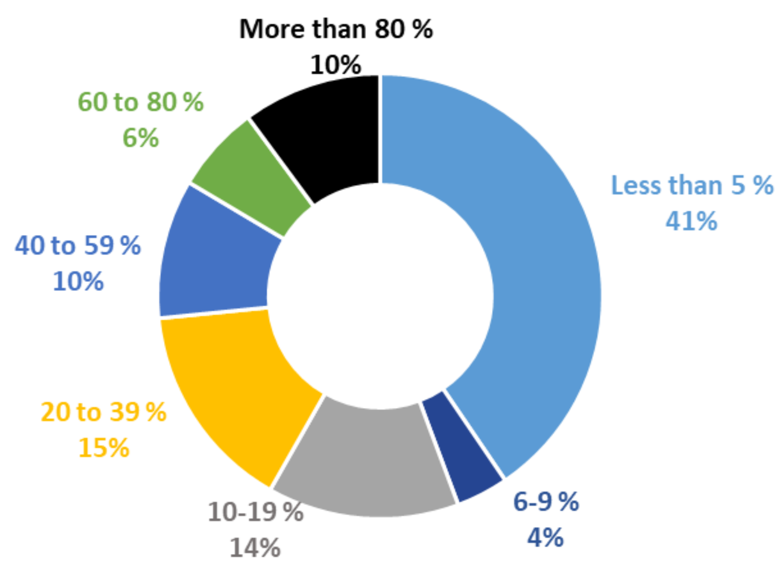

20. Is your creative economy income necessary for your financial survival? (n= 77)



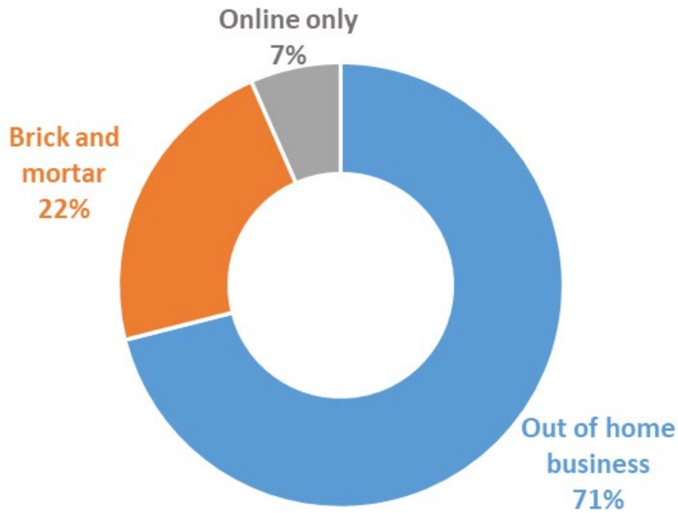
21. Why is/isn't your creative economy income necessary for your financial survival? (n=29)



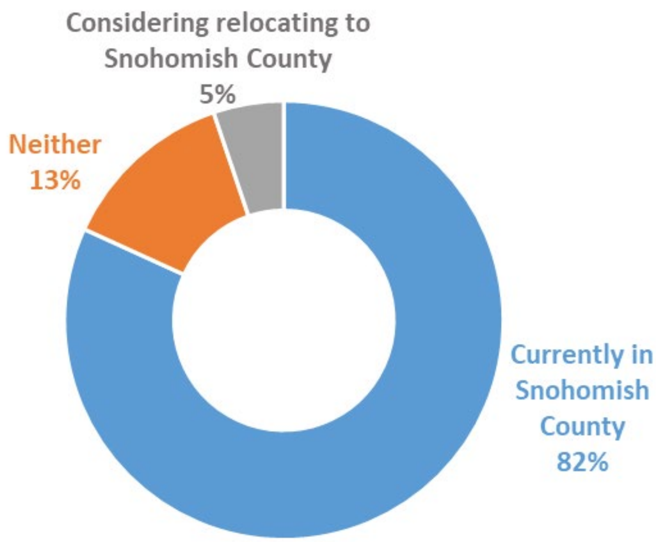

22. What percentage of your household's income comes from your role in the creative economy? (n= 79)



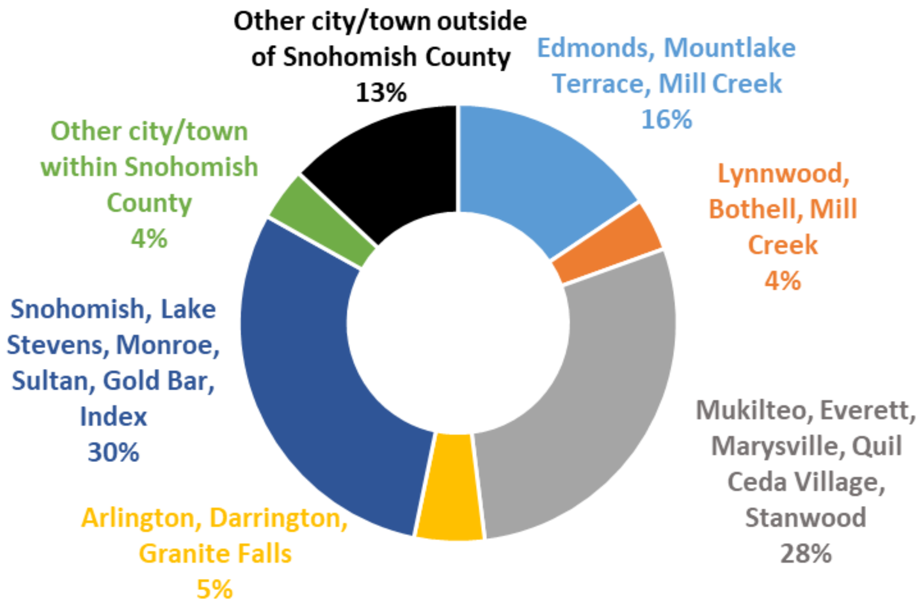
23. How would you identify your business? (n=76)



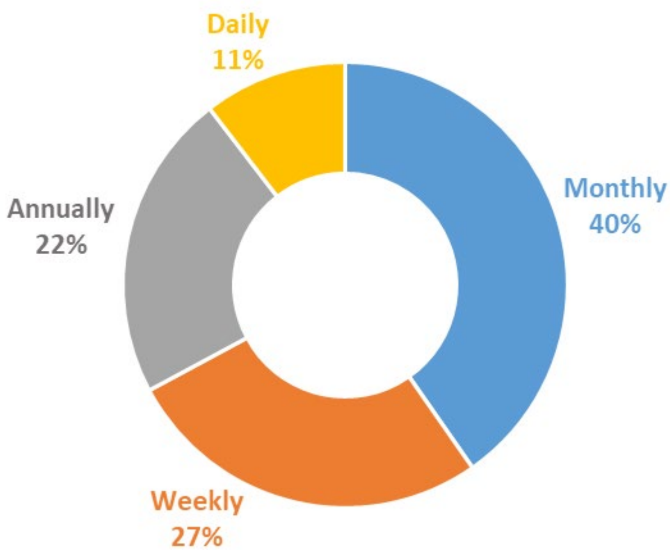

24. Is your business currently in Snohomish County, or are you considering relocating to Snohomish County? (n=77)



25. Where is your business located? (n=77)

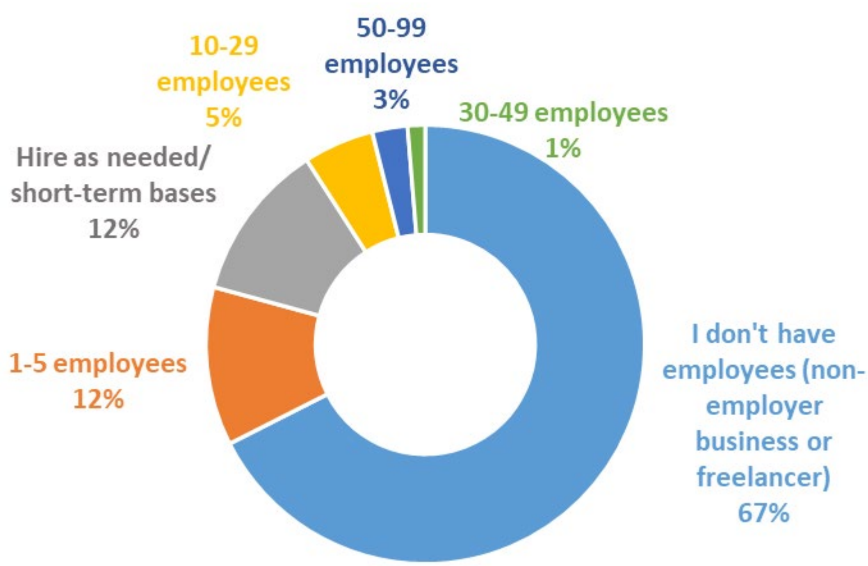



26. How often do you leave the city to do your work? (n=67)

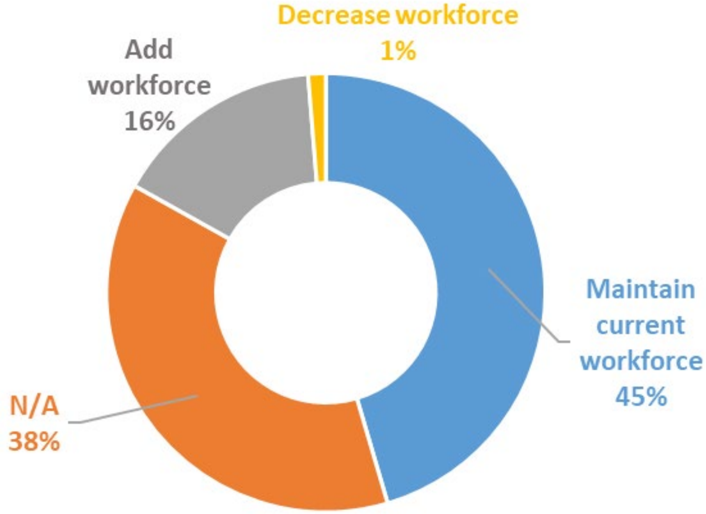


27. If you leave your city for work opportunities what city are those opportunities? (n= 48)

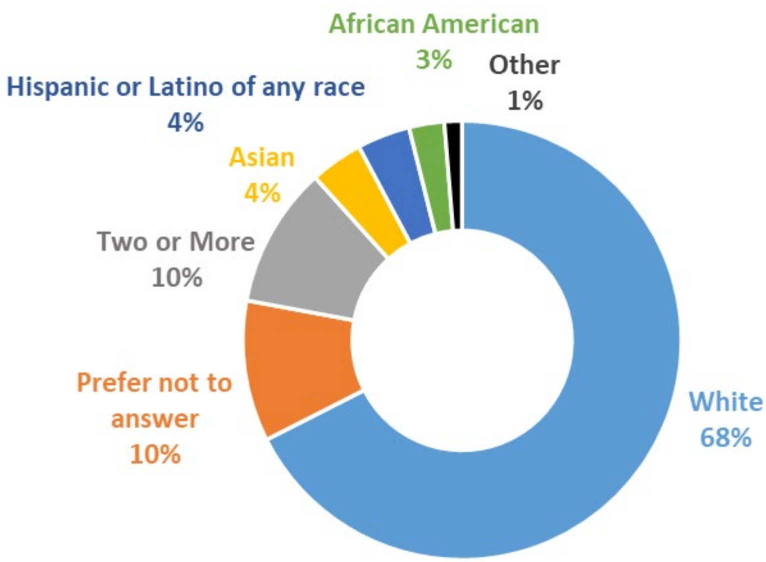

28. How large is your organization's workforce (full-time equivalent working on Arts and Culture directly)? (n=77)



29. Over the next year, do you think your organization will… (n=77)




30. How do you identify? (n=77)



31. What changes would you recommend to help the Arts & Culture industry thrive within Snohomish County? (n=52)


32. Please rate what creative placemaking policies would be most important to retain or expand your business in Snohomish County. (n= 76)