Future of Arts and Culture Project: Phase One Segment Assessment

Sponsored By:

Snohomish County Arts Commission

Prepared By:

Better City

Future of Arts and Culture Project: Phase One Segment Assessment

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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 45). 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. 45).

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.

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!)**

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. 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.

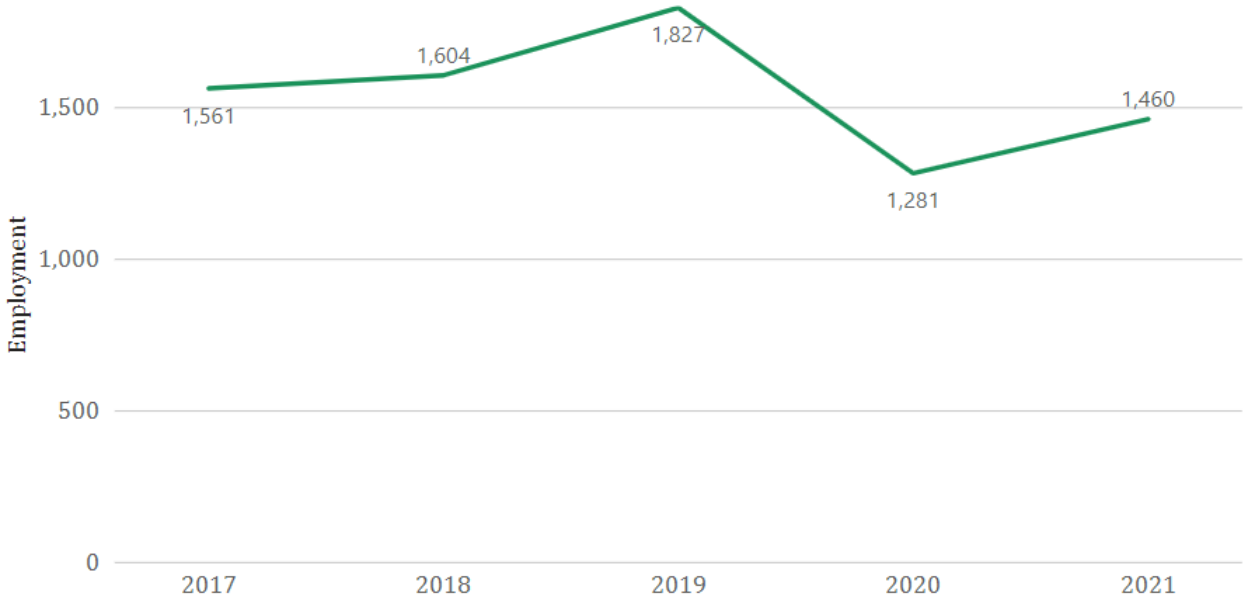
Snohomish County Arts and Culture Employment

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)

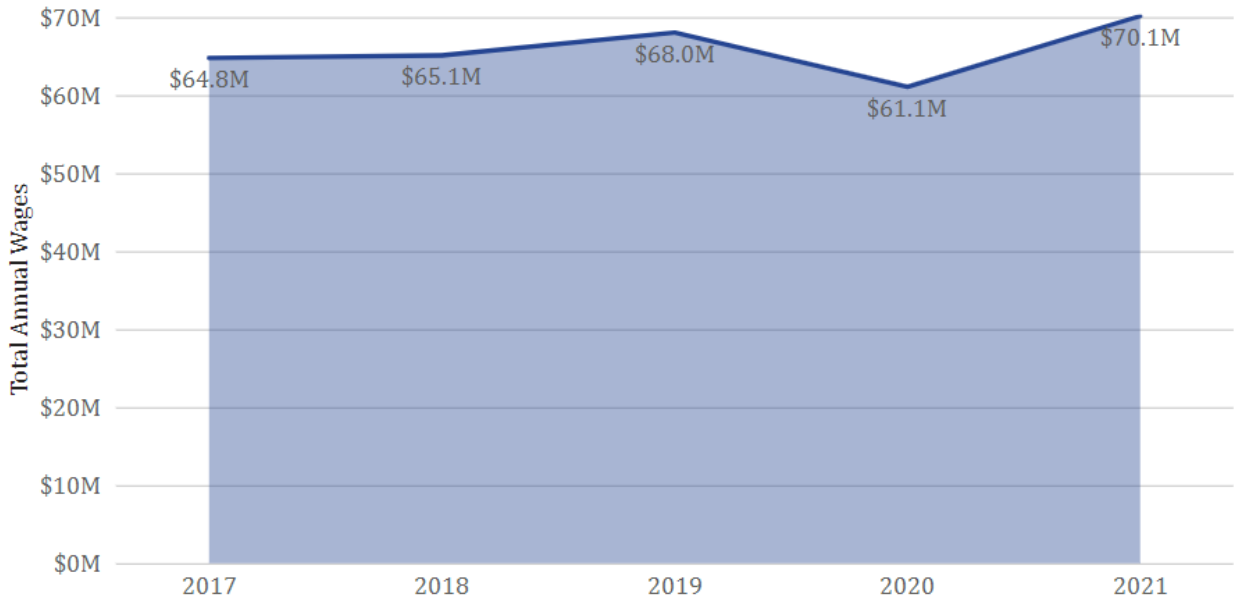
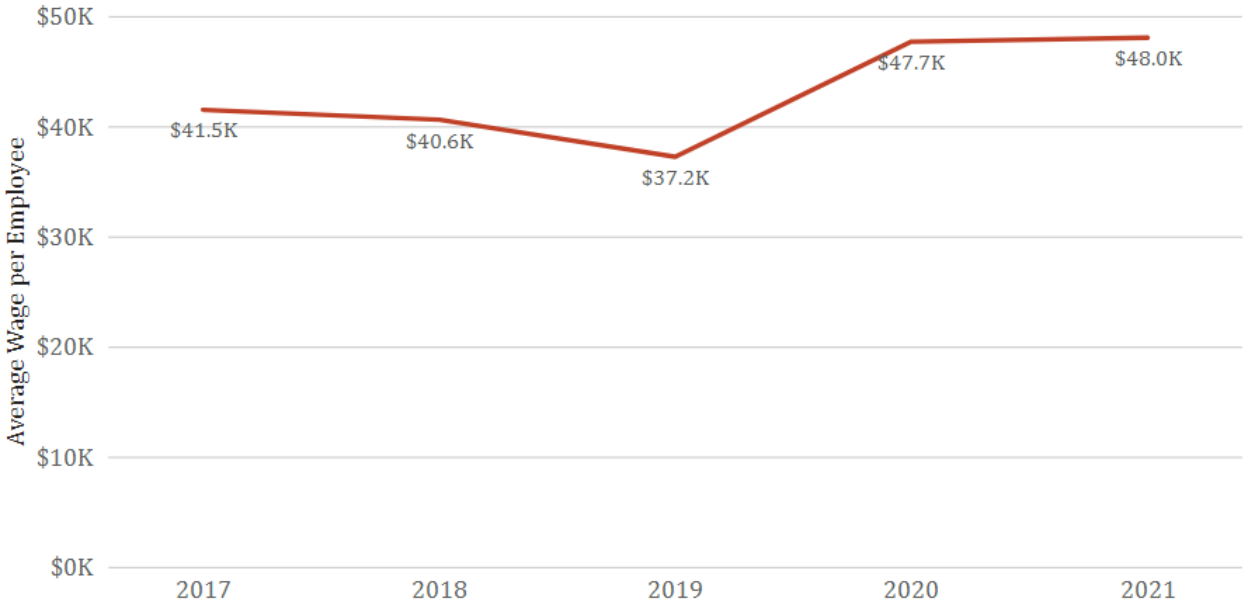


Chart 3—Snohomish County Average Wage per Employee (2017-2021)



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).

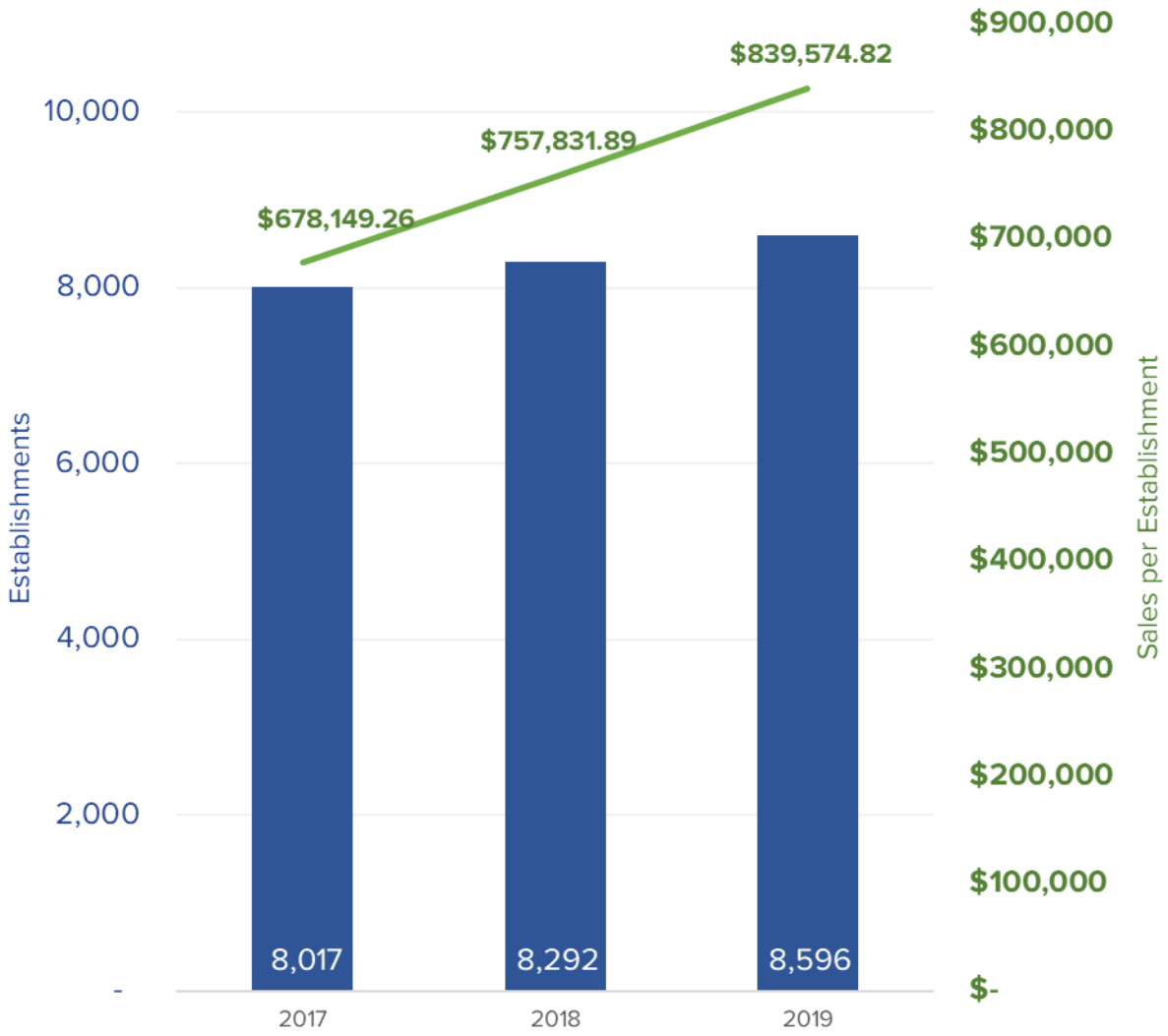
Table 2—Snohomish County Share of Non-employer Businesses by NAICS Code

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

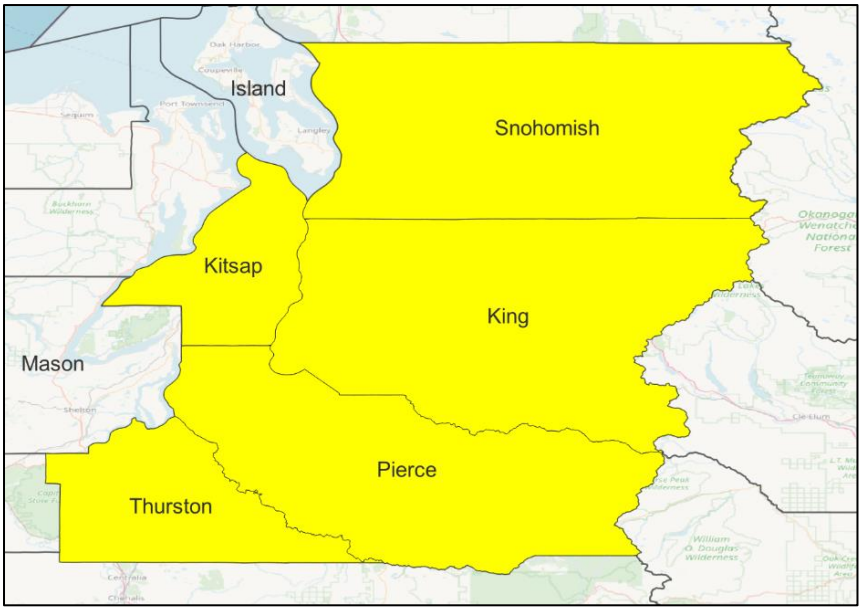


Table 4—Share of King County Workers by Home County

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)

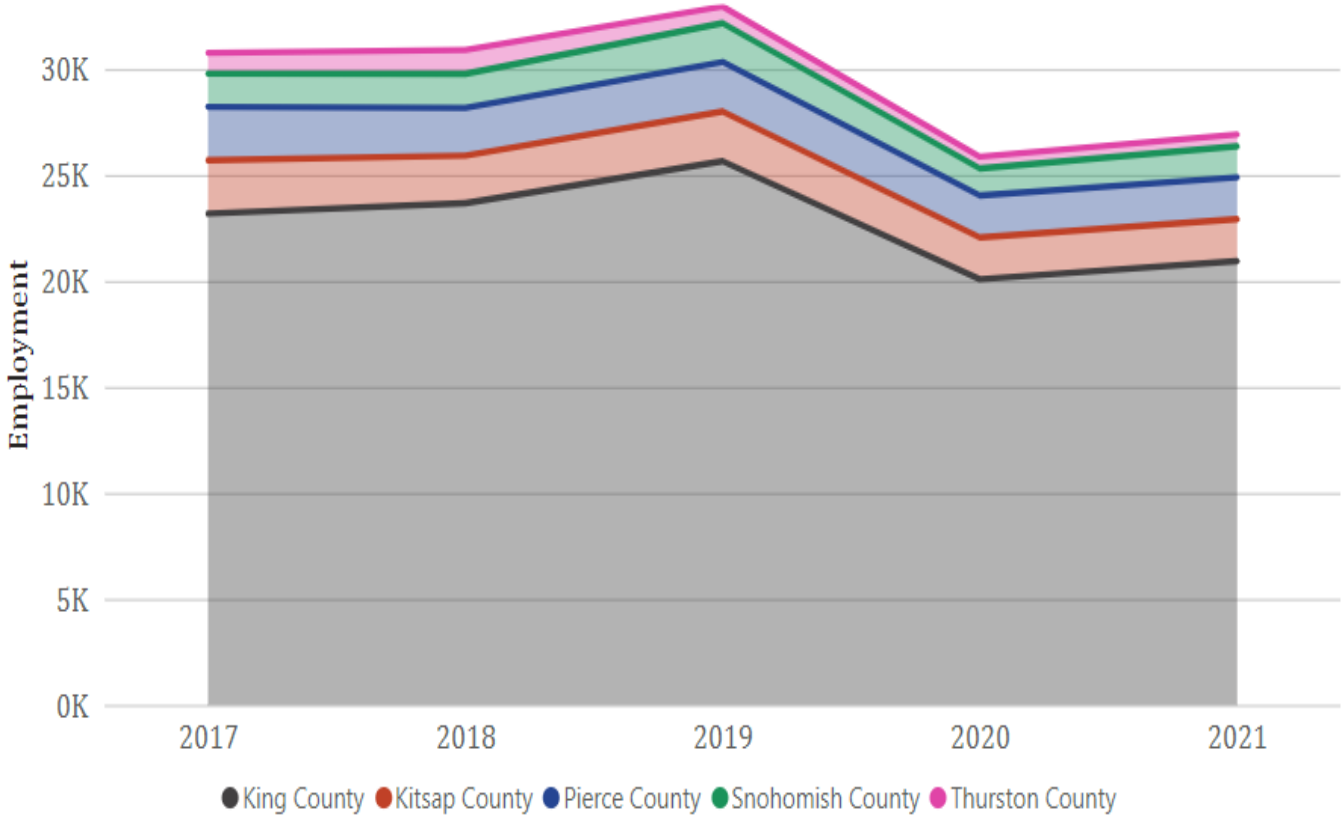
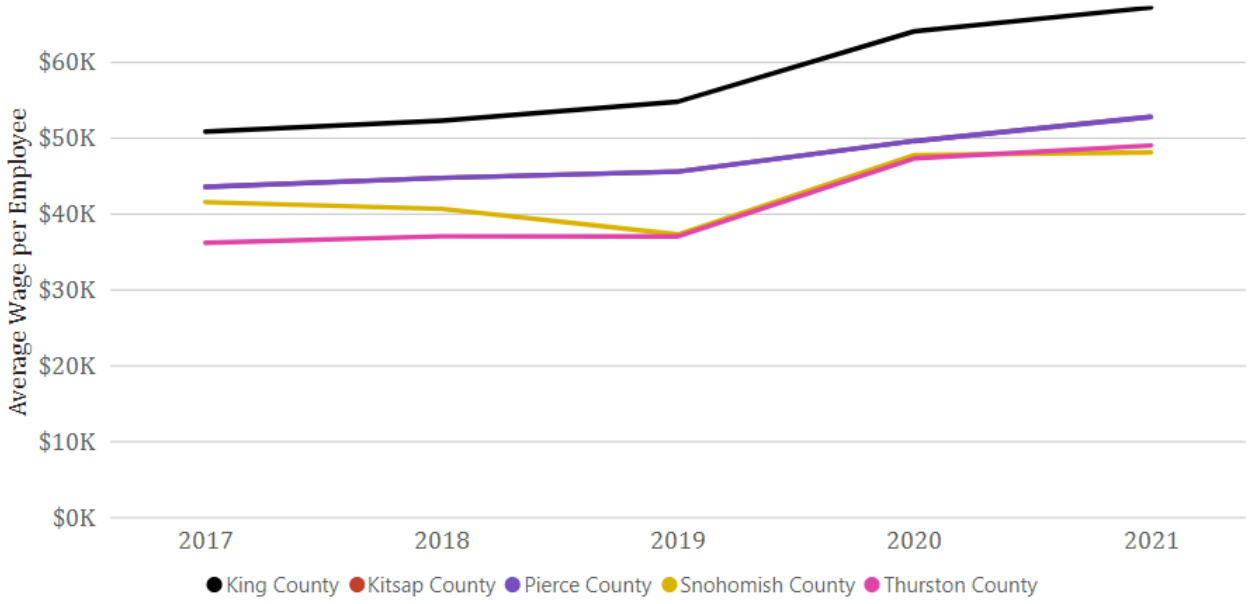


Chart 6 shows the average wage per the Segment's employees in each of the Watershed counties. King County's wages are approximately 33 percent higher than the average for the other counties, evidence for how central King County is to the Segment at the regional level.

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)

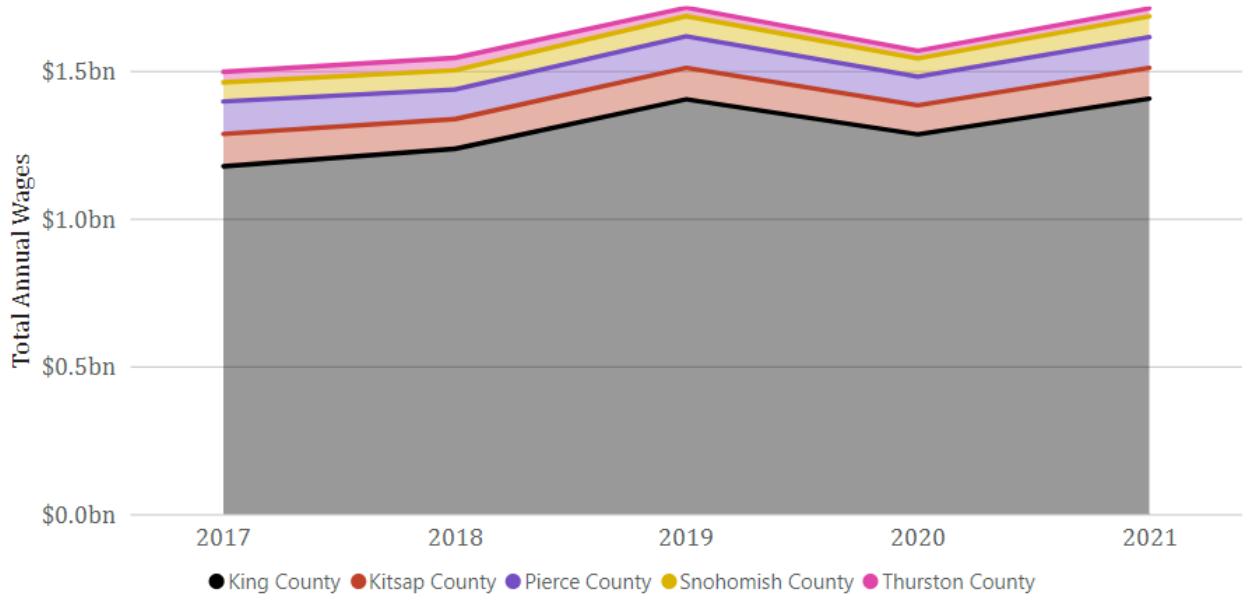


Total wages in the Watershed experienced an average annual growth rate of 3.6 percent per year between 2017 and 2021 (see Chart 7), on par with the Snohomish County Arts and Culture Segment wage growth.

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.

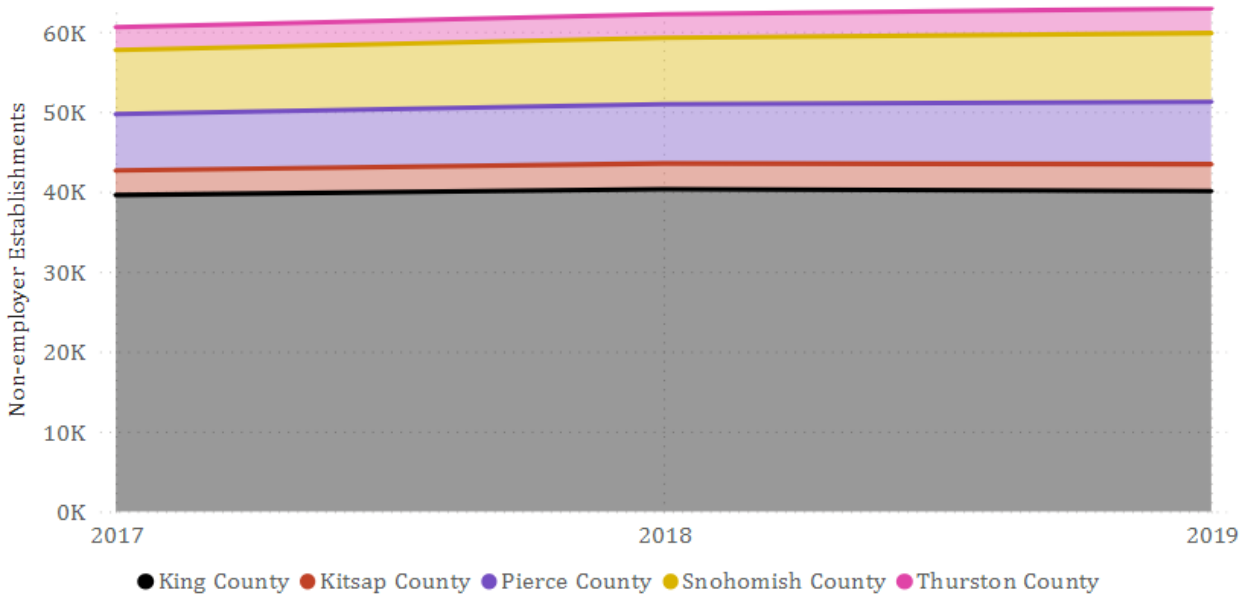
Chart 7—Total Annual Wages by County and Year (Watershed)



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

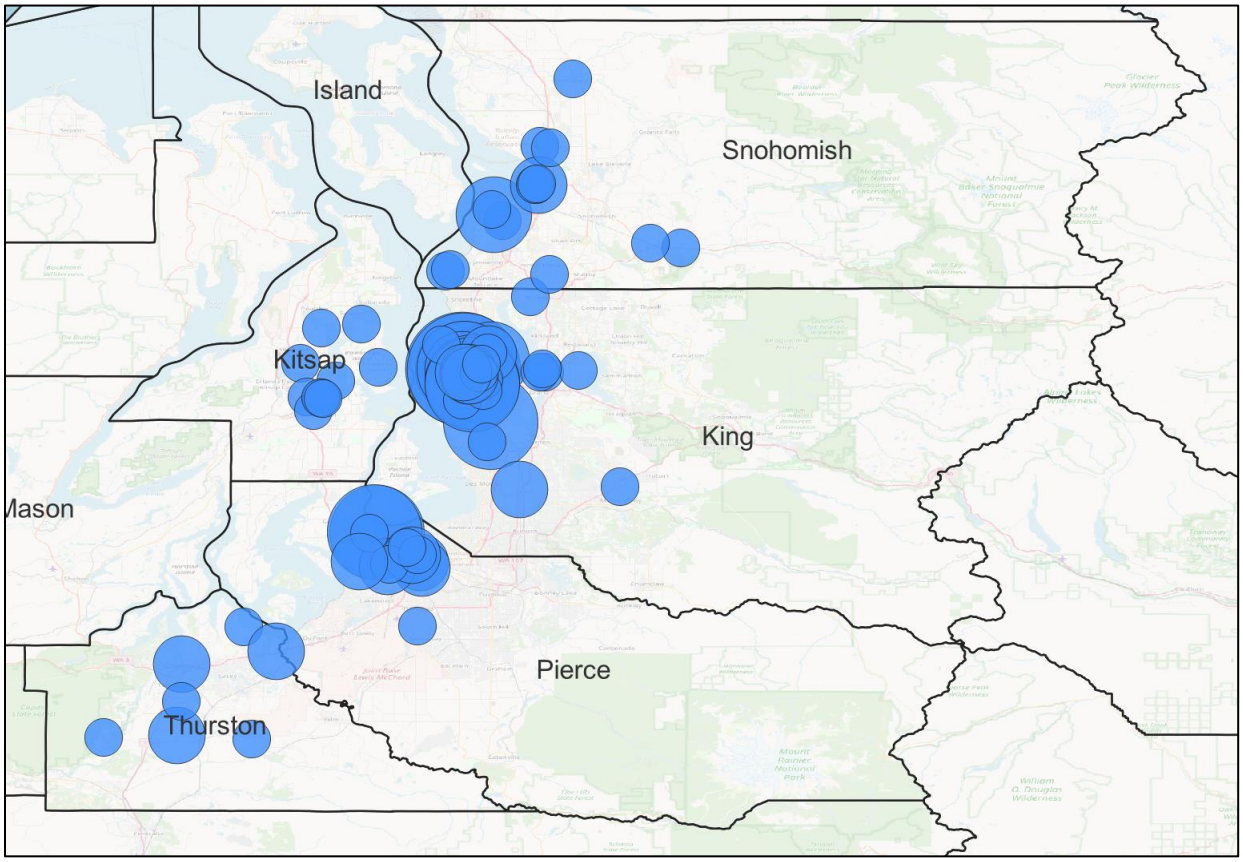
SOURCE: Google Maps, Google Reviews, Better City

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)

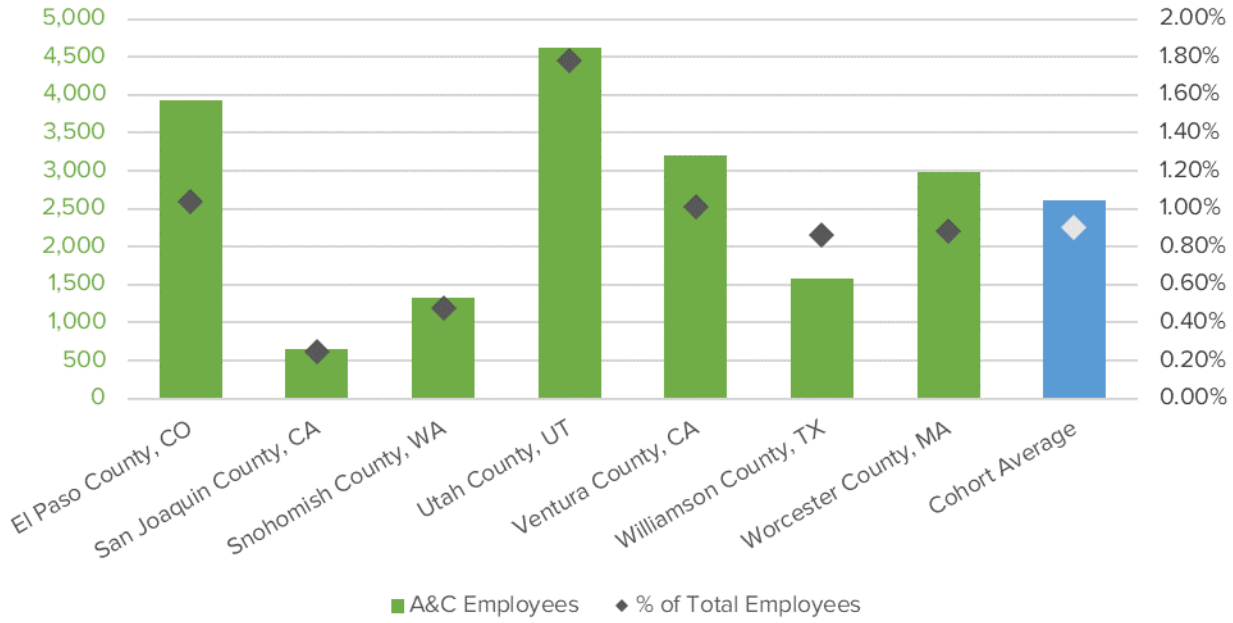
SOURCE: US Census Bureau, TIGERlines Shapefiles

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).

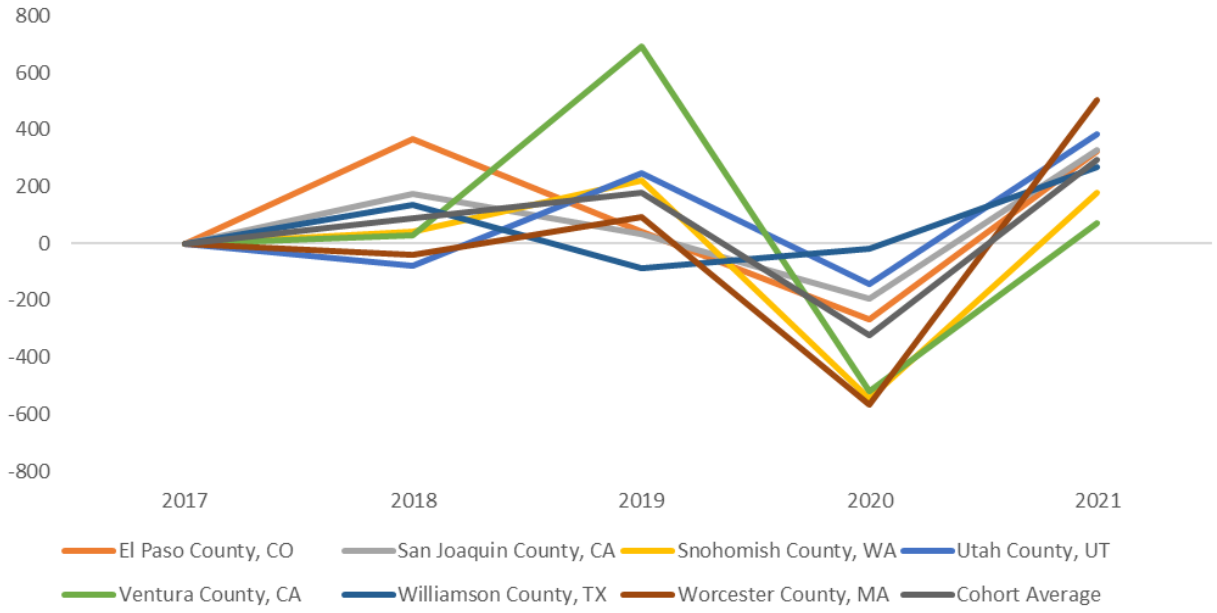
Key Benchmark: Snohomish County will need to double employment in the Segment to reach the 2,500-employment average of its six peer counties.

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).

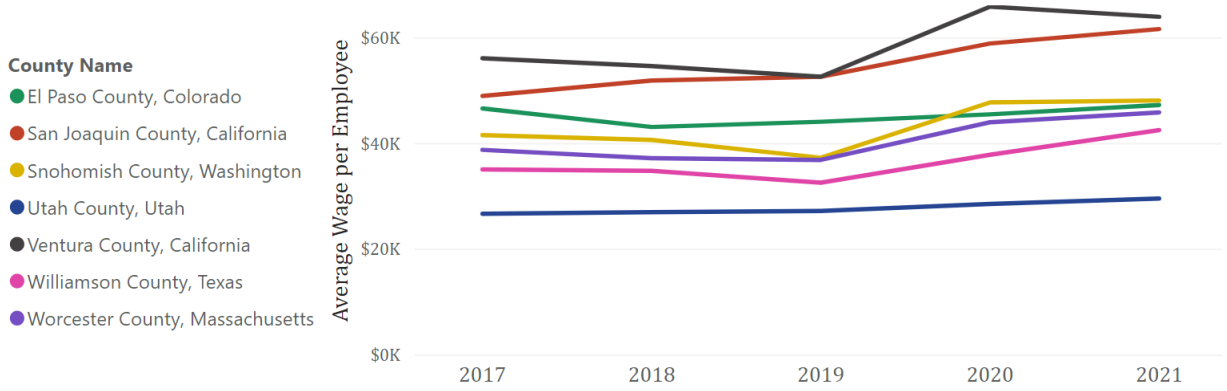
Chart 10—Employment Gains and Losses by County and Year (National Comparison)



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

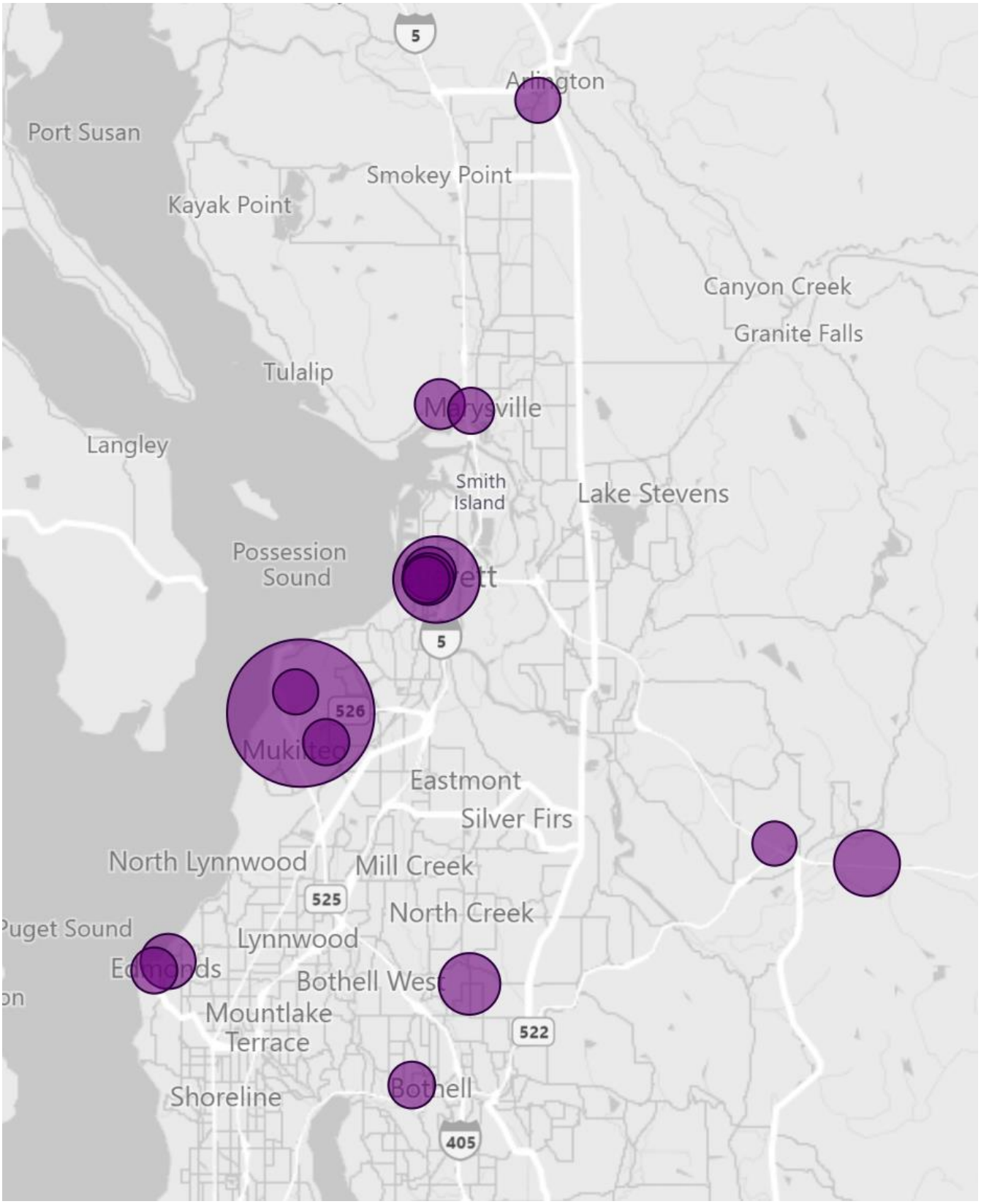
This section utilizes data from Datafy, a vendor that provides visitation and event analytics for the Seattle NorthCountry destination, as well as behavior insights from aggregated data from more than 225 million devices, to understand visitation trends for Arts and Culture Segment sites throughout Snohomish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

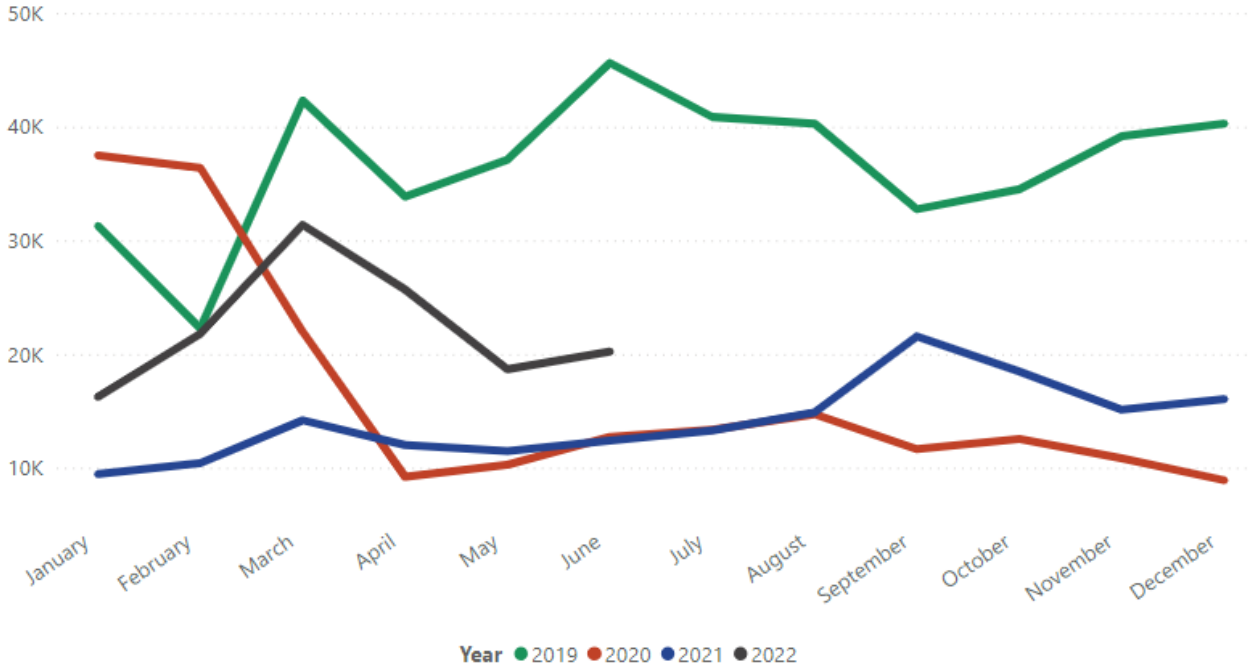
Regional Market (1 to 50 Miles)

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

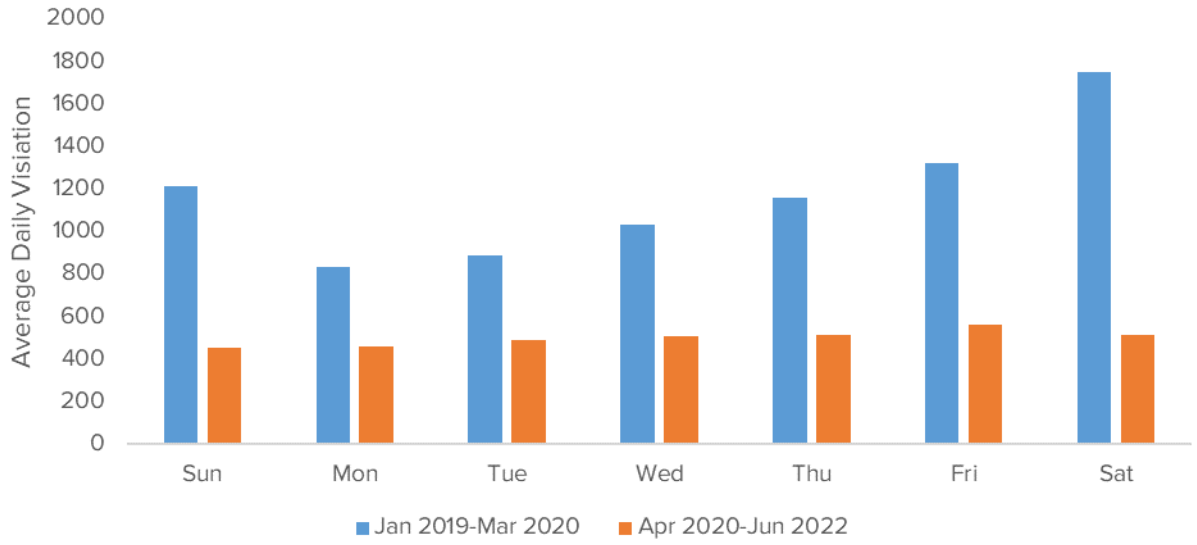


It is important to see when the loss of regional visitation occurred. As shown in Chart 13, before the Pandemic, 2019 the regional market showed a continued increase from Monday to the weekend, with Saturdays as the strongest performing day (an average of 1,752 people attended the 11 POIs each week).

[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

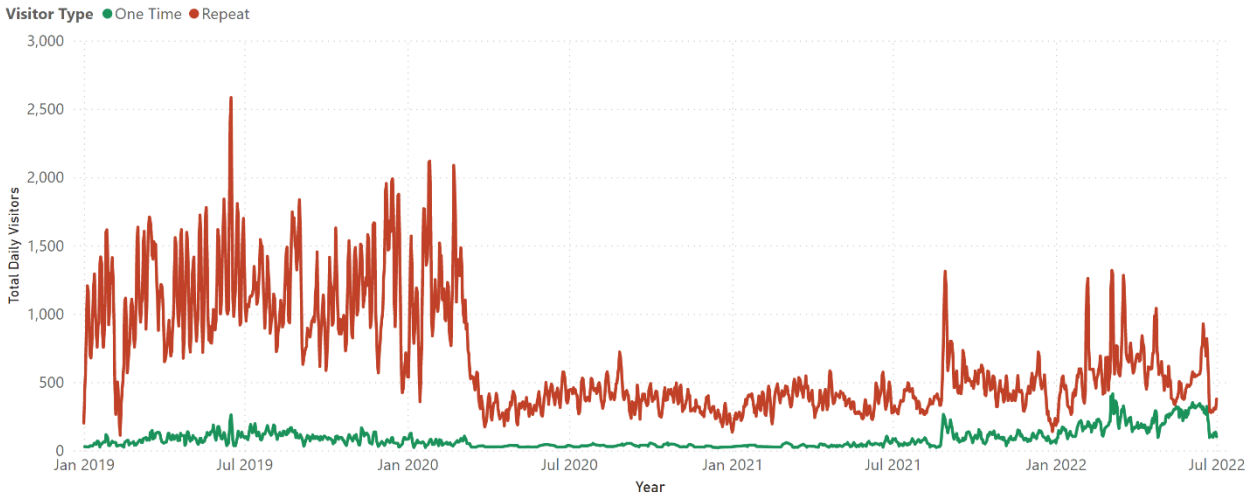


An additional shift in consumer behavior is shown in Chart 14. Previous regional repeat visitors (those who have gone to a particular venue multiple times between 2019 and 2022[3]) accounted for a steep drop in visitation to venues after the Pandemic started.

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

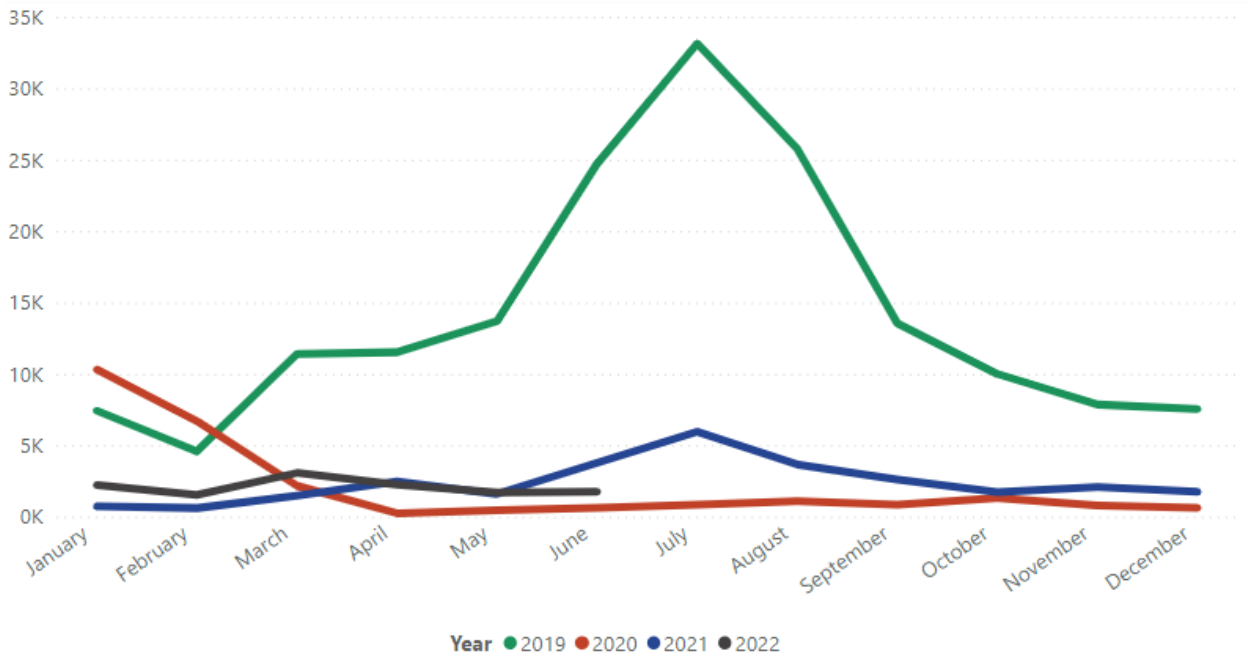


Key Takeaway: Regional visitors are key to sustained recovery for cultural venues. Resources, staffing, and other forms of support for venues during recovery should be a priority.

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.

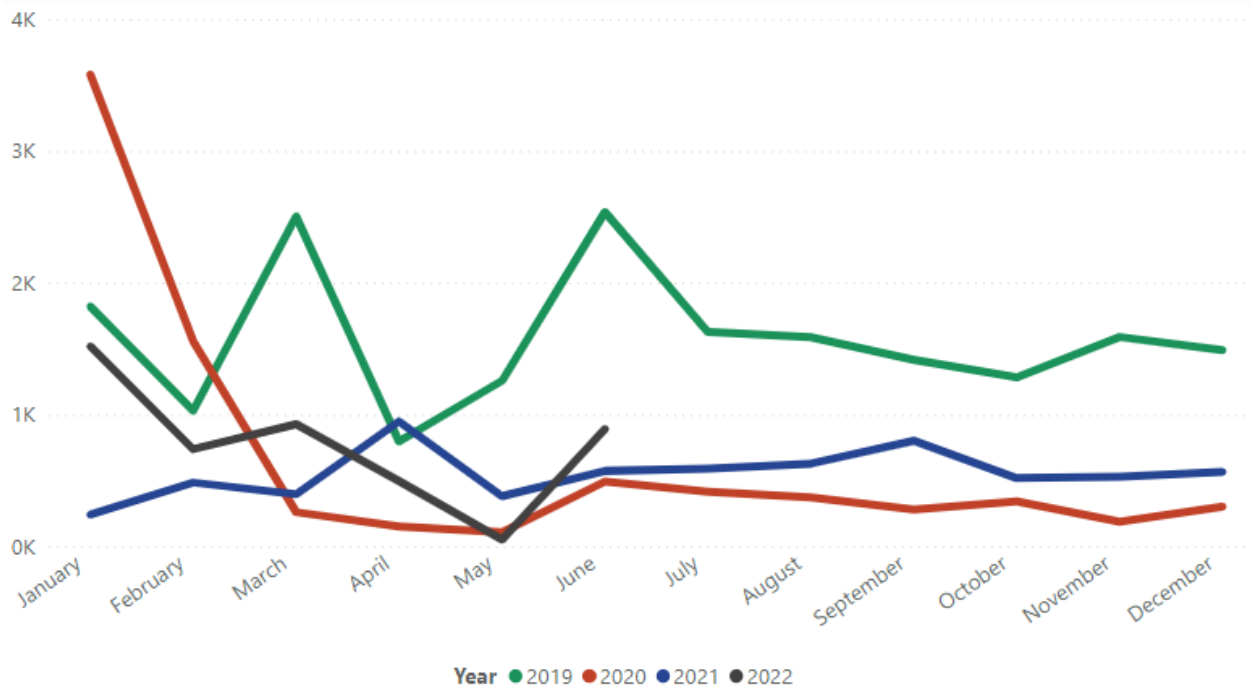
Chart 15—Extra-regional visitation (2019-June 2022)



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

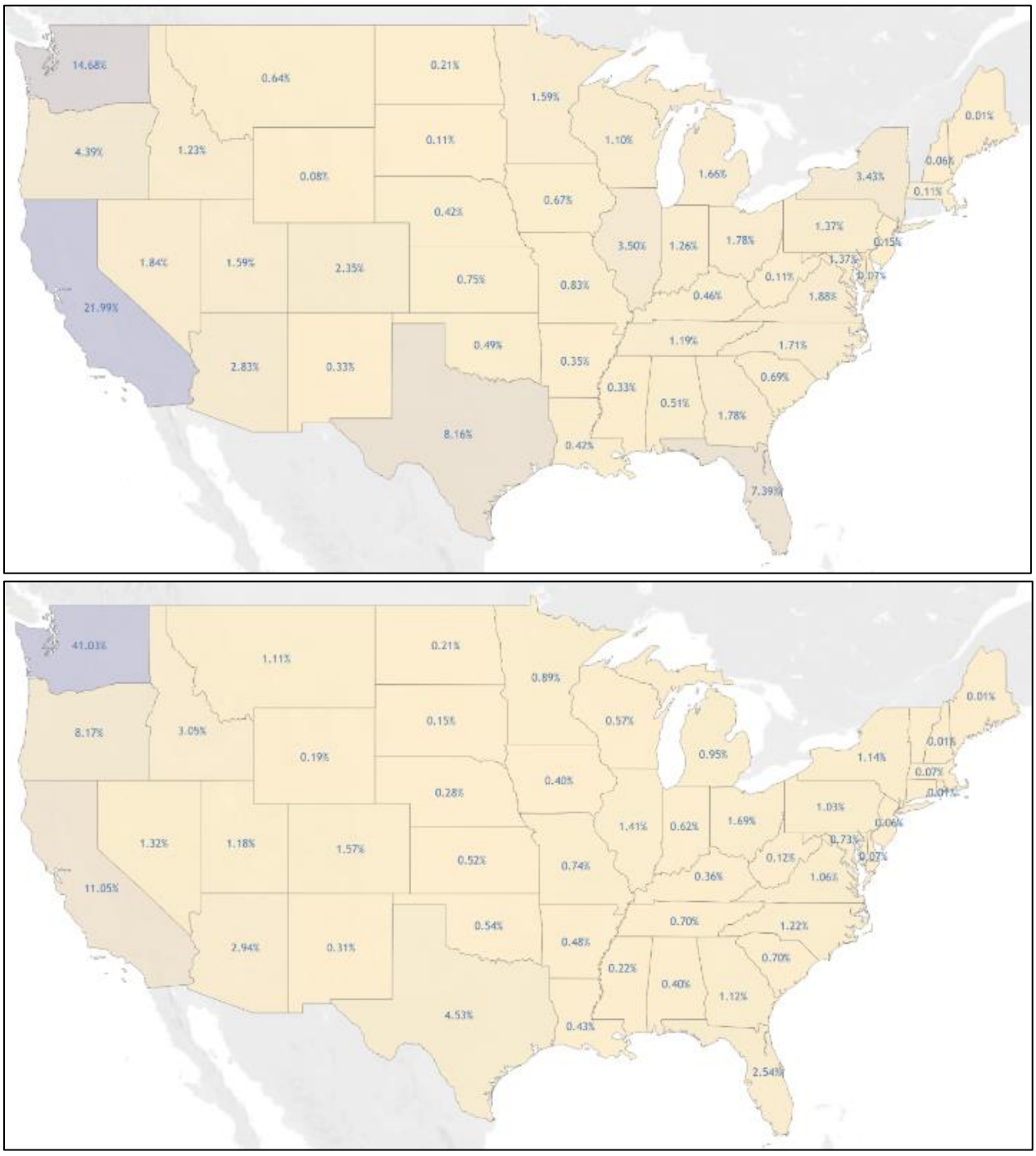
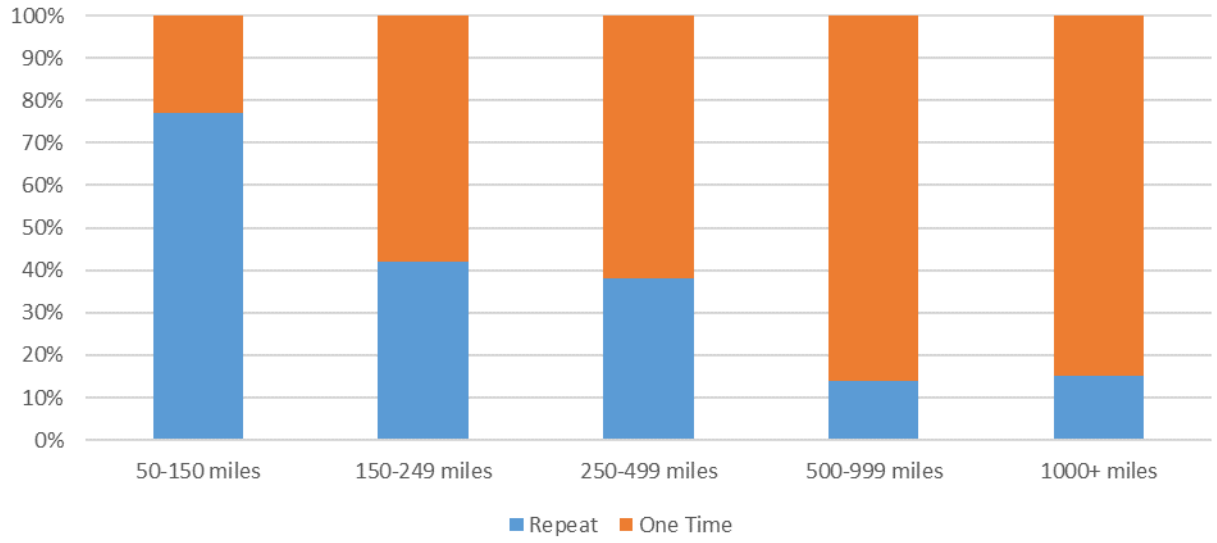


Chart 17 shows the shares of one-time, extra-regional visitors versus repeat visitors for various distance groupings. As should be expected from gravity model theory, repeat visitation appears to be a function of distance to venues: the closer a visitor lives to a cultural asset, the more likely they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

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%

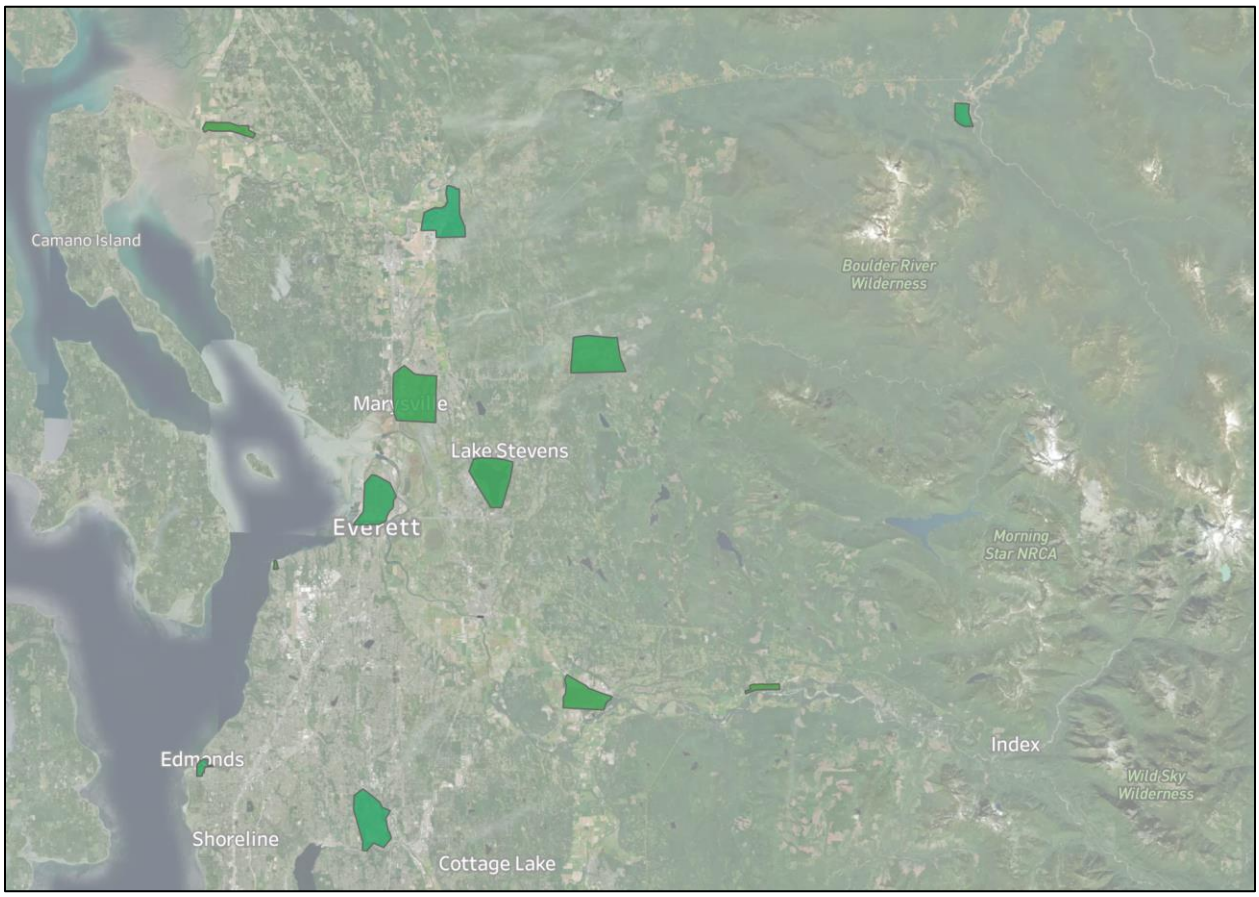
Key Benchmark: For cultural venue recovery, build back regional visitors (1 to 50 miles) rather than targeting extra-regional, markets of 50+ miles or more).

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 are shown on Map 5 for the following cities and towns, including:

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

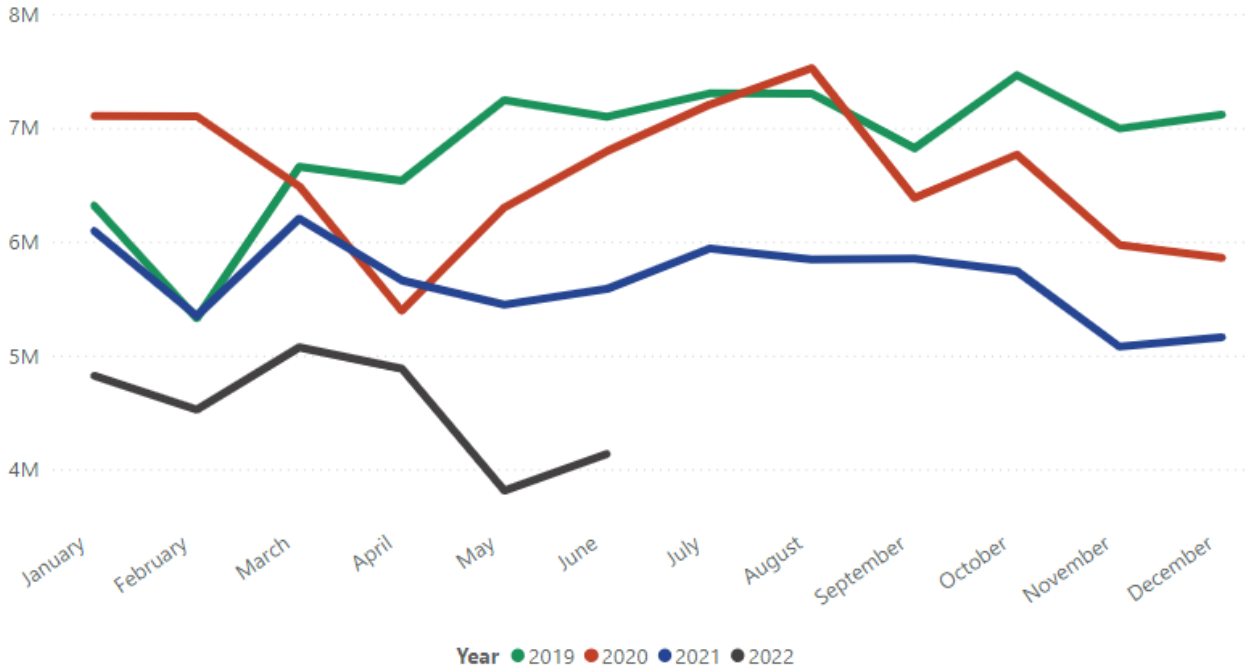
Map 5—Downtown POI boundaries



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.

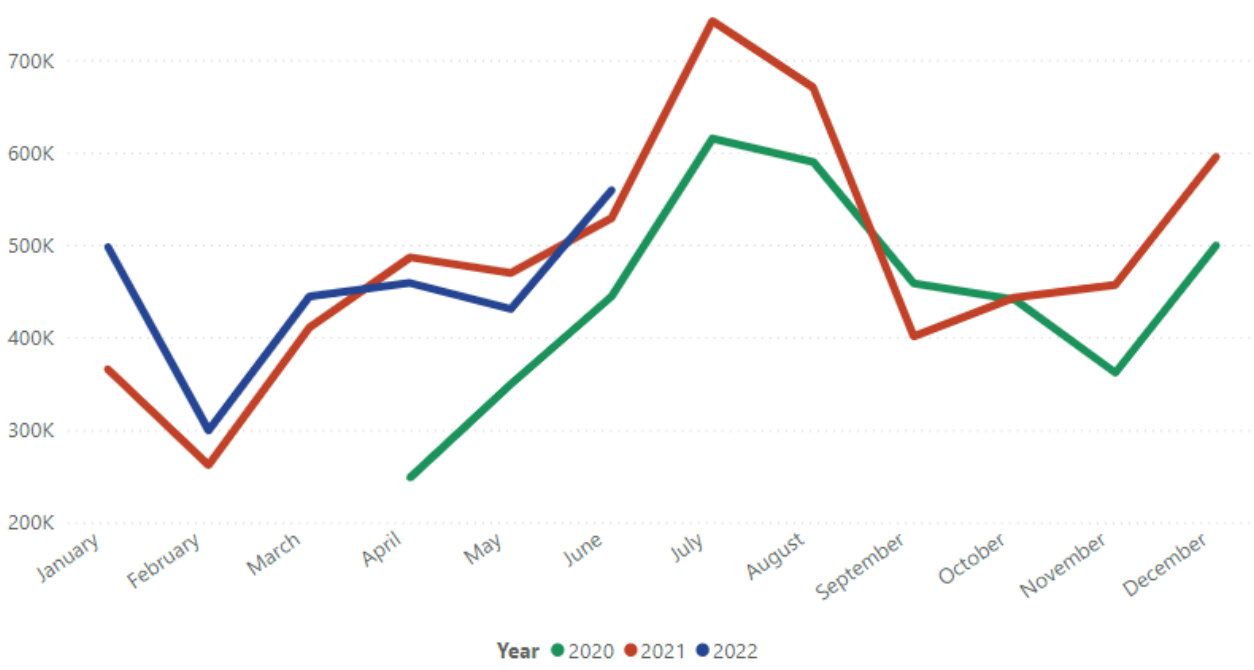
Extra-regional Market (51+ Miles)

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: 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—Q12: Where do you live? (n=398)

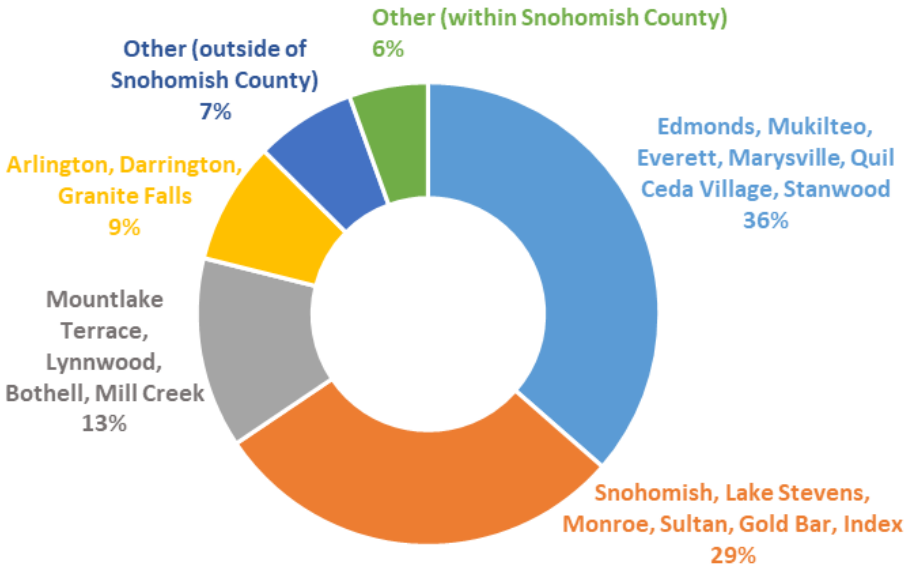


Chart 21—Q11: How do you identify? (n=394)

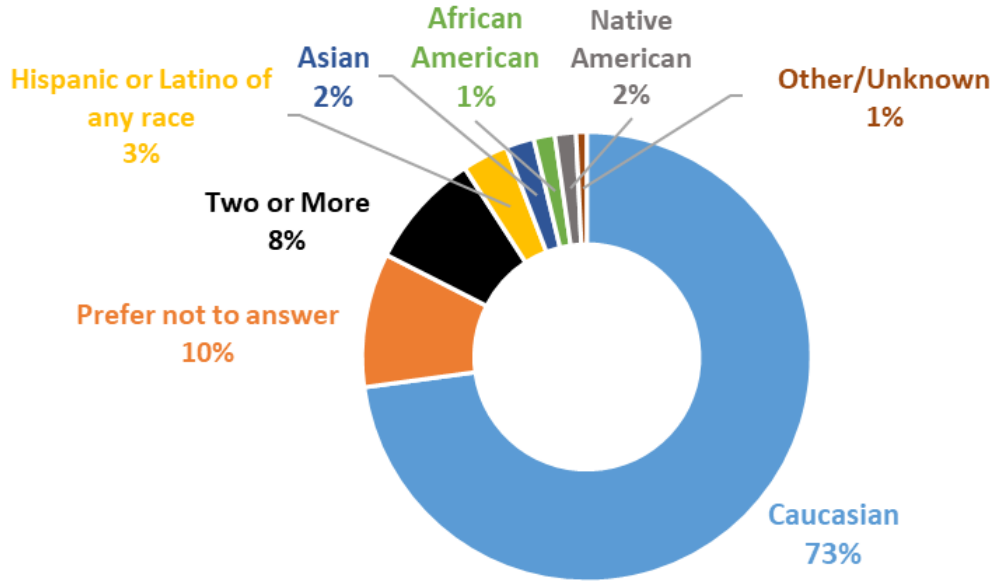
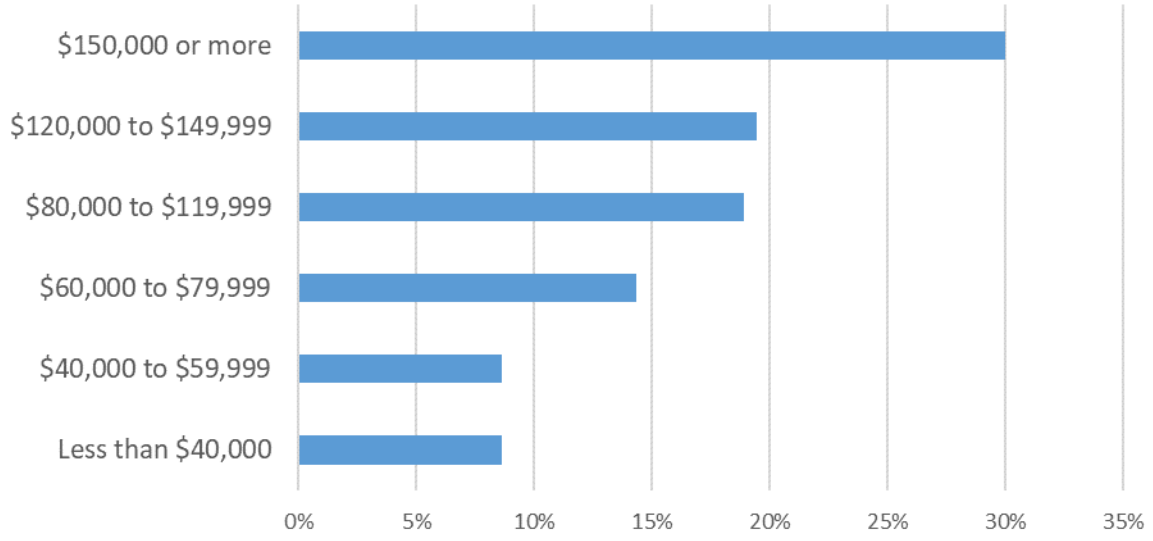


Chart 22—Q13: What is your total household income? (n=370)



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.

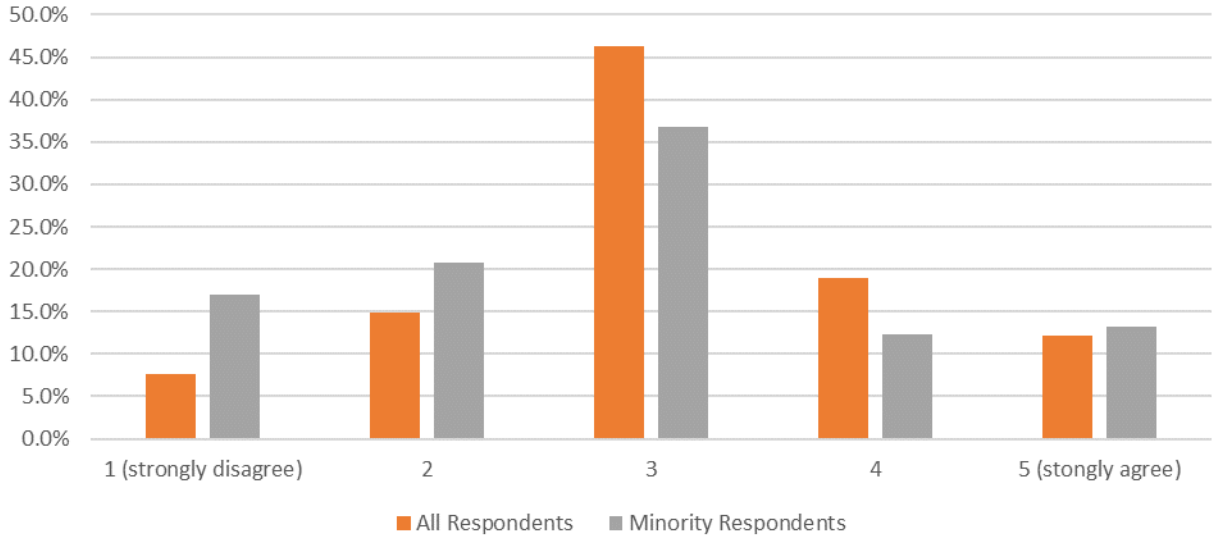
Chart 23—Q1: Communities rich with arts and culture experience the following benefits. Please prioritize these from greatest (1) to least (5). Average of each option shown. (n=324)

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)

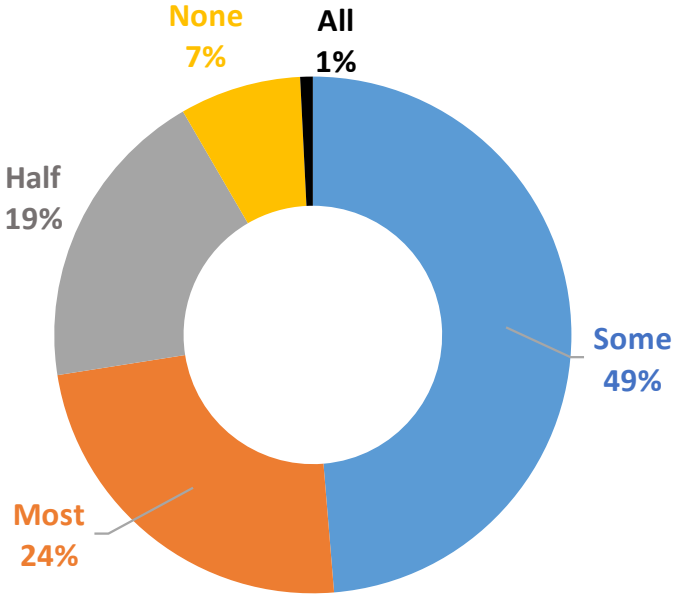
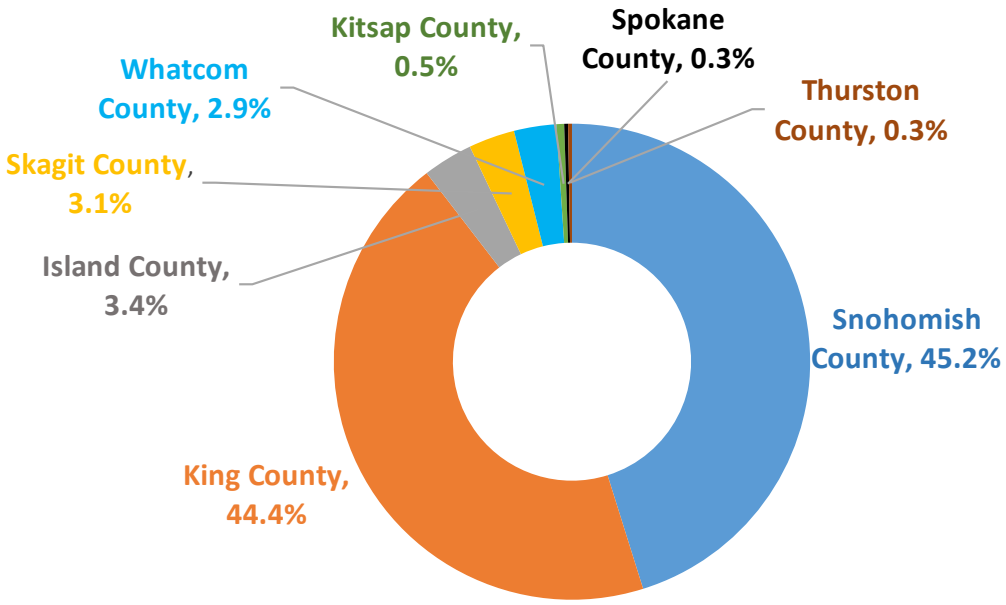


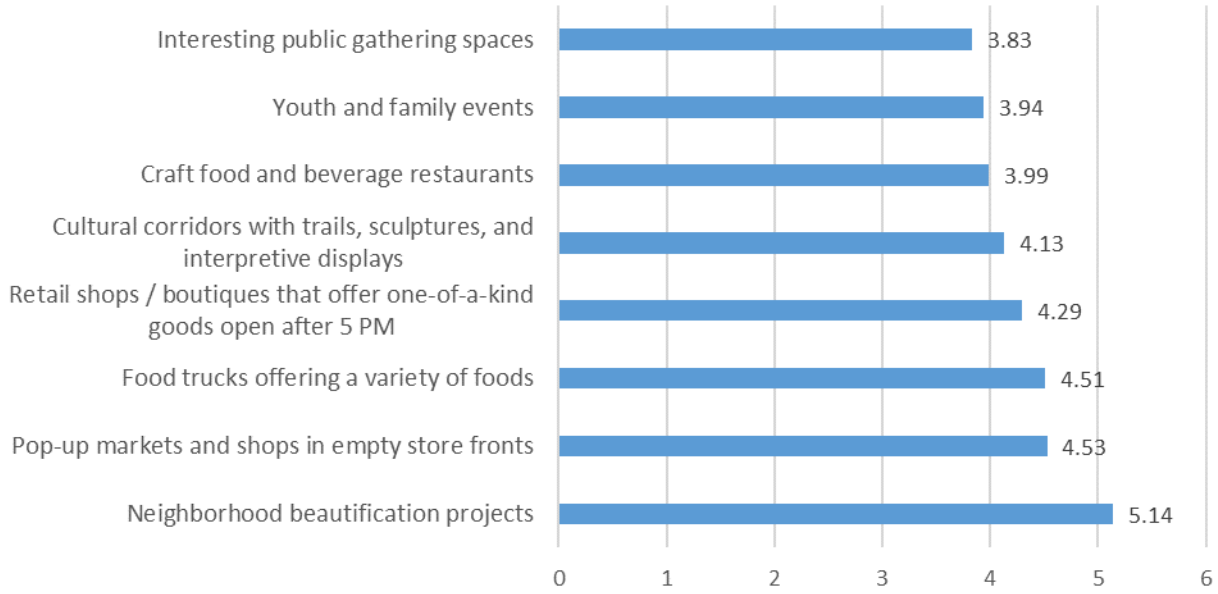
Chart 28— Q7: Select the county you go to MOST for arts and culture events and activities. (n=396)



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)

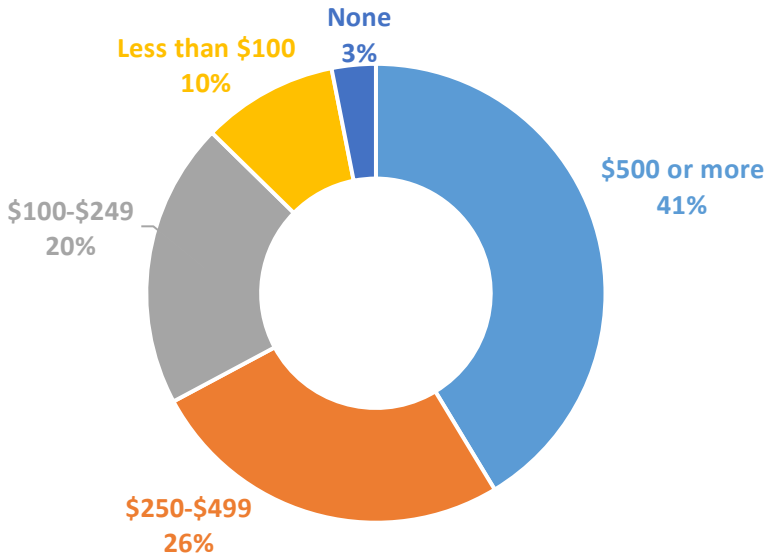


Table 12— Q10: crosstabulation by Income Level (n=398)

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)

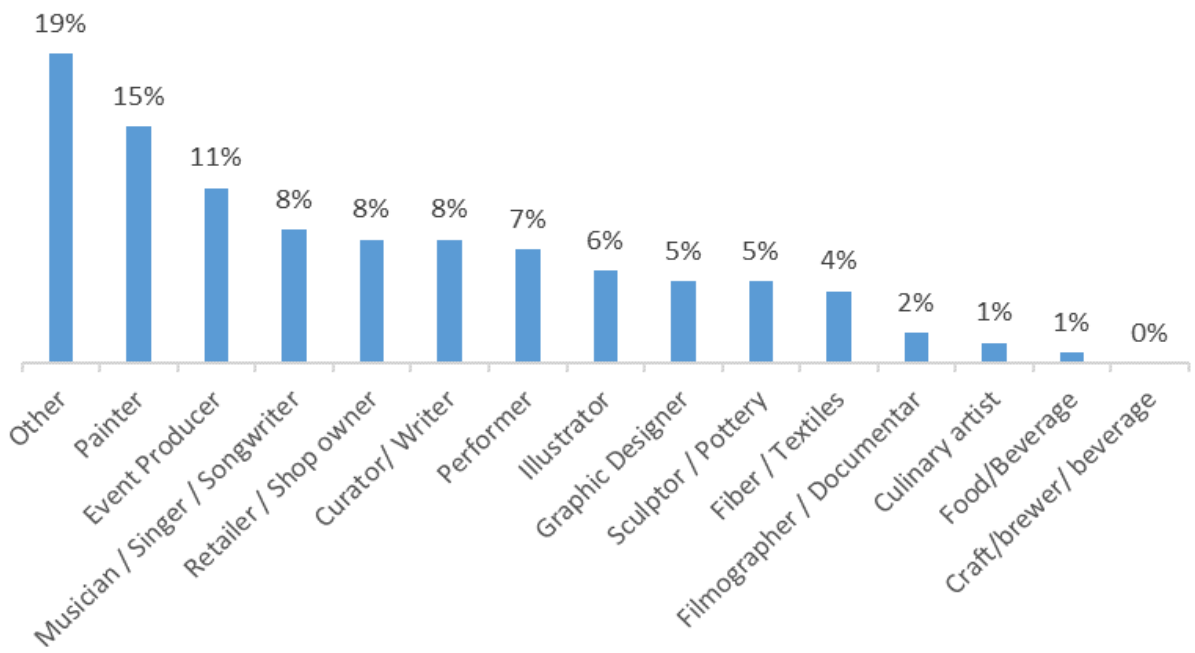
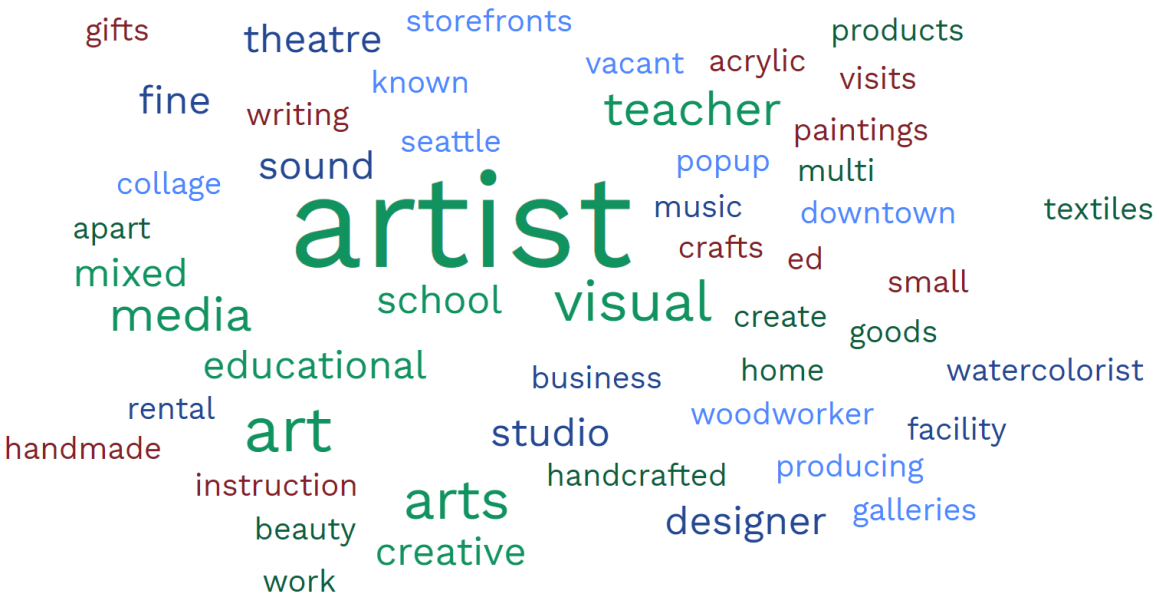
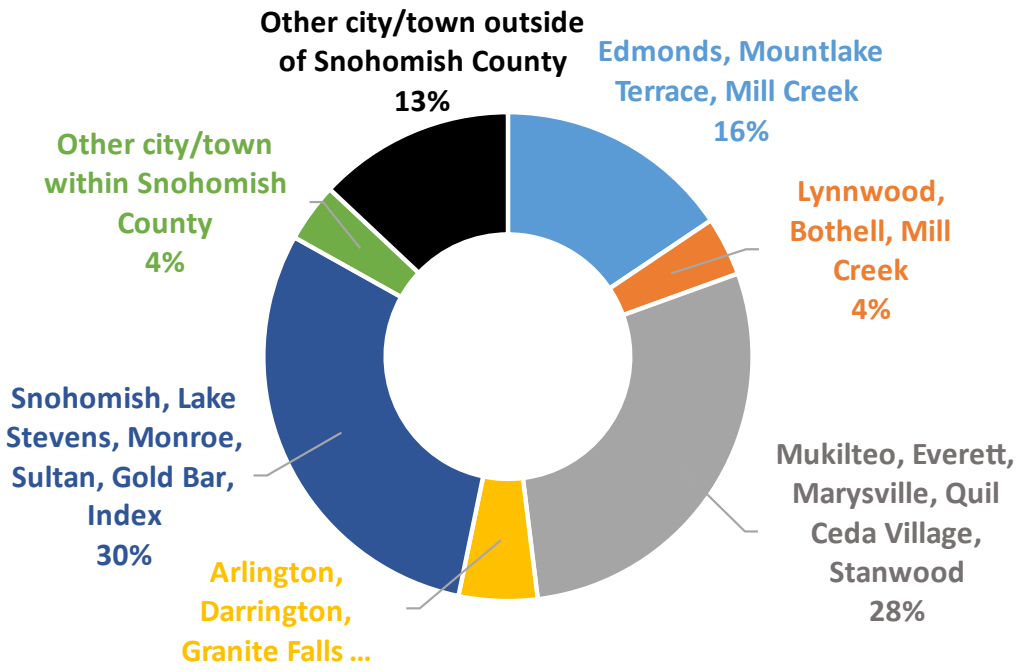


Chart 32—Q3: Word Cloud of “Other” business/occupation categories (n=16)



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)



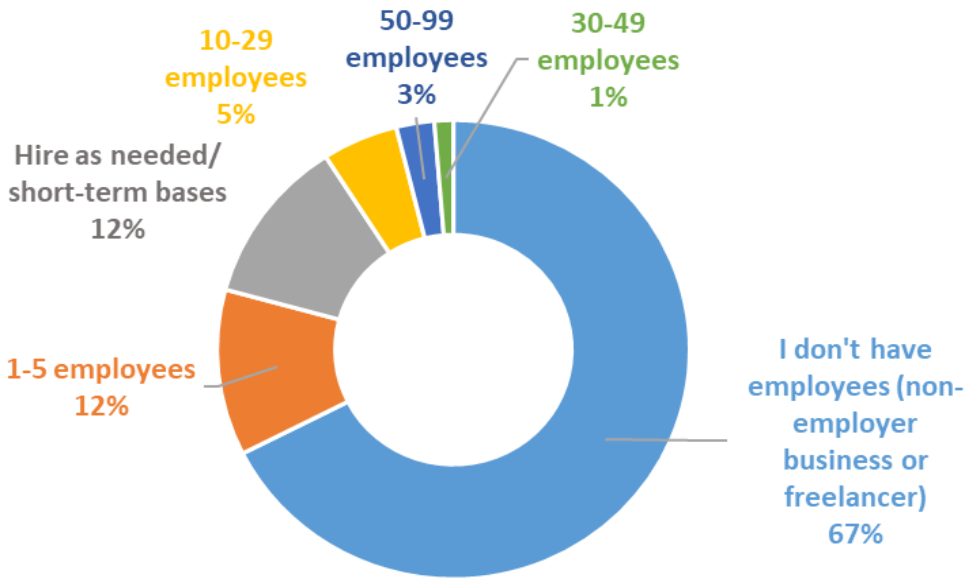
Respondents captured in the Creators Survey have a high correlation with the targeted 50 NAICS codes used to define Segment of Arts and Culture in Snohomish County, meaning findings from this section can be generalized using the economic analyses described in the previous sections.

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)?



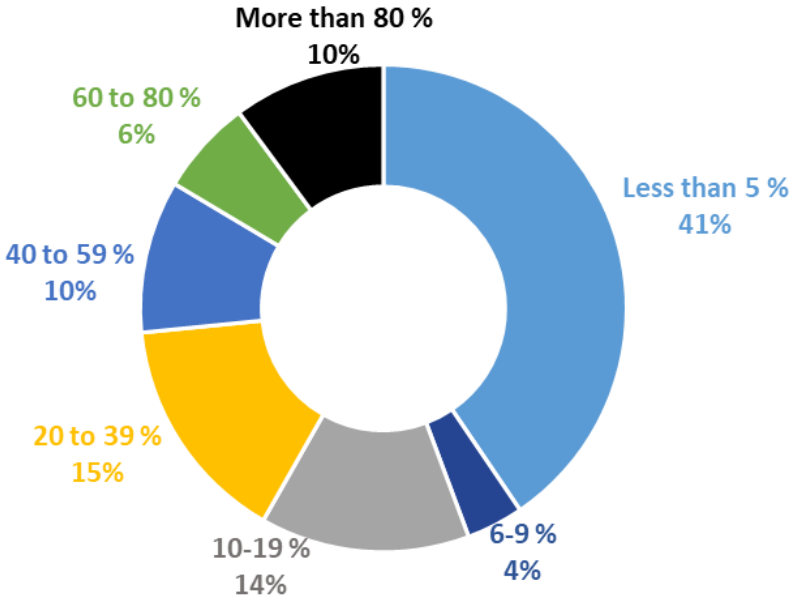
Creative pursuits can sometimes play a small role in household income, with many using arts and culture as a creative outlet, or hobby. This is supported by the survey findings, with 41 percent of respondents saying that their income contributed to less than five percent of total household income (this 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).

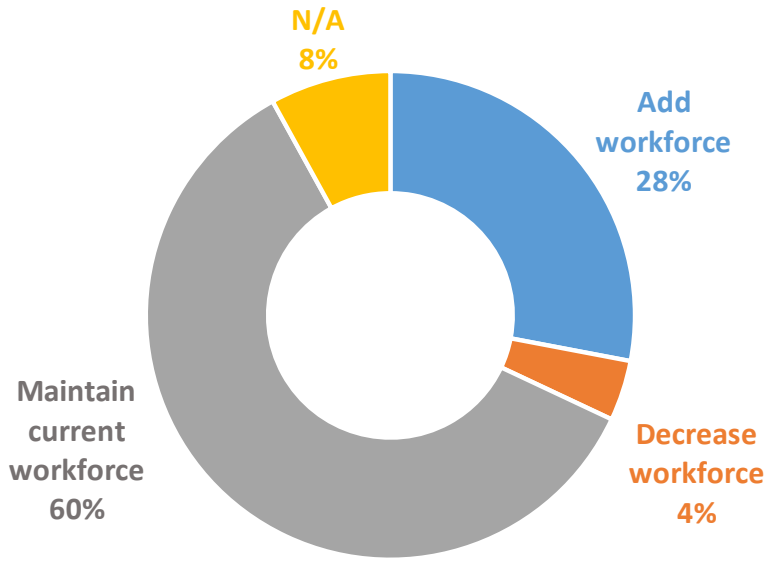
Key Takeaway: The County should identify and support those ready to scale their business, expand their workforce (or begin hiring if non-employers), and generate new wealth in the local economy.

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)

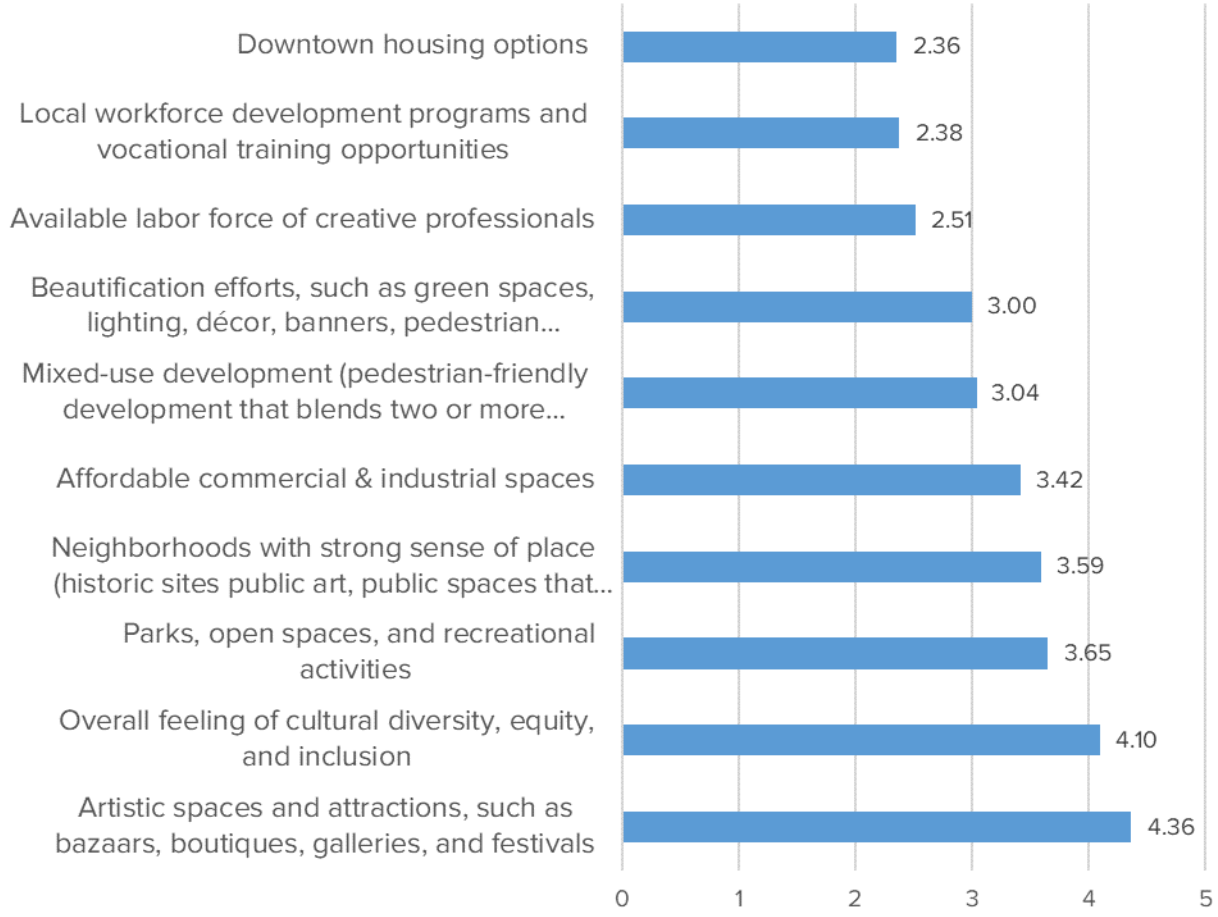


When asked what the County and related organizations should do to enhance the growth of Arts and Culture Segment, Creators ranked financial resources as their highest priority (see Chart 37). When broken down by type, although, non-employer businesses declared marketing resources as a slightly higher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

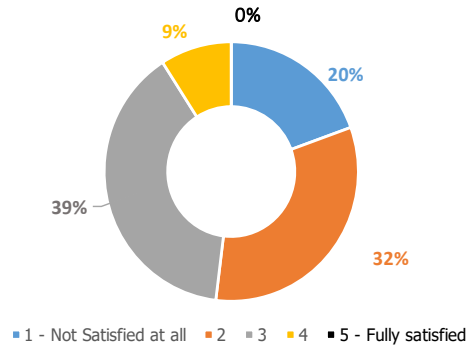


A large portion of the Creators survey (Q6-Q11) asked about overall satisfaction and resource availability in various categories. Overall, respondents were unsatisfied with current opportunities and suggested a lack of proper financial resources, training, and support services (see Chart 39).

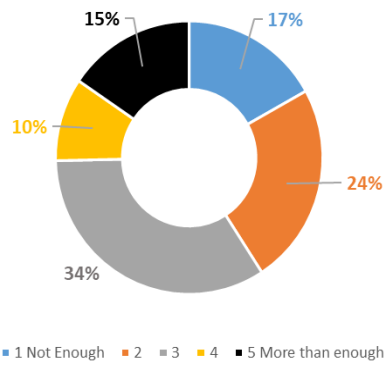
The type of Creator business compared to their income helps delineate where needs exist for the survey respondents: 32 percent of respondents that identify as out-of-home business report that their role in the creative economy makes up less than five percent of their household income**,** whereas nine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

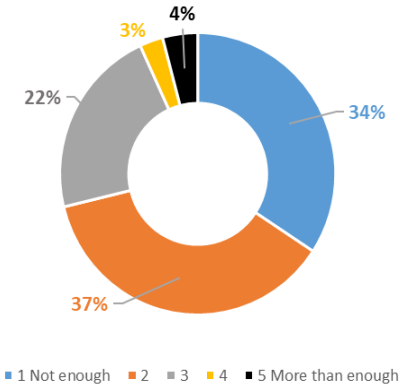
Q6: I am satisfied with the current opportunities for arts and culture workers and businesses within Snohomish County.



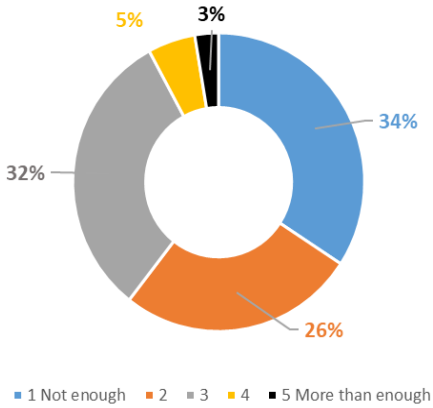
Q7: My business has access to the workforce needed to perform to the best of its ability.



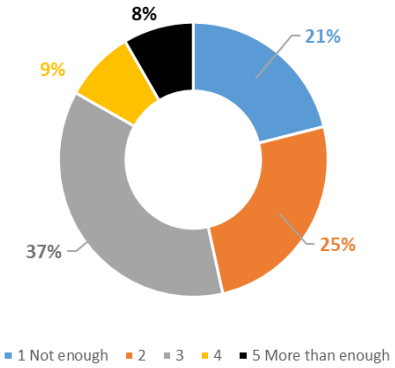
Q8: My business has access to the funding resources needed to perform to the best of its ability.



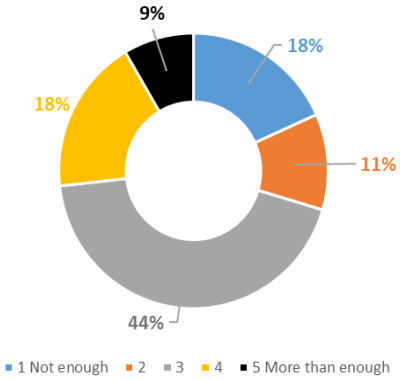
Q9: My business has access to support services needed to perform to the best of its ability.



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

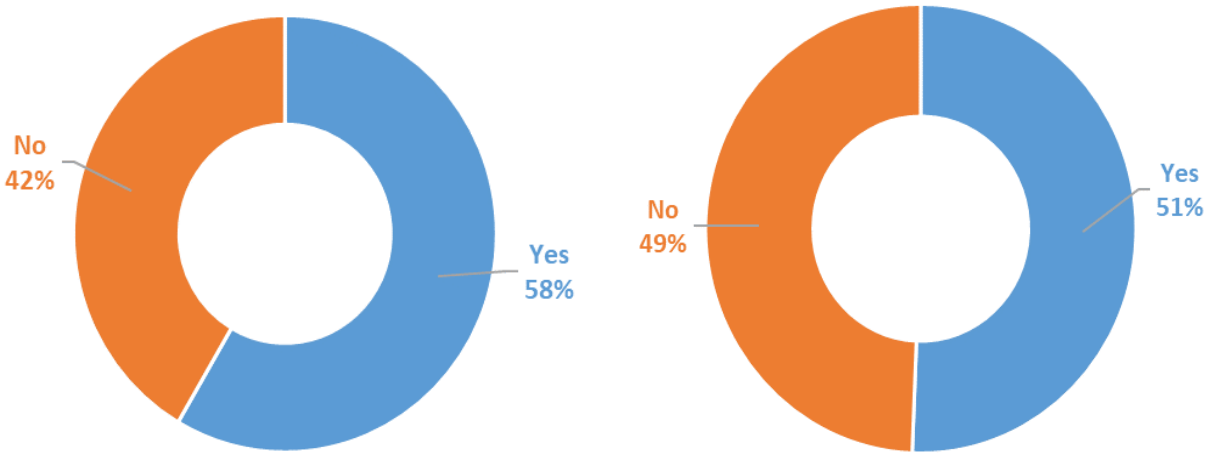


Q11: My business has access to the materials/ supplies needed to perform to the best of its ability.



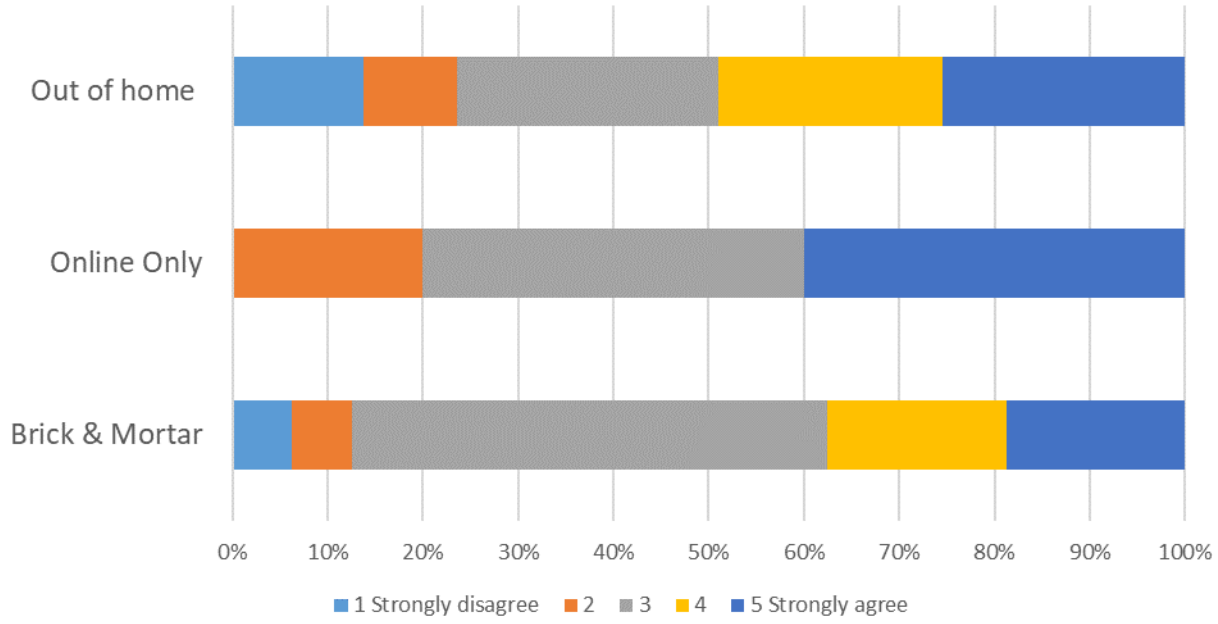
Income and resources both yield the retention of Arts and Culture workers and support the sustainability of the Segment. 58% of creators deem their creative income necessary for their financial survival, and 51% identify their work as a creator as their primary source income.

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)



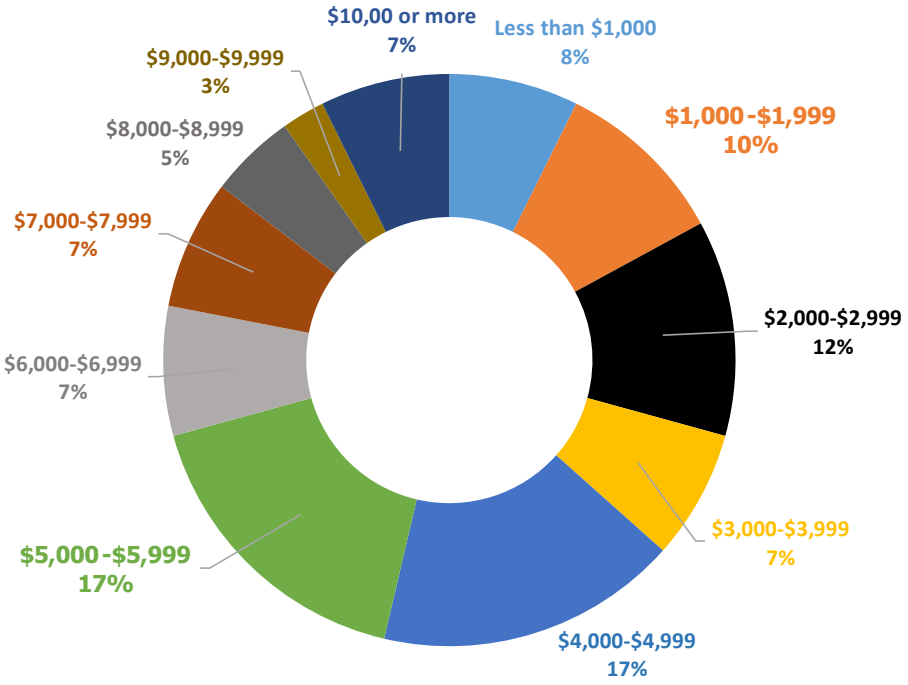
Financial needs differ across businesses, with online-only businesses showing much greater impacts on a Creator's ability to participate in the creative economy due to their income. Overall, 47 percent of all Creators feel that their income is a constraint on their ability to more fully participate in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



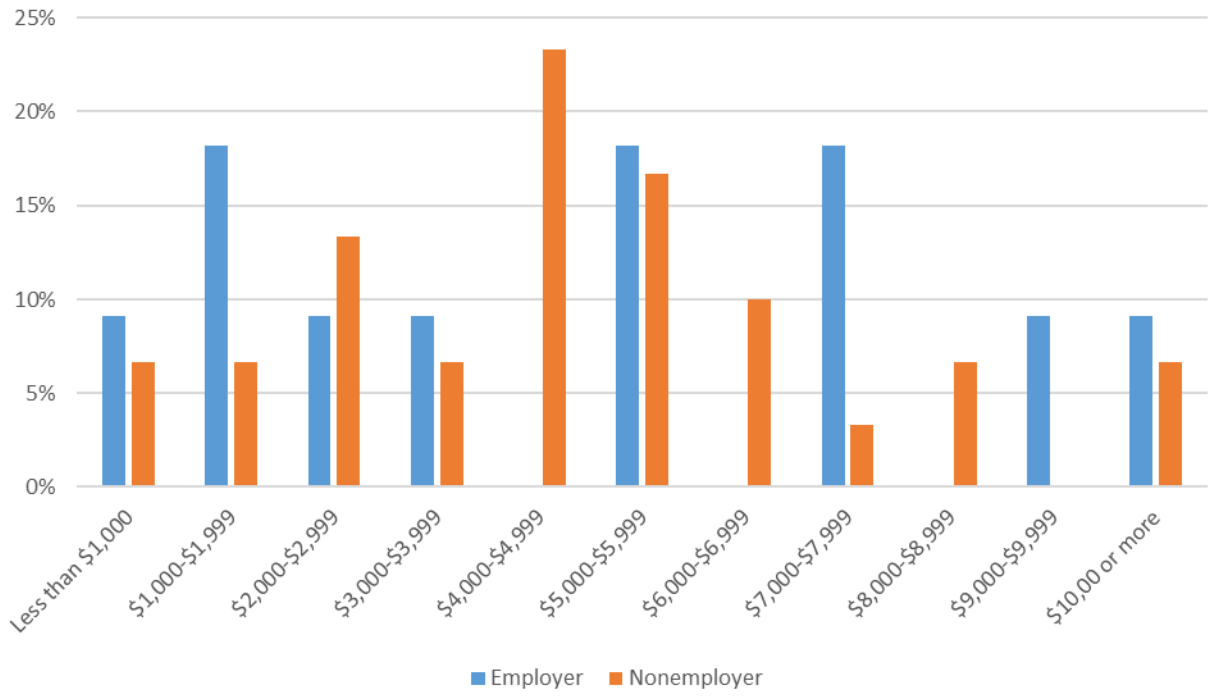
One of the survey questions asked creators who are currently participating in the Arts and Culture Segment as a secondary source of income, how much they would need to earn per month to convert it into a primary source of income. The spread was very high, however, there are a few Creators that are very 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.

Most of the analysis tools used in the workforce and industry section of the report are available at www.bettercity.us/snohomishfuturesproject 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: Survey Questions

Resident/Visitor Survey

1. Communities rich with arts and culture experience the following benefits. Please prioritize these.

Sort from most beneficial (highest) to least beneficial (lowest)

Move items here.

- Improved school attendance and graduation rates +
- Thriving boutique retail, craft food and beverage district(s) +
- Public gathering spaces that feel welcoming and inspire community connection +
- Participation and volunteerism from residents +
- More small businesses offering locally produced products +
- Exchange of ideas and meaningful dialogue within the community +
- Overall feeling of cultural diversity, equity, and inclusion +

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.

Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

Please share why.

3. Over the last three years, how often have you participated in the following activities?

	Weekly	Monthly	Annually	Never
Costume play (Cosplay), Live Action Role Playing (LARP), tabletop games	☐	☐	☐	☐
Cultural venues and interactive museums (history, heritage, science, art, industrial, etc.)	☐	☐	☐	☐
Demonstrations, workshops, and classes (fiber arts, gardening, pottery, photography, etc.)	☐	☐	☐	☐
Ethnic celebrations, events, and gatherings	☐	☐	☐	☐
Esports, video game competitions	☐	☐	☐	☐
Homesteading seminars and classes (equestrian, animal husbandry, brewing, preserving, foraging, farming, tiny house living, etc.)	☐	☐	☐	☐
Live independent or community performances (dance, readings, music, theater, etc.)	☐	☐	☐	☐
Live commercial events (concerts, circus, wrestling, racing, monster trucks, etc.)	☐	☐	☐	☐
Outdoor recreation classes and conventions (hunting, fishing, firearms, RVs, motorsports, etc.)	☐	☐	☐	☐
Outdoor sports (horseback riding, frisbee games, fishing, climbing, hunting, bird watching, etc.)	☐	☐	☐	☐
Shopping in fine arts galleries, boutique retail stores, etc.	☐	☐	☐	☐
Shopping for hand-crafted specialty foods, beverages, home/garden wares, clothing, etc.	☐	☐	☐	☐
Visits to parks, playgrounds, town centers, cultural and historic sites	☐	☐	☐	☐
Other activities not mentioned above	☐	☐	☐	☐

If you chose "other activity" above, please describe.

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

- ○ None
- ○ Some
- ○ Half
- ○ Most
- ○ All

5. Select the county you go to MOST for arts and culture events and activities.

- ○ Island County
- ○ Snohomish County
- ○ King County
- ○ Pierce County
- ○ Thurston County
- ○ Skagit County
- ○ Whatcom County
- ○ Kitsap County
- ○ Other (describe)

6. 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.

Sort most impactful (highest) to least impactful (lowest)

Move items here.

- Retail shops / boutiques that offer one-of-a-kind goods open after 5 PM +
- Pop-up markets and shops in empty store fronts +
- Food trucks offering a variety of foods +
- Craft food and beverage restaurants +
- Youth and family events +
- Interesting public gathering spaces +
- Neighborhood beautification projects +
- Cultural corridors with trails, sculptures, and interpretive displays +

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

Light rail service is scheduled to begin in Snohomish County in 2024/25. The Lynnwood and Everett communities are set for 2036. Communities planned around light rail service are usually walkable and transit-oriented, and have a potential to create accessible, creative places. Are there any feature or amenities, such as regionally themed public art, accessible community spaces, cultural events, or any other features or amenities you'd like to see in these communities?

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?

- ○ None
- ○ Less than $100
- ○ $100-$249
- ○ $250-$499
- ○ $500 or more

9. How do you identify?

- ○ African American
- ○ Asian
- ○ Caucasian
- ○ Hispanic or Latino of any race
- ○ Native American
- ○ Native Hawaiian or Pacific Islander
- ○ Other/Unknown
- ○ Two or More
- ○ Prefer not to answer

10. Where do you live?

- ○ Edmonds, Mukilteo, Everett, Marysville, Quil Ceda Village, Stanwood
- ○ Mountlake Terrace, Lynnwood, Bothell, Mill Creek
- ○ Arlington, Darrington, Granite Falls
- ○ Snohomish, Lake Stevens, Monroe, Sultan, Gold Bar, Index
- ○ Other (within Snohomish County)
- ○ Other (outside of Snohomish County)

11. What is your total household income?

All results will be reported anonymously and as an aggregated measure.

- ○ Less than $40,000
- ○ $40,000 to $59,999
- ○ $60,000 to $79,999
- ○ $80,000 to $119,999
- ○ $120,000 to $149,999
- ○ $150,000 or more

12. Rank the following based on how much time you spend on each platform per month.

Place in order of usage from top (highest usage) to bottom (lowest usage).

Move items here.

- Google +
- Email +
- TikTok +
- Facebook +
- Instagram +
- Twitter +
- Snapchat +

13. Please indicate if you are willing to participate in other Future of Arts and Culture Project activities (select all that apply)

- ☐ Surveys
- ☐ Focus Groups
- ☐ Workshops
- ☐ Supporting outreach through my organizational newsletters and social network
- ☐ Become Future's Project Ambassador

If you would like to stay involved or select any of the above choices to participate in, please share your email below.

If you share your information, it will not be sold or shared with third parties.

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?

Yes | No

2. How do you identify in the creative economy?

In your own words, describe your profession in the arts and culture industry.

3. Which of the following best matches your business/occupation?

Select as many creative economy jobs that describe yourself best

- [ ] Culinary artist
- [ ] Curator/ Writer
- [ ] Filmographer / Documentarian
- [ ] Illustrator
- [ ] Musician / Singer / Songwriter
- [ ] Painter
- [ ] Photographer
- [ ] Sculptor / Pottery
- [ ] Streamer / Youtuber / Blogger
- [ ] Graphic Designer
- [ ] Performer
- [ ] Food/Beverage
- [ ] Fiber / Textiles
- [ ] Retailer / Shop owner
- [ ] Craft/brewer/ beverage
- [ ] Event Producer
- [ ] Other (describe)

4. What is your current role in the creative economy?

- ○ Business Owner / Solopreneur
- ○ Employee of arts and culture small business (Full time)
- ○ Employee of arts and culture small business (Part time)
- ○ Freelancer (I don't work for / own a small business)

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

Place in order of priority from top (highest priority) to bottom (lowest priority)

Move items here.

- Financial resources +
- Marketing resources +
- Education resources +
- Affordable maker spaces / coworking locations +
- Networking opportunities +

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

Not satisfied at all | 1 | 2 | 3 | 4 | 5 | Fully Satisfied

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

Not enough | 1 | 2 | 3 | 4 | 5 | More than enough

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

Not enough | 1 | 2 | 3 | 4 | 5 | More than enough

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

Business support includes taxes, legal assistance, loans, grants, administrative, etc.

Not enough | 1 | 2 | 3 | 4 | 5 | More than enough

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

Not enough | 1 | 2 | 3 | 4 | 5 | More than enough

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

Not enough | 1 | 2 | 3 | 4 | 5 | More than enough

12. Would you prefer to purchase your material/supply locally?

Yes | No

13. If you said yes, describe what material/supplies you would like?

14. Do you have to rely on child/elderly care in order to do your job?

Yes | No

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

Yes | No

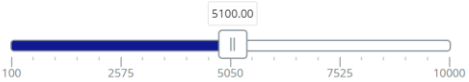
16. My ability to earn income in my current role in the creative economy is limiting my participation in the arts and culture industry.

Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

17. Is your current role in the creative economy your primary source of employment?

Yes | No

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?



19. If you answered no, please list your primary source of employment.

20. Is your creative economy income necessary for your financial survival?

Yes | No

21. If you would like to add more detail to your above responses, provide below:

22. What percentage of your household's income comes from your role in the creative economy?

- More than 80 %
- 60 to 80 %
- 40 to 59 %
- 20 to 39 %
- 10-19 %
- 6-9 %
- Less than 5 %

23. How would you identify your business?

- Brick and mortar
- Online only
- Out of home business

24. Is your business currently in Snohomish County, or are you considering relocating to Snohomish County?

- Currently in Snohomish County
- Considering relocating to Snohomish County
- Neither

25. Where is your business located?

For freelancers and out-of-home workers, please provide the city / town where you reside.

- Edmonds, Mountlake Terrace, Mill Creek
- Lynnwood, Bothell, Mill Creek
- Mukilteo, Everett, Marysville, Quil Ceda Village, Stanwood
- Arlington, Darrington, Granite Falls
- Snohomish, Lake Stevens, Monroe, Sultan, Gold Bar, Index
- Other city/town within Snohomish County
- Other city/town outside of Snohomish County

26. How often do you leave the city to do your work?

- Daily
- Weekly
- Monthly
- Annually

27. If you leave your city for work opportunities, what city are those opportunities in?

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

An employee would be considered outside of your own self

- I don't have employees (non-employer business or freelancer)
- Hire as needed/ short-term bases
- 1-5 employees
- 6-9 or more employees
- 10-29 employees
- 30-49 employees
- 50-99 employees
- 100-249 employees
- 250 or more employees

29. Over the next year, do you think your organization will

- Add workforce
- Maintain current workforce
- Decrease workforce
- N/A

30. How do you identify?

- African American
- Asian
- Native American
- Native Hawaiian or Pacific Islander
- Hispanic or Latino of any race
- White
- Other
- Prefer not to answer
- Two or More

31. What changes would you recommend to help the arts and culture industry thrive within Snohomish County?

What examples of infrastructure, development, or activities will improve arts, culture, and the creative sector? Is there anything major that Snohomish County can do in terms of urban planning policy, land use design, or infrastructure and development that would help your creative industry thrive?

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

0 = Not at all important to 5 = Very important

	0	1	2	3	4	5
Artistic spaces and attractions, such as bazaars, boutiques, galleries, and festivals	☐	☐	☐	☐	☐	☐
Affordable commercial & industrial spaces	☐	☐	☐	☐	☐	☐
Available labor force of creative professionals	☐	☐	☐	☐	☐	☐
Beautification efforts, such as green spaces, lighting, décor, banners, pedestrian infrastructure, etc.	☐	☐	☐	☐	☐	☐
Diversity of retail spaces (pop-ups, strip malls, factory outlets, warehousing etc.)	☐	☐	☐	☐	☐	☐
Downtown housing options	☐	☐	☐	☐	☐	☐
Local workforce development programs and vocational training opportunities	☐	☐	☐	☐	☐	☐
Mixed-use development (pedestrian-friendly development that blends two or more residential, commercial, cultural, institutional, and/or industrial uses)	☐	☐	☐	☐	☐	☐
Neighborhoods with strong sense of place (historic sites public art, public spaces that encourage community interaction, signage, wayfinding maps, etc.)	☐	☐	☐	☐	☐	☐
Overall feeling of cultural diversity, equity, and inclusion	☐	☐	☐	☐	☐	☐
Parks, open spaces, and recreational activities	☐	☐	☐	☐	☐	☐

33. Are there any creative features or amenities that you would like to see in Snohomish County's light rail communities?

Light rail service is scheduled to begin in Snohomish County in 2024/25. The Lynnwood and Everett communities are set for 2036. Communities planned around light rail service are usually walkable and transit-oriented, and have a potential to create accessible, creative places. Are there any feature or amenities, such as regionally themed public art, accessible community spaces, cultural events, or any other features or amenities you'd like to see in these communities?

Please indicate if you are willing to participate in other Future of Arts and Culture Project activities (select all that apply)

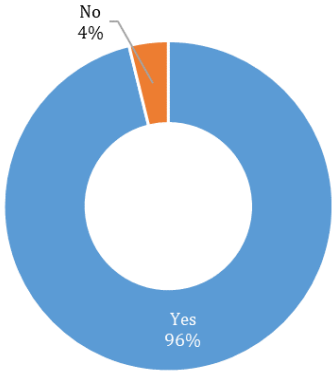
- ☐ Surveys
- ☐ Focus Groups
- ☐ Workshops
- ☐ Supporting outreach through my organizational newsletters and social network
- ☐ Become Future's Project Ambassador

If you would like to stay involved or select any of the above choices to participate in, please share your email

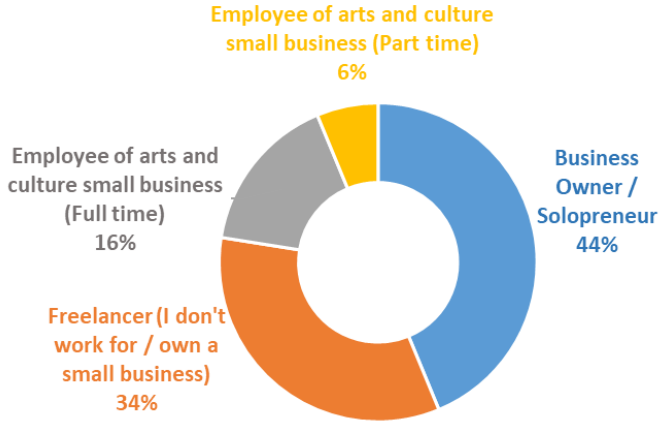
If you share your information, it will not be sold or shared with third parties.

Appendix IV: Additional Creator Survey Responses

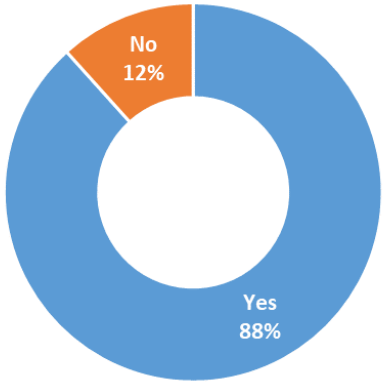
Q1: Are you a culture maker, artistic creator, cultural business, staffer, volunteer, and/or solopreneur generating income in the County's Creative Economy (n=78)



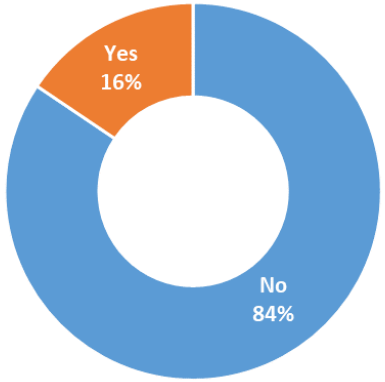
Q4: What is your current role in the creator economy? (n=80)



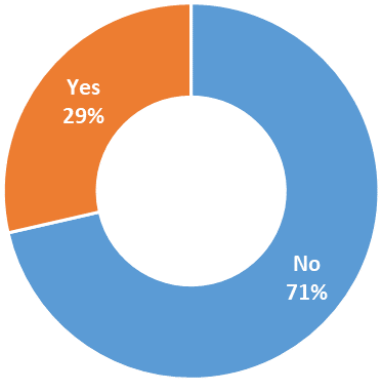
Q12: Would you prefer to purchase your material/supply locally?



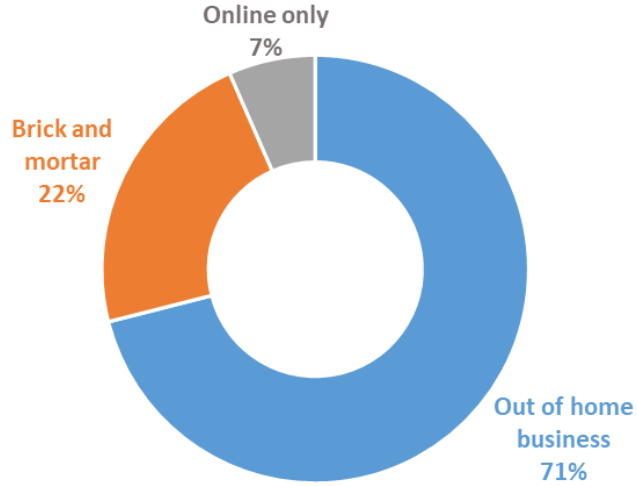
Q14: Do you have to rely on child/elderly care in order to do your job? (n=77)



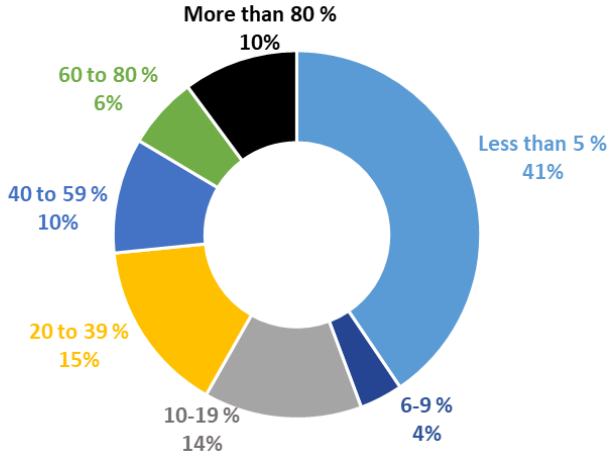
Q15: Are you a retiree who is pursuing arts and culture as a business or secondary source of income? (n=77)



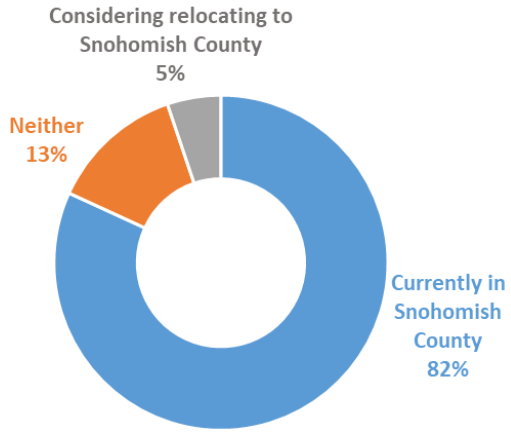
Q23: How would you identify your business? (n=76)



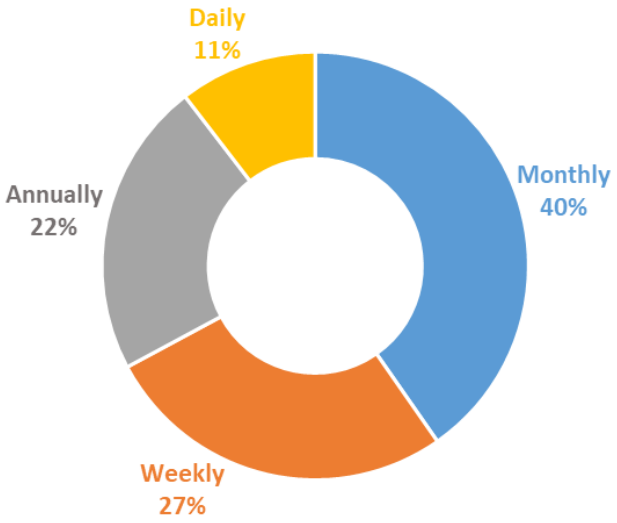
Q22: What percentage of your household's income comes from your role in the creative economy? (n=79)



Q24: Is your business currently in Snohomish County, or are you considering relocating to Snohomish County? (n=77)



Q26: How often do you leave the city to do your work? (n=67)



Q30: How do you identify? (n=77)