

Attachment A

**Office of Economic Opportunity and Creative Economy
Accountability Report**

December 2024



King County

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I. Proviso Text

Ordinance

[Ordinance 19546](#), Section 20, Proviso P1.¹

Of this appropriation, \$100,000 shall not be expended or encumbered until the executive transmits an accountability report related to the office of economic opportunity and creative economy and a motion that should acknowledge receipt of the report and a motion acknowledging receipt of the report is passed by the council. The motion should reference the subject matter, the proviso's ordinance number, ordinance section and proviso number in both the title and body of the motion.

The report shall include, but not be limited to, the following:

- A. A business plan supporting investments for the office of economic opportunity and creative economy. The plan shall also include a definition of what constitutes a creative economy. The business plan shall include, but not be limited to:
 - 1. both long-term and short-term goals, objectives and strategies of the office;*
 - 2. proposed activities to implement the strategies;*
 - 3. performance metrics including benchmarks and targets to measure the objectives; and*
 - 4. the resources necessary to achieve either the performance benchmarks, performance targets or both;**
- B. Analysis of the results achieved during the 2023-2024 biennium with the addition of both the director of creative economy and director of economic development and economic recovery. As much as feasible, quantitative results shall be provided;*
- C. Assessment of the region's current creative economy market, analysis of the region's creative economy market potential and the rationale for the need for the office of economic opportunity and creative economy to achieve the region's creative economy market potential;*
- D. Quantitative analysis of the results achieved during the 2023-2024 biennium with the investment of the Harbor Island sound stages and a rationale of how the sound stages would be an economic benefit for the county;*
- E. Strategies on how the office of economic opportunity and creative economy will have deliberate focus on historically and currently disadvantaged communities including those communities most impacted by the pandemic and its disproportionate health and economic effects; and*
- F. The office of economic opportunity and creative economy's role in existing county economic development programs such as, but not limited to, the Department of Local Services' economic development and small business assistance programs, Department of Local Services' unincorporated economic alliance program, the lodging tax supported tourism allocations and the Black, Indigenous and People of Color (BIPOC) business and economic resiliency program.*

The executive should electronically file the report and motion required by this proviso no later than December 31, 2024, with the clerk of the council, who shall retain an electronic copy and provide an electronic copy to all councilmembers, the council chief of staff and the lead staff for the transportation, economy and environment committee or its successor.

¹ "Legislation Detail: ID 5853313." *King County Legislation*. Accessed November 24, 2024.
<https://kingcounty.legistar.com/LegislationDetail.aspx?ID=5853313&GUID=F6192C85-2562-418F-8276-C64CEFB14DEF>.

II. Executive Summary

Office Overview

The Office of Economic Opportunity and Creative Economy's (OEOCE) mission is to advance economic opportunity and growth throughout the King County region by fortifying community partnerships and resources. OEOCE's responsibilities set forth in [Ordinance 19541](#) are:

- Coordinating the county's efforts to develop a strong equitable economy that creates opportunities for all residents;
- Developing and implementing strategies to promote economic revitalization and equitable development; and
- Assisting communities and businesses in creating economic opportunities, promoting a diversified economy, and promoting family-wage job creation.

OEOCE Duties and Functions: OEOCE is a hub to align strategy and policy across King County's executive branch. The OEOCE has two directors, one to oversee economic opportunity and one to lead creative economy. The directors serve on the Executive's Cabinet, advise the Executive on economic development policy, creative economy policy, strategy, and budget. In 2024, OEOCE employs four full-time employees and manages a \$2.1 million budget.

In addition to performing its code-identified responsibilities, OEOCE develops countywide strategies, aligns King County policy priorities with community needs, and unifies economic development work among executive branch departments.

On behalf of the Executive, OEOCE oversees strategic partnerships with economic and workforce development organizations, such as [Greater Seattle Partners](#),² [Port of Seattle](#),³ [Workforce Development Council of Seattle-King County](#),⁴ and [Associate Development Organization \(Seattle Metropolitan Chamber of Commerce\)](#).⁵ In addition, the OEOCE performs the following duties:

- Convenes the Economic Opportunity Coalition, a monthly meeting with 20+ King County Executive Branch representatives who work in economic and workforce development. OEOCE helps coordinate and share information with this group to help advance King County's economic and workforce goals;
- Works in collaboration with the [Executive Climate Office](#),⁶ to help address climate change impacts of workforce, business, and economic development. OEOCE staff are contributors to the Strategic Climate Action Plan (SCAP);

² "Greater Seattle." *Greater Seattle*. Accessed November 24, 2024. <https://greater-seattle.com/>.

³ "Port of Seattle." *Port of Seattle*. Accessed November 24, 2024. <https://www.portseattle.org/>.

⁴ "Seattle-King County Workforce Development Council." *Seattle-King County Workforce Development Council*. Accessed November 24, 2024. <https://www.seakingwdc.org/>.

⁵ "Seattle Metropolitan Chamber of Commerce." *Seattle Metropolitan Chamber of Commerce*. Accessed November 24, 2024. <https://www.seattlechamber.com/>.

⁶ "Climate Change." *King County*. Accessed November 24, 2024. <https://kingcounty.gov/en/legacy/services/environment/climate.aspx>.

- Supports key industry sectors and provides focused attention to creative industries, with an emphasis on film and music production;
- Consults on small business assistance to the unincorporated areas of King County;
- Oversees the Executive's Local Food Initiative;
- Plans the annual Executive's Small Business Awards;
- Fosters tourism and hospitality;
- Collaborates with 4Culture, and
- Manages the Executive's Film Advisory Board (EFAB)

OEOCE Business Plan

The OEOCE business plan (Appendix A.1) outlines the office's goals, objectives, strategies, milestones, and key performance measures (KPMs) during the 2023-2024 biennium. This plan describes 19 priority initiatives and their alignment with the County's equity, racial, and social justice priorities.

To ensure program and project efficacy, OEOCE developed a diverse mix of goals and strategies that were informed by ongoing engagement with residents and combined with data-driven decision-making. OEOCE provided focused support on several key sectors during the biennium, including film, music, aerospace, local food, and tourism. Key efforts included:

- Continued development of Harbor Island Studios⁷
- Expansion of the award-winning Community Business Connector program⁸
- Production of the Cloudbreak Music Festival⁹
- Completion of the International Public Market Feasibility Analysis¹⁰
- Re-envisioning the Executive's Small Business Awards¹¹
- Funding the Air & Space 2030 Strategy¹²
- Expansion of the King County Aerospace Alliance¹³
- Launching the Economic Opportunity Coalition¹⁴

⁷ King County Creative. "Harbor Island Studios." Accessed December 6, 2024.

<https://kingcountycreative.com/harbor-island-studios/>.

⁸ Seattle Metro Chamber of Commerce. "Community Business Connector." Accessed December 6, 2024.

<https://communitybusinessconnector.com/>.

⁹ Cloudbreak Music Fest. "Cloudbreak Music Fest 2024." Accessed December 6, 2024.

<https://cloudbreakmusicfest.org/>.

¹⁰ Port of Seattle. "International Public Market Feasibility Study." Accessed December 6, 2024.

<https://www.portseattle.org/projects/international-public-market-feasibility-study>.

¹¹ King County. "Executive's Small Business Awards." Accessed December 6, 2024.

<https://kingcounty.gov/en/dept/executive-services/about-king-county/business-operations/finance-business-operations/business-development-contract-compliance/small-business-awards>.

¹² OneRedmond. "Air-Space 2030 Final Report." September 2024. Accessed December 6, 2024.

https://oneredmond.org/wp-content/uploads/2024/09/Air-Space-2030_Final-Report.pdf.

¹³ King County. "King County Aerospace Alliance." Accessed December 6, 2024.

<https://kingcounty.gov/en/legacy/elected/executive/constantine/initiatives/aerospace-alliance>.

¹⁴ King County. "About the Office of Economic Opportunity and Creative Economy." Accessed December 6, 2024.

<https://kingcounty.gov/en/dept/executive/governance-leadership/economic-opportunity-creative-economy/about>.

- Closing out COVID economic recovery projects (see Section E)
- Securing new grants, partnerships, and fellowships

Due to resource and capacity limitations, OEOCE focuses its efforts on convening, facilitating, supporting, and championing various internal and external efforts. Staff also provides limited one-on-one and group resource navigation to small businesses and workers. OEOCE develops strategic partnerships with agencies, leaders, unions, and organizations to coordinate, leverage, and accelerate economic development efforts throughout the county. As a regional leader, OEOCE convenes those who are doing economic development work in different parts of the county, to support their efforts and fuel the benefits of collective collaboration.

Performance metrics: OEOCE has laid out a comprehensive set of project objectives and KPMs for 2025 onward in its 2025 Annual Plan, currently in draft form submitted on 11/5/2024, to be finalized in January 2025 (Appendix A.1). OEOCE tracks each objective with performance measures to ensure alignment with broader strategic goals and community needs. These objectives span multiple areas, including government operations, communication, infrastructure, industry support, and equity-driven initiatives. OEOCE's goal is to ensure that strategic goals, mission, and vision drive action effectively, and involves extensive performance measurement to embed Equity, Racial, and Social Justice (ERSJ) values.

Resources: In 2025, the Executive's proposed budget included recentralizing and consolidating a few Executive-sponsored initiatives and corresponding roles within OEOCE,¹⁵ further highlighting the Executive's commitment to economic opportunity.

Creative Economy Defined

According to Americans for the Arts, a nonprofit organization whose primary focus is advancing the arts in the United States, there is not one single definition of "creative economy."¹⁶ OEOCE defines creative economy as those economic sectors based on creative and intellectual assets, rather than traditional commodities or services.

King County's creative economy is comprised of working creative laborers such as theater technicians, musicians, and costume makers; nonprofit organizations such as arts organizations and cultural producers and small businesses in the creative sector such as production shops, recording studios, and art galleries. King County's creative economy encompasses a wide range of activities including arts, design, media, architecture, fashion, advertising, gaming, and more. The Executive is focused on supporting workers in film and music production, and more broadly focused on the creative sector overall.

¹⁵ King County, *2025 Proposed Budget Complete Book* (2025), 103, accessed November 27, 2024, https://cdn.kingcounty.gov/-/media/king-county/depts/executive/performance-strategy-budget/budget/2025/2025-proposed-budget-book/2025_kingcountyproposedbudget_complete.pdf?rev=a1b5c40d99e94f069d60045f3d8f85cb&hash=BA8979715B712965819DD49506DA8CB4.

¹⁶ Americans for the Arts. "Creative Economy." Accessed December 2, 2024. <https://www.americansforthearts.org/by-topic/creative-economy#:~:text=The%20creative%20economy%20is%20an,artistic%2Dbased%20goods%20and%20services>.

Results Achieved

Given its limited resources, OEOCE focuses on priority sectors within the region's key industries (see Figure 2 in Background section), including film, music, aerospace, local food, and tourism. To embed an ethos of continuous improvement, OEOCE strives to support initiatives that have broad and deep community impact and leverage the strengths of the small OEOCE team. To do this, OEOCE partners with County departments and external organizations to capitalize on King County's investment and spur economic growth. Often, this work is accomplished by convening community and industry organizations and economic development collaborators to collectively design strategies for economic sustainability and economic growth.

OEOCE leverages partnerships and available resources to advance high-priority initiatives and projects. Activities that OEOCE undertook in the 2023-2024 biennium are described in Table 2 in Section B.

Creative Economy Market Assessment

In March 2024, the WA Department of Commerce released [*Creative Washington: Strategic Plan for Growing and Strengthening Washington's Creative Sector*](#).¹⁷ To date, this is the most comprehensive creative economy data available for King County and Washington state. The findings of this study, commonly referred to as the *Washington Creative Economy Strategic Plan*, are specifically relevant to King County, as many of the jobs and revenue generated come from this county. This 2023 data is the most recent and thorough available to analyze the regional creative economy. Hence, OEOCE will utilize the framing and data from this study to define and measure the regional creative economy.

Notably, this research cites that Washington's creative sector accounts for nearly 20 percent of the state's economy, contributing nearly \$120 billion annually to the state GDP. The 2022 US Bureau of Economic Analysis assessed that Washington state has the highest share of GDP generated by arts and cultural industries at 9.5 percent.¹⁸ The share for most states ranged between 2 and 5 percent. Washington, the District of Columbia, California, and New York were the only areas where the arts and cultural share of total GDP exceeded 5 percent. 9.5 percent is a significant percentage of King County's overall economy. Notably, the *Washington Creative Economy Strategic Plan* noted that 74 percent of the GDP generated in the Washington creative economy is generated in King County.¹⁹

Given the significant portion of the county's GDP that is generated by the creative sector, it is important that the OEOCE support this work. With the 272,218 jobs cited in the Mid Sound region, this is a significant portion of the county's economy.

¹⁷ Washington State Department of Commerce. *Washington Creative Economy Strategic Plan: Final Report*. December 26, 2023. Accessed December 6, 2024. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

¹⁸ U.S. Bureau of Economic Analysis (BEA). *Arts and Cultural Production Satellite Account, U.S. and States, 2022*. March 25, 2024. Accessed December 6, 2024. <https://www.bea.gov/news/2024/arts-and-cultural-production-satellite-account-us-and-states-2022>.

¹⁹ Washington State Department of Commerce. *Washington Creative Economy Strategic Plan: Final Report*. December 26, 2023. Accessed December 6, 2024. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

The regional music economy was forged without much government support or intervention. King County's popular music scene attracts tourism, and OEOCE has leveraged this by producing Cloudbreak Music Festival in partnership with Visit Seattle as a music tourism initiative. Before the pandemic, the regional music industry had little intersection with government, and did not receive incentives to support their small businesses. During the pandemic, this industry worked closely with local government leaders, including OEOCE, as they struggled to survive while their small businesses and performance spaces were closed due to COVID restrictions.

King County's regional film industry is reflected as three percent of Washington's creative economy. A healthy film industry has many direct and indirect economic benefits,²⁰ and many states have incentivized this industry²¹ with the intent of garnering the economic returns that are generated by a robust regional film sector. These benefits include employment of unionized film crews, creation of marketing content for local companies, activation of the regional small business supply chain that supports the film industry, and film tourism. Additionally, having an active regional film industry allows local corporations and businesses to generate the content needed to market their services and their wares, and it allows local stories to be told.

Nurturing and supporting the businesses, nonprofits and workers in the regional creative ecosystem is important for King County's health and prosperity. Not only is it a substantial part of King County's economy, but this creative ecosystem is also important for the storytelling and images of the region as viewed by the world, generating regional attraction for businesses, as well as community development.

Overview of Harbor Island Studios

The building on Harbor Island was home to a flour mill from 1909 to 2001. It was a bustling hub of industry in the region, with hundreds of workers coming and going every day. In 2002, King County Solid Waste Division purchased the facility, originally to handle excess waste. However, it was never used for this purpose and has largely stood unused in the past 19 years.

The large 100,000 square foot building with high ceilings and open space made it ideal for conversion to a soundstage. A soundstage is a large building where film and television can record in a controlled, enclosed environment. Sets and lighting are designed and built to meet the needs of the production, and filming is not impacted by weather or daylight. In early 2020, the pandemic brought film production to a halt, at the same time as an Amy Poehler episodic was scheduled to film in multiple locations throughout King County. Pandemic realities made it impossible for this production to film on location as planned. This production became the first production in Harbor Island Studios. The facility allowed the production to follow strict film production pandemic guidelines, which required daily COVID testing and zoning to keep cast and crew safe. The adaptive reuse of this warehouse on Harbor Island allowed King County to put more than 200 unemployed film workers back to work for five months during the height of the COVID pandemic.

²⁰ Motion Picture Association, "Driving Local Economies," accessed December 2, 2024, <https://www.motionpictures.org/advocacy/driving-local-economies/>.

²¹ National Conference of State Legislatures, "State Film and Television Incentive Programs," accessed December 2, 2024, <https://www.ncsl.org/fiscal/state-film-and-television-incentive-programs>.

Since that time, King County has continued to invest in the development of Harbor Island Studios with the goal of establishing infrastructure that fuels job creation and small business activation in the regional film industry.

Harbor Island Studios - Quantitative Analysis

With the development of Harbor Island Studios, King County is already attracting film, television, and commercial productions that previously had to film elsewhere, taking their business out of the county. King County has not had a large-scale soundstage since *Northern Exposure*²² finished its production in 1996.

The current state of development of Harbor Island Studios limits the marketing and rentals rates that King County can pursue as the soundstages are a work in progress. Currently, there is no climate control in the soundstages, and to meet industry standards a lighting grid needs to be installed. Thus, OEOCE cannot market the studio to major productions. Items to be addressed to enhance utilization are: upgrade of the roof (scheduled for December 2024-February 2025); building of the carpenters' mill (scheduled for December 2024); and with installation of a lighting grid, OEOCE will be able to market the soundstages to a broader market.

Even in its current state, OEOCE has been successful at marketing the soundstages locally. Since January 1, 2024, there have been:

- 67 individual productions
- 191 total production days
- 922 individual cast and crew
- 2,735 total crew days

Of the 67 individual productions, 66 have been comprised of entirely local cast and crew.

There has been local industry demand for Harbor Island Studios. Even while the facility is a work-in-progress and lacks critical amenities like heat, the studios have already been in demand. The productions in the soundstages since January 1, 2024 include:

- 5 episodic productions
- 37 independent productions
- 13 commercial productions
- 9 art production/set building days
- 3 short film competitions

Additionally, Harbor Island Studios has hosted:

- 21 public tours
- 7 free film skills trainings
- 3 high school film career days

²² "Northern Exposure," *Wikipedia*, last modified December 2, 2024, accessed December 2, 2024, https://en.wikipedia.org/wiki/Northern_Exposure.

Beyond the cast and crew members employed in the 2024 productions, Harbor Island Studios has hosted an additional 1,014 guests since January 1, 2024. This group is comprised of tour guests, skills training participants, high school film students, and film competition participants.

There has been a long-standing gap in the regional film ecosystem, as frequently cited by local film unions and other film professionals. Without a soundstage, productions go elsewhere, and local film talent is exported to other markets with soundstages. All successful film regions have at least one soundstage, and most have multiple soundstages.²³ Having a soundstage increases local production work and activates the local film-related small business supply chain. A soundstage also provides the environment for novel opportunity for career-connected learning, mentoring, and apprenticeship growth.

One of the ways that King County supports local productions and crews is by embedding its core values in the Harbor Island Studios rental pricing plan to support local and under-resourced filmmakers. The four primary factors that influence rental rates include hiring local cast and crew, having a diverse cast and crew and/or an equity plan, embedding green filmmaking practices into the production plan, and hiring a new film student or production assistant on their crew.

OEOCE has collaborated deeply with PSB and FMD on the development of the soundstage plan. Regular meetings advance this collaboration and work, all with the goal of improving the Harbor Island soundstages and production space. The Executive's Film Advisory Board, comprised of 15 volunteer film professionals, has collaborated closely with OEOCE to continue to make progress at Harbor Island Studios. These volunteers serve as ambassadors for King County's Harbor Island Studios and provide advice to OEOCE and FMD on soundstage development.

Nationwide the need for soundstages is strong. The number of outlets of streaming media and film production has created a demand of places to film. Both nationally and internationally "In cities large and small, developers are building cavernous soundstages, rushing to fill a voracious demand for the space needed to make movies and TV shows. A scramble by studios and tech giants for programming to keep their streaming platforms fresh has touched off a building bonanza unlike any seen since the early days of the entertainment industry."²⁴

As King County makes capital improvements at Harbor Island Studios, there is significant opportunity for economic growth. The development of this infrastructure allows local film professionals, including many union workers, to work locally and tell this region's stories. Additionally, the economic impact of film production stands to benefit the entire county, including the production-related small business supply chain. The workers Harbor Island Studios aspires to keep employed are the behind-the-scenes film crews. Comprised of carpenters, electricians, makeup artists, prop makers, costume designers, art directors, cinematographers, set builders, caterers, drivers, and other skilled trades, these are the jobs that make film production possible. Many of these film workers are unionized, primarily in the IATSE

²³ FilmLA, *Sound Stage Production Study* (2017), accessed December 2, 2024, <https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>.

²⁴ LA North Studios. "With Hollywood Production in Overdrive, the Soundstage Is a Hot Commodity." July 11, 2021. Accessed December 6, 2024. <https://www.lanorthstudios.com/with-hollywood-production-in-overdrive-the-soundstage-is-a-hot-commodity/>.

(International Alliance of Theatrical Stage Employees), Teamsters (Motion Picture and Theatrical Trade Division), and Local 600 (International Cinematographers Guild) unions.

Supplying an environment that can be used to provide well-paying, union jobs to hundreds of local workers, as well as increasing the local economy, are primary goals of Harbor Island Studios initiative.

Equity Focus

The Economic Development Agency (EDA) defines equity as "providing support to traditionally underserved populations or underserved communities." EDA defines traditionally underserved populations as those "including but not limited to women, Black, Latino, and Indigenous and Native American persons, Asian Americans, and Pacific Islanders or 2) underserved communities within geographies that have been systemically and/or systematically denied a full opportunity to participate in aspects of economic prosperity such as Tribal Lands, Persistent Poverty Counties (XLSX), and rural areas with demonstrated, historical underservice."²⁵

OEOCE Vision: Become a regional leader that builds an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive

Reflective of the statutory responsibilities of OEOCE, the office prioritizes equitable economic and workforce development practices and seeks to unlock the full potential of the region's economy by removing barriers and expanding opportunities for the County's priority communities.

Equitable economic development aims to create a more just and equitable society where economic growth benefits everyone, contributing to overall social stability and cohesion.²⁶ Equitable economic development isn't just good for society, it is good for business. Studies show that more robust economies are created in places with broad majority participation in economic development.²⁷

OEOCE has implemented strategies to deliberately focus on historically and currently disadvantaged communities. Since 2020, these strategies have focused on those most impacted by the pandemic and its disproportionate health and economic effects.

OEOCE Economic Recovery Task Force: The Small Business Task Force was transitioned to the Economic Recovery Task Force (and is now permanently established as the Economic Opportunity Coalition). This cross-departmental group spanning the Executive Branch was led by OEOCE and implemented a strategic plan to support economic recovery.

²⁵ U.S. Economic Development Administration. "Investment Priorities." U.S. Department of Commerce. Last modified November 2023. <https://www.eda.gov/funding/investment-priorities>.

²⁶ Civic Commons. "Scorecard for Shared Prosperity: Measuring change to drive collective action." Accessed November 3, 2024. <https://www.civic-commons.org/king2021>.

²⁷ International Monetary Fund. "Growth That Reaches Everyone: Facts, Factors, Tools." *IMF Blog*, September 20, 2017. Accessed October 31, 2024. <https://www.imf.org/en/Blogs/Articles/2017/09/20/growth-that-reaches-everyone-facts-factors-tools>.

Economic Recovery Projects: Using federal ARPA/CLFR funds from 2020-2024, OEOCE was able to take meaningful steps to retain and/or expand access to high-quality, living wage, high-demand jobs for residents disproportionately impacted by the COVID-19 pandemic. These initiatives were established prior to OEOCE becoming a codified office and overseen by OEOCE in the 2023-2024 biennium. These projects aimed to narrow employment, wage, and wealth inequities within the community through careers with established employers or self-employment/entrepreneurship opportunities. The County conducted an “Equitable Economic Recovery Performance Report” assessment.²⁸ This analysis helped identify key areas for intervention and growth. A breakdown of COVID economic recovery projects under oversight by OEOCE is outlined in Table 5 in Section E.

Role in Existing County Programs

OEOCE has multiple roles in existing county economic development programs, including the Department of Local Services (DLS) economic development and small business assistance programs, DLS Unincorporated Economic Alliance program, Lodging Tax support tourism allocations, BIPOC Business and Economic Resiliency program, Department of Executive Services (DES) Facility Management Division (FMD) for Harbor Island Studios facilities management, Department of Natural Resources and Parks (DNRP) Director’s Office for Executive’s Local Food Initiative, partnership with Councilmember Upthegrove’s office to develop the International Public Market (IPM) Feasibility Study, and various programs with the Executive Climate Office.

Conclusion

The economic growth of a community depends on effective public sector economic and workforce development strategies. These strategies yield well-informed policy, sound investments in assets and infrastructure, and timely services. These inputs lay the foundation to help spur private investment, which generates jobs and income, and pays dividends of expanded tax revenue back to public sector. This revenue is reinvested back into the community, thus completing the cycle, and leading to profound economic expansion when repeated at scale. Most importantly, this cycle of economic growth provides residents with livelihoods and a sense of well-being.

Overall, the establishment of OEOCE and the addition of the Economic Opportunity Director and the Creative Economy Director, have significantly fortified the economic development work throughout the county. This is evidenced by the extensive engagement of OEOCE with industry and community leaders, unions, workers, and residents in King County. It is further evidenced by the successful securing of funds from other resources to support OEOCE’s work, as well as anecdotal input from workers and small businesses. Investment in OEOCE has exponential return for King County as this small office prides itself on being responsive to local economic concerns, connecting small businesses, organizations, and workers with resources, working to ensure that opportunities are equitable, and allocating resources where they will have the most impact.

²⁸ King County, “Equitable Economic Recovery Performance Report,” *King County Revive & Thrive Recovery Plan 2023*, 2023, <https://kingcounty.gov/en/dept/executive/governance-leadership/performance-strategy-budget/-/media/depts/executive/performance-strategy-budget/budget/COVID-19/AmericanRescuePlan/2023RecoveryPlanReport/EquitableEconomicRecoveryPerfReport-CaseStudy.ashx>.

III. Background

Office Overview

The Office of Economic Opportunity and Creative Economy's (OEOCE) helps King County become a regional leader as the County builds an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive. OEOCE's mission is to advance economic opportunity and growth throughout the King County region by fortifying community partnerships and resources. OEOCE's responsibilities set forth in [Ordinance 19541](#) are:

- Coordinating the county's efforts to develop a strong equitable economy that creates opportunities for all residents;
- Developing and implementing strategies to promote economic revitalization and equitable development, and
- Assisting communities and businesses in creating economic opportunities, promoting a diversified economy, and promoting family-wage job creation.

Key Context

OEOCE Duties and Functions: OEOCE is a hub to align strategy and policy across King County's executive branch. The OEOCE has two directors, one to oversee economic opportunity and one to lead creative economy. The directors serve on the Executive's Cabinet, advise the Executive on economic development policy, creative economy policy, strategy, and budget. In 2024, OEOCE employs four full-time employees and manages a \$2.1 million budget.

In addition to performing its code-identified responsibilities, OEOCE develops countywide strategies, aligns King County policy priorities with community needs, and unifies economic development work among executive branch department.

On behalf of the Executive, OEOCE oversees strategic partnerships with economic and workforce development organizations, such as [Greater Seattle Partners](#),²⁹ [Port of Seattle](#),³⁰ [Workforce Development Council of Seattle-King County](#),³¹ and [Associate Development Organization \(Seattle Metropolitan Chamber of Commerce\)](#).³² In addition, the OEOCE performs the following duties:

- Convenes the Economic Opportunity Coalition, a monthly meeting with 20+ King County Executive Branch representatives who work in economic and workforce development. OEOCE helps coordinate and share information with this group to help advance King County's economic and workforce goals;

²⁹ "Greater Seattle." *Greater Seattle*. Accessed November 24, 2024. <https://greater-seattle.com/>.

³⁰ "Port of Seattle." *Port of Seattle*. Accessed November 24, 2024. <https://www.portseattle.org/>.

³¹ "Seattle-King County Workforce Development Council." *Seattle-King County Workforce Development Council*. Accessed November 24, 2024. <https://www.seakingwdc.org/>.

³² "Seattle Metropolitan Chamber of Commerce." *Seattle Metropolitan Chamber of Commerce*. Accessed November 24, 2024. <https://www.seattlechamber.com/>.

- Works in collaboration with the [Executive Climate Office](#),³³ to help address climate change impacts of workforce, business, and economic development. OEOCE staff are contributors to the Strategic Climate Action Plan (SCAP);
- Supports key industry sectors and provides focused attention to creative industries, with an emphasis on film and music production;
- Consults on small business assistance to the unincorporated areas of King County;
- Oversees the Executive's Local Food Initiative;
- Plans the annual Executive's Small Business Awards;
- Fosters tourism and hospitality;
- Collaborates with 4Culture, and
- Manages the Executive's Film Advisory Board (EFAB)

Economic Development Overview: The International Economic Development Council (IEDC) characterizes economic development as “programs and policies that aid in the creation, retention, and expansion of jobs; the development of a stable tax base; and the enhancement of wealth. Economic development aims to influence the growth and restructuring of a community’s economy to enhance its well-being.”³⁴ The US Economic Development Administration³⁵ defines economic development as “creating the conditions for economic growth and improved quality of life by expanding the capacity of individuals, businesses, and communities to maximize the use of their talents and skills to support innovation, job creation, and private investment.” As of the writing of this report, the term economic development is not statutorily defined by Washington State or King County, although some statutes describe it in the context of the work authorized.

³³ "Climate Change." *King County*. Accessed November 24, 2024.

<https://kingcounty.gov/en/legacy/services/environment/climate.aspx>.

³⁴ Who We Are. International Economic Development Council. <https://www.iedconline.org/pages/who-we-are/>

³⁵ Economic Development Glossary. US Economic Development Administration. Accessed April 29, 2023.

<https://www.eda.gov/about/economic-development-glossary>



Fig. 1: Cycle of Economic Growth in a Community.
Graphic: Office of Economic Opportunity and Creative Economy

Notably, definitions of economic development developed by International Economic Development Council (IEDC) and EDA reference necessary inputs, common outputs, and desired outcomes. These elements are represented in Figure 1, which show the cycle of economic growth in a community.

Like economic development, workforce development does not hold a standard definition across industry, government, or community. The U.S. Department of Labor characterizes one of its key roles as “help[ing] businesses find the qualified workers they need.”³⁶ These activities include workforce recruitment, screening, training, education, upskilling, and transitioning.³⁷

Economic Development in the U.S.: The post-war period of reconstruction gave way to an increased interest in public sector economic development programs as a means of advancing prosperity and peace.³⁸ In 1949, during his inaugural speech, President Harry Truman identified development of undeveloped areas as a priority for the west. In 1961, the Area Redevelopment Administration (ARA) became the first federal program designed to advance economic development. In 1965, Congress passed the Public Works and Economic Development Act of 1965 (42 U.S.C. § 3121), which authorized

³⁶ U.S. Department of Labor. “Workforce Development Solutions.” Accessed October 30, 2024.
<https://www.dol.gov/agencies/eta/employers/workforce-development-solutions>.

³⁷ U.S. Department of Labor. “Workforce Development Solutions.” Accessed October 30, 2024.
<https://www.dol.gov/agencies/eta/employers/workforce-development-solutions>.

³⁸ History of Economic Development Administration. Economic Development Administration. Accessed May 29, 2023.
<https://www.eda.gov/archives/2016/50/history/#:~:text=In%201965%2C%20Congress%20passed%20the,succeed%20the%20previous%20ARA%20organization.>

the creation of the Economic Development Administration previous ARA organization. The EDA was initially established to create and retain jobs, develop basic infrastructure, provide planning support, and help stimulate economic growth in distressed rural and urban communities. Since that time, the federal government has expanded the EDA's authority, role, and reach.³⁹ The agency became more involved in policy and helped advance the economic development profession. It also established Economic Development Districts (EDD) across the nation, which are multi-jurisdictional, cross-sector entities that help lead planning processes and develop regional economic development strategy.⁴⁰ King County is part of the five-county Puget Sound EDD that is convened by the Puget Sound Regional Council. Today, the EDA remains the only federal agency with an exclusive mission of supporting economic development initiatives.

Economic Development in Washington State: Washington State's economic development arm resides in the Department of Commerce's Office of Economic Development and Competitiveness (OEDC). OEDC focuses on supporting and expanding key industries, international trade, small businesses, workforce training, access to funding, and county economic development partnerships.⁴¹ Additionally, OEDC provides annual funding for Associate Development Organizations (ADOs), which are its primary county-level economic development partners, which will be further addressed below.⁴²

The Washington State Constitution imposes restrictions on how cities and counties can use public funds to advance economic development, with few allowable uses of public funds to financially assist the private sector.⁴³ At the outset of the COVID-19 global pandemic, however, the Washington State Attorney General issued an emergency waiver of this prohibition to provide maximum flexibility to jurisdictions to provide emergency relief to businesses.⁴⁴

Washington State offers a limited set of economic development financial incentives, including tax incentives, credits, and deferrals.⁴⁵ It also funds workforce training through various programs that are

³⁹ History of Economic Development Administration. Economic Development Administration. Accessed May 29, 2023. <https://www.eda.gov/archives/2016/50/history/#:~:text=In%201965%2C%20Congress%20passed%20the,succeed%20the%20previous%20ARA%20organization>.

⁴⁰ Economic Development Districts. Economic Development Administration. Accessed May 30, 2023. [https://www.eda.gov/about/economic-development-glossary/edd#:~:text=Economic%20Development%20Districts%20\(EDDs\)%20are,cases%20even%20cross%2Dstate%20borders](https://www.eda.gov/about/economic-development-glossary/edd#:~:text=Economic%20Development%20Districts%20(EDDs)%20are,cases%20even%20cross%2Dstate%20borders).

⁴¹ Growing the Economy. Washington State Department of Commerce. Accessed May 15, 2023. <https://www.commerce.wa.gov/growing-the-economy/>

⁴² Economic Partnerships. Washington State Department of Commerce. Accessed June 1, 2023. <https://www.commerce.wa.gov/growing-the-economy/local-economic-partnerships/>

⁴³ Limitations on Economic Development. Municipal Research and Services Center. <https://mrsc.org/explore-topics/economic-development/economic-development-basics/economic-development-in-washington-state-an-introd#authority>

⁴⁴ Attorney General of Washington Memorandum Regarding Guidance on Analyzing Issues Related to Gifts of Public Funds During the COVID-19 Pandemic. Municipal Research and Services Center. Published March 17, 2020. Accessed April 18, 2023. Guidance on Analyzing Issues Related to Gifts of Public Funds During the COVID-19 Pandemic. <https://mrsc.org/getmedia/37fa7cc7-fb7f-4dc4-88d4-4ad6a8887318/w3agcoronagopf.pdf>

⁴⁵ Tax incentives, credits, and deferrals. Choose Washington – Washington State Department of Commerce. Accessed April 8, 2023. <http://choosewashingtonstate.com/i-need-help-with/foreign-domestic-investment/incentives/>

housed primarily at community and technical colleges throughout the state.⁴⁶ In 2021, the state legislature established a tax increment financing (TIF) tool, which represented an expansion of allowable local economic development financial incentives. TIF allows for the allocation of increases in assessed value of real property to fund public infrastructure in targeted areas.⁴⁷

Washington State defines its key industries as those that have the most potential for creating economic wealth and job growth throughout the state. They include:⁴⁸

- Aviation and aerospace
- Agriculture and food manufacturing
- Clean technology
- Creative economy
- Forest products
- Information and communication technology

Economic Development in King County: The ADO is King County's primary county-level economic development partner. The ADO designation currently resides at the Seattle Metropolitan Chamber of Commerce. The King County ADO focuses on business retention and expansion activities, or small business assistance, which is defined as the process of nurturing business survival and growth in a community through a variety of programmatic and policy means.⁴⁹ One organization is designated biennially by the King County Executive as the ADO. It maintains an ongoing partnership with OEOCE during that biennia. Through 2024, the County funds the Community Business Connector program, in partnership with the Port of Seattle, through a portion of the County's federal Coronavirus Local Fiscal Recovery (CLFR) allocation.⁵⁰ This program aims to expand technical assistance provision to all county businesses related to pandemic economic impact.

Internal Economic Development at King County: Over a decade before the writing of this report, King County's Executive Department contained a codified economic development office. After this office disbanded, most of its resources and key staff were decentralized and deployed across several Executive Branch departments. As these departments identified new economic and workforce development needs in the years following, they allocated dedicated departmental staff and resources to meet these needs, as budgets allowed. The Executive Department maintained one to two staff members who oversaw economic and workforce development matters from that time until 2023.

⁴⁶ Training the workforce of the future. Choose Washington – Washington State Department of Commerce. Accessed April 8, 2023. <http://choosewashingtonstate.com/i-need-help-with/foreign-domestic-investment/incentives/>

⁴⁷ Tax Increment Financing. Municipal Research and Services Center. Accessed April 3, 2023. <https://mrsc.org/explore-topics/economic-development/financing-economic-development/tax-increment-financing>

⁴⁸ Washington's growth industries. Choose Washington – Department of Commerce. Accessed April 27, 2023. <http://choosewashingtonstate.com/why-washington/our-key-sectors/>

⁴⁹ Why a Business Retention and Expansion Program Matters. International Economic Development Council. Published February 7, 2020. Accessed May 16, 2023. https://www.iedconline.org/clientuploads/Downloads/Key_Strategies/IEDC_Why_and_Impact_BRE_NEW.pdf

⁵⁰ Community Business Connector. Seattle Metropolitan Chamber of Commerce. Accessed June 2, 2023. <https://www.seattlechamber.com/pages/cbc/>

In April 2019, the Executive appointed a Creative Economy Strategist. Later that same year, the Executive issued an Executive Order that directed relevant County departments to prioritize film production and content creation by implementing the following action plan:

- Develop a new King County Film Ordinance that prioritizes film and content production throughout relevant King County departments.
- Identify a King County lead in each relevant department to work with the Creative Economy Strategist and industry and union leaders to understand the needs of the film industry.
- Leverage King County real estate assets and prioritize short-term leases and rental arrangements to make King County assets and locations accessible to film producers and content creators.
- Modify film permitting process under new film ordinance; reduce cost-prohibitive permit fees.
- Work interdepartmentally to design processes to expedite film permitting approvals and provide a three-working day response window on film permitting applications.
- Work with Equity and Social Justice leadership to ensure that all changes are implemented through a racial equity and social justice lens.
- Work with the Creative Economy Strategist, and film industry and union leaders to ensure that the policies that are pursued, and the processes undertaken will address challenges and offer opportunities that help to fortify and grow the regional film industry.
- Emphasize environmentally sound film production practices wherever possible.

The Creative Economy Strategist convened different industry sectors and built out a creative economy plan for King County, working to achieve the goals of the Executive Order related to film production. Many industry leaders and workers participated in the development of this plan. In February 2020, the Executive and the Creative Economy Strategist convened 160 music industry representatives at Washington Hall, to flush out an economic development strategy for the countywide music sector. The next month, the COVID pandemic set in, and all efforts shifted to communication and response efforts for the next two years.

In July 2020, the Executive appointed an Economic Development and Recovery Director to support various pandemic relief efforts for small businesses and workers. This position oversaw several key industry partnerships and contracts, including the Associate Development Organization (Seattle Metropolitan Chamber of Commerce), Workforce Development Council of Seattle-King County, and Greater Seattle Partners. The Economic Development & Recovery Director and the Creative Economy Strategist worked together to develop a countywide economic recovery strategy that prioritized these five objectives:

- Expand access to high-quality, living wage, high-demand jobs for Black, Indigenous, and People of Color (BIPOC) communities, narrowing white-BIPOC employment, wage, and wealth gaps.
- Attract new high-quality employers in the County's underserved communities and retain the County's high-quality employers that pay living wages and share King County's values of racial equity, environmental sustainability, and workers' rights.
- Protect and retain the creative, hospitality, and tourism industries and build a more equitable creative economy for BIPOC communities.
- Leverage relationships with partner organizations to coordinate and advance workforce development, economic development, and economic recovery efforts.
- Leverage King County's position as a major employer to drive economic recovery and reduce racial inequities.

OEOCE prioritizes equitable economic and workforce development practices and seeks to unlock the full potential of the region’s economy by helping remove barriers and expand opportunities for the County’s residents, particularly low income, Black, Indigenous and people of color, immigrants and refugees, people with disabilities, members of limited-English speaking communities, veterans, seniors, and LGBTQ+ populations.

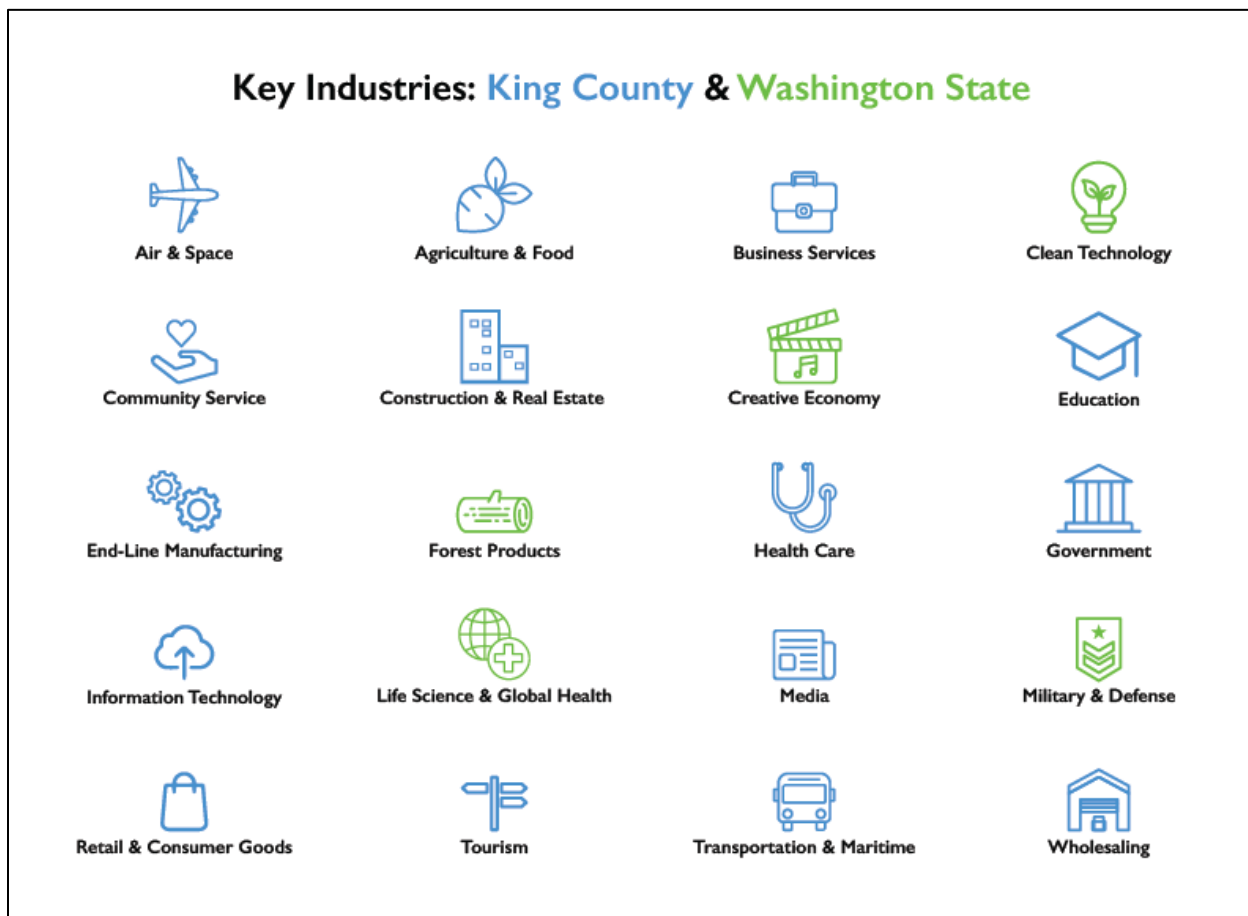


Figure 2: Key Industries: King County & Washington State
 Graphic: King County Office of Economic Opportunity and Creative Economy
 Data: Seattle Metropolitan Chamber of Commerce, <https://www.seattlechamber.com/pages/industries/>
 Choose Washington, <https://choosewashingtonstate.com/why-washington/our-key-sectors/>

OEOCE focuses on activities that support the creative economy, particularly film and music production,⁵¹ while championing all key industries in King County. In this context, key industries generally hold a higher employment concentration relative to other geographies, show strong growth potential, and give a community its competitive advantage. King County industry sectors that contributed more than 100,000 estimated jobs in 2021 include:⁵²

- Professional and business services

⁵¹ King County Creative. The Creative Economy Initiative.
<https://kingcounty.gov/elected/executive/constantine/initiatives/economic-development.aspx>

⁵² King County Profile. Employment Security Department Washington State. Accessed April 7, 2023.
<https://kingcounty.gov/elected/executive/constantine/initiatives/economic-development.aspx>

- Education and health services
- Retail trade
- Government
- Information
- Leisure and hospitality
- Creative Industries

Other key industries that are vital to the regional economy include aerospace, agriculture, maritime, life sciences, and technology.⁵³ Within these industries, several high-growth subsectors have recently emerged in King County, including new space manufacturing, biotechnology research and development, biotechnology manufacturing, clean technology research and development, artificial intelligence software development, and virtual reality software development.

King County has enjoyed tremendous economic growth over the last three decades. This growth is due in large part to its geographic, cultural, and industrial diversity. The County has experienced long-term growth in all major industry sectors⁵⁴ despite significant regional challenges, including an increasing cost of living, a housing crisis, and a global pandemic-induced economic recession.

Small Business Assistance: Small businesses are integral to local economic vitality. They continue to generate over 40 percent of economic activity and create around two-thirds of net new jobs.⁵⁵ Exact statistics vary by local and regional geographies, but roughly 80 percent of all new jobs and capital investment in a community are generated by existing businesses.⁵⁶

Small business assistance is a critical discipline of the economic development profession. Sometimes referred to as business retention and expansion, small business assistance is the process of nurturing business survival and growth in a community through a variety of programmatic and policy means. Small business assistance helps create and retain jobs, increase tax revenue, attract new businesses, diversify the economy, inform workforce development strategies, and expand and enhance community amenities.⁵⁷

COVID-19 Pandemic Impact and Economic Recovery: The pandemic-induced recession of 2020 disrupted all industries in King County. The impact varied across sectors, with industries such as hospitality, tourism, retail, and entertainment being particularly hard-hit by lockdowns, restrictions, and changes in consumer behavior. The leisure and hospitality industries lost the largest number of jobs. As

⁵³ Key Industries. You Belong Here. Greater Seattle Partners. Published September 15, 2022. Accessed May 22, 2023. https://greater-seattle.com/wp-content/uploads/2022/10/You_Belong_Here.pdf

⁵⁴ King County Profile. Employment Security Department Washington State. Accessed April 7, 2023. <https://kingcounty.gov/elected/executive/constantine/initiatives/economic-development.aspx>

⁵⁵ Small Businesses Generate 44 Percent of US Economic Activity. US Small Business Administration Office of Advocacy. Accessed May 2, 2023. <https://advocacy.sba.gov/2019/01/30/small-businesses-generate-44-percent-of-u-s-economic-activity/>

⁵⁶ Why a Business Retention and Expansion Program Matters. International Economic Development Council. Published February 7, 2022. Accessed May 11, 2023. https://www.iedconline.org/clientuploads/Downloads/Key_Strategies/IEDC_Why_and_Impact_BRE_NEW.pdf

⁵⁷ Why a Business Retention and Expansion Program Matters. International Economic Development Council. Published February 7, 2022. Accessed May 11, 2023. https://www.iedconline.org/clientuploads/Downloads/Key_Strategies/IEDC_Why_and_Impact_BRE_NEW.pdf

of March 2022, these sectors were still down 44,000 jobs, or about 30 percent, in King County. Conversely, information technology, professional and business services, retail trade, financial services, and construction maintained or expanded employment levels. As of March 2022, the information technology sector saw 15,500 more jobs than March 2020; however, companies in this sector have recently laid off more than 3,000 employees.⁵⁸

According to data from the U.S. Bureau of Labor Statistics, King County's unemployment rate surged during the early months of the pandemic, peaking at 15.3 percent in April 2020 before gradually declining as restrictions eased and economic activity resumed.⁵⁹ However, the recovery has been uneven, with certain sectors and demographic groups facing persistent challenges in regaining pre-pandemic employment levels.

In response to the urgent need for economic recovery during the COVID-19 pandemic, King County pivoted its economic development strategy to assist the businesses and workers most impacted by the emergency health directives. The Economic Development and Recovery Director and Creative Economy Director developed the Economic Recovery Priority to serve as the COVID economic recovery strategic plan (see Appendix Background.1).

58 King County Profile - Overview. Employment Security Department of Washington State. Published by Anneliese Vance-Sherman, Ph.D. in May 2022. Accessed May 3, 2023. <https://esd.wa.gov/labormarketinfo/county-profiles/king>

59 "King County Profile." Washington State Employment Security Department. Accessed October 20, 2024. <https://esd.wa.gov/labormarketinfo/county-profiles/king>

OEOCE Mission, Vision, Values

Guided by the Executive's True North and its statutory responsibilities, OEOCE's vision is to become a regional leader helping to build an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive.⁶⁰ OEOCE prioritizes equitable economic and workforce development practices and seeks to unlock the full potential of the region's economy by helping remove barriers and expand opportunities for the County's priority communities.

Guided by this vision, OEOCE's mission is to propel economic opportunity and growth throughout the region. The office strives to achieve this by crafting sound policies, forging trusted strategic partnerships, and harnessing resources effectively.

Embedded within OEOCE's ethos are core values that serve as the cornerstone of all activities:

- **Accountability:** Operate with transparency in response to community need and input.
- **Equity:** Leverage institutional power to fuel opportunity where it hasn't existed or has been limited.
- **Leadership:** Provide servant leadership to the community and industry.
- **Industry:** Provide responsive support while championing the success of industry partners.
- **Results:** Move at the speed of innovation — earning the trust of community, including business, labor, organizations, and individuals.
- **Teamwork:** Empower internal and external partners to fortify an economic landscape where all can thrive.

Through the collective embodiment of OEOCE's vision, mission, and values, staff endeavors to forge a future where every individual has the opportunity to thrive within a vibrant and inclusive, equitable regional economy.

Rationale for Investment in Equitable Economic Development

The central Puget Sound region has flourished economically over the last several decades. As of 2022, King County has the 6th highest Real Gross Domestic Product in the nation at \$367 billion.⁶¹ However, much like Washington State and the U.S., this prosperity has not been shared equitably across the region. This region maintains a high degree of income inequality, which is known to harm health and exacerbate health disparities by sustaining higher rates of poverty, increasing chronic stress, and decreasing social cohesion among communities. While higher income is associated with greater life expectancy, lower incomes decrease one's ability to prevent and cope with health concerns. Two ways to measure income inequality are: 1) the difference in the percent of total income owned by the top and bottom 20 percent of income earners, and 2) racial inequities in median household income.⁶²

60 King County Executive. "Economic Development Initiatives." King County, accessed December 5, 2024. <https://kingcounty.gov/elected/executive/constantine/initiatives/economic-development.aspx>

61 Bureau of Economic Analysis. "Gross Domestic Product by State and Metropolitan Area, Interactive Data Table." Accessed December 5, 2024. <https://apps.bea.gov/itable>.

62 US Census Bureau, American Community Survey via Communities Count <https://www.communitiescount.org/income-inequality#:~:text=Among%20all%20Washington%20state%20counties,2010%20to%2051.7%25%20in%202021>

In King County, the top 20 percent of income earners made an average of \$398,619 in 2021, while the bottom 20 percent made \$21,462. By comparison – in Washington, the top 20 percent made an average of \$294,454 while the bottom 20 percent made an average of \$18,741. In the United States overall, the top and bottom 20 percent made an average of \$253,601 and \$14,539, respectively. Among all Washington state counties, King County ranked 4th in highest income inequality in 2017-2021, with the top 20 percent owning 50.7 percent of all income in the county. The share of income owned by the top 20 percent in King County has grown from 49.3 percent in 2010 to 51.7 percent in 2021. In Washington, the top 20 percent owned 47.7 percent of all income in 2010 and 50.6 percent in 2021. Simply stated, the top 20 percent of income earners own 19 times more total income than the bottom 20 percent in King County.⁶³

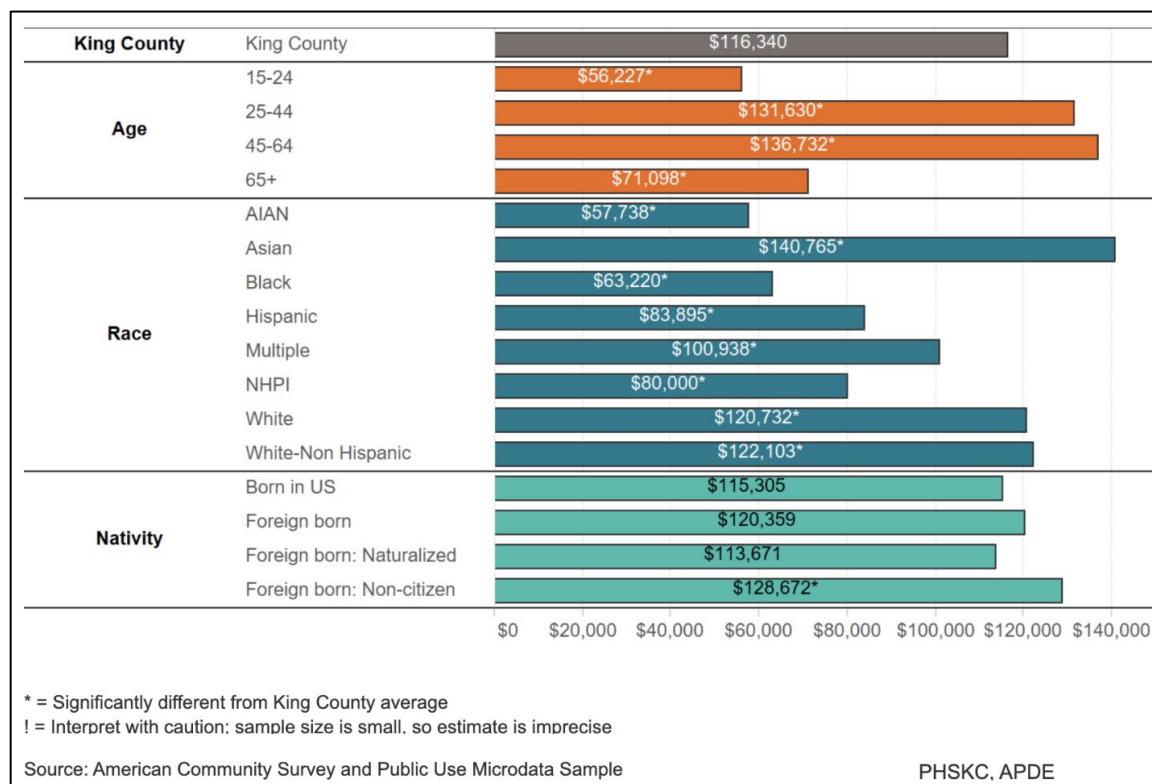


Figure 3: King County Income By Age, Race, and National Origin 2018-2022
 Data: <https://www.communitiescount.org/median-household-income>

Figure 3 shows that Asian-headed and white-headed households had median incomes higher than the King County average. Households headed by American Indian and Alaska Native, Black/African American, Hispanic/Latino, Native Hawaiian/Pacific Islander, and multiple race people, as well as people of other races had median household incomes that were lower than the King County average.

Reflective of the Executive’s True North and the statutory responsibilities of the OEOCE, it is the vision of OEOCE that King County becomes a regional leader helping to build an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive. OEOCE prioritizes equitable

63 US Census Bureau, American Community Survey via Communities Count
<https://www.communitiescount.org/income-inequality#:~:text=Among%20all%20Washington%20state%20counties,2010%20to%2051.7%25%20in%202021>

economic and workforce development practices and seeks to unlock the full potential of the region's economy by helping remove barriers and expand opportunities for the County's priority communities.

So, there are two cases to be made for public sector investment in economic development. First, to help broadly grow the regional economy, and secondly, to focus on equitable economic development to narrow the income inequality divide.

Rationale for Investment in the Creative Sector

The creative economy refers to sectors that are based on creative and intellectual assets, rather than traditional commodities or services. King County's creative economy is comprised of working creative laborers, nonprofit organizations, and small businesses in the creative sector. It encompasses a wide range of activities including arts, design, media, architecture, fashion, advertising, gaming, and more.⁶⁴

King County is focused on supporting businesses and workers in film and music production and more broadly focused on the creative sector overall. The creative economy thrives at the intersection of innovation, originality, cultural heritage, and the generation of intellectual property. It encompasses both commercial and non-commercial activities and plays a significant role in driving economic growth, fostering cultural development, and shaping societal progress.⁶⁵

Investing in King County's creative economy is important for several reasons:

- **Economic Growth and Job Creation:** The creative economy encompasses a wide range of industries, including arts, culture, design, media, entertainment, and technology.⁶⁶ These are critical economic sectors with significant gaps in the support infrastructure throughout the county. By investing in these sectors, especially the underinvested sectors of film and music production, the County is stimulating an important and often overlooked segment of the regional economy. These creative industries generate revenue, employ a diverse workforce, and contribute nearly \$120 billion to Washington State's gross domestic product (GDP), thus fostering economic resilience and vitality.⁶⁷
- **Innovation and Entrepreneurship:** Creativity is the bedrock of innovation in a society.⁶⁸ Investing in the creative economy nurtures an environment conducive to innovation and entrepreneurship.⁶⁹ Creative professionals often pioneer groundbreaking ideas, technologies, and solutions across various fields, driving progress and competitiveness in the global market.
- **Cultural and Social Enrichment:** The creative economy enriches society by fostering cultural diversity, developing, and preserving a community's unique heritage, and enhancing quality of place. Art, music, film, literature, and other cultural expressions contribute to a vibrant and dynamic society, enhancing quality of life, fostering a sense of belonging, and promoting cross-cultural understanding.⁷⁰
- **Tourism and Destination Appeal:** Creative industries often play a role in attracting tourists and enhancing the appeal of destinations. Communities such as Seattle and the surrounding area that are seen on film or heard about in music can often generate demand for tourist visitation. Such

⁶⁴ Washington State Department of Commerce. *Washington Aerospace Competitiveness Study Final Report*, 2024. February 2024, 6. Accessed December 5, 2024. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

⁶⁵ John Howkins. *The Creative Economy: How People Make Money from Ideas*. London: Allen & Unwin. 2001.

⁶⁶ Greater Seattle Partners, "Home," 6, accessed December 2, 2024, <https://greater-seattle.com/>.

⁶⁷ Washington State Department of Commerce, "Report: Creative Economy contributes nearly 120 billion to Washington State GDP." <https://www.commerce.wa.gov/news/report-creative-economy-contributes-nearly-120-billion-to-washington-state-gdp/>

⁶⁸ <https://www.sciencedirect.com/science/article/abs/pii/S0160791X08000742#:~:text=Innovation%20springs%20from%20the%20creative,ingenious%2C%20have%20no%20market%20potential>.

⁶⁹ <https://www.creativityculturecapital.org/blog/2021/01/13/impact-investing-in-the-creative-economy-today/>

⁷⁰ ArtsFund. *Social Impact of the Arts Study: Executive Summary*. November 2018, 6. Accessed December 5, 2024. https://www.artsfund.org/wp-content/uploads/2018/11/ArtsFund_2018_SIS_ExecutiveSummary_11.6.pdf.

demand is documented by Seattle's consistent visitors to the *Sleepless in Seattle*⁷¹ houseboat, Viretta Park near the home of Nirvana's Kurt Cobain, Seattle International Film Festival, Bumbershoot, and others. An excellent example of this is the tourism generated for North Bend, by virtue of 'Twin Peaks' having been produced there. The town has a sign that says 'Welcome to Twin Peaks,' there are two annual Twin Peaks festivals, and Twede's Cafe, which portrayed the RR Diner in Twin Peaks, has international visitors daily, due to the infamy of the TV show that was filmed there. Live music events, film sets, cultural attractions, festivals, museums, theaters, and galleries can draw visitors, stimulate spending, and bolster the tourism sector. Investments in cultural infrastructure and creative placemaking contribute to the overall attractiveness and competitiveness of cities and regions.

- **Education and Skill Development:** Investing in the creative economy supports education and skill development initiatives. This education not only cultivates creativity and critical thinking but also equips individuals with valuable skills such as problem-solving, communication, and collaboration. Creative industries provide opportunities for lifelong learning and professional development, empowering individuals to thrive in a rapidly evolving job market.
- **Health and Well-being:** Engagement with the arts and creative activities has been linked to improved mental health, emotional well-being, and overall quality of life. Investments in arts-based therapies, community arts programs, and cultural initiatives contribute to positive health outcomes, social inclusion, and community resilience.⁷²

Investing in the creative economy fosters economic prosperity, drives innovation, enriches culture and society, promotes tourism, empowers individuals, and enhances overall well-being. By recognizing the value of creativity and supporting creative industries, King County can unlock new opportunities for growth, development, and prosperity.

Economic Outlook: Despite setbacks from the COVID-19 pandemic, the King County economy is well-positioned for broad industry growth. However, without a thoughtful and consistent public sector strategy to expand access to economic opportunity, employment, wage, and wealth inequities shown in Figure 3 will continue to persist among King County residents.

Report Methodology

This report was written by the staff of the Office of Economic Opportunity and Creative Economy. Data used to inform the analyses, findings, and recommendations of this report are cited throughout and include:

- Internal data from OEOCE programs, projects, and reports
- Local and national census and demographic data, including County demographic data
- Industry reports and publications

⁷¹ *Sleepless in Seattle*. Directed by Nora Ephron. TriStar Pictures, 1993.

⁷² ArtsFund. *Social Impact of the Arts Study: How Arts Impact King County Communities*. Seattle. WA. ArtsFund. 2018. https://www.artsfund.org/wp-content/uploads/2018/11/ArtsFund_2018_SIS_11.6.pdf.

IV. Report Requirements

This section is organized to respond to each of the requirements included in Ordinance 19546, Section 20, Proviso P1.

A. A business plan supporting investments for the office of economic opportunity and creative economy. The plan shall also include a definition of what constitutes a creative economy. The business plan shall include, but not be limited to:

- 1. both long-term and short-term goals, objectives and strategies of the office;**
- 2. proposed activities to implement the strategies;**
- 3. performance metrics including benchmarks and targets to measure the objectives; and**
- 4. the resources necessary to achieve either the performance benchmarks, performance targets or both;**

The OEOCE business plan⁷³ (Appendix A.1) outlines the office's goals, objectives, strategies, milestones, and key performance measures (KPMs) during the 2023-2024 biennium. The plan reflects the office's vision to launch and enhance its operations, support key industries, and foster equitable economic and workforce development throughout King County. This plan describes 19 priority initiatives and their alignment with the County's equity, racial, and social justice priorities.

To ensure program and project efficacy, OEOCE developed a diverse mix of goals and strategies that were informed by ongoing engagement with residents and combined with data-driven decision-making. OEOCE provided focused support on several key sectors during the biennium, including film, music, aerospace, local food, and tourism. Key efforts included:

- Continued development of Harbor Island Studios⁷⁴
- Expansion of the award-winning⁷⁵ Community Business Connector program
- Production of the Cloudbreak Music Festival⁷⁶
- Completion of the International Public Market Feasibility Analysis⁷⁷
- Re-envisioning the Executive's Small Business Awards⁷⁸
- Funding the Air & Space 2030 Strategy⁷⁹

⁷³ See Appendix A.1

⁷⁴ King County Creative. "Harbor Island Studios." Accessed December 2, 2024.

<https://kingcountycreative.com/harbor-island-studios/>.

⁷⁵ Seattle Metropolitan Chamber of Commerce. "Community Business Connector Receives Program Recognition." September 16, 2024. Accessed December 2, 2024. <https://www.seattlechamber.com/news/2024/09/16/press-room/community-business-connector-receives-program-recognition/#:~:text=SEATTLE%20%E2%80%93%20Today%20the%20Seattle%20Metropolitan,the%20Community%20Business%20Connector%20program.>

⁷⁶ Cloudbreak Music Festival. "Home." Accessed December 2, 2024. <https://cloudbreakmusicfest.org/>.

⁷⁷ <https://www.portseattle.org/projects/international-public-market-feasibility-study>

⁷⁸ King County Executive Office. "Small Business Awards." Accessed December 2, 2024.

<https://kingcounty.gov/en/dept/executive-services/about-king-county/business-operations/finance-business-operations/business-development-contract-compliance/small-business-awards>.

⁷⁹ OneRedmond. *Air & Space 2030: Final Report* (September 2024), accessed December 2, 2024, https://oneredmond.org/wp-content/uploads/2024/09/Air-Space-2030_Final-Report.pdf.

- Expansion of the King County Aerospace Alliance⁸⁰
- Launching the Economic Opportunity Coalition
- Closing out COVID economic recovery projects (see Section E)
- Securing new grants, partnerships, and fellowships (see p. 43)

The office maximized existing County resources, generated new sources of funding, and fostered collaboration and visibility across sectors to drive innovation, equity, and economic prosperity.

OEOCE's 19 priority initiatives are listed below, followed by a brief summary of the office's corresponding activities in 2023-2024.

Operational Activities

1. Operationalize the Office: OEOCE created and implemented a plan of work for 2023-2024; built a system to collect, analyze, and report program/project data on a rolling basis; and trained OEOCE staff in implementing the system and updating data.
2. Develop Communications Strategy: OEOCE developed a preliminary communications strategy, which entails content development for two websites, two newsletters, two Instagram accounts and one Facebook group. The strategy will be refreshed and expanded in 2025.

Creative Economy / Film Industry

3. Harbor Island Studios - Business Development: OEOCE generated new film businesses and jobs through the development of Harbor Island Studios. 2024-2025 were designated as pilot years for managing and monitoring the studio's operations. The purpose of the pilot years is to demonstrate demand for the studio, while simultaneously making the capital improvements to compel high level productions that will employ many local film workers. This includes documenting production inquiries, tours, completed productions, and budgetary details to establish a baseline for productivity.
4. Harbor Island Studios - Capital Improvements: A mill construction and roof upgrade are scheduled for late 2024 and early 2025, respectively. The improvements will enhance the facility's utility and support the local film industry by providing updated infrastructure. The objective is to complete these projects on time and within budget, ensuring minimal disruption to ongoing and future productions.
5. Executive's Film Advisory Board (EFAB) and Film Permitting: EFAB is a group of 15 film industry advisors that consult on the regional film industry and development of Harbor Island Studios. The group continues to meet monthly and is managed by OEOCE. Film permitting is led by OEOCE in collaboration with multiple County departments. An internal team of film liaisons from King County Parks, Facilities Management Division (FMD), Metro and Roads meet regularly with OEOCE to troubleshoot any issues and refine permitting processes. In 2025, with the addition of a Film Specialist, OEOCE will work to establish a more film-friendly permitting process. Current

⁸⁰ King County Executive Office. "Aerospace Alliance." Accessed December 2, 2024.
<https://kingcounty.gov/en/legacy/elected/executive/constantine/initiatives/aerospace-alliance>.

process entails use of a Special Use Permit (SUP) which is not intended, nor especially effective, for film permitting.

Creative Economy - Music Industry

6. Music Industry Development - Innovation Cluster, Cascadia Music Corridor, and WA Music Census: In the spring of 2024, OEOCE worked with four University of Washington Evans School of Public Policy and Governance graduate students to develop a strategy for a statewide music census. This was the students' capstone project for their Master's in Public Administration (MPA) degree. OEOCE and the Washington Department of Commerce Creative Sector Lead partnered to provide the project for the students. The methodology they developed is now ready to be executed as the next phase of the Washington Music Census work.

Creative Economy – Cross-Sector Business Development

7. Festivals/Events/Nightlife Partnerships: OEOCE met regularly with groups of small business owners and producers, including the Washington Festival and Events Association (WFEA), the Washington Nightlife Music Association (WANMA), Cultural Leaders Roundtable, Nighttime Economy Culture and Policy Alliance (NITECAP), and others to provide technical assistance and strategic support. OEOCE will host the Cascadia Music Summit on April 24-26, 2025.
8. Hospitality/Tourism - Cloudbreak Music Festival: OEOCE, in partnership with Visit Seattle and the City of Seattle, produced the third year of Cloudbreak Music Festival. OEOCE increased promotions, marketing, and communication of festival.
9. Countywide Creative Districts: OEOCE worked to ensure that creative economy is supported and visible throughout King County, leading to increased opportunities and income for creative workers and businesses. The office met monthly with District 3 city leaders to explore the development of local creative districts.

Economic Opportunity – Business Development

10. Community Business Connector program: to support small businesses, especially those in underrepresented and under-resourced communities and/or impacted by the COVID pandemic, OEOCE (through the Community Business Connector⁸¹ program) increased assistance capacity by contracting with two additional organizations in 2024 (now nine total). By focusing on areas with the lowest economic self-sufficiency standards, the office aims to enhance economic opportunities and support for local entrepreneurs. The Community Business Connector was also recognized by the Washington Economic Development Alliance (WEDA) for its focus on diversity,

⁸¹ Community Business Connector, "Home," accessed December 2, 2024, <https://communitybusinessconnector.com/>.

equity, and inclusion⁸² and the International Economic Development Council (IEDC) for its efforts in regionalism.⁸³

11. King County Aerospace Alliance: OEOCE completed an aerospace competitiveness study (Air & Space 2030 Strategy)⁸⁴ and expanded the King County Aerospace Alliance in 2024. OEOCE hosted two study briefings and fostered collaboration among legislators, educators, and private industry, thus seeking to retain the legacy aerospace manufacturing footprint while promoting growth in the new space sector. OEOCE transitioned the King County Aerospace Alliance to the “Aerospace Alliance” and contracted portions of its management to Greater Seattle Partners (GSP) in early 2024. GSP is working with OEOCE to host at least two regional aerospace industry convenings in 2025.
12. Business Retention & Expansion: OEOCE conducted an analysis of current County assets, especially real property, that could potentially be utilized /repurposed for business attraction and/or expansions. Special focus was paid to properties in unincorporated King County, clean technology development, and/or green economy businesses. OEOCE has made efforts to build an inventory of properties in conjunction with DLS staff. DLS capacity will open up in Q1 2025 to expand collaboration.
13. Cascadia Ultra High-Speed Ground Transportation (UHS GT): OEOCE advanced Cascadia high-speed rail by allocating the remainder of its funding. In partnership with University of Washington Mobility Innovation Lab, OEOCE developed the Transportation 2050 Dashboard and predictive model. OEOCE will also coordinate the County’s sponsorship of the Cascadia UHS GT Local Elected Officials Summit in 2025.
14. Regional Business Attraction & Marketing - Key Industry Expansion: In partnership with WA State Department of Commerce and Greater Seattle Partners, OEOCE attracted two new high-growth key industry business attraction/expansion projects in the cleantech sectors. OEOCE ensured the projects aligned with King County’s equity, climate, and workforce values.
15. Executive’s Small Business Awards: In partnership with the Department of Executive Services, OEOCE re-envisioned and relaunched the Executive’s Small Business Awards in 2024. A creative economy award category was added. The Executive recognized 24 finalists and eight awardees in categories that spanned from green economy to workforce development. OEOCE will lead the production of the awards in 2025 and plans to add more award categories.
16. FIFA World Cup 2026 Activation: Through the Community Business Connector program, OEOCE will provide focused support to business owners in select industries throughout King County to leverage the opportunity for FIFA World Cup tourism in 2026.

⁸² Washington Economic Development Association (WEDA), *Washington Economic Development Association (WEDA) Celebrates Excellence in Economic Development & Legislative Economic Development Champion with 2023 WEDA Economic Development Awards* (April 3, 2023), accessed December 5, 2024, <https://wedaonline.org/wp-content/uploads/2023/04/WEDA-2023-Economic-Development-Awards-Media-Release-FINAL-4-3-23.pdf>.

⁸³ The Seattle Metropolitan Chamber of Commerce, *Community Business Connector Receives Program Recognition* (September 16, 2024), accessed December 5, 2024, <https://www.seattlechamber.com/news/2024/09/16/press-room/community-business-connector-receives-program-recognition/>.

⁸⁴ Joint Center for Aerospace Technology Innovation, *Air & Space 2030: Final Report* (2024), accessed December 2, 2024, https://jcati.org/sites/default/files/Air%20%26%20Space%202030_Final%20Report.pdf.

Economic Opportunity – Workforce Development

17. Workforce Development Flexible Funding Development: OEOCE worked with the City of Seattle Office of Economic Development (OED) and Workforce Development Council of Seattle-King County (WDC) to secure \$15 million in flexible funding to support the WDC's primary function. This involved identifying new funding sources and ensuring sustainable financing for workforce training and placement initiatives. As of the end of 2024, \$12 million was secured.
18. King County Economic Opportunity Coalition (EOC): OEOCE transitioned the COVID Small Business Task Force to EOC in 2023. OEOCE, through EOC, met monthly with economic and workforce development employees across the Executive Branch. This gathering helped foster closer working relationships and more effective economic development program delivery.
19. Workforce Development Partnerships: OEOCE, through the WDC, convened Unincorporated King County and South King County municipal partners to discuss common workforce opportunities/challenges twice during the biennium. Meetings will continue in 2025 with other regions of the county.

Due to resource and capacity limitations, OEOCE focuses its efforts on convening, facilitating, supporting, and championing various internal and external efforts. Staff also provides limited one-on-one and group resource navigation to small businesses and workers. OEOCE develops strategic partnerships with agencies, leaders, unions, and organizations to coordinate, leverage, and accelerate economic development efforts throughout the county. As a regional leader, OEOCE convenes those who are doing economic development work in different parts of the county, to support their efforts and fuel the benefits of collective collaboration.

Creative Economy Defined: According to Americans for the Arts, a nonprofit organization whose primary focus is advancing the arts in the United States, there isn't one single definition of "creative economy."⁸⁵ "Creative economy" as a term gained popularity in 2001 from the book *The Creative Economy: How People Make Money from Ideas*, by John Howkins.⁸⁶

OEOCE defines creative economy as those economic sectors based on creative and intellectual assets, rather than traditional commodities or services. King County's creative economy is comprised of working creative laborers such as theater technicians, musicians, and costume makers; nonprofit organizations such as arts organizations and cultural producers and small businesses in the creative sector such as production shops, recording studios, and art galleries. King County's creative economy encompasses a wide range of activities including arts, design, media, architecture, fashion, advertising, gaming, and more. The Executive is focused on supporting workers in film and music production, and more broadly focused on the creative sector overall.

⁸⁵ Americans for the Arts. "Creative Economy." Accessed December 2, 2024.

<https://www.americansforthearts.org/by-topic/creative-economy/#:~:text=The%20creative%20economy%20is%20an,artistic%2Dbased%20goods%20and%20services.>

⁸⁶ The Policy Circle. "The Creative Economy." Accessed December 2, 2024.

[https://www.thepolicycircle.org/minibrief/the-creative-economy/#:~:text=In%202001%2C%20John%20Howkins%20brought,\)%2C%20social%20value%20\(stimulating%20knowledge.](https://www.thepolicycircle.org/minibrief/the-creative-economy/#:~:text=In%202001%2C%20John%20Howkins%20brought,)%2C%20social%20value%20(stimulating%20knowledge.)

The creative economy thrives at the intersection of innovation, originality, cultural heritage, and the generation of intellectual property. It encompasses both commercial and non-commercial activities and plays a significant role in driving economic growth, fostering cultural development, and shaping societal progress.

King County's creative economy consists of businesses, entrepreneurs, creatives, and nonprofit organizations that utilize a person's individual creativity as the source for the products and services they bring to life.

Performance Metrics

In 2024, OEOCE engaged with the King County Office of Performance, Strategy and Budget (PSB) staff intern to develop its office-wide and program/project key performance measures (KPMs). OEOCE has laid out a comprehensive set of project objectives and KPMs for 2025 onward in its 2025 Annual Plan, currently in draft form submitted on 11/5/2024, to be finalized in January 2025 (Appendix A.1). OEOCE tracks each objective with performance measures to ensure alignment with broader strategic goals and community needs. These objectives span multiple areas, including government operations, communication, infrastructure, industry support, and equity-driven initiatives. OEOCE's goal is to ensure that strategic goals, mission, and vision drive action effectively, and involves extensive performance measurement to embed Equity, Racial, and Social Justice (ERSJ) values.

Resources

Over the last two decades, King County's economic and workforce development portfolio has been reduced and decentralized, with a limited number of specialized economic and workforce development resources siloed within a few departments. In 2023, the King County Office of Economic Opportunity and Creative Economy (OEOCE) was established in King County Code to help unify and coordinate these disparate bodies of work under a common set of strategic and policy priorities outlined above.

OEOCE has increased communication across County agencies through the Economic Opportunity Coalition. In 2025, the Executive's proposed budget included recentralizing and consolidating a few Executive-sponsored initiatives and corresponding roles within OEOCE,⁸⁷ further highlighting the Executive's commitment to economic opportunity.

Below is a breakdown of OEOCE's requested resources in the 2025 Executive Proposed budget, all of which were adopted by the County Council without Council changes:

⁸⁷ King County, *2025 Proposed Budget Complete Book* (2025), 103, accessed November 27, 2024, https://cdn.kingcounty.gov/-/media/king-county/depts/executive/performance-strategy-budget/budget/2025/2025-proposed-budget-book/2025_kingcountyproposedbudget_complete.pdf?rev=a1b5c40d99e94f069d60045f3d8f85cb&hash=BA8979715B712965819DD49506DA8CB4.

Table 1 - OEOCE Requested New Resources in the 2025 King County Executive Proposed Budget

Adopted 2025 OEOCE Proposal	Amount	Position Changes	Justification for Proposal
Add a term-limited position with existing funding to support transportation infrastructure, with an emphasis on high-speed rail planning, as well as various internal workforce development efforts.	\$500,000	+0.5 TLT	Currently, the Economic Development director oversees both economic development and workforce development functions of the office. This position would add capacity to manage various workforce development efforts, including internal workforce equity, difficult to fill positions, and a Results for America state and local workforce fellowship.
Add a film specialist to manage film permitting and Harbor Island Studios reservations and marketing support.	\$153,000	+1.0 TLT	OEOCE requires additional capacity to effectively coordinate film permitting, liaise with other departments, manage scheduling for Harbor Island Studios, and support community engagement and marketing.
Add a communications specialist to manage social media, website development, newsletters, content creation for OEOCE, and marketing campaigns for Harbor Island Studios.	\$153,000	+1.0 TLT	For effective communications strategy implementation, OEOCE requires additional capacity to manage four social media channels, two monthly newsletters, website content creation, and marketing campaigns (including Harbor Island Studios marketing campaign) requires oversight and language accessibility.
Transfer funding from Finance and Business Operations (FBOD) to OEOCE for the 2025 Executive's Small Business Awards.	\$50,000	N/A	OEOCE will lead planning for a tribute event for the Executive in his final year of his final term. FBOD currently had capacity limitations to manage this event.

B. Analysis of the results achieved during the 2023-2024 biennium with the addition of both the director of creative economy and director of economic development and economic recovery. As much as feasible, quantitative results shall be provided

During the 2023-2024 biennium, the director of creative economy and the director of economic development and economic recovery (now referred as the director of economic opportunity) established OEOCE and its functions, expanded the office's services, and engaged more community collaborators. The directors' key accomplishments include:

- Continued development of Harbor Island Studios⁸⁸
- Expansion of the award-winning Community Business Connector⁸⁹ program
- Production of the Cloudbreak Music Festival⁹⁰
- Completion of the International Public Market Feasibility Analysis⁹¹
- Re-envisioning the Executive's Small Business Awards⁹²
- Funding the Air & Space 2030 Strategy⁹³
- Expansion of the King County Aerospace Alliance⁹⁴
- Launching the Economic Opportunity Coalition⁹⁵
- Closing out COVID economic recovery projects (see Section E)
- Securing new grants, partnerships, and fellowships

OEOCE staff offer technical support services to small businesses, working creatives, organizational partners, and other sector representatives daily, which include:

- Troubleshooting small business issues
- Connecting workers and businesses with resources
- Convening focus groups
- Advocating for policy changes
- Developing growth strategies that allow key sectors to thrive

⁸⁸ King County Creative. "Harbor Island Studios." Accessed December 6, 2024.

<https://kingcountycreative.com/harbor-island-studios/>.

⁸⁹ Seattle Metro Chamber of Commerce. "Community Business Connector." Accessed December 6, 2024.

<https://communitybusinessconnector.com/>.

⁹⁰ Cloudbreak Music Fest. "Cloudbreak Music Fest 2024." Accessed December 6, 2024.

<https://cloudbreakmusicfest.org/>.

⁹¹ Port of Seattle. "International Public Market Feasibility Study." Accessed December 6, 2024.

<https://www.portseattle.org/projects/international-public-market-feasibility-study>.

⁹² King County. "Executive's Small Business Awards." Accessed December 6, 2024.

<https://kingcounty.gov/en/dept/executive-services/about-king-county/business-operations/finance-business-operations/business-development-contract-compliance/small-business-awards>.

⁹³ OneRedmond. "Air-Space 2030 Final Report." September 2024. Accessed December 6, 2024.

https://oneredmond.org/wp-content/uploads/2024/09/Air-Space-2030_Final-Report.pdf.

⁹⁴ King County. "King County Aerospace Alliance." Accessed December 6, 2024.

<https://kingcounty.gov/en/legacy/elected/executive/constantine/initiatives/aerospace-alliance>.

⁹⁵ King County. "About the Office of Economic Opportunity and Creative Economy." Accessed December 6, 2024.

<https://kingcounty.gov/en/dept/executive/governance-leadership/economic-opportunity-creative-economy/about>.

Given its limited resources, OEOCE focuses on priority sectors within the region's key industries (see Figure 2 in Background section), including film, music, aerospace, local food, and tourism. To embed an ethos of continuous improvement, OEOCE strives to support initiatives that have broad and deep community impact and leverage the strengths of the small OEOCE team. To do this, OEOCE partners with County departments and external organizations to capitalize on King County's investment and spur economic growth. Often, this work is accomplished by convening community and industry organizations and economic development collaborators to collectively design strategies for economic sustainability and economic growth. Examples of this include:

- Industry Cluster Acceleration Program (ICAP): Collaborated with Washington Department of Commerce, Recording Academy, and representatives of WANMA (Washington Nightlife and Music Association) to engage with the sector development strategists at the Washington Department of Commerce to research the sector growth potential of the music industry.
- Executive's Film Advisory Board (EFAB): this group convenes monthly with OEOCE staff, and other King County departments, as is relevant. A group of experienced film professionals, these volunteers have offered significant consultation on the development of Harbor Island Studios
- King County Aerospace Alliance: a public-private partnership that was convened by King County Executive Constantine in 2010 to unite local jurisdictions, public sector groups, business, and labor toward one goal – fostering the long-term economic vitality, growth, and global competitiveness of the local aerospace industry – a major and indispensable source of family-wage jobs in King County. A sector study (Air & Space 2030 Strategy) was completed in 2023.
- Community Business Connector: This initiative is a partnership of King County, the Port of Seattle, and the Seattle Metropolitan Chamber of Commerce to help with technical assistance, access to capital, business planning, marketing, assistance with government forms and grants, and language interpretation services.
- Washington Nightlife & Music Association (WANMA): this group of small business owners, in the music and nightlife sector, meets monthly with OEOCE, to keep King County abreast of nighttime culture and business issues.
- Washington Festivals and Events Association (WFEA): OEOCE is a regular participant and presenter in monthly meetings of statewide festival and event producers, most of whom are King County-based. As issues are highlighted, OEOCE helps to connect producers to King County resources that can be helpful in reaching successful resolutions.

OEOCE strives to be a regional convener and sector advocate, and not a direct service provider as much as possible, in order to impact the largest number of citizens with the limited resources available. The OEOCE team focuses on initiatives that can be supported and implemented effectively, and that serve immediate community needs across King County.

These collaborations foster information sharing that allows King County to stay abreast of the economy while strategizing responses, policies and initiatives that encourage economic stability, sustainability, and growth. As a regional leader, convening internal and external partners is an essential role for OEOCE. For example, Cloudbreak Music Festival was initially a response to the COVID pandemic. OEOCE knew that music venues (and other performance venues) were the first to close, and the last to reopen, and working musicians had not had performance spaces throughout the pandemic, which is where they make their living. So, OEOCE collaborated with Visit Seattle to develop an initiative that centered both independent live music venues, and working musicians, while appealing to tourists.

OEOCE ACTIVITIES

OEOCE leverages partnerships and available resources to advance high-priority initiatives and projects. Activities that OEOCE undertook in the 2023-2024 biennium are described in the table below.

Table 2 - OEOCE Activities, 2023-2024

OEOCE Activity	Description	Quantitative Data
Leadership of Economic Opportunity Coalition	OEOCE established the employee Economic Opportunity Coalition (formerly the COVID Economic Recovery Task Force) to align economic and workforce development strategy across the Executive Branch	Group meets monthly to share updates and explore collaboration opportunities
Consultation on music and nightlife related issues	Monthly engagement with WANMA (Washington Nightlife & Music Association); this group is comprised of small business owners	12 monthly meetings, partnership on ICAP (Innovation Cluster Accelerator Program) yearlong program – resulted in \$150,000 in funding for WANMA
Development and implementation of Cloudbreak Music Festival	Annual music festival founded in 2022, and now in its third year King County and Visit Seattle are primary partners; Seattle OED joined as primary partner in 2023 and 2024 Funded by King County lodging tax, and City of Seattle OED funding, this is a music tourism initiative	71 downtown hotels, 35 independent small business live music venues, and hundreds of local musicians are all engaged in Cloudbreak Music Festival Tourists staying in any of the 71 downtown hotels have free access to the Cloudbreak shows
King County Film Initiative development with external partners	Developing the King County Film Initiative in partnership with regional film cities and organizations	12 meetings annually with regional film liaisons from King County, 12 meetings annually with film unions (IATSE & SAG-AFTRA); 12 meetings annually with Washington Filmworks (State film agency) and Seattle Film Office; Meetings and presentations as needed with other King County film offices including Shoreline Film Office, Burien Film Office, Seattle Film Commission, and Snoqualmie Valley Film Commission

OEOCE Activity	Description	Quantitative Data
King County Film Initiative development with internal partners	Collaboration with multiple internal county departments in support of film initiative development. Regular partners include FMD and SW, as they are key developers of Harbor Island Studios. Related to film permitting, OEOCE convenes quarterly meetings with film liaisons from Metro, King County Parks, King County Roads, and King County Facilities to discuss and refine process for film production on King County properties.	Quarterly meetings with interdepartmental King County film liaisons to coordinate film permitting processes and assess impacts (Eight meetings in 2023-2024); Regular monthly meetings with FMD re: Harbor Island Studios (48 meetings in 2023-2024).
Harbor Island Studios development	Ongoing work in progress to develop Harbor Island Studios and build out infrastructure to support local film workers.	<p>In 2023-2024, OEOCE led the business development for Harbor Island Studios. 2024 highlights of the stats to date (1/1/24-11/30/24) include:</p> <p>88 productions (86 are entirely local productions)</p> <p>191 production days</p> <p>2,735 cast and crew days</p>
OEOCE websites and social media	Management of OEOCE website, newsletters and King County Creative website and social media	<p>OEOCE oversight of development of new King County OEOCE website scheduled to launch on 12/6/24; content creation and management of OEOCE website with 577 visits in 2023, and 1,759 visits through 11/30/2024;</p> <p>Content creation and management of King County Creative website with 15,247 views in 2023 and 26,462 views through 11/30/2024;</p> <p>Content creation and management of two Instagram accounts:</p>

OEOCE Activity	Description	Quantitative Data
		@kingcountycreative with 1,386 followers, newly created @harborislandstudios with 383 followers
OEOCE newsletters	Content creation and publishing of King County Creative Connector monthly newsletter; development of soon to be released OEOCE newsletter	King County Creative Connector monthly newsletter currently has 2,213 subscribers with an average open rate >60 percent; New OEOCE newsletter first issue is being published in December 2024
Collaboration with Washington Department of Commerce Creative Sector Lead	OEOCE partnered with WA Dept. Of Commerce Creative Sector Lead to develop statewide music census plan. Currently working collaboratively to implement this plan.	Recruited four UW Evans School MPA grad students in spring 2024 to develop music census plan.
Management of key partnerships	Managed strategic partnerships with multiple economic and workforce development organizations	Staff and/or represent Executive Constantine on Greater Seattle Partners board of directors and executive council, Workforce Development Council board of directors; advise Executive on biennial ADO designation; oversee contracts with each organization
Tourism development strategies	Advised on various tourism development strategies, such as the FIFA World Cup, MLB All-Star Game, Bumbershoot, Tasveer Film Festival and Brand USA Consulted with new Bumbershoot leadership team; Partnered with Tasveer Film Festival; Presented at international tourism conference	Six meetings with new Bumbershoot leadership to consult about historical challenges, opportunities, and best practices; Tasveer partnership: OEOCE Creative Economy Director served on a panel at the Tasveer Film Market and OEOCE hosted a trade show booth and a tour of Harbor Island Studios with international film producers who potentially want to work

OEOCE Activity	Description	Quantitative Data
		in King County to employ film professionals; Brand USA: In October 2024, Brand USA covered expenses for OEOCE Creative Economy Director to travel to London and present at the USA Tourism Conference on the value of centering arts and culture in a tourism strategy. Cloudbreak Music Festival was featured.
Funded the PowerPA (Production Assistant) Partnership, a film industry workforce development initiative	Building an equitable film ecosystem is a key goal of the King County film initiative. Leveraging an existing training that helps individual workers skill up and land their first jobs is a cost-effective way to help entry level film workers enter the film industry.	OEOCE provided scholarships in 2023 and 2024 to support 45 diverse and under-resourced King County residents' participation in a weekend production assistant training; they each earned a certificate
Participated in the Cascadia Music Corridor, a four-state regional initiative to support music industry development	Ongoing collaboration building out a network and shared resources to support four state regional music industry development	This work is ongoing and specifically intended to support music-related small businesses and working musicians in rural areas; an established network will help them find and access resources, touring routes, etc.
Resources and referrals / Customer service	Resources and referrals for creative industry small businesses and working creatives; fielding daily calls and connecting small businesses to resources	This is a large part of what OEOCE does on a daily basis. OEOCE fields a wide variety of inquiries, connecting King County residents, businesses and workers to resources and opportunities. Due to capacity constraints, OEOCE currently only tracks film-related inquiries. In 2024, OEOCE fielded 1,785 film inquiries via phone, email, and meetings
Career Corps	In partnership with the Workforce Development Council of Seattle-King County (WDC), King County provided \$3	Led by a subrecipient partnership with WDC, the program has placed 62 individuals into living-wage jobs paying an average of \$27.25 an hour since August 2022. King

OEOCE Activity	Description	Quantitative Data
	million to establish a Career Corps ⁹⁶ program to connect dislocated workers of color, bilingual workers, and youth with career services, training, job placement, and wraparound services to individuals in King County who are unemployed or underemployed due to the COVID-19 pandemic.	County pays wages for an average work experience length of 11 months. 14 individuals continue working in 2024, with the program concluding by the end of the year.
Virtual Hiring Hall	In partnership with Martin Luther King Labor , ⁹⁷ King County provided \$150,000 to set up a virtual hiring hall and training partnership linking underrepresented workers, community organizations, labor, and employers, facilitating efficient job placement and skill development.	The platform reached more than 750 people in 2022, with more than 300 of those people receiving wrap-around services through the program. 30 unions and over 100 employers are now engaged in the program. A total of three Job Fairs with over 200 people in attendance were hosted.
ADO Business Assistance Program (Community Business Connector) ⁹⁸	The Seattle Metropolitan Chamber of Commerce, which is the Associate Development Organization (ADO) for King County, was awarded \$1 million in funding to develop a COVID Business Assistance program. At least 70 percent of the businesses the ADO assisted had to score higher in King County's Social & Economic Risk Index (SERI).	Facilitated more than 800 business interactions such as help with technical assistance, access to capital, business planning, marketing, assistance with government forms and grants and language interpretation services. Reached small businesses in 31 King County jurisdictions, of which 78 percent were BIPOC-owned. Hosted seven business assistance events with local chambers and partners for networking and knowledge exchange in Shoreline, Skyway, Tukwila, SeaTac, Kent, Snoqualmie Valley and Vashon Island.

⁹⁶ King County Workforce Development Council, "Investment Guide," accessed December 2, 2024, <https://www.seakingwdc.org/investment-guide>.

⁹⁷ MLK Labor, "Home," accessed December 2, 2024, <https://www.mlklabor.org/>.

⁹⁸ Community Business Connector, "Home," accessed December 2, 2024, <https://communitybusinessconnector.com/>.

OEOCE Activity	Description	Quantitative Data
South Seattle Community Food Hub (SSCFH)	King County partnered with Food Lifeline to develop a community-driven effort that builds vital infrastructure for a more equitable, sustainable, and accessible regional food system throughout Western Washington. The focal point of this multi-phase project is a processing and distribution center designed to increase capacity and connection between local farmers and their constituents including hunger relief agencies, wholesalers, and other consumers across multiple sectors.	Since the formation of the Advisory Committee, SSCFH has secured \$6.5 million in grant funding from King County and the US Department of Housing and Urban Development through the support of Senator Patty Murray's office. These grants primarily fund the preconstruction and construction phases of the project. A portion of the funding enables the project to hire critical staff and consultants who will, in the coming year, complete assessments, design the facility, and prepare for the launch of construction.
Arts & Culture Grant Program	The Arts and Culture grant program provided one-time grants to some of King County's most impactful cultural organizations and businesses that were adversely affected by the pandemic. These grants aimed to prepare facilities for reopening, bring the people of King County together in a safe environment, and re-employ cultural workers.	After award eligibility review and organizational pre-pandemic revenue adjustment, \$19,247,093 was awarded to 103 organizations in the areas of arts, culture, heritage, science, independent music venues, and independent movie theaters.
Events and Festival Grant Program	These one-time grants provided relief to the festivals and events producers adversely impacted by the COVID-19 pandemic, so they could address the needs of event and festival producers seeking to reestablish community activities, events, festivals, and celebrations in a safe environment, while engaging residents and tourists throughout the County and employing event workers, working creatives, and culture bearers.	\$1,977,446 in relief was delivered to 185 organizations to put on over 200 events and festivals throughout King County.
Childcare Expansion Program	King County provided \$1 million to Imagine Institute's "Imagine U" and its Shared Services Hub. The Hub, led and designed by childcare business owners for childcare business owners, helps	The "Imagine U" component completed in 2023, having trained and supported successful licensure of 25 childcare providers, creating up

OEOCE Activity	Description	Quantitative Data
	childcare entrepreneurs maximize their profits using innovative tools and services.	to 300 additional childcare slots in King County. The peer-based learning model provided paid internship experiences, mentorship, and wrap around supports related to business needs. The Shared Services Hub supports 187 existing licensed childcare providers through monthly peer gatherings in languages including Oromo, Somali, and English, and provides a suite of on demand business technical assistance services. The grant has funded development of a website directory of childcare providers, business software including QuickBooks and Sandbox, translation of program and business documents, and development of early learning curriculums.
Economic Recovery & Reconciliation Alliance (ERRA)	King County provided \$1 million in funding to ERRA, an initiative launched in 2020 by a collective of more than 90 King County BIPOC nonprofit and business leaders to ensure the inclusion of communities in the region's post-COVID-19 recovery and prosperity.	Funding was used to develop an audit of King County's equity framework for ARPA/CLFR funding decisions, as well as the www.erralliance.org ⁹⁹ website.
Air & Space 2030	A third-party analysis of the regional aerospace industry and the supply chain impact of the COVID-19 pandemic, "Air and Space 2030 Final Report." ¹⁰⁰ This analysis provided crucial insights for developing targeted support strategies for this critical sector.	Hosted two study briefings for elected officials and educational institutions. Developed a Kent Valley aerospace industry sector partnership.

KEY OEOCE INITIATIVES

⁹⁹ Economic Resilience and Recovery Alliance, "Home," accessed December 2, 2024, <https://www.erralliance.org/>.

¹⁰⁰ King County Aerospace Alliance, "Air and Space 2030 Strategy: Investing in the Evolution of King County's Aerospace Sector," Spring 2023, https://oneredmond.org/wp-content/uploads/2024/09/Air-Space-2030_Final-Report.pdf

CLOUDBREAK MUSIC FESTIVAL

During the pandemic music venues were largely closed, and both the venues and local musicians experienced a significant drop in revenue. Additionally, the musicians, many of whom were gig economy workers, were not eligible for pandemic relief funding from unemployment resources. At the same time, tourism had also declined for the pandemic. To help artists, music venues, and hotels recover, OEOCE designed a music tourism initiative in partnership with Visit Seattle, funded by King County Lodging Tax. The Cloudbreak Music Festival spanned the dates of 11/3/22 through 11/23/22 in its first year and 11/01/23 through 11/22/23 in its second year. The third year of Cloudbreak was implemented from 11/7/24 through 11/27/24 with 90 shows in 35 venues. As of this writing, the data analysis from 2024 Cloudbreak Music Festival is not yet available.

During Cloudbreak Music Festival, downtown Seattle hotel guests are provided access to complimentary concerts. The lodging taxes fund the artist performance fees for these concerts. The independent live music venues, who would typically sell tickets to pay the artists, agreed to provide a percentage of the concert capacity for free to the tourists as they did not have to pay the funded portion of the artist's fee. The campaign works for stakeholders as it incentivizes stays in Seattle hotels by offering free entertainment to tourists, while also providing earnings to local musicians working in independently owned music venues.

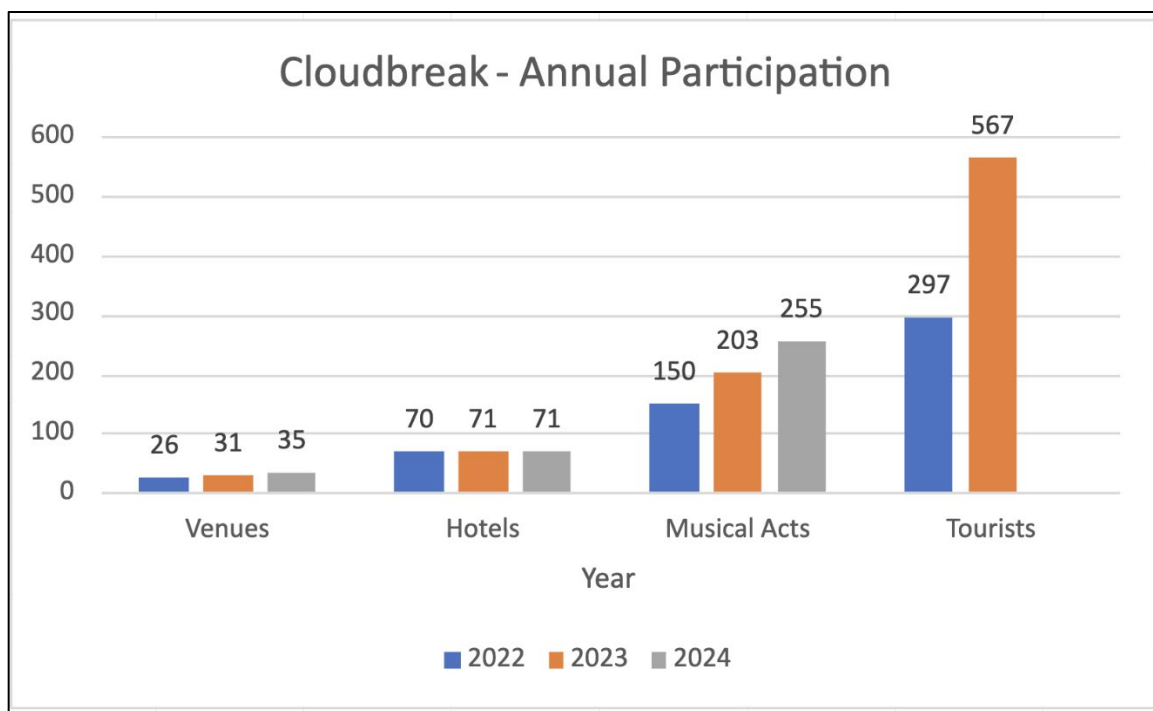


Figure 4: Cloudbreak Participation by Year (Venues, Hotels, Musical Acts, Tourists).
Note: Cloudbreak 2024 took place in November 2024. Tourist data is not yet available.
Data: Visit Seattle

As reported by Visit Seattle, 70 downtown Seattle hotels, 26 independent live music venues, more than 150 artists, and 297 tourists participated in the first year of Cloudbreak. In 2023, the City of Seattle contributed \$100,000 to the Cloudbreak Music Festival initiative, joining the partnership with King County and Visit Seattle. 71 downtown hotels, 31 independent live music venues, 203 artists, and 567

tourists participated in Cloudbreak 2023, with over 60 events produced with 255 local musical acts (some bands, some individual musicians). For the full reports on Cloudbreak 2022-2023, see Appendix B.1. In November 2024 OEOCE executed the third year of Cloudbreak Music Festival, in partnership with Visit Seattle and City of Seattle Office of Economic Development. The festival ran November 7-27 in 35 King County music venues. Tourist engagement numbers are still being collected from hotels and venues, as this proviso is being submitted, so they will be forthcoming.

POWER PA (PRODUCTION ASSISTANT) TRAINING SCHOLARSHIPS

It is a shared understanding that in the film industry, one of the most effective entry points for a new worker is through being a production assistant (PA). In this role, PAs learn the different roles and responsibilities of a film production set, make connections with film professionals, and can take the first steps into a film career track. This entry level opportunity does not require a college education, but it does require basic training that allows PAs to land their first jobs in the industry.

[The Power P.A. Course \(thepowerpacourse.com\)](https://www.thepowerpacourse.com/)¹⁰¹ offers necessary basic training for PAs led by established industry professionals. The organization reported that as it was filling its classes multiple King County residents who applied could not afford the \$350 course fee. Reflecting the Executive's priority of advancing racial equity, OEOCE sponsored 45 students for the PA class for in 2023 and 2024, supporting the growth of a diverse, local crew workforce.

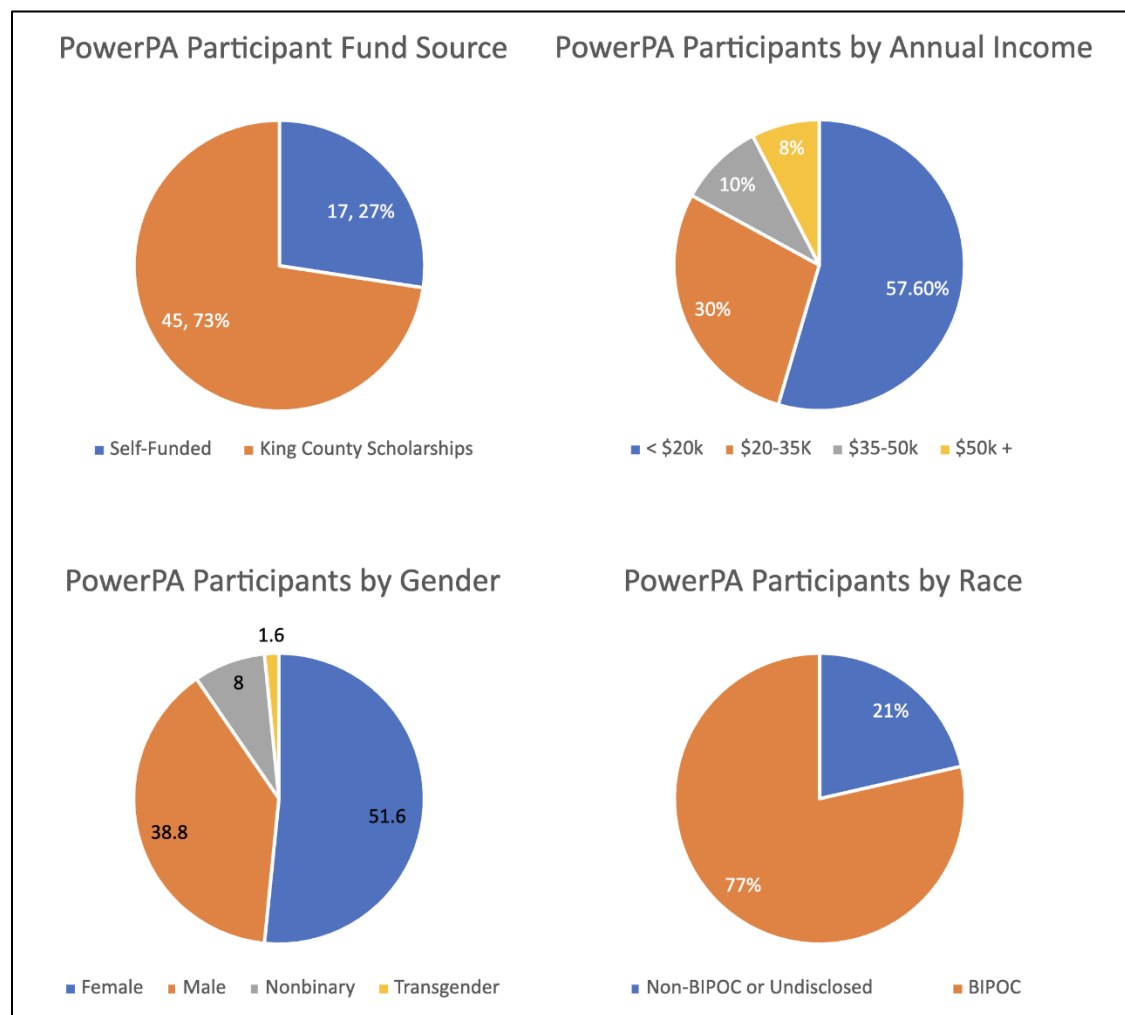


Figure 5: Power PA Participation (Funding Source, Annual Income, Gender, and Race)
Data: Power PA Course Leadership – Enrollment Data

¹⁰¹ The Power PA Course. "Home." Accessed November 25, 2024. <https://www.thepowerpacourse.com/>.

KEY CREATIVE ECONOMY COMPLETED STUDIES AND NEW STUDIES UNDERWAY IN 2023-2024:

Understanding the creative economy ecosystem is essential to informing policy and programmatic decisions, yet little local data exists previously. In 2019, the City of Seattle released the Seattle Creative Economy report,¹⁰² which included much King County data. Of note, this report found that when creative technology is included in the data, King County has the highest wages in the country.

Seattle has the highest paid Computer workers in the nation, lowest paid Arts workers. It's no secret that workers in Computer occupations are some of Seattle's most highly paid and workers in Arts, Design, Entertainment, and Media occupations are not. However, the data reveal a striking disparity in Seattle, beyond that of all other large U.S. metros. When we compared cost-of-living-adjusted, median hourly earnings of the 53 U.S. metros with populations over 1 million, we found that the Seattle-Tacoma-Bellevue metro has the highest paid creatives in Computer occupations (\$48.88/hr.) and the lowest paid creatives in Arts, Design, Entertainment, and Media occupations (\$11.87/hr.).¹⁰³

Musicians and music composers were amongst the lowest wage earners in this study, at \$10.21/hr. and \$12.05/hr. respectively,¹⁰⁴ significantly below the minimum wage.

The economic status of musicians as made clear in the 2019 Seattle Creative Economy Study, followed by the devastating effects of the pandemic on the regional music ecosystem, warrant additional research on the health of the regional music ecosystem, and specifically, the commercial music industry.

King County's only known music economic impact study, until the forthcoming Washington Music Census (2025), is the 2008 [The Economic Impact of Music on the Seattle Economy](#).¹⁰⁵ This study reported that the King County music industry directly created 20,193 jobs annually, with \$2.2 billion in sales, \$840 million in earnings, and at least \$148 million in tax revenues. Including indirect and induced impacts of the industry, the impact grew to 38,862 jobs supported, \$4.6 billion in sales, and \$1.6 billion in labor income. No economic impact study of the statewide commercial music industry has yet been conducted, although with the recent funding allocation from the Washington Department of Commerce the statewide music census is scheduled to be completed by 12/31/24, with the full analysis of the data scheduled to be completed by 3/31/25. The methodology for this study was completed in May 2024, by four University of Washington Evans School students as their capstone project (Appendix B.2).

Washington Music Census – Funded by Washington Department of Commerce and City of Seattle Office of Economic Development in 2024; music census underway for Fall 2024; full music census to be completed by 3/31/25 (Appendix B.3).

¹⁰² City of Seattle, *Creative Economy Report Final*, accessed December 2, 2024, <https://www.seattle.gov/documents/Departments/FilmAndMusic/Creative%20Economy%20Report%20Final.pdf>.

¹⁰³ City of Seattle, *Creative Economy Report Final*, 32, accessed December 2, 2024, <https://www.seattle.gov/Documents/Departments/FilmAndMusic/Creative%20Economy%20Report%20Final.pdf>.

¹⁰⁴ City of Seattle, *Creative Economy Report Final*, 61, accessed December 2, 2024, <https://www.seattle.gov/Documents/Departments/FilmAndMusic/Creative%20Economy%20Report%20Final.pdf>.

¹⁰⁵ City of Seattle. *Seattle Music EIS: 2008*. Accessed November 25, 2024. https://www.seattle.gov/documents/departments/filmandmusic/seattle_music_eis_2008.pdf.

INQUIRIES & TECHNICAL ASSISTANCE

OEOCE receives daily inquiries from small businesses, individual working creatives, and nonprofits seeking technical assistance, funding assistance, referrals, collaborative opportunities, or consultation requests. Given OEOCE's current resources, and the needs of the creative and other sectors, OEOCE's strategy is to connect those who inquire with community resources whenever possible. The result of this work is that King County citizens and workers connect with the resources they need. As a regional leader, OEOCE is often called on by small businesses, municipalities in King County, and working creatives for technical assistance needs. OEOCE is routinely called upon as subject matter experts in the field to provide direct service to King County residents and business owners in need of support or advice.

OTHER OEOCE ACCOMPLISHMENTS

In addition to developing initiatives with broad impact, OEOCE engages in much community and industry support work. As a core tenet of this work, OEOCE strives to maximize its service to the greatest number of people in King County, although routinely, small business owners and individual entrepreneurs seek guidance or resources from the staff. OEOCE regularly convenes, connects, and collaborates with small business owners and working creatives. Examples of this include monthly meetings with Washington Nightlife and Music Association (WANMA), Washington Festivals & Events Association (WFEA), Film Crew Town Hall, and Film Focus Fridays, a series of meetings with different segments of small business owners in the film industry (e.g. producers, studio owners, production assistants, location managers, etc.).

HARBOR ISLAND STUDIOS

In June of 2023, King County hosted the soft opening of Harbor Island Studios. Featuring three short films shot entirely in the studio by emerging local film producers, the soft opening was attended by more than 1,000 people. This event publicly launched the studio and was received with enthusiastic and robust community response. OEOCE continues to host public tours on a regular basis.

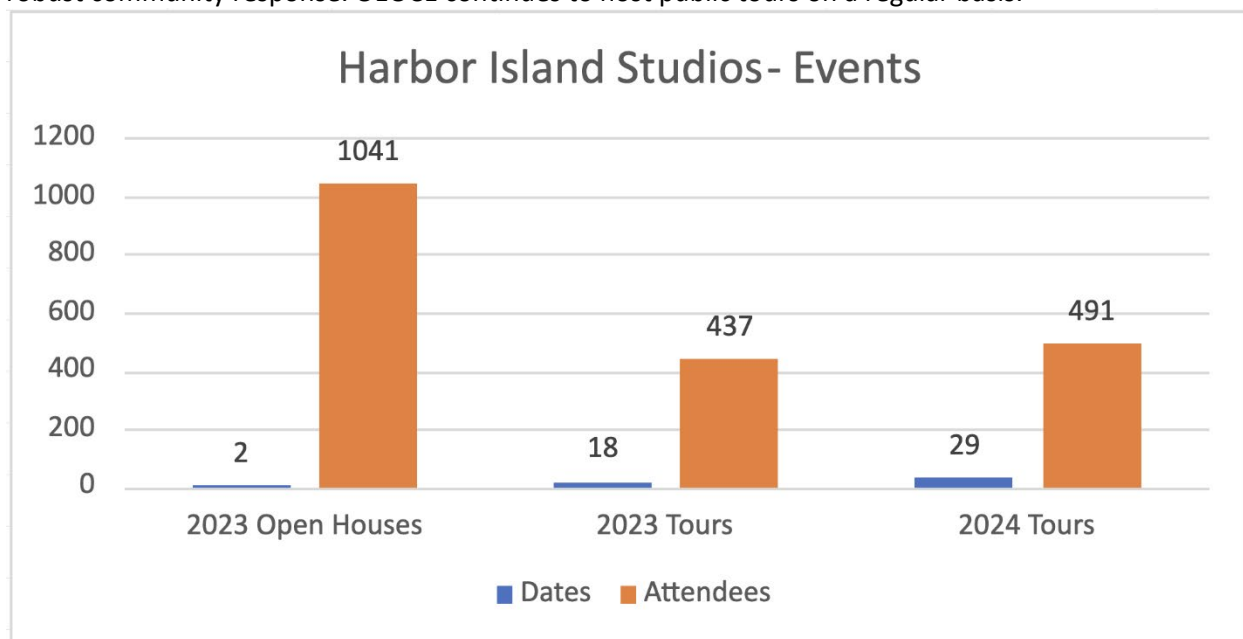


Figure 6: Harbor Island Studios Events (Open House, Tours)
Data: Office of Economic Opportunity and Creative Economy

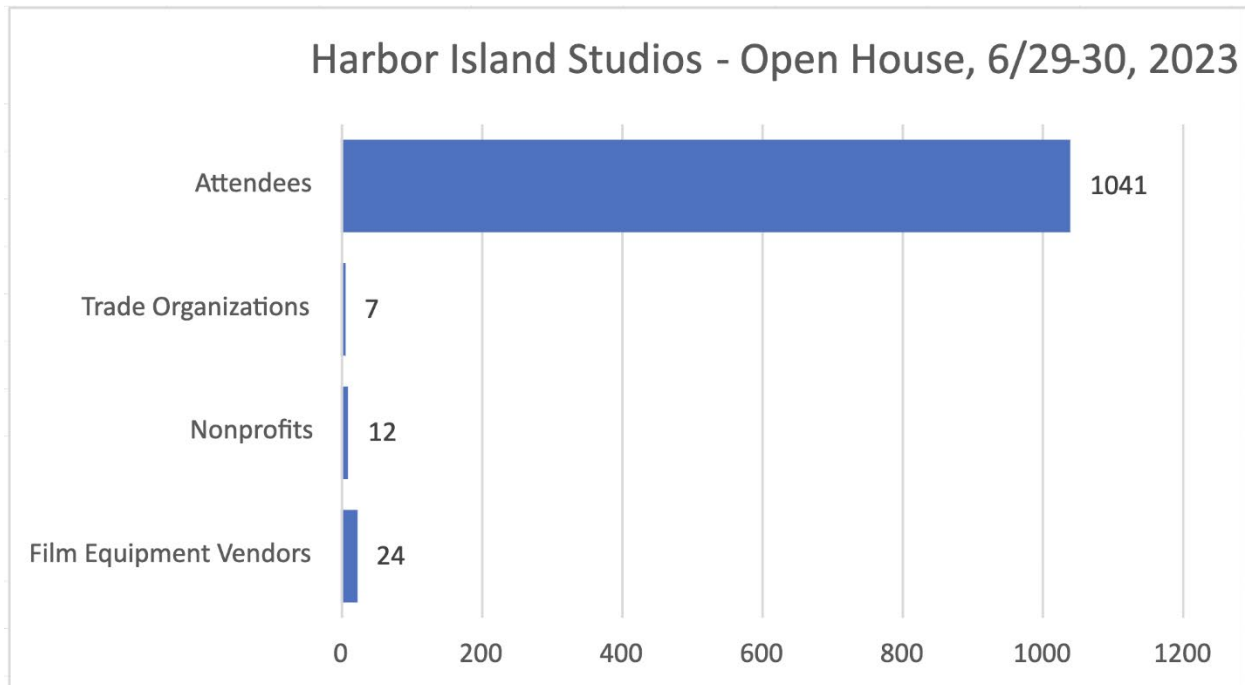


Figure 7: Harbor Island Studios Open House Participation

Note: Actual number of organizations, nonprofits, and vendors is being calculated; this is included as an example and will be updated.

Data: Office of Economic Opportunity and Creative Economy

Twenty-four independent small businesses and film equipment vendors, 12 film-related nonprofit organizations, and seven trade organizations engaged with these visitors who came to see Harbor Island Studios. This was an opportunity to introduce the community and the film industry to the work at Harbor Island Studios. Accordingly, more than 1,000 people became aware of the opportunity that is being developed at Harbor Island Studios. Most of these visitors were from the local film industry. The crowd exuded excitement about this new opportunity, the addition of production facility infrastructure to local industry that has been without heretofore. Film industry workers, including many union members, expressed hopefulness that the addition of Harbor Island Studios to the County's film ecosystem will generate work that keeps them employed locally.



Figure 8: Executive Film Advisory Board, County Executive and Creative Economy Director at Harbor Island Studios Open House
Photography: Erik Vision

FUNDING AWARDS

OEOCE pursued non-general fund, external funding opportunities throughout the biennium. The office was successful in four of its five applications. Below is a list of funding received by OEOCE:

- \$200,000 from City of Seattle Office of Economic Development for partnership on Cloudbreak Music Festival
- \$10,000 from WA Department of Commerce for Cascadia Music Corridor work
- \$30,000 from WA Department of Commerce for Solar Panel Feasibility Study & Structural Analysis for Harbor Island Studios

COMMUNICATIONS & SOCIAL MEDIA

While OEOCE does not have a dedicated communications staff, the office maintains strong engagement rates across communications and social media platforms. This is one of the primary ways that OEOCE shares relevant information with county residents and receive input and feedback from them. During the biennium, OEOCE staff sent 18 monthly King County Creative Connector newsletters to a list of more than 2,200 subscribers, with a 63 percent average open rate. OEOCE also hosts 3,105 members on its [King County Creative FB group](https://www.facebook.com/groups/KingCountyCreative/)¹⁰⁶ and 1,321 Instagram followers @kingcountycreative.¹⁰⁷

¹⁰⁶ King County Creative. "King County Creative." Facebook group. Accessed November 25, 2024. <https://www.facebook.com/groups/KingCountyCreative/>.

¹⁰⁷ King County Creative. "King County Creative." Instagram. Accessed November 25, 2024. <https://www.instagram.com/kingcountycreative/>.

NATIONAL AND STATEWIDE MEETINGS & COLLABORATIONS

OEOCE participates in statewide and national meetings and collaborations on a regular basis. The office's participation in these meetings is to market King County as a significant music hub along with mutual information and best practices sharing.

Cumulatively, all the work referenced in this subsection reflects an office strategy to leverage limited resources for the greatest impact possible. Work such as Cascadia Music Corridor initiative helps connect and convene working creatives, small businesses, and nonprofit organizations with each other, while offering shared knowledge and expertise to help the creative sector embrace opportunities to advance their work in King County.

Overall, the establishment of OEOCE and the addition of the Economic Opportunity Director and the Creative Economy Director, have significantly fortified the economic development work throughout the county. This is evidenced by the extensive engagement of OEOCE with industry and community leaders, unions, workers, and residents in King County. It is further evidenced by the successful securing of funds from other resources to support OEOCE's work, as well as anecdotal input from workers and small businesses. Investment in OEOCE has exponential return for King County as this small office prides itself on being responsive to local economic concerns, connecting small businesses, organizations, and workers with resources, working to ensure that opportunities are equitable, and allocating resources where they will have the most impact. OEOCE strives to move at the speed of business, while engendering trust with small businesses, organizations, and partners. Responsiveness to community and industry needs is a high priority for OEOCE. The addition of the director of economic opportunity and the director of creative economy and the establishment of the OEOCE has allowed King County to fortify and expand its economic development and creative economy work, its reach into communities, and its impacts across the region.

C. Assessment of the region's current creative economy market, analysis of the region's creative economy market potential and the rationale for the need for the office of economic opportunity and creative economy to achieve the region's creative economy market potential

OEOCE defines creative economy as those economic sectors based on creative and intellectual assets, rather than traditional commodities or services. King County's creative economy is comprised of working creative laborers such as theater technicians, musicians, and costume makers; nonprofit organizations such as arts organizations and cultural producers and small businesses in the creative sector such as production shops, recording studios, and art galleries. King County's creative economy encompasses a wide range of activities including arts, design, media, architecture, fashion, advertising, gaming, and more. The Executive is focused on supporting workers in film and music production, and more broadly focused on the creative sector overall.

Much like information technology and green economy, creative economy sectors and occupations cut across many other sectors and occupations. Thus, measuring the creative economy market and its potential is not a straightforward analysis. As noted, the terms "creative economy" and "creative industries" are somewhat new, so less research is available on their potential and impact.

King County's creative economy consists of businesses, entrepreneurs, creatives, and nonprofit organizations that utilize a person's individual creativity as the source for the products and services they bring to life.

In March 2024, the WA Department of Commerce released [*Creative Washington: Strategic Plan for Growing and Strengthening Washington's Creative Sector*](#).¹⁰⁸ To date, this is the most comprehensive creative economy data available for King County and Washington state. The findings of this study, commonly referred to as the *Washington Creative Economy Strategic Plan*, are specifically relevant to King County, as many of the jobs and revenue generated come from this county. This 2023 data is the most recent and thorough available to analyze the regional creative economy. Hence, OEOCE will utilize the framing and data from this study to define and measure the regional creative economy.

Notably, this research cites that Washington's creative sector accounts for nearly 20 percent of the state's economy, contributing nearly \$120 billion annually to the state GDP. The 2022 US Bureau of Economic Analysis assessed that Washington state has the highest share of GDP generated by arts and cultural industries at 9.5 percent. The share for most states ranged between 2 and 5 percent. Washington, the District of Columbia, California, and New York were the only areas where the arts and cultural share of total GDP exceeded 5 percent. 9.5 percent is a significant percentage of King County's overall economy. Notably, the *Washington Creative Economy Strategic Plan* noted that 74 percent of the GDP generated in the Washington creative economy is generated in King County.

Based on an extensive review of national and international best practices by a team of Washington creative economy stakeholders,¹⁰⁹ the state's creative economy has been defined to encompass the following economic sectors:

¹⁰⁸ Choose Washington State. *WACESP Final Report*. December 26, 2023. Accessed November 27, 2024. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

¹⁰⁹ Washington State Department of Commerce. *Washington Aerospace Competitiveness Study Final Report*, 2024. February 2024, 40. Accessed December 5, 2024. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

- Architecture and Living
- Creative Technology (Ex: Video games, Web design, Podcasts)
- Culinary Arts and Beverage
- Cultural Institutions
- Design and Advertising
- Fashion
- Film, Television, and Radio
- Music, Performing Arts, and Visual Arts
- Publishing



Figure 9: Creative Economy Wheel
Data: 2024 Washington Department of Commerce Creative Economy Strategic Plan

North American Industry Classification System (NAICS) Codes and Standard Occupational Classification (SOC) Codes were used in this research to identify the creative economy components. From the *Washington Creative Economy Strategic Plan*:

There is healthy debate amongst economists about which industries should and should not be part of a creative economy definition, but this range of sectors is consistent with practice and allows the unique assets of each of Washington's regions to shine through. Creative technology, though the subject of much discussion, is a distinctive feature of Washington's creative economy that significantly contributes to the growth and strength of the creative economy as a key industry sector. The proliferation of online content in the creative economy as well as the continued growth of subsectors, like the video game industry, also make this a vital part of the

creative economy to support and to further define through research and industry engagement. The creative economy is characterized by a significant number of non-traditional workers who operate sole proprietorships and sole-owner LLCs and who are small business owners, independent contractors, and freelancers. This makes small business and workforce development strategies essential to the development of the state's creative economy.¹¹⁰

King County's creative economy consists of businesses, entrepreneurs, creatives, and nonprofit organizations that utilize a person's individual creativity as the source for the products and services they bring to life. OEOCE's creative economy initiative, known as King County Creative, focused on supporting the aspects of the creative economy that are not already supported by 4Culture. 4Culture leads the work of supporting nonprofit arts, culture, heritage, and preservation nonprofits throughout King County, serving more than 700 regional nonprofit organizations. While 4Culture's work is to support the nonprofit arts and culture organizations in the region, much of the creative ecosystem is in the private sector, composed of working creatives, entrepreneurs, and small businesses throughout the county.

The King County Creative initiative supports the overall creative economy in King County with a distinct focus on fortifying the creative sector small business owners and working professionals, many of whom are in the film and music production fields and face unique challenges. The work that creatives do is frequently intersectional gig work, as creative professionals often contract their services from job to job and through different parts of the creative sector. For instance, stage technicians and lighting technicians often work on theater stages, festival grounds and large film productions, and could receive pay as either a contractor or employee from different sources. Similarly, audio engineers often work in live music clubs, festival grounds, and recording studios, and a costume designer might work for a dance organization, then a videogame production, then an opera. This professional intersectionality that many creative workers experience makes analyzing the creative economy challenging, particularly due to the way job data is captured and tracked. Gig economy jobs, including many in the creative sector, do not show up in labor reports.¹¹¹

The aforementioned 2024 data and research report from the *Washington Creative Economy Strategic Plan* offers some key insights into King County's creative economy, including the number of creative economy jobs in the mid-Sound region.

¹¹⁰ Choose Washington State, *WACESP Final Report* (December 26, 2023), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

¹¹¹ Washington State Department of Commerce, *Nontraditional Workers Report* (December 2020), 2, accessed December 2, 2024, <https://www.commerce.wa.gov/wp-content/uploads/2020/12/Nontraditional-Workers-Report.pdf>.

Creative Economy Jobs by Region 2022

Map subdivided into economic development regions

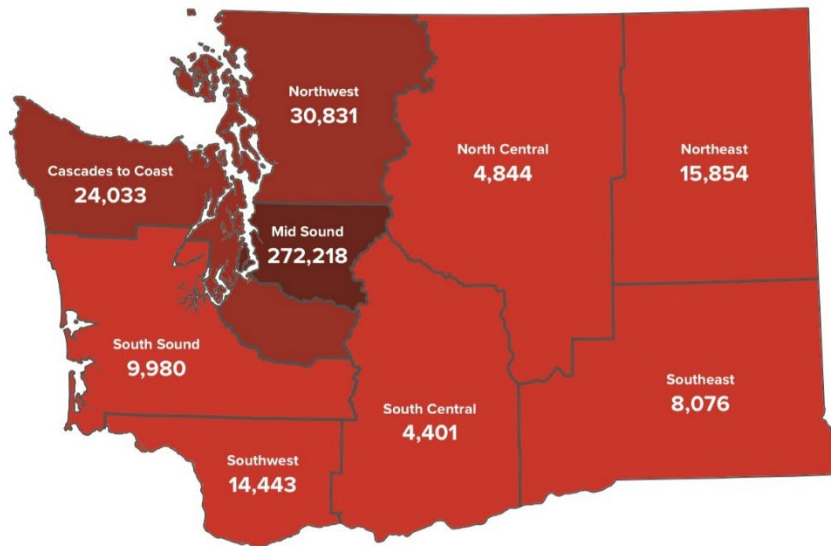


Figure 10: WA State Economic Development Regions
Data: 2024 Washington Department of Commerce Creative Economy Strategic Plan

The Mid Sound region contributes the largest amount of creative industry earnings to Washington. In 2020, these industry earnings were \$55.9 billion, 94 percent of the total creative economy earnings in the state. A majority of the state of Washington's creative economy originates from this region as the map above indicates the vast majority of the state's creative economy jobs are in the Mid Sound region.

Creative Industries: Industry earnings increased by 19 percent during the pandemic from 2019-2020. Industry jobs grew by 4.5 percent for a total of 262,481 industry jobs.¹¹²

Table 3 – Top and Bottom Five King County Creative Industries¹¹³

Top Five Industries	Bottom Five Industries
Software Publishers	Nonchocolate Confectionery Manufacturing
Electronic Shipping and Mail-Order Houses	Cable and Other Subscription Programming
Internet Publishing and Broadcasting and Web Search Portals	Motion Picture and Video Distribution
Architectural Services	Books Printing
Wineries	Custom Architectural Woodwork and Millwork Manufacturing

Creative Occupations: Mid Sound currently supports 100,939 creative jobs, after a 6 percent decline during the pandemic from 2019–2020. On average, creative occupations earn \$80,762 annually. The top occupations have a high concentration of jobs for a region of this size when compared nationally, making them unique to the area.¹¹⁴

Table 4 – Top and Bottom Five King County Creative Occupations¹¹⁵

Top Five Occupations	Bottom Five Occupations
Advertising Sales Agents	Tailors, Dressmakers, and Custom Sewers
Architects	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders
Entertainment Attendants and Related Workers	Model Makers
Marketing Managers	Wood, Cabinetmakers, and Bench Carpenters
Special Effects Artists and Animators	Plasterers and Stucco Masons

¹¹² Choose Washington State, *Creative Economy Definition* (July 15, 2022), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2023/04/Creative-Economy-Definition-Final-7-15-22.pdf>.

¹¹³ Choose Washington State, *Creative Economy Definition* (July 15, 2022), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2023/04/Creative-Economy-Definition-Final-7-15-22.pdf>.

¹¹⁴ Choose Washington State, *Creative Economy Definition* (July 15, 2022), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2023/04/Creative-Economy-Definition-Final-7-15-22.pdf>.

¹¹⁵ Choose Washington State, *Creative Economy Definition* (July 15, 2022), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2023/04/Creative-Economy-Definition-Final-7-15-22.pdf>.

The state study found that creative technology employs the largest number of creative economy workers in the mid-Sound region. Creative technology includes videogames, e-sports, website design and other content creation occupations. King County is home to the second largest videogame industry in the US, most of which is based out of the Eastside cities of Bellevue and Redmond.¹¹⁶

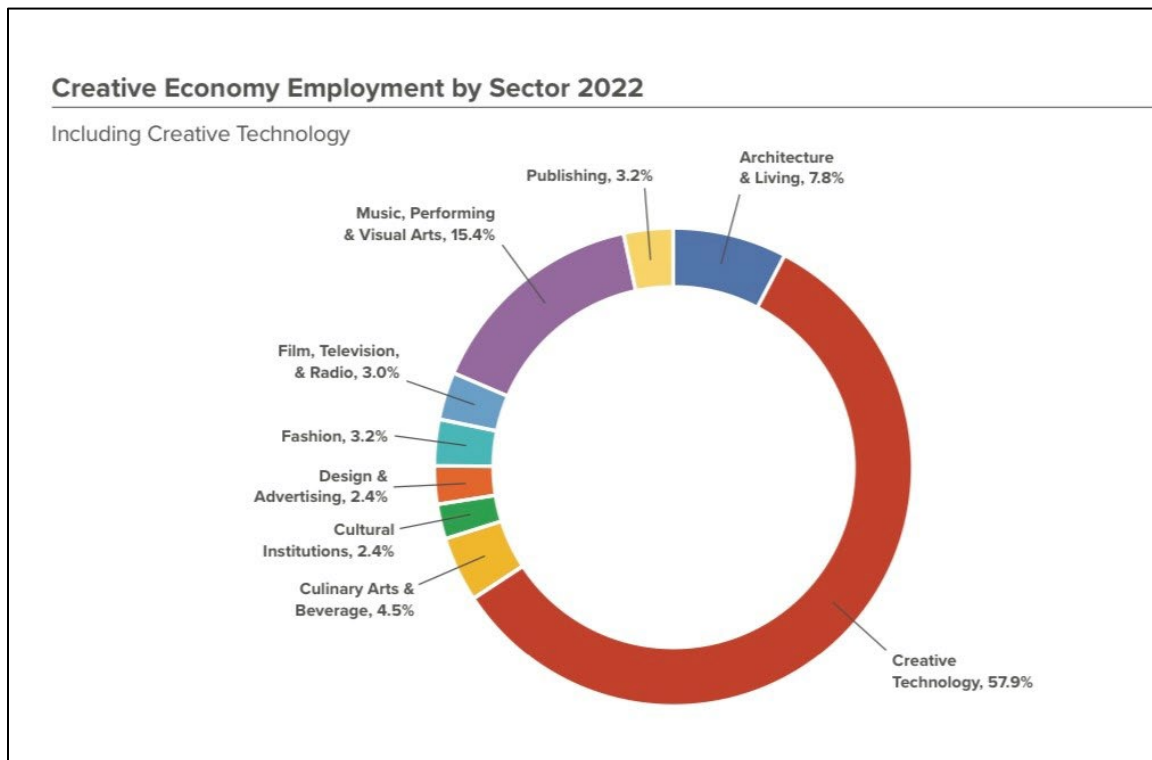


Figure 11: Creative Economy Employment by Sector 2022, Including Creative Technology
Data: 2024 Washington Department of Commerce Creative Economy Strategic Plan

¹¹⁶ Entertainment Software Association, "Video Game Impact Map: Washington," accessed December 2, 2024, <https://www.theesa.com/video-game-impact-map/state/washington/>.

The creative economy without creative technology included:

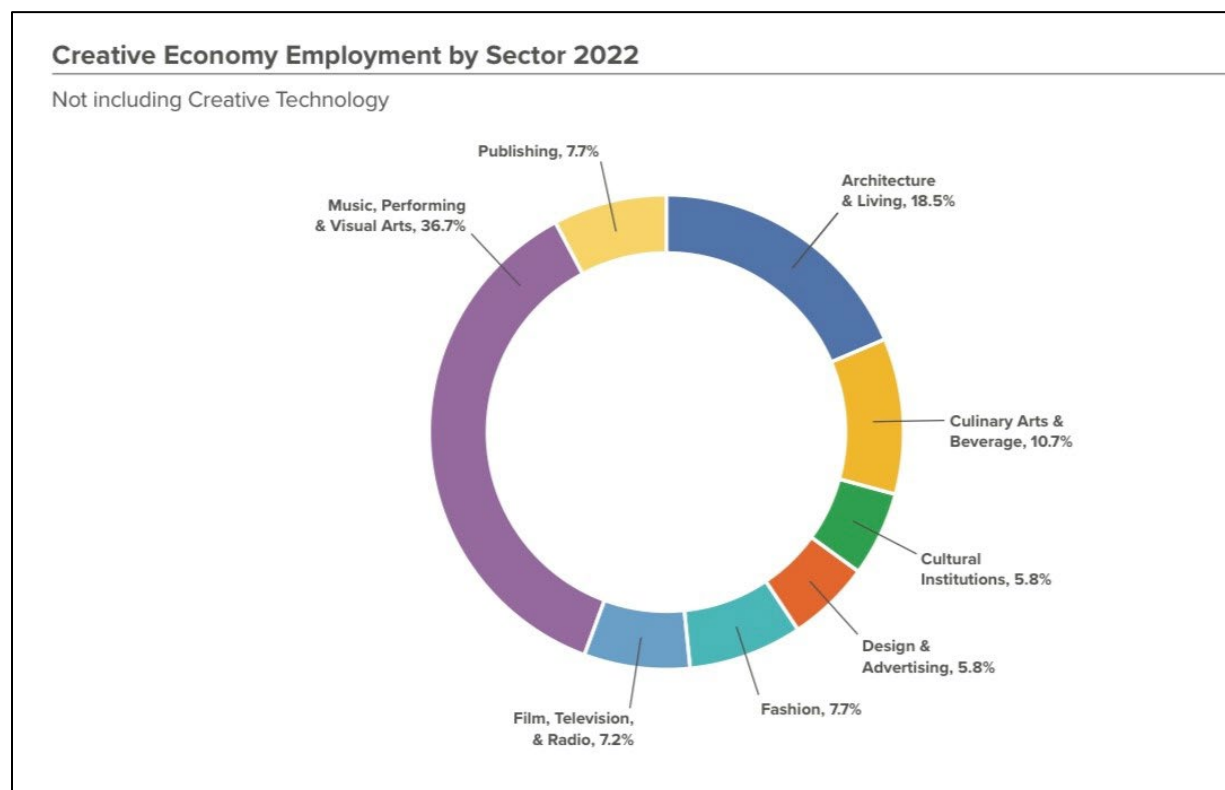


Figure 12: Creative Economy Employment by Sector 2022, Not Including Creative Technology
Data: 2024 Washington Department of Commerce Creative Economy Strategic Plan

Given the significant portion of the county's GDP that is generated by the creative sector, it is important that the OEOCE support this work. With the 272,218 jobs cited in the Mid Sound region, this is a significant portion of the county's economy. The creative ecosystem is inherently challenging given that so much of the workforce is a gig economy,¹¹⁷ and it also presents unique barriers to entry that require public interventions to help pursue equitable opportunity for all who pursue careers in the regional creative economy. Government can help level the playing field with policy interventions and incentivized opportunities.

As noted, OEOCE is keenly focused on fortifying and growing the regional film and music industries. In the Washington Creative Economy Strategy report, music is included with performing and visual arts, making it hard to parse the music industry's exact significance relative to jobs and economic impact. It appears to be significant as this grouping reflects 15.4 percent of Washington's creative economy. Film, television, and radio are reflected as 3 percent of Washington's creative economy in the report.

The regional music economy was forged without much government support or intervention. King County's popular music scene attracts tourism, and OEOCE has leveraged this by producing Cloudbreak Music Festival in partnership with Visit Seattle as a music tourism initiative. Before the pandemic, the regional music industry had little intersection with government, and did not receive incentives to

¹¹⁷ Washington State Department of Commerce, *Nontraditional Workers in Washington State*, December 2020, <https://www.commerce.wa.gov/wp-content/uploads/2020/12/Nontraditional-Workers-Report.pdf>.

support their small businesses. During the pandemic, this industry worked closely with local government leaders, including OEOCE, as they struggled to survive while their small businesses and performance spaces were closed due to COVID restrictions.

King County's regional film industry is reflected as three percent of Washington's creative economy.¹¹⁸ A healthy film industry has many direct and indirect economic benefits,¹¹⁹ and many states have incentivized this industry¹²⁰ with the intent of garnering the economic returns that are generated by a robust regional film sector. These benefits include employment of unionized film crews, creation of marketing content for local companies, activation of the regional small business supply chain that supports the film industry, and film tourism. Additionally, having an active regional film industry allows local corporations and businesses to generate the content needed to market their services and their wares, and it allows local stories to be told.

Visit Seattle reports that the *Sleepless in Seattle* houseboat is still one of the region's most visited tourist sites. Until last year, Washington had one of the lowest film incentives in the country, and lacked an accessible production facility, until the creation of Harbor Island Studios. Many of this region's film professionals must travel to work when there is not enough work in King County. Many of the region's stories are not filmed here, and King County is missing the significant economic benefit that comes from having a robust film industry. This is why OEOCE focuses on film industry development.

As referenced above, the *Washington Creative Economy Strategic Plan*¹²¹ reflects that when creative technology jobs are included, the creative sector constitutes 8.03 percent of all jobs in the state. When creative technology jobs are excluded, the creative sector constitutes 3.38 percent of all Washington jobs. Creative technology significantly contributes to the growth and strength of the creative economy as a key industry sector in King County.

¹¹⁸ Washington State Department of Commerce. *Washington Creative Economy Strategic Plan: Final Report*. February 2024. 8. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

¹¹⁹ Motion Picture Association, "Driving Local Economies," accessed December 2, 2024, <https://www.motionpictures.org/advocacy/driving-local-economies/>.

¹²⁰ National Conference of State Legislatures, "State Film and Television Incentive Programs," accessed December 2, 2024, <https://www.ncsl.org/fiscal/state-film-and-television-incentive-programs>.

¹²¹ Choose Washington State, *WACESP Final Report* (December 26, 2023), accessed December 2, 2024, <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

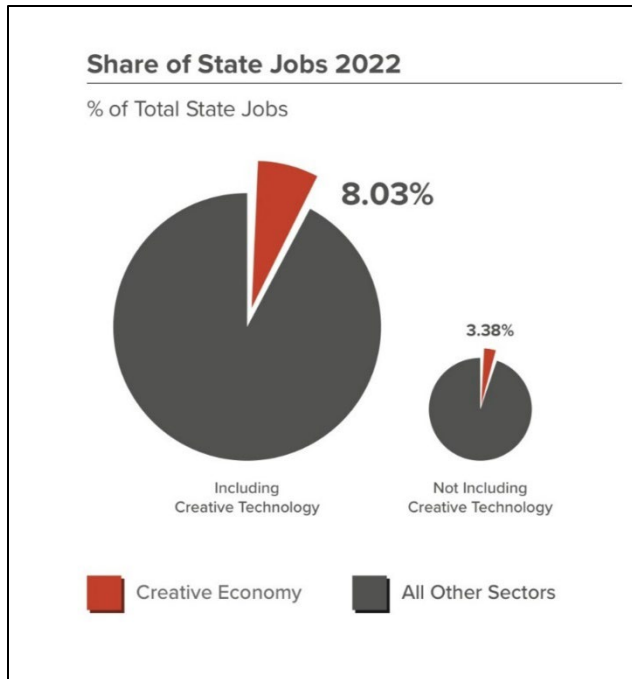


Figure 13: Share of State Jobs 2022
 2024 Washington Department of Commerce Creative Economy Strategic Plan

As demonstrated in this graphic, the total 2022 GRP is 21.2 percent of the whole when creative technology is included, and 2.35 percent of the whole when creative technology is excluded. The most significant portion of this is the creative technology sector, which includes the regional videogame industry, the second largest in the country.¹²²

¹²² Statista, "Direct In-State Employment in the U.S. Video Game Industry," accessed December 2, 2024, <https://www.statista.com/statistics/1258010/us-video-game-industry-direct-in-state-employment/>.

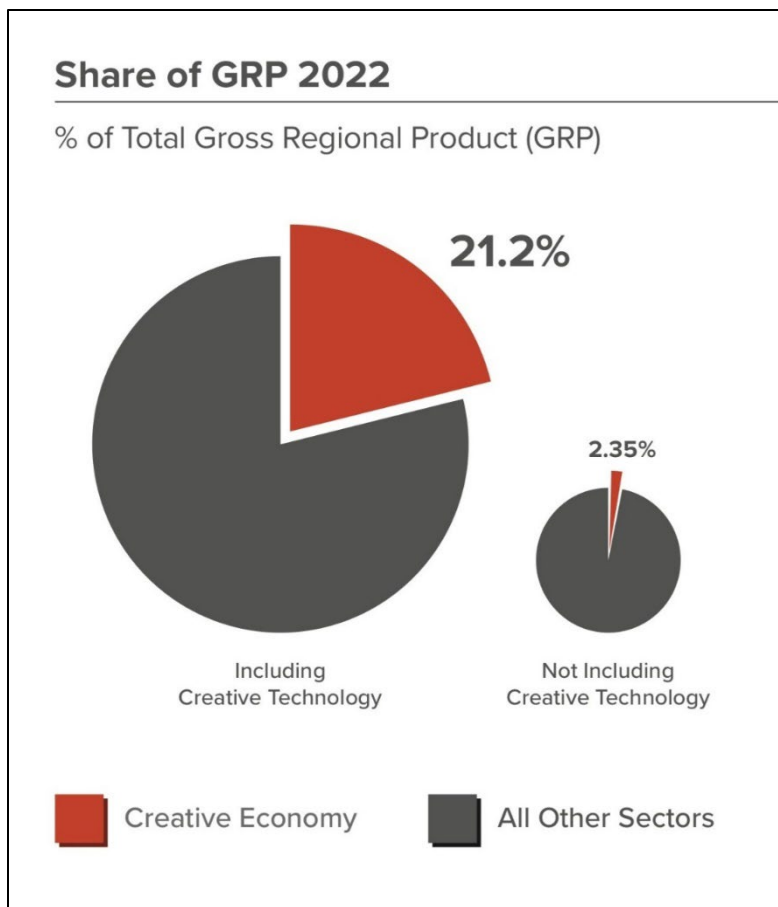


Figure 14: Share of GRP 2022
Data: 2024 Washington Department of Commerce Creative Economy Strategic Plan

The Mid Sound region currently supports 272,218 creative jobs,¹²³ after a 6 percent decline during the pandemic from 2019–2020. On average, creative occupations make \$80,762 annually. The top occupations, based on location quotient, include advertising sales agents, architects, entertainment attendants and related workers, marketing managers, and special effects artists and animators. Compared nationally, these occupations have a high concentration of jobs for a region of this size, making these occupations unique to the area.

Given the significant portion of the King County’s GDP that is generated by the creative sector as noted above, it is important that the Office of Economic Opportunity and Creative Economy support this work. The creative ecosystem is inherently challenging given that so much of the workforce is a gig economy, and it also presents unique barriers to entry that require public interventions to help pursue equitable opportunities for all who pursue careers in the regional creative economy. Some King County residents have much more opportunity than others to pursue a career in the creative industries. Government can help level the playing field with policy interventions and incentivized opportunities. The findings of the Washington Creative Economy Strategic Plan are specifically relevant to King County, as the majority of

¹²³ Washington State Department of Commerce. *Washington Creative Economy Strategic Plan: Final Report*. February 2024. 7. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>.

the jobs and revenue generated come from King County. This data is the most recent and thorough available to analyze King County's regional creative economy.

As demonstrated in the two aforementioned studies, King County is at the center of Washington's creative economy. This creative ecosystem is critical to the regional brand. King County is known for creative talent, and it is part of what makes living here appealing. This regional reputation, including for art, music, and nightlife scenes, is frequently cited by major employers in their talent recruitment strategies, further contributing to King County's economy.

Nurturing and supporting the businesses, nonprofits and workers in the regional creative ecosystem is important for King County's health and prosperity. Not only is it a substantial part of King County's economy, but this creative ecosystem is also important for the storytelling and images of the region as viewed by the world, generating regional attraction for businesses, as well as community development.

The work of OEOCE is to support this creative ecosystem, working directly with regional leaders, small businesses, unions, and working creative professionals to share information, promote opportunities, implement initiatives, and advocate for policies that promote equitable creative sector growth.

D. Quantitative analysis of the results achieved during the 2023-2024 biennium with the investment of the Harbor Island sound stages and a rationale of how the sound stages would be an economic benefit for the county

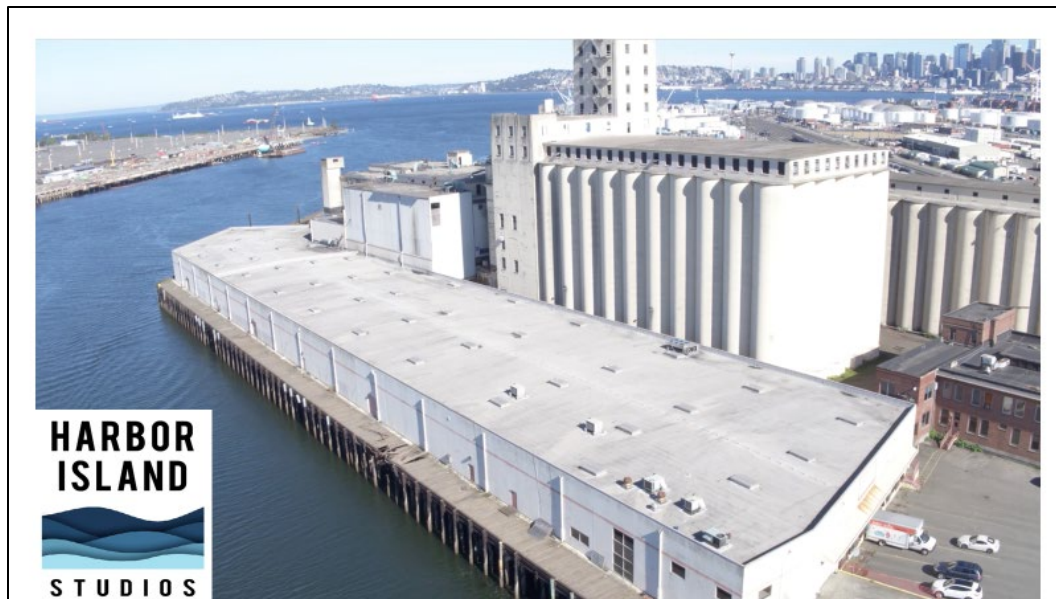


Figure 15: Harbor Island Studios, Aerial View

Photography: Office of Economic Opportunity and Creative Economy. Logo: King County Visual Design Team, Elizabeth Inglese

Overview of Harbor Island Studios

The building on Harbor Island was home to a flour mill from 1909-2001. It was bustling hub of industry in the region with hundreds of workers coming and going every day. In 2002, King County Solid Waste Division purchased the facility originally to handle excess waste. However, it was never used for this purpose and has largely stood unused in the past 19 years.

The large 100,000 square foot building with high ceilings and open space made it ideal for conversion to a soundstage. A soundstage is a large building where film and television can record in a controlled, enclosed environment. Sets and lighting are designed and built to meet the needs of the production, and filming is not impacted by weather or daylight. In early 2020, the pandemic brought film production to a halt, at the same time as an Amy Poehler episodic was scheduled to film in multiple locations throughout King County. Pandemic realities made it impossible for this production to film on location as planned. This production became the first production in Harbor Island Studios. The facility allowed the production to follow strict film production pandemic guidelines, which required daily COVID testing and zoning to keep cast and crew safe. The adaptive reuse of this warehouse on Harbor Island allowed King County to put more than 200 unemployed film workers back to work for five months during the height of the COVID pandemic.

Since that time, King County has continued to invest in the development of Harbor Island Studios with the goal of establishing infrastructure that fuels job creation and small business activation in the regional film industry.



Figure 15: Harbor Island Studios, Stage 1
Photography: Nate Brend, Office of Economic Opportunity and Creative Economy

Quantitative Analysis

With the development of Harbor Island Studios, King County is already attracting film, television, and commercial productions that previously had to film elsewhere, taking their business out of the county. King County has not had a large-scale soundstage since *Northern Exposure*¹²⁴ finished its production in 1996.

The current state of development of Harbor Island Studios limits the marketing and rentals rates that King County can pursue as the soundstages are a work in progress. Currently, there is no climate control in the soundstages, and to meet industry standards a lighting grid needs to be installed. Thus, OEOCE cannot market the studio to major productions. Items to be addressed to enhance utilization are: upgrade of the roof (scheduled for December 2024-February 2025); building of the carpenters' mill (scheduled for December 2024); and with installation of a lighting grid, OEOCE will be able to market the soundstages to a broader market.

Even in its current state, OEOCE has been successful at marketing the soundstages locally. Since January 1, 2024, there have been:

- 67 individual productions
- 191 total production days
- 922 individual cast and crew
- 2,735 total crew days

Of the 67 individual productions, 66 have been comprised of entirely local cast and crew.

¹²⁴ "Northern Exposure," *Wikipedia*, last modified December 2, 2024, accessed December 2, 2024, https://en.wikipedia.org/wiki/Northern_Exposure.

There has been local industry demand for Harbor Island Studios. Even while the facility is a work-in-progress and lacks critical amenities like heat, the studios have already been in demand. The productions in the soundstages since January 1, 2024 include:

- 5 episodic productions
- 37 independent productions
- 13 commercial productions
- 9 art production/set building days
- 3 short film competitions

Additionally, Harbor Island Studios has hosted:

- 21 public tours
- 7 free film skills trainings
- 3 high school film career days

Beyond the cast and crew members employed in the 2024 productions, Harbor Island Studios has hosted an additional 1,014 guests since January 1, 2024. This group is comprised of tour guests, skills training participants, high school film students and film competition participants.

Notably, no major motion feature films have shot in Harbor Island Studios yet. Currently, King County has intentionally not marketed the studio beyond the Puget Sound region. The EFAB (Executive's Film Advisory Board) and film union leaders, as well as OEOCE's statewide film office colleagues have cautioned about marketing Harbor Island Studios to national productions before the facility upgrades are complete, as the industry is very reputation-based. Once the roof upgrade and carpenters' mill construction are complete, OEOCE will launch a national marketing campaign in Q1 2025, targeting producers and productions that will provide family wage employment opportunities to local film unions, casts, and crews.

At the national level, the film industry has had several challenging years in a row recently, causing a lull in major production nationally. The film industry was deeply impacted by the COVID pandemic.¹²⁵ As the industry began to recover from the pandemic, the WGA (Writers Guild of America) went on strike for 148 days.¹²⁶ While the WGA was on strike, SAG-AFTRA (Screen Actors Guild – American Federation of Television and Radio Artists)¹²⁷ also went out on strike for 118 days. These historic strikes, preceded by the pandemic, have had crippling impacts on the national film industry, including local producers and film union crews.¹²⁸

The health of the overall industry is relative to the opportunity at hand with King County's development of Harbor Island Studios. Healthy film industries are coveted around the world, as they generate significant economic benefit, both to film workers, the film-related small business chain, and the

¹²⁵ Wharton Undergraduate Media and Entertainment Club, "COVID's Impact on the Film Industry: The Biggest Shift in the History of Hollywood," accessed December 2, 2024, <https://www.whartonume.com/blog/covids-impact-on-the-film-industry-the-biggest-shift-in-the-history-of-hollywood>.

¹²⁶ Wendy Lee, "Writers' Strike: What to Know About the WGA Walkout That Is Shutting Down Hollywood," *Los Angeles Times*, May 1, 2023, accessed December 2, 2024, <https://www.latimes.com/entertainment-arts/business/story/2023-05-01/writers-strike-what-to-know-wga-guild-hollywood-productions>.

¹²⁷ SAG-AFTRA. *Home Page*. Accessed December 5, 2024. <https://www.sagaftra.org/>.

¹²⁸ The Economic Impact of the Hollywood Writers and Actors Strikes

economy overall.¹²⁹ This is why so many states, counties, and cities incentivize their film industry with cash rebates and tax incentives.

Motion picture production spending goes beyond the film industry itself and impacts almost every sector of the economy. A significant portion of a production's budget supports small, local businesses in areas of location and equipment rentals¹³⁰ A major motion picture contributes \$250,000 per day on average to the local economy. Filming a one-hour television episode contributes \$150,000 per day on average to the local economy.¹³¹

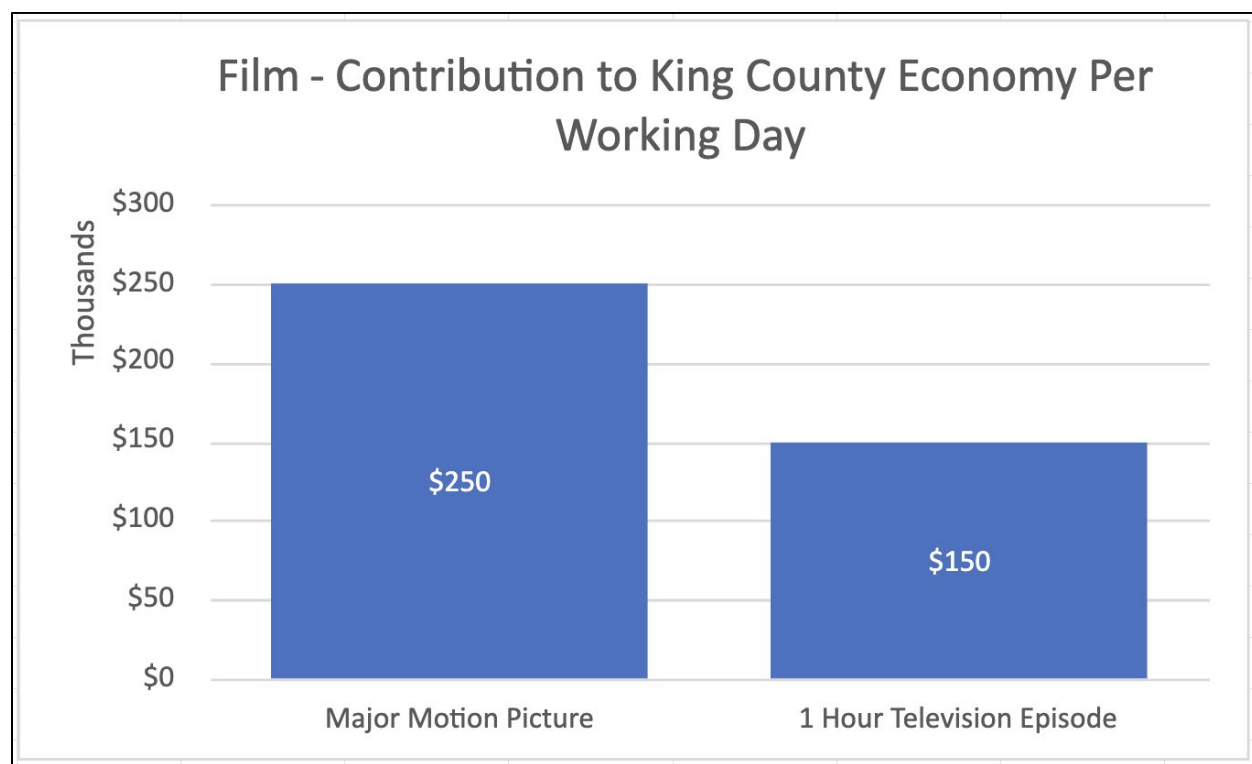


Figure 16: Film – Contribution to King County Economy per Working Day
Data: Washington Filmworks Motion Picture Competitiveness Program Fact Sheet

Locally made productions trigger the regional supply chain of small businesses that support the film industry. Film productions also bring increased visibility and tourist activity to King County and the region. When images of King County's surroundings go out to the world via locally made films, this adds to the County's reputation as a desirable tourism location and place to live.

There has been a long-standing gap in the regional film ecosystem, as frequently cited by local film unions and other film professionals. Without a soundstage, productions go elsewhere and export local film talent is exported to other markets with soundstages. All successful film regions have at least one

¹²⁹ Motion Picture Association. *Driving Local Economies*. Accessed December 5, 2024.
<https://www.motionpictures.org/advocacy/driving-local-economies/>.

¹³⁰ Screen Yorkshire. *The Economic Benefits of Film Production*. Accessed December 5, 2024.
<https://www.screenyorkshire.co.uk/news/the-economic-benefits-of-film-production/>.

¹³¹ Motion Picture Association, *MPA U.S. Economic Contribution 2021* (January 2023), accessed December 2, 2024,
https://www.motionpictures.org/wp-content/uploads/2023/01/MPA_US_Economic_Contribution_2021_Final.pdf.

soundstage, and most have multiple soundstages.¹³² Having a soundstage increases local production work and activates the local film-related small business supply chain. A soundstage also provides the environment for novel opportunity for career-connected learning, mentoring, and apprenticeship growth.

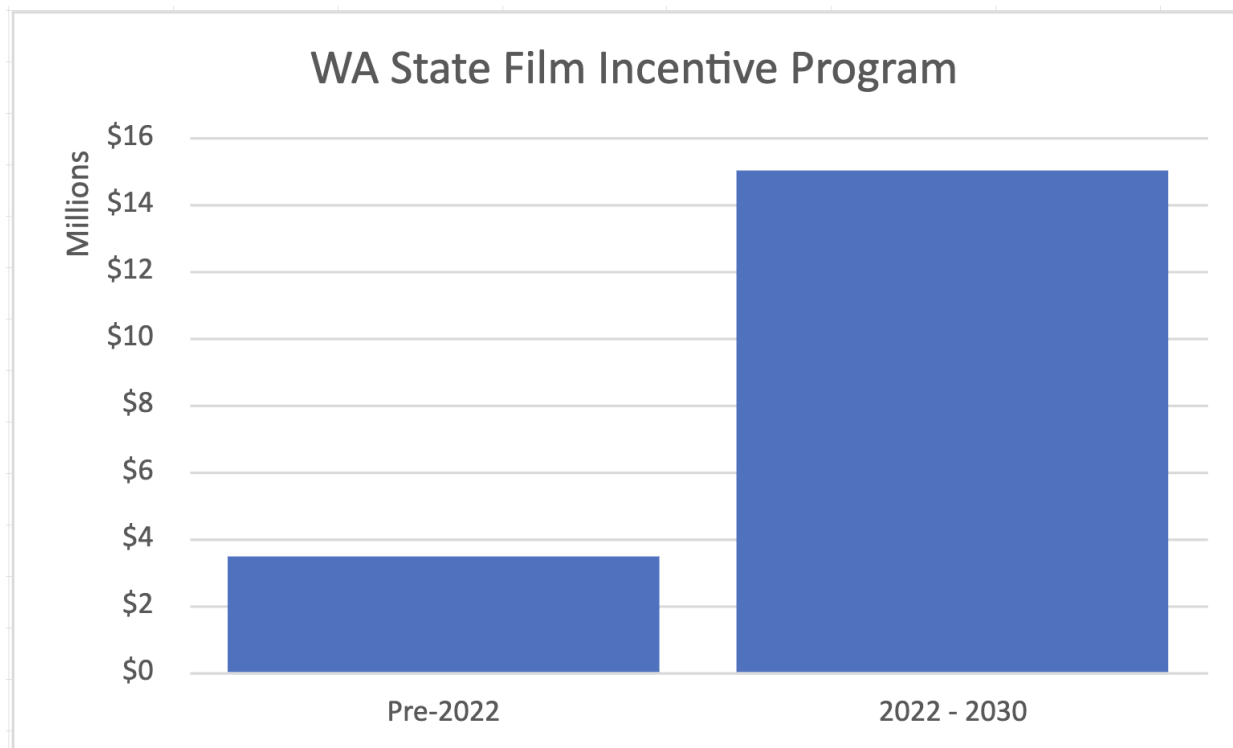


Figure 17: Washington State Film Incentive Program
Data: King County Executive's Office

In the 2022 Washington State legislative session, the state expanded the Motion Picture Competitiveness Program (otherwise known as the WA State Film Incentive)¹³³ to provide a \$15 million per year incentive for productions filmed in Washington State, increased from \$3.5 million annually. This moves Washington State from having one of the smallest state incentives in the country to being more competitive with other U.S. states. This incentive makes King County a more desirable location to film, as well as provides a boost of economic activity and hiring in the region. For every dollar of state funding assistance, a production generates an estimated \$10 of economic activity in the region, with only 5 percent¹³⁴ The remainder is spent on local businesses that support productions, like hotels, equipment houses, caterers, lumber yards, and prop houses. To qualify for the state incentive, 85 percent of the hires must be local hires. As the first major soundstage in Washington, Harbor Island Studios provides a location for these productions to film.

¹³² FilmLA, *Sound Stage Production Study* (2017), accessed December 2, 2024, <https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>.

¹³⁴ Keep Film in Washington, *Fact Sheet* (February 2024), accessed December 2, 2024, https://keepfilminwa.com/wp-content/uploads/2024/02/FactSheet_FD24.pdf.

One of the ways that King County supports local productions and crews is by embedding its core values in the Harbor Island Studios rental pricing plan to support local and under-resourced filmmakers. The four primary factors that influence rental rates include hiring local cast and crew, having a diverse cast and crew and/or an equity plan, embedding green filmmaking practices into the production plan, and hiring a new film student or production assistant on their crew.

OEOCE has collaborated deeply with PSB and FMD on the development of the soundstage plan. Regular meetings advance this collaboration and work, all with the goal of improving the Harbor Island soundstages and production space. The Executive's Film Advisory Board, comprised of 15 volunteer film professionals, has collaborated closely with OEOCE to continue to make progress at Harbor Island Studios. These volunteers serve as ambassadors for King County's Harbor Island Studios and provide advice to OEOCE and FMD on soundstage development.

Nationwide the need for soundstages is strong. The number of outlets of streaming media and film production has created a demand of places to film. Both nationally and internationally "In cities large and small, developers are building cavernous soundstages, rushing to fill a voracious demand for the space needed to make movies and TV shows. A scramble by studios and tech giants for programming to keep their streaming platforms fresh has touched off a building bonanza unlike any seen since the early days of the entertainment industry."¹³⁵

As King County makes capital improvements at Harbor Island Studios, there is significant opportunity for economic growth. The development of this infrastructure allows local film professionals, including many union workers, to work locally and tell this region's stories. Additionally, the economic impact of film production stands to benefit the entire county, including the production-related small business supply chain. The workers Harbor Island Studios aspires to keep employed are the behind-the-scenes film crews. Comprised of carpenters, electricians, makeup artists, prop makers, costume designers, art directors, cinematographers, set builders, caterers, drivers, and other skilled trades, these are the jobs that make film production possible. Many of these film workers are unionized, primarily in the IATSE (International Alliance of Theatrical Stage Employees), Teamsters (Motion Picture and Theatrical Trade Division), and Local 600 (International Cinematographers Guild) unions.

Supplying an environment that can be used to provide well-paying, union jobs to hundreds of local workers, as well as increasing the local economy, are primary goals of Harbor Island Studios initiative.

¹³⁵ Erich Schwartzel, "With Hollywood Production in Overdrive, the Soundstage Is a Hot Commodity," *The Wall Street Journal*, August 18, 2021, accessed December 2, 2024, <https://www.wsj.com/articles/with-hollywood-production-in-overdrive-the-soundstage-is-a-hot-commodity-11625833268>.

E. Strategies on how the Office of Economic Opportunity and Creative Economy will have deliberate focus on historically and currently disadvantaged communities including those communities most impacted by the pandemic and its disproportionate health and economic effects

Inherent in the Executive's True North – making King County a welcoming community where every person can thrive – is a call to action to focus on historically and currently disadvantaged communities. Because of this, OEOCE developed the vision statement: become a regional leader that builds an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive.

The EDA defines equity as "providing support to traditionally underserved populations or underserved communities." EDA defines traditionally underserved populations as those "including but not limited to women, Black, Latino, and Indigenous and Native American persons, Asian Americans, and Pacific Islanders or 2) underserved communities within geographies that have been systemically and/or systematically denied a full opportunity to participate in aspects of economic prosperity such as Tribal Lands, Persistent Poverty Counties (XLSX), and rural areas with demonstrated, historical underservice."¹³⁶

OEOCE Vision: Become a regional leader that builds an anti-racist, equitable, resilient, and sustainable regional economy, where every person can thrive.

The central Puget Sound region has flourished economically over the last several decades. As of 2022, King County has the 6th highest real gross domestic product in the nation at \$367 billion.¹³⁷ However, much like Washington State and the U.S., this prosperity has not been shared equitably. This region maintains a high degree of income inequality,¹³⁸ which is known to harm health and exacerbate health disparities by sustaining higher rates of poverty, increasing chronic stress, and decreasing social cohesion among communities.¹³⁹ While higher income is associated with greater life expectancy, lower incomes decrease one's ability to prevent and cope with health concerns.¹⁴⁰ Two ways to measure income inequality are: 1) the difference in the percent of total income owned by the top and bottom 20 percent of income earners, and 2) racial inequities in median household income.

In King County, the top 20 percent of income earners made an average of \$398,619 in 2021, while the bottom 20 percent made \$21,462. By comparison – in Washington, the top 20 percent made an average

¹³⁶ U.S. Economic Development Administration. "Investment Priorities." U.S. Department of Commerce. Last modified November 2023. <https://www.eda.gov/funding/investment-priorities>.

¹³⁷ Federal Reserve Bank of St. Louis. "Real Gross Domestic Product: All Industries in King County, WA (REALGDPALL53033)." FRED. Federal Reserve Bank of St. Louis. Accessed December 5, 2024. <https://fred.stlouisfed.org/series/REALGDPALL53033>.

¹³⁸ Washington State Department of Health. *Chronic Disease Profile: King County*, 4. Accessed October 31, 2024. <https://doh.wa.gov/sites/default/files/legacy/Documents/Pubs/345-271-ChronicDiseaseProfileKing.pdf>

¹³⁹ Kawachi, I., & Berkman, L. F. "Social Cohesion, Social Capital, and Health." *American Journal of Public Health*, vol. 87, no. 9, 1997, pp. 1491–1498. Accessed October 31, 2024. <https://pubmed.ncbi.nlm.nih.gov/9112854/>.

¹⁴⁰ Ayanian, John Z., and others. "Healthy Low-Income People Face Greater Health Risks." *The Commonwealth Fund*, December 12, 2018. Accessed October 31, 2024. <https://www.commonwealthfund.org/blog/2018/healthy-low-income-people-greater-health-risks>.

of \$294,454 while the bottom 20 percent made an average of \$18,741. In the United States overall, the top and bottom 20 percent made an average of \$253,601 and \$14,539, respectively. Among all Washington state counties, King County ranked 4th in highest income inequality in 2017-2021, with the top 20 percent owning 50.7 percent of all income in the county. The share of income owned by the top 20 percent in King County has grown from 49.3 percent in 2010 to 51.7 percent in 2021. In Washington, the top 20 percent owned 47.7 percent of all income in 2010 and 50.6 percent in 2021. Simply stated, the top 20 percent of income earners own 19 times more total income than the bottom 20 percent in King County.¹⁴¹

Figure 20 shows that Asian-headed and white-headed households had median incomes higher than the King County average. Households headed by American Indian and Alaska Native, Black/African American, Hispanic/Latino, Native Hawaiian/Pacific Islander, and multiple race people, as well as people of other races had median household incomes that were lower than the King County average.

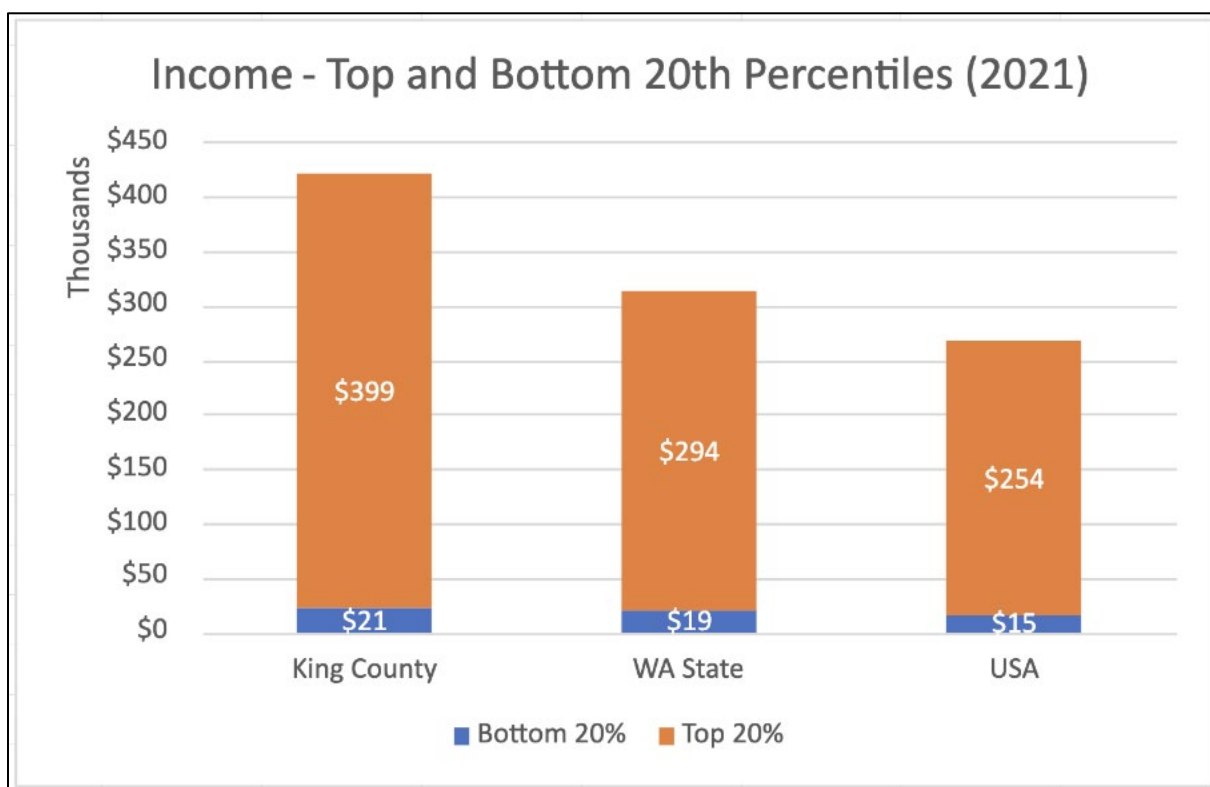


Figure 18: King County Income – Top and Bottom 20th Percentiles (2021)
Data: <https://www.communitiescount.org/income-inequality>

¹⁴¹ Communities Count, "Income Inequality." Accessed November 4, 2024.
<https://www.communitiescount.org/income-inequality>

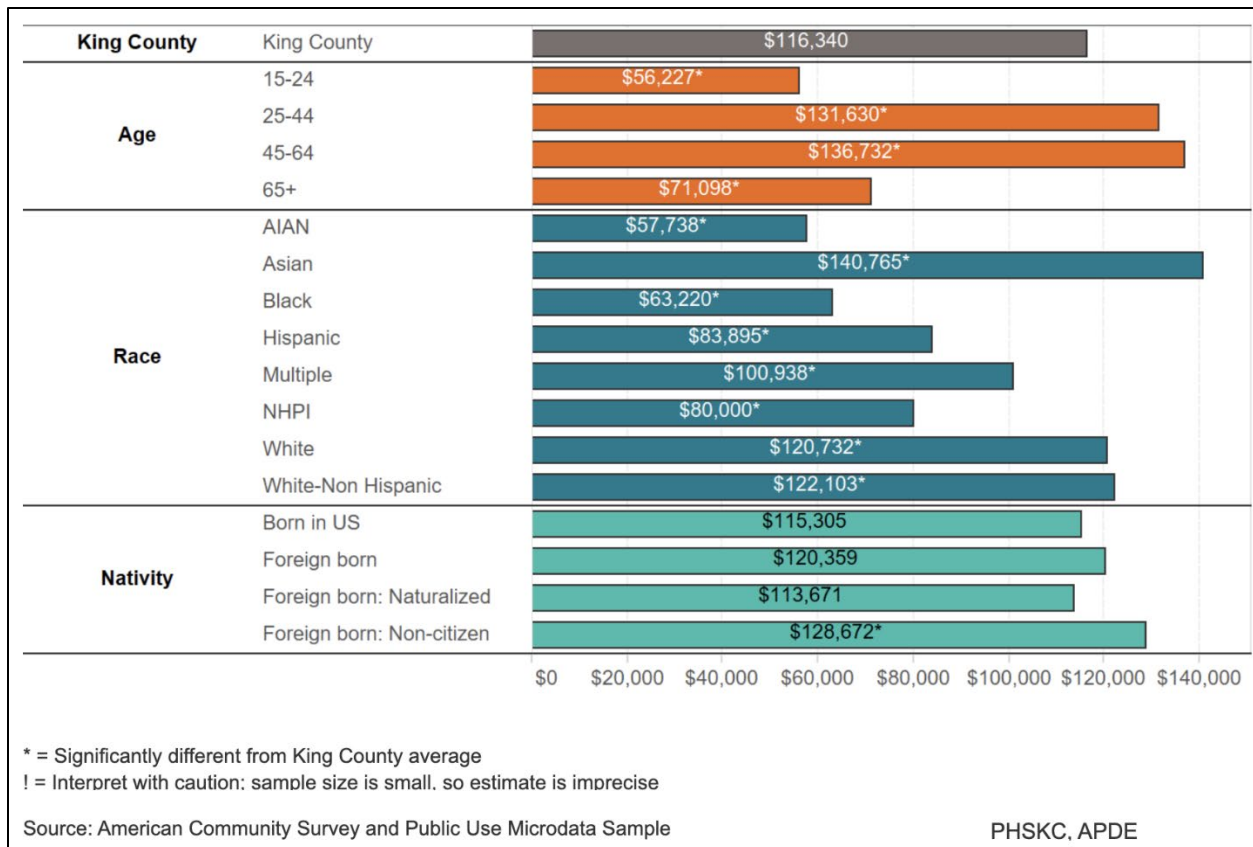


Figure 19: King County Income By Age, Race, and National Origin 2018-2022
 Data: <https://www.communitiescount.org/median-household-income>

Reflective of the statutory responsibilities of OEOCE, the office prioritizes equitable economic and workforce development practices and seeks to unlock the full potential of the region's economy by removing barriers and expanding opportunities for the County's priority communities.

So, there are two cases to be made for public sector investment in economic development. First, to help broadly grow the regional economy, and secondly, to focus on equitable economic development to narrow the income inequality divide.

Equitable Economic Development: OEOCE practices *equitable economic development*, which is defined by the International Economic Development Council as "a growth process that ensures that the benefits of economic progress are shared widely across all segments of society."¹⁴² It emphasizes reducing inequality and ensuring that everyone, especially marginalized and vulnerable groups, have access to economic opportunities, resources, and services needed to improve their well-being and quality of life.

¹⁴²International Economic Development Council, *Race, Equity, and Economic Development Playbook* (2024), accessed December 2, 2024, [https://www.iedconline.org/clientuploads/Resources/Race_Equity_EconDev/Final_IEDC_Playbook_Web_\(1\).pdf](https://www.iedconline.org/clientuploads/Resources/Race_Equity_EconDev/Final_IEDC_Playbook_Web_(1).pdf).

Key features of equitable economic development include:¹⁴³

- **Equitable Access to Opportunities:** Ensuring that all individuals have fair access to education, healthcare, employment, and other resources necessary for economic participation.
- **Reducing Inequality:** Addressing income and wealth disparities by promoting policies that support fair wages, social protection, and equitable wealth distribution.
- **Sustainable Growth:** Fostering economic growth that is environmentally sustainable and socially inclusive, benefiting both current and future generations.
- **Empowering Marginalized Groups:** Creating specific programs and policies that target underrepresented and disadvantaged groups, such as women, ethnic minorities, and low-income communities.
- **Participatory Governance:** Encouraging inclusive decision-making processes where all stakeholders, including marginalized communities, have a voice in shaping policies and initiatives.
- **Social Safety Nets:** Implementing social protection systems to support individuals during economic downturns, ensuring that no one falls below a certain standard of living.
- **Balanced Regional Development:** Promoting economic development across different regions to prevent geographic disparities and ensure balanced growth.

Equitable economic development aims to create a more just and equitable society where economic growth benefits everyone, contributing to overall social stability and cohesion.¹⁴⁴ Equitable economic development isn't just good for society, it is good for business. Studies show that more robust economies are created in places with broad majority participation in economic development.¹⁴⁵

OEOCE has implemented strategies to deliberately focus on historically and currently disadvantaged communities, as described below. Since 2020, these strategies have focused on those most impacted by the pandemic and its disproportionate health and economic effects.

OEOCE Economic Recovery Task Force: The Small Business Task Force was transitioned to the Economic Recovery Task Force (and is now permanently established as the Economic Opportunity Coalition). This cross-departmental group spanning the Executive Branch was led by OEOCE and implemented a strategic plan to support economic recovery.

Economic Recovery Projects: Using federal ARPA/CLFR funds from 2020-2024, OEOCE was able to take meaningful steps to retain and/or expand access to high-quality, living wage, high-demand jobs for residents disproportionately impacted by the COVID-19 pandemic. These initiatives were established prior to OEOCE becoming a codified office and overseen by OEOCE in the 2023-2024 biennium. These

¹⁴³International Economic Development Council, *Race, Equity, and Economic Development Playbook* (2024), accessed December 2, 2024, [https://www.iedconline.org/clientuploads/Resources/Race_Equity_EconDev/Final_IEDC_Playbook_Web_\(1\).pdf](https://www.iedconline.org/clientuploads/Resources/Race_Equity_EconDev/Final_IEDC_Playbook_Web_(1).pdf).

¹⁴⁴ Civic Commons. "Scorecard for Shared Prosperity: Measuring change to drive collective action." Accessed November 3, 2024. <https://www.civic-commons.org/king2021>.

¹⁴⁵ International Monetary Fund. "Growth That Reaches Everyone: Facts, Factors, Tools." *IMF Blog*, September 20, 2017. Accessed October 31, 2024. <https://www.imf.org/en/Blogs/Articles/2017/09/20/growth-that-reaches-everyone-facts-factors-tools>.

projects aimed to narrow employment, wage, and wealth inequities within the community through careers with established employers or self-employment/entrepreneurship opportunities. The County conducted an “Equitable Economic Recovery Performance Report” assessment.¹⁴⁶ This analysis helped identify key areas for intervention and growth. Below is a breakdown of COVID economic recovery projects under oversight by OEOCE.

¹⁴⁶ King County, “Equitable Economic Recovery Performance Report,” *King County Revive & Thrive Recovery Plan 2023*, 2023, <https://kingcounty.gov/en/dept/executive/governance-leadership/performance-strategy-budget/-/media/depts/executive/performance-strategy-budget/budget/COVID-19/AmericanRescuePlan/2023RecoveryPlanReport/EquitableEconomicRecoveryPerfReport-CaseStudy.ashx>.

Table 5 - COVID-19 Economic Recovery Projects Overseen by OEOCE

OEOCE COVID Economic Recovery Project	Description	Outcomes
Career Corps	In partnership with the Workforce Development Council of Seattle-King County (WDC), King County provided \$3 million to establish a Career Corps ¹⁴⁷ program to connect dislocated workers of color, bilingual workers, and youth with career services, training, job placement, and wraparound services to individuals in King County who are unemployed or underemployed due to the COVID-19 pandemic.	Led by a subrecipient partnership with WDC, the program has placed 62 individuals into living-wage jobs paying an average of \$27.25 an hour since August 2022. King County pays wages for an average work experience length of 11 months. 14 individuals continue working in 2024, with the program concluding by the end of the year.
Virtual Hiring Hall	In partnership with Martin Luther King Labor , ¹⁴⁸ King County provided \$150,000 to set up a virtual hiring hall and training partnership linking underrepresented workers, community organizations, labor, and employers, facilitating efficient job placement and skill development.	The platform reached more than 750 people in 2022, with over 300 of those people receiving wrap-around services through the program. 30 unions and over 100 employers are now engaged in the program. A total of three Job Fairs with over 200 people in attendance were hosted.
ADO Business Assistance Program (Community Business Connector ¹⁴⁹)	The Seattle Metropolitan Chamber of Commerce, which is the Associate Development Organization (ADO) for King County, was awarded \$1 million in funding to develop a COVID Business Assistance program. At least 70 percent of the businesses the ADO assisted had to score higher in King County's Social & Economic Risk Index (SERI).	Facilitated more than 800 business interactions such as help with technical assistance, access to capital, business planning, marketing, assistance with government forms and grants and language interpretation services. Reached small businesses in 31 King County jurisdictions, of which 78 percent were BIPOC-owned. Hosted seven business assistance events with local chambers and partners for networking and knowledge exchange in Shoreline, Skyway, Tukwila, SeaTac, Kent, Snoqualmie Valley and Vashon Island.

¹⁴⁷ King County Workforce Development Council, "Investment Guide," accessed December 2, 2024, <https://www.seakingwdc.org/investment-guide>.

¹⁴⁸ MLK Labor, "Home," accessed December 2, 2024, <https://www.mklabor.org/>.

¹⁴⁹ Community Business Connector, "Home," accessed December 2, 2024, <https://communitybusinessconnector.com/>.

OEOCE COVID Economic Recovery Project	Description	Outcomes
South Seattle Community Food Hub (SSCFH)	King County partnered with Food Lifeline to develop a community-driven effort that builds vital infrastructure for a more equitable, sustainable, and accessible regional food system throughout Western Washington. The focal point of this multi-phase project is a processing and distribution center designed to increase capacity and connection between local farmers and their constituents including hunger relief agencies, wholesalers, and other consumers across multiple sectors.	Since the formation of the Advisory Committee, SSCFH has secured \$6.5 million in grant funding from King County and the US Department of Housing and Urban Development through the support of Senator Patty Murray's office. These grants primarily fund the preconstruction and construction phases of the project. A portion of the funding enables the project to hire critical staff and consultants who will, in the coming year, complete assessments, design the facility, and prepare for the launch of construction.
Arts & Culture Grant Program	The Arts and Culture grant program provided one-time grants to some of King County's most impactful cultural organizations and businesses that were adversely affected by the pandemic. These grants aimed to prepare facilities for reopening, bring the people of King County together in a safe environment, and re-employ cultural workers.	After award eligibility review and organizational pre-pandemic revenue adjustment, \$19,247,093 was awarded to 103 organizations in the areas of arts, culture, heritage, science, independent music venues, and independent movie theaters.
Events and Festival Grant Program	These one-time grants provided relief to the festivals and events producers adversely impacted by the COVID-19 pandemic, so they could address the needs of event and festival producers seeking to reestablish community activities, events, festivals, and celebrations in a safe environment, while engaging residents and tourists throughout the County and employing event workers, working creatives, and culture bearers.	\$1,977,446 in relief was delivered to 185 organizations to put on over 200 events and festivals throughout King County.
Childcare Expansion Program	King County provided \$1 million to Imagine Institute's "Imagine U" and its Shared Services Hub. The Hub, led and designed by childcare business owners for childcare business owners, helps childcare entrepreneurs maximize their	The "Imagine U" component completed in 2023, having trained and supported successful licensure of 25 childcare providers, creating up to 300 additional childcare slots in King County. The peer-based

OEOCE COVID Economic Recovery Project	Description	Outcomes
	profits using innovative tools and services.	learning model provided paid internship experiences, mentorship, and wrap around supports related to business needs. The Shared Services Hub supports 187 existing licensed childcare providers through monthly peer gatherings in languages including Oromo, Somali, and English, and provides a suite of on demand business technical assistance services. The grant has funded development of a website directory of childcare providers, business software including QuickBooks and Sandbox, translation of program and business documents, and development of early learning curriculums.
Economic Recovery & Reconciliation Alliance (ERRA)	King County provided \$1 million in funding to ERRA, an initiative launched in 2020 by a collective of more than 90 King County BIPOC nonprofit and business leaders to ensure the inclusion of communities in the region's post-COVID-19 recovery and prosperity.	Funding was used to develop an audit of King County's equity framework for ARPA/CLFR funding decisions, as well as the www.erralliance.org ¹⁵⁰ website.
Air & Space 2030	A third-party analysis of the regional aerospace industry and the supply chain impact of the COVID-19 pandemic, "Air and Space 2030 Final Report." ¹⁵¹ This analysis provided crucial insights for developing targeted support strategies for this critical sector.	Hosted two study briefings for elected officials and educational institutions. Developed a Kent Valley aerospace industry sector partnership.

The Community Business Connector program was a strategy that was initiated as emergency response to COVID-19 and originally received one-time CLFR funds. It is now a permanent program that receives ongoing funding from King County, the Seattle Metropolitan Chamber of Commerce, and the Port of Seattle.

¹⁵⁰ Economic Resilience and Recovery Alliance, "Home," accessed December 2, 2024, <https://www.erralliance.org/>.

¹⁵¹ King County Aerospace Alliance, "Air and Space 2030 Strategy: Investing in the Evolution of King County's Aerospace Sector," Spring 2023, https://oneredmond.org/wp-content/uploads/2024/09/Air-Space-2030_Final-Report.pdf

Attracting and Retaining High-Quality Employers: King County sought to attract new high-quality employers to underserved communities and retain and grow existing high-quality employers. This effort was guided by the county's values of racial equity, environmental sustainability, and workers' rights.

International Public Market (IPM) Feasibility Analysis: In Spring of 2023, OEOCE and the Port of Seattle hired New Venture Advisors to conduct a [feasibility analysis](#)¹⁵² to determine if an IPM is the right fit for South King County. The goals of the International Public Market concept are to support equitable economic development and entrepreneurship for small businesses, with an emphasis on ethnic businesses; serve as an attraction for tourists and visitors; provide a gathering space; and showcase local cultural foods and products. King County is awaiting a financial and site commitment from one of the three candidate cities (Burien, SeaTac, or Tukwila). Once that commitment is made, King County will work with the Port of Seattle to determine what funding commitments they can make toward the project.

Building Institutional Capacity and Leveraging Partnerships: King County worked with regional partner organizations to protect and retain the creative, hospitality, and tourism industries, thereby building a more equitable creative economy. King County directed relief funding to those most impacted by COVID, which helped get resources to BIPOC and immigrant and refugee communities. Film and music production initiatives were centered in the county's economic recovery strategy, with interdepartmental support built for these sectors. Stabilization, retention, and reopening strategies were implemented for Phase 4 businesses and organizations.

Despite setbacks from the COVID-19 pandemic, the King County economy is poised for broad industry growth. However, without a thoughtful and consistent public sector strategy to expand access to economic opportunity, employment, wage, and wealth inequities will continue to persist among King County residents. This is particularly true in urban areas of unincorporated King County, which have higher concentrations of BIPOC and low-income residents who face institutional and systemic barriers to living wage and high-wage jobs, as well as expanded economic opportunity beyond waged labor – such as entrepreneurship, and becoming job creators, business owners, and investors in their own right.

¹⁵² Port of Seattle, *IPM Feasibility Report Final Report* (March 28, 2024), accessed December 2, 2024, https://www.portseattle.org/sites/default/files/2024-05/IPM_Feasibility%20Report%20Final%20Report%20%28Finalv03.28%29.pdf.

F. The Office of Economic Opportunity and Creative Economy's role in existing county economic development programs such as, but not limited to, the Department of Local Services' economic development and small business assistance programs, Department of Local Services' unincorporated economic alliance program, the Lodging Tax supported tourism allocations, and the Black, Indigenous and People of Color (BIPOC) business and economic resiliency program.

In practicing its core responsibilities, OEOCE works across Executive branch departments to develop countywide strategies, align policy priorities, and unify economic development and workforce development work. The office convenes representatives of these bodies of work within the Economic Opportunity Coalition, which is a monthly meeting of leaders from each of the below programs, and others. In addition, OEOCE has multiple roles in existing county economic development programs. They are described below.

Department of Local Services' (DLS) economic development and small business assistance programs:

As subject matter experts in economic development, OEOCE advises, supports, and informs' DLS small business assistance strategy in unincorporated King County. OEOCE has consulted with DLS on numerous projects, including:

- CLFR programs (e.g. small business grant program, unincorporated economic alliance program);
- Small business outreach (e.g. DLS business roundtable meetings, small business survey question development, fire-impacted business assistance), and
- Policy planning (e.g. minimum wage ordinance, business licensing).

OEOCE directors collaborates with the DLS Director on a weekly basis at the Executive's Cabinet meeting, and the OEOCE Economic Development Director holds monthly meetings with the DLS Economic Development Manager.

In partnership with OEOCE, DLS is implementing three initiatives below to help give small businesses in unincorporated areas a better chance at survival and growth, further strengthening the local economy:

1. **Customer Relationship Management System:** DLS is implementing a customer relationship management (CRM) database system to more efficiently and effectively collect data on small businesses. A CRM system allows staff to efficiently collect, track, and identify local business trends. These trends help inform future programs, services, and initiatives.
2. **Consistent Business Engagement:** DLS is conducting more consistent and formalized business engagement. This includes deployment of regular business surveys, one-on-one interviews, and focus groups with key business contacts. To optimize response rates, OEOCE recommended that surveys ask fewer questions and include only the highest priority data needs to fill data gaps in the CRM database. These surveys are being conducted on a biennial basis at a minimum, and more often as critical information is deemed necessary.
3. **Streamlined Access to Local Resources:** DLS is providing small businesses with a more streamlined approach to accessing and matching local resources to small businesses. DLS is considering an in-house or third-party website application, or email newsletter that highlights top recommendations.

Department of Local Services’ Unincorporated Economic Alliance program: Over the last few years, King County through DLS mitigated pandemic-related economic impacts in unincorporated King County by distributing a portion of federal CLFR funding to community-informed programs. These programs included multiple small business grant rounds and the development of the Unincorporated King County (UKC) Economic Alliance. The UKC Alliance funds contracted with community organizations that have expertise in and a history of working with disproportionately impacted communities within unincorporated King County. These organizations provide entrepreneurial and career training, microbusiness incubation, small business technical assistance, and consultation for individuals and businesses most vulnerable to COVID-19 impacts in unincorporated King County. The OEOCE Economic Development Director meets with the Economic Alliance Program Manager on a monthly basis and consults as a subject matter expert, including planning for a Community Investment Trust in the White Center central business district.

OEOCE’s Creative Economy Director fields inquiries from film professionals wishing to locate productions in King County. If a production is seeking a location in unincorporated King County, the Creative Economy Director coordinates with the DLS Roads Division to permit the production.

Lodging Tax supported tourism allocations: The Cloudbreak Music Festival was designed by OEOCE in partnership with Visit Seattle. King County Lodging Tax proceeds provided seed funding for the partnership at \$187,000 in 2022, \$103,000 in 2023, and \$107,000 in 2024. The City of Seattle invested \$100,000 in 2023 and again in 2024. Cloudbreak was created to help artists, music venues, and hotels recover from the COVID pandemic-related impacts.

During the pandemic, music venues were largely closed, and both the venues and local musicians experienced loss of revenue. (See Appendix F.1, “King County Live Music Venues.”) Additionally, the musicians, many of whom were gig economy workers, were not eligible for pandemic relief funding from unemployment resources. In November 2024, OEOCE, the City of Seattle Office of Economic Development, and Visit Seattle, presented the third year of Cloudbreak Music Festival featuring 40 independent live music venues, 90 shows, 71 downtown hotels and approximately 200 local musicians (See Figure 4).

BIPOC Business and Economic Resiliency Program: In 2021, in response to the challenges posed by the COVID-19 pandemic, particularly for BIPOC-owned businesses, OEOCE, in collaboration with the Seattle Metro Chamber of Commerce (acting as the King County ADO), initiated a trusted messenger business navigator initiative. The Executive Office, and later OEOCE, provided \$1 million CLFR proceeds to seed fund what later became the Community Business Connector (CBC) program¹⁵³ initiative in 2023. CBC supports small business owners and entrepreneurs in various aspects, spanning marketing, technology, business planning, accessing capital, and navigating regulations. This program is still in existence today.

Late in 2023, OEOCE staff facilitated the development of a technical assistance program between the Office of Equity, Racial and Social Justice (OERSJ) and the CBC program for the BIPOC business and resiliency grant program. The CBC organizations provided application technical assistance in March for King County, generating 403 small business applications with local partners for the grant opportunity.

¹⁵³ Seattle Chamber of Commerce. “City Business Community.” Accessed October 31, 2024. <https://www.seattlechamber.com/pages/cbc/>.

Department of Executive Services (DES) Facility Management Division (FMD) for Harbor Island Studios facilities management:

OEOCE's creative economy director works extensively with King County FMD to coordinate facility improvements at Harbor Island Studios. FMD has a facility manager on site since October 2023. Creative economy leadership and FMD leadership meeting biweekly to share facility needs and updates. FMD is leading the capital improvements at Harbor Island Studios.

Department of Natural Resources and Parks (DNRP) Director's Office for Executive's Local Food

Initiative: OEOCE works closely with the DNRP Local Food Economy Manager to manage the Executive's Local Food Initiative (LFI). Launched in 2014,¹⁵⁴ aims to build a stronger farm-to-plate pipeline by setting targets to:

- Better connect local farms to consumers
- Increase access to healthy, affordable foods in underserved areas
- Support farmers and protect farmland
- Create a sustainable farm-to-plate pipeline more resilient to the effects of climate change

International Public Market (IPM) Feasibility Study: OEOCE partnered with Councilmember Upthegrove's office and the Port of Seattle's economic development division (via Commissioner Mahamed) to conduct a [feasibility analysis](#)¹⁵⁵ to determine if an IPM is the right fit for South King County. The goals of the International Public Market concept are to support equitable economic development and entrepreneurship for small businesses, with an emphasis on ethnic businesses; serve as an attraction for tourists and visitors; provide a gathering space; and showcase local cultural foods and products. King County is awaiting a financial and site commitment from one of the three candidate cities (Burien, SeaTac, or Tukwila). Once that commitment is made, King County will work with the Port of Seattle to determine what funding commitments they can make toward the project.

Executive Climate Office (ECO): King County has established aggressive climate goals, a Strategic Climate Action Plan focused on equity, resilience, and sustainability, and a new Executive Climate Office (ECO). OEOCE's co-directors provided input to the Strategic Climate Action Plan updates. In addition, OEOCE's Economic Development Director and Creative Economy Director meet regularly with ECO's director to collaborate on these shared priorities:

- Green Jobs/Business
- Green Filmmaking
- Sustainable Music Tourism
- Decarbonization of Harbor Island Studios

¹⁵⁴ King County. "Local Food Initiative." Accessed October 31, 2024. <https://kingcounty.gov/en/dept/dnrrp/about-king-county/about-dnrrp/sustainability-commitments/local-food-initiative>.

¹⁵⁵ Port of Seattle, IPM Feasibility Report Final Report (March 28, 2024), accessed December 2, 2024, https://www.portseattle.org/sites/default/files/2024-05/IPM_Feasibility%20Report%20Final%20Report%20%28Finalv03.28%29.pdf.

V. Conclusion

The economic growth of a community depends on effective public sector economic and workforce development strategies. These strategies yield well-informed policy, sound investments in assets and infrastructure, and timely services. These inputs lay the foundation to help spur private investment, which generates jobs and income, and pays dividends of expanded tax revenue back to public sector. This revenue is reinvested back into the community, thus completing the cycle, and leading to profound economic expansion when repeated at scale. Most importantly, this cycle of economic growth provides residents with livelihoods and a sense of well-being.

The establishment of OEOCE has fortified the economic development work throughout the county. This is evidenced by the extensive engagement of OEOCE with industry and community leaders, unions, workers, and residents in King County. It is further evidenced by the successful securing of funds from other resources to support OEOCE's work, as well as anecdotal input from workers and small businesses. Investment in OEOCE has exponential return for King County as this small office prides itself on being responsive to local economic concerns, connecting small businesses, organizations, and workers with resources, working to ensure that opportunities are equitable, and allocating resources where they will have the most impact.

Nurturing and supporting the businesses, nonprofits and workers in the regional creative ecosystem is important for King County's health and prosperity. Not only is it a substantial part of King County's economy, but this creative ecosystem is also important for the storytelling and images of the region as viewed by the world, generating regional attraction for businesses, as well as community development.

VI. Appendices

Appendix Background.1

Economic Recovery 2020 Executive Priority Matrix

ECONOMIC RECOVERY EXECUTIVE PRIORITY 2021-2022

(combined Economic Development & Creative Economy Priorities)

True North: Making King County a welcoming community where every person can thrive

Goal: Rebuild an anti-racist, equitable, resilient, and sustainable regional economy

Performance of this work is contingent upon several key variables and timelines, including vaccine rollout, federal relief funding, and resulting consumer behavior.

SLT Sponsor: April Putney (KCEO) **Leaders:** Ashton Allison, Kate Becker (KCEO) **Gov't Relations Rep:** Shannon Braddock (KCEO) **DLS Rep:** John Taylor

Project Manager: Rey Sugui (DLS) **PSB Coaches:** Aaron Rubardt, Drew Ponds, & Brad Steinmetz (PSB) **ESJ Rep:** Ericka Cox **DCHS Rep:** Leo Flor

Small Business Task Force (SBTF): Shannon Harris (PSB), Hugo Garcia (DLS), Sandy Hanks (FBOD), Dan Bernard (PH/COO), Natasha Jones (KCEO), Paulis Petrovics (KCEO), Saleem Hodge (Metro)

Additional Team Members: Megan Pedersen (OLR), John Parrott (KCIA/DES), Tom Koney & Cameron Satterfield (DES), Megan Stanley (DCHS), Jennifer Meisner (HPP), Jessica Emerson (DNRP), Janice Rahman (OEM), Jenny Huston (KCEO)

Internal Resources/External Partners: Lauren Smith (PSB/Reg. Planning), Gina Topp (KCEO), Carrie Cihak (Metro), Michael Jacobsen (PSB), Tanya Hannah (KCIT), Scarlett Aldebot-Green & Leon Richardson (DCHS), Workforce Development Council/Local Workforce Development Board (WDC/LWDB), Greater Seattle Partners (GSP), Associate Development Organization (ADO)

OBJECTIVES	STRATEGIES	ACTIONS	LEAD	SUPPORT	DUE
1. Expand access to high-quality, living wage, high-demand jobs for Black, Indigenous, and People of Color (BIPOC) communities, narrowing white-BIPOC employment, wage, and wealth gaps.	1. Adopt a set of quantifiable performance metrics and establish an online dashboard that tracks progress and ensures accountability.	1. Revisit and build upon the regional dashboard work that was conducted as part of the Seattle Region Partnership.	AA	SBTF	3/31/21
		2. Work with internal County staff and/or consultants to extract appropriate data and develop a dashboard product that meets diverse stakeholder needs.	AA	SBTF/SKCPH	12/31/20
		3. Apply for the 2021-2022 Urban Institute Upward Mobility Cohort to beta test upward mobility metrics, participate in a national cohort of seven other counties, and receive 18 months of coaching and technical assistance to develop a county-wide upward mobility action plan.	AA	CC/MJ	11/24/20
	2. Assess COVID-19 economic impact and resulting job demand of existing and emerging industry sectors in the county.	1. Engage a consulting firm to conduct a COVID-19 survey and economic impact analysis, including creative, hospitality, and tourism industries.	AA, KB	SBTF	12/31/20
		2. Review publicly available data sources and consult with the Workforce Development Council (WDC), Greater	AA, KB	SBTF/SKCPH	ONGOING

		Seattle Partners (GSP), and other partners to glean the latest labor market data and trends.			
		3. Communicate analyses to various stakeholders and the general public through the County website and various speaking engagements.	AA	SBTF	ONGOING
	3. Upskill a racially diverse talent base and prepare BIPOC workers for local industry job demands, jobs of tomorrow, entrepreneurship and business ownership opportunities.	1. Create at least one new WDC-convened industry leadership table (ILT) that would help elevate BIPOC workers' wages and skills by the end of 2022. a. Identify top 2-3 challenges for the industry b. Develop and implement strategies for the top 2-3 challenges for industries participating in industry leadership tables.	AA	JH	3/31/21
		2. Work with private employers to develop public, private, or blended funded on-the-job training programs for quality in-demand jobs and jobs of the future (e.g. Amazon's Career Choice).	AA	JH	6/30/21
		3. Increase participation in at least 4 green trades: pipelines for electrical, HVAC, plumbing/pipefitting and film by 45%.	SH/AA	JH	12/31/21
2. Attract new high-quality employers in the County's underserved communities and retain the County's high-quality employers that pay living wages and share King County's values of racial equity, environmental sustainability, and workers' rights.	1. Transition the Small Business Task Force (SBTF) to the Economic Recovery Task Force and implement the finalized strategic plan (currently in process).	1. Continue to provide direct advising to businesses during the Governor's Stay Home order. 2. Continue to provide advising on reopen to phase 3 and phase 4 businesses. 3. Continue to provide various PPE and safety material - masks, hand sanitizer, educational posters, etc. to businesses 4. Continue to conduct webinars about SBA and other emergency relief & loan products to increase the accessibility of the those products 5. Continue to develop and implemented grant programs for direct and indirect assistance throughout the county.	SBTF	--	3/31/21
		1. Develop tools and incentives to attract and retain high-quality employers to UKC, including technical assistance,	jT/HG	AA	ONGOING

	2. Implement the Unincorporated King County (UKC) economic development strategy.	integrating economic development into land-use planning, economic incentives, and tools to ensure we support agriculture and forestry.			
		2. Establish Economic Opportunity Zones by Q4 2021	JT/HG		12/31/21
		4. Provide one-on-one assistance to small businesses to rethink their business models and redesign their real estate footprints to survive and thrive in a pandemic environment, with a focus on BIPOC-owned businesses	HG	AA	12/31/20
		5. Develop green jobs strategy including apprenticeships, training, and educational programs in partnership with DNRP. Ensure pipelines reduce racial inequities in green jobs.	JT/HG	AA	12/31/21
		6. Provide technical assistance to 40-50 businesses with focus on providing sustainability assistance during COVID-19 in areas such as, how to apply for EIDL Loans, and the Payment Protection Program through 2020.	SBTF	HG	12/31/20
		7. Implement a \$4 Million Small Business Support Program for unincorporated King County, consisting of technical assistance, language/translation services, and direct grants to businesses through 2020.	JT/HG	AA	12/31/20
		8. Convene UKC Business Advisory Group - internal/external stakeholder group.	JT/HG	AA	ONGOING
		9. Convene coordinated meetings with Local Food Economy manager to coordinate rural economic development recovery strategies and actions.	HG	AA	ONGOING
	3. Increase the number of King County contracts that meet King County's high-quality standards by 25% in 2021 and 50% in 2022.	1. Expand the County's Priority Hire program by reducing the threshold to \$5 million for Community Workforce Agreement applicable projects.	SH	AA	12/31/2022
		2. Engage with County Agencies to review their planned contracting opportunities and opportunities to ramp up utilization of accelerator contracts, consultant contracts with applied ESJ Innovation Plans. Work with County Agencies to set targets and adopt processes as needed.	SH	AA	ONGOING

	4. Analyze King County International Airport current and desired tenants projected airfield/infrastructure needs and develop CIP program to meet high quality tenant needs.	1. Implement "quality" provisions in new KCIA leases and contracts.	JP	AA	12/31/20
		2. Implement incentives for high quality KCIA tenants.	JP	AA	12/31/21
	5. Encourage local CEOs and C-Suite leaders to adopt anti-racist policies, practices, and behaviors in their organizations.	1. Develop a minimum threshold of values for business attraction, expansion, and retention projects in King County and embed into partner organization contracts and agreements.	AA	SBTF	12/31/21
		2. Work with partner organizations to develop a CEO Jobs Council in which private employers pledge to train and hire workers in diverse, low-income communities that meet their own hiring needs.	AA	SBTF	12/31/21
		3. Address racial bias and barriers to racial equity in talent attraction, retention, engagement, wages, and advancement.	AA	SBTF	12/31/21
		4. Amend biased procurement policies and practices and incentivize spending with local BIPOC-owned businesses with intention to create family sustaining jobs for BIPOC in undercapitalized neighborhoods.	AA	SBTF	12/31/21
		5. Invest in the growth of BIPOC owned businesses in growth sectors by providing mentors and advisors	AA	SBTF	12/31/21
		6. Invest in multi-year, unrestricted funds in BIPOC-led businesses, and specifically to advance property ownership.	AA	SBTF	12/31/21
		7. Invest capital in Black, Indigenous and POC owned businesses and in non-traditional efforts led by BIPOC to increase property ownership among BIPOC owned businesses	AA	SBTF	12/31/21
		8. Invest in Tabor 100's economic development HUB and Black Business Equity Fund	AA	SBTF	12/31/21

		9. Develop an updated King County Aerospace Alliance strategic plan.	AA	SBTF	12/31/21
3. Protect and retain the creative, hospitality, and tourism industries and build a more equitable creative economy for BIPOC communities.	1. Work with regional partner organizations to support the most impacted industry sectors from COVID-19, including the creative, hospitality, and tourism industries.	1. Connect with, lead, and learn from other regions in developing creative sector recovery strategies	KB	SBTF	ONGOING
		2. Facilitate industry roundtables (e.g. REVS, Film Advisory Board) to garner up-to-date economic intel directly from stakeholders.	KB	SBTF	ONGOIN
		3. Implement population-specific strategies to decrease disparities in income, such as improving language access for English-language learners, accessibility of service provides, and clarity of program pathways that provide needed credentials or career-building opportunities.	KB	SBTF	12/31/21
	2. Center film and music production initiatives in the County's economic recovery strategy and build interdepartmental support for these industry sectors.	1. Incentivize the hiring of BIPOC film professionals and support film production with existing film incentive funds. Transfer these 2020 funds to launch in January 2021.	KB	SBTF	1/31/21
		2. Leverage King County's real estate assets and existing resources to support film industry recovery to incentivize regional film production.	KB	SBTF	12/31/22
		3. Recover 500 lost music industry jobs lost to COVID-19 impacts			
		4. Transmit King County film ordinance and implement King County film initiative by April 2021			
		5. Create 1,000 living wage union jobs through growing the film and music economy and through a hospitality/convention center/sports complex hiring hall by 2022			
		6. Leverage King County COVID Relief Fund to garner philanthropic support for independent live music venues			
		7. Advance Harbor Island warehouse proposal to accommodate six film productions that will create 500 new jobs in a pilot project launching January 2021	KB/TW	SBTF	1/31/21
		8. Center film and music production in King County's recovery strategy and build interdepartmental support for these industry sectors.	KB	SBTF	ONGOING

	3. Implement stabilization, retention and reopening strategies focused on Phase 4 businesses and organizations that will reopen last.	1. Provide technical assistance to creative sector small business owners via updated COVID-19 Handbook for the Creative Sector, in-person webinars with subject matter experts, social media updates, and connection to resources.	KB	SBTF	3/31/21
4. Leverage relationships with partner organizations to coordinate and advance workforce development, economic development, and economic recovery efforts.	1. Build new institutional workforce and economic development capacity at King County	1. Work with internal departments to understand how more staffing resources can be made available	AA	KB	3/31/21
	2. Coordinate economic development and economic recovery efforts with Greater Seattle Partners (GSP)	1. Manage GSP contract and deliverables.	AA	SBTF/GSP	12/31/20
		2. Ensure that a GSP representative (ideally the CEO) is engaged on the Local Workforce Development Board and Industry Engagement Committee	AA	SBTF/GSP	12/1/20
		3. Serve on Economic Recovery Industry Cluster Work Group	AA	SBTF/GSP	8/1/20
		4. Serve on Economic Recovery Policy and Advocacy Work Group	AA	SBTF/GSP	8/1/20
		5. Serve on Economic Recovery Marketing & Tourism Work Group	KB	SBTF/GSP	8/1/20
	3. Coordinate workforce development and economic recovery efforts with the Workforce Development Council of Seattle and King County (WDC) and Local Workforce Development Board (LWDB).	1. Oversee the reorganization of the WDC and finalize the governance structure by Q1 2021.	AA	SBTF/WDC /LWDB	3/31/21
		2. Promote the services and elevate the profile of the organization within all King County communities <ul style="list-style-type: none"> a. Organize quarterly meetings with County Councilmembers and/or Council staff to brief them on WDC activities and accomplishments b. Schedule regular speaking engagements with the Sound Cities Association leadership and membership. 	AA	SBTF/WDC /LWDB	ONGOING
		3. Oversee the DCHS Adult Services division's relationship with the Workforce Development Council and associated programmatic work	MS	AA	ONGOING

		4. Create the division's economic development strategy and ensure integration within VSHSL economic development strategies	MS	AA	ONGOING
	4. Coordinate business retention/expansion and economic recovery efforts with the ADO	1. Manage ADO contract and deliverables. 2. Evaluate ADO designation for 2021-2022 biennium.	AA	SBTF/ADO	6/30/21
	5. Advocate for and leverage federal and state funding.	1. Develop local, state, and federal legislative agenda for workforce development, economic recovery, and creative industries, including expansion of the toolbox. 2. Partner with other state and local leaders to advocate for changes to SBA and other emergency relief programs	AA, KB	SBTF	3/31/21
5. Leverage King County's position as a major employer to drive economic recovery and reduce racial inequities.	1. Conduct an analysis of current County assets, specifically real property and buildings, that could potentially be repurposed for economic recovery efforts.	1. Establish a pilot program that artists can utilize to access housing/workspace.	KB	SBTF	TBD
		2. Establish remote worksite opportunities for King County employees to increase flexibility, drive economic development in target neighborhoods, ease traffic congestion, and reduce our regional carbon footprint.	TK	AA	TBD
		3. Establish remote service points to increase access to King County services, drive economic development in target neighborhoods, ease traffic congestion, and reduce our carbon footprint.	TK	AA	TBD
		4. Drive economic development and economic recovery in urban UKC and other high transit areas by serving as an anchor tenant	TK/HG	AA	TBD
		5. Decentralize five County operations to serve as anchor institutions, economic drivers, and major employers in key portions of the County.	TK/AA	--	TBD

Appendix B.1

Cloudbreak Music Festival 2022 and 2023 Reports



CLOUDBREAK

Seattle's ReviveLive Music Fest

NOVEMBER 3-23, 2022
SEATTLE, WASHINGTON

2022 RECAP

Presented by





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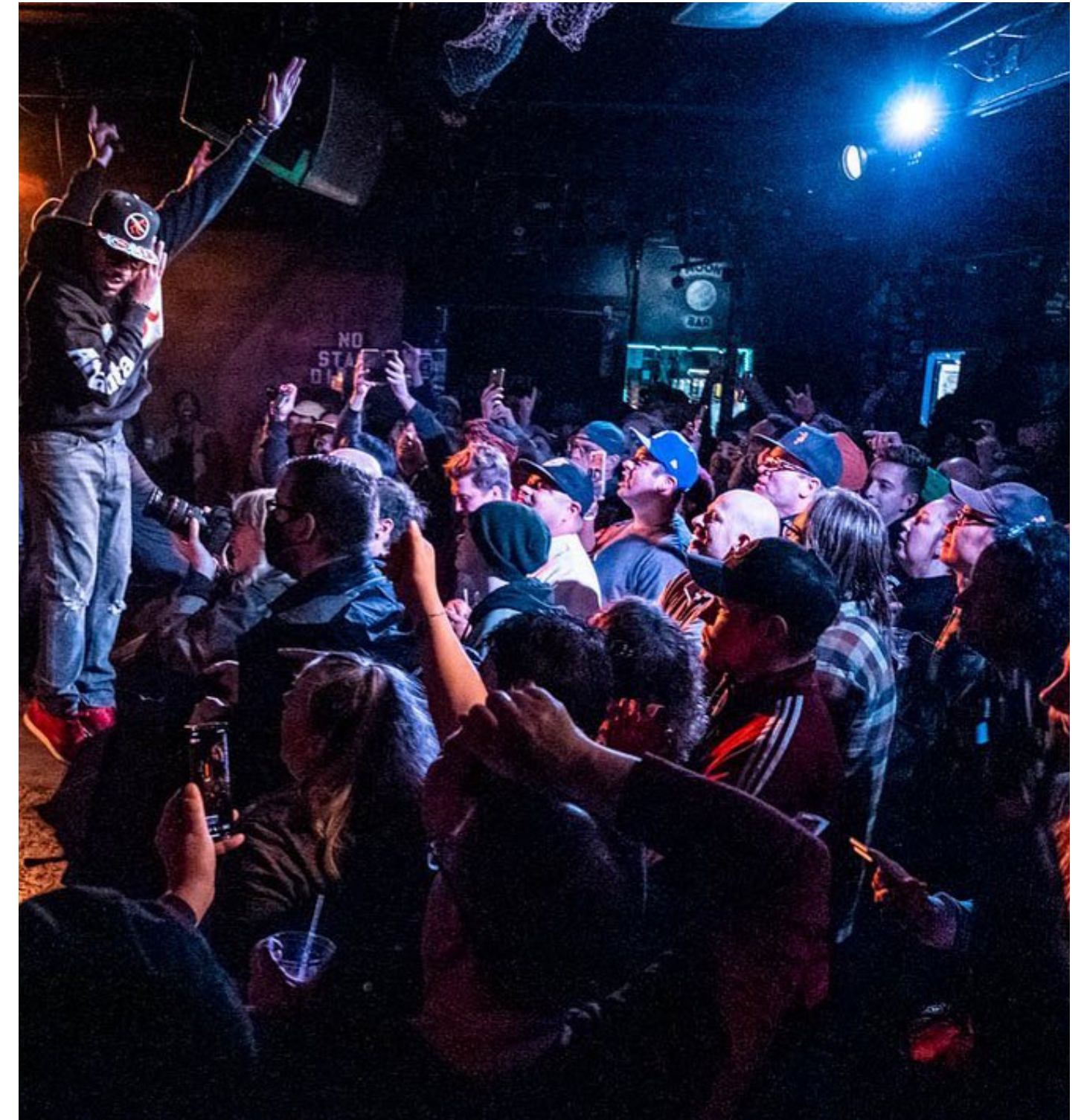


Credit: Niffer Calderwood

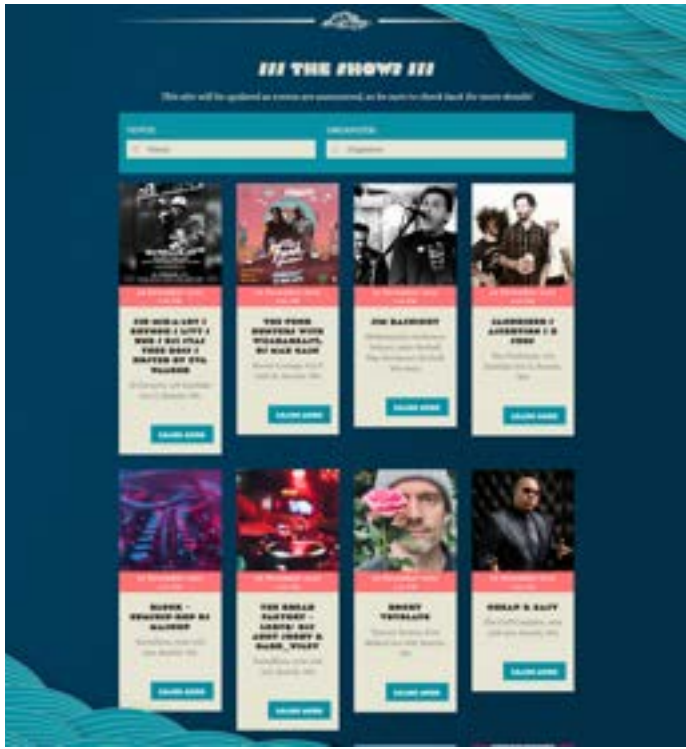


PROGRAM OVERVIEW

- Our music venues had been silent for much too long, and it was time to revel in the magic of live music once again.
- King County Creative and Visit Seattle launched Cloudbreak: Seattle's ReviveLive Music Fest to celebrate the reopening of the city's music scene. The festival kicked off at El Corazón, with Seattle legend Sir Mix-a-Lot taking the stage.
- Cloudbreak was possible due to funding by King County in support of music tourism, and significant support from Visit Seattle. The partnership between King County, the Seattle Tourism Improvement Area (STIA) and Visit Seattle allowed for fair payment to all artists and regional promotion to drive downtown stays during November.
- Visitors staying at participating downtown hotels November 3-23 received free access to live music events throughout the city.
- The program generated national press from a targeted media campaign and put Seattle's music culture in the spotlight.



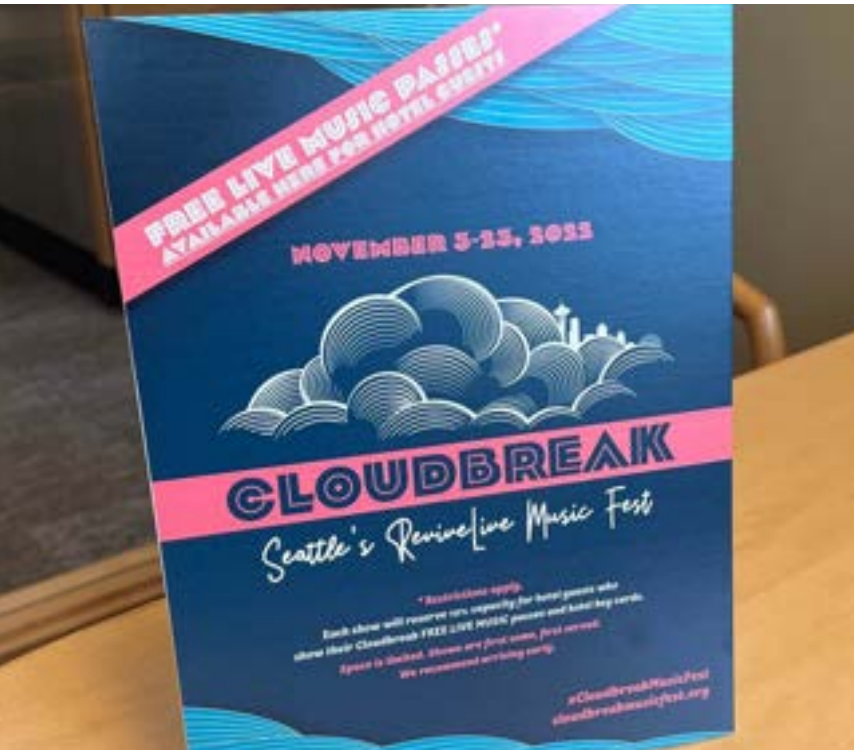
WEBSITE



MUSIC PASSES



TABLE TOPS



T-SHIRTS + POSTERS



SPOTIFY PLAYLIST



LOGO



VENUE PARTICIPATION

- Seattle area primary music venues were invited to participate. In 2022, 26 venues enrolled in the program.
- Funding for artist fees and the overall marketing and/PR initiatives were provided by the campaign. Venues were asked to hold 10% of capacity for free admission for hotel guests presenting official Cloudbreak passes and key cards during the scheduled events.
- Visit Seattle supplied each venue with a marketing/social media toolkit and a program overview to help promote the program and set venues up for success.
- Venue staff were also given Cloudbreak t-shirts to unify the campaign.



26 VENUES, 150+ ARTISTS

PARTICIPATING AREA VENUES

- Belltown Yacht Club
- Central Saloon
- Clock-Out Lounge
- Conor Byrne Pub
- El Corazón
- The Crocodile
- The Cuff Complex
- Freakout Fest
- The Funhouse
- Here-After
- High Dive
- Hotel Albatross
- McMenamins Anderson School
- Nectar Lounge
- Neumos
- Queer/Bar
- Red Lounge
- Royal Room
- Salmon Bay Eagles
- St. Mark's Cathedral
- Abbey Arts
- Sunset Tavern
- Tractor Tavern
- Trinity Nightclub
- The Vera Project
- Vermillion
- Washington Hall



VENUE PROMOTION EXAMPLES



HOTEL PARTICIPATION

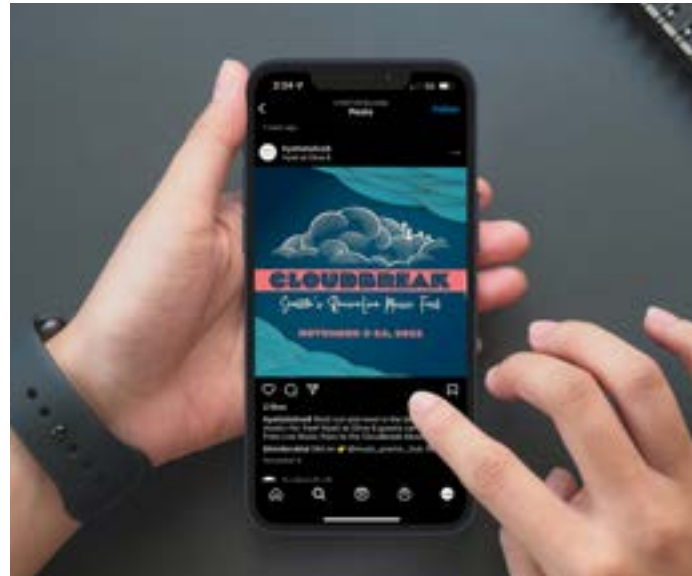


All Seattle Tourism Improvement Area (STIA) hotels were eligible to participate in Cloudbreak: Seattle's ReviveLive Music Fest. In 2022 we had 70 hotels participate. Visit Seattle provided hotel partners with exclusive live music passes to distribute to guests, tools to help promote, lobby signage and a social media tool kit. Commemorative posters were also created for hotel visitors to take home.

PARTICIPATING STIA HOTELS

- The Alexis Royal Sonesta Hotel Seattle
- Astra Hotel Seattle
- Belltown Inn
- Best Western Plus Pioneer Square Hotel Downtown
- The Charter Hotel Seattle, Curio Collection by Hilton
- citizenM Seattle Pioneer Square
- citizenM Seattle South Lake Union
- Courtyard Seattle Downtown / Lake Union
- Courtyard Seattle Downtown / Pioneer Square
- Crowne Plaza Seattle-Downtown
- The Edgewater Hotel
- Embassy Suites by Hilton Seattle Downtown Pioneer Square
- Even Hotel Seattle Downtown – Lake Union
- Executive Hotel Pacific
- Fairfield Inn & Suites Seattle Downtown / Seattle Center
- Fairmont Olympic Hotel
- Four Points by Sheraton Downtown Seattle Center
- Four Seasons Hotel Seattle
- Grand Hyatt Seattle
- Hampton Inn & Suites Seattle-Downtown
- Hilton Garden Inn Seattle Downtown
- Hilton Seattle
- Holiday Inn Seattle Downtown – Lake Union
- Homewood Suites by Hilton Seattle Convention Center Pike Street
- Homewood Suites by Hilton Downtown
- Hotel 1000, LXR Hotels & Resorts
- Hotel Ändra
- Hotel Five
- Hotel Max
- Hotel Sorrento
- Hotel Theodore
- Hyatt at Olive 8
- Hyatt Seattle / Downtown
- Hyatt Place Seattle / Downtown
- Hyatt Regency Seattle
- Inn at the Market
- The Inn at Virginia Mason
- Kimpton Hotel Monaco Seattle
- Kimpton Hotel Vintage Seattle
- Kimpton Palladian Hotel
- La Quinta Inn and Suites by Wyndham Seattle Downtown
- Level Hotels & Furnished Suites – South Lake Union
- Lotte Hotel Seattle
- The Maxwell Hotel
- Mayflower Park Hotel
- The Mediterranean Inn
- The Moore Hotel
- Motif Seattle
- Moxy Seattle Downtown
- Palihotel Seattle
- Pan Pacific Seattle
- Paramount Hotel Seattle
- Renaissance Seattle Hotel
- Residence Inn Seattle Downtown / Convention Center
- Residence Inn Seattle Downtown / Lake Union
- Marriott Seattle Waterfront
- Sheraton Grand Seattle
- Silver Cloud Hotel – Seattle Stadium
- Silver Cloud Hotel Seattle – Broadway
- Silver Cloud Hotel – Seattle Lake Union
- The Sound Hotel Seattle Belltown
- Springhill Suites by Marriott Seattle Downtown / South Lake Union
- The State Hotel
- Staybridge Suites Seattle Downtown – Lake Union
- Thompson Seattle
- Travelodge Seattle by the Space Needle
- W Seattle
- Warwick Seattle
- The Westin Seattle

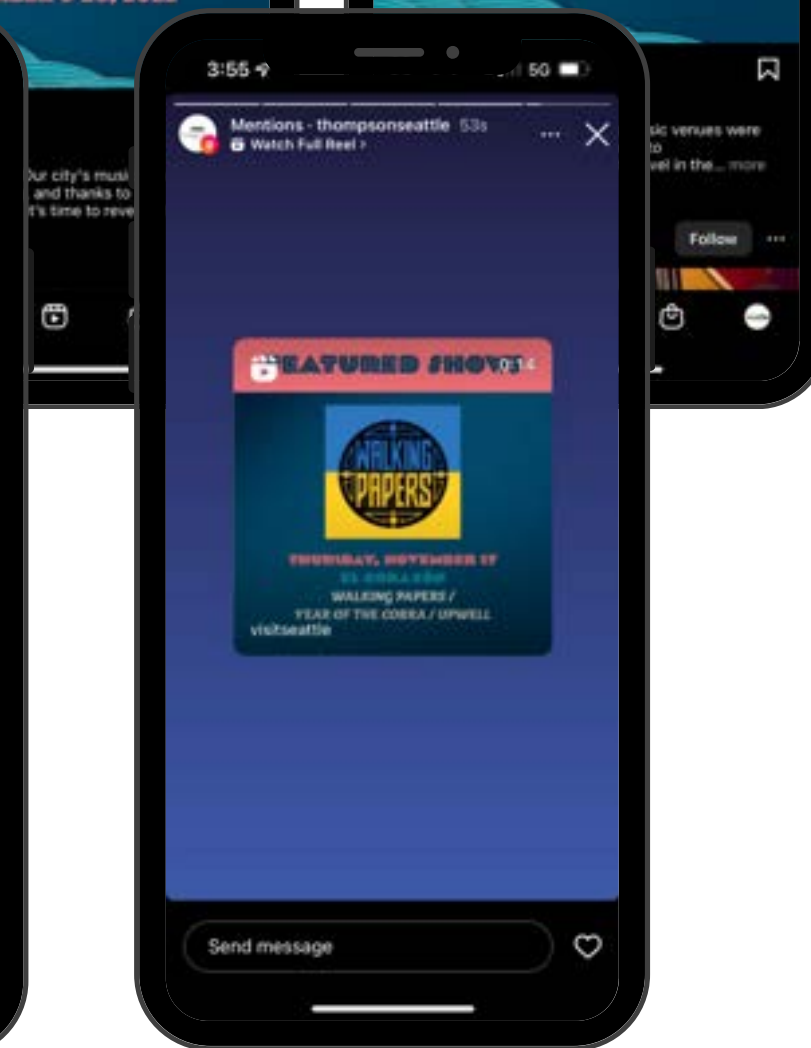
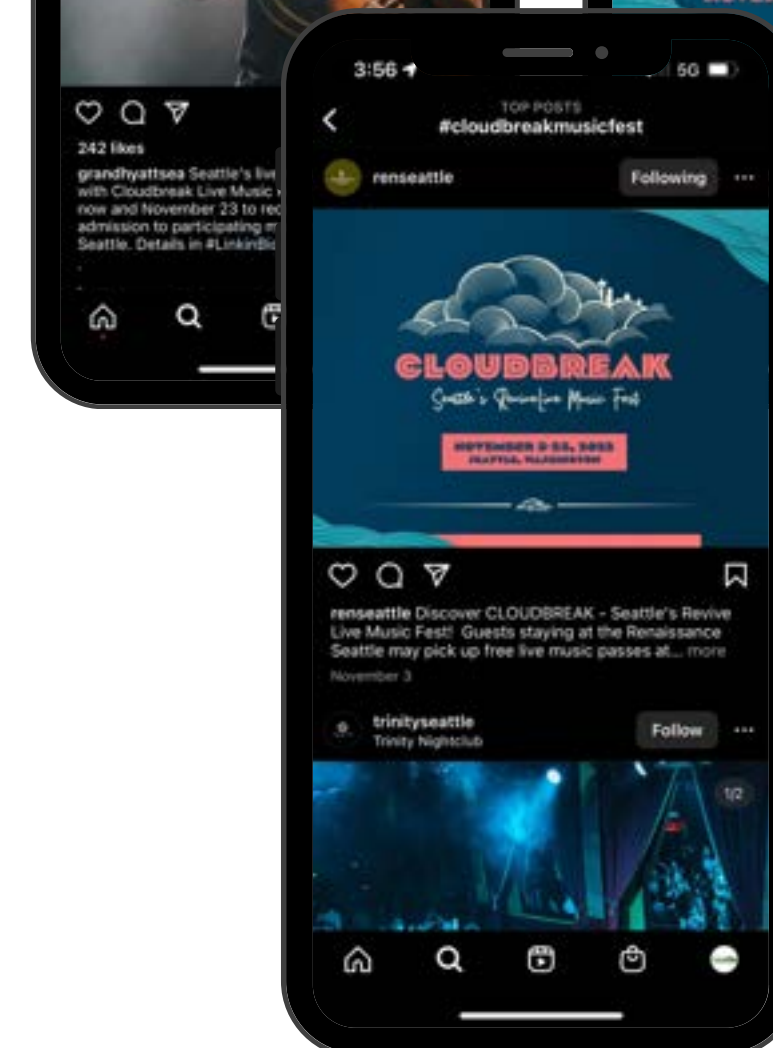
HOTEL PROMOTION EXAMPLES



Sheraton Grand
Seattle



Grand Hyatt
Seattle



SOUNDBITES

"I wanted to take a moment and thank each of you for the opportunity to participate in the Cloudbreak Music Fest. Our show was fantastic and we were surprised that we had so many hotel guests in attendance. Our show sold out and it was truly an honor to have so much talent on one stage. It was a magical night, everyone in attendance was smiling and dancing. On behalf of myself and the Clock-Out Lounge staff. We wanted to thank you for including us." - Jodi Ecklund, Clock-Out Lounge

"Guests that had returned from a show at Tractor Tavern reported that the staff were so welcoming and enthusiastic that they were part of the program with their passes." - concierge team at the Seattle Marriott Waterfront

*"Thank you for passes to Cloudbreak. We had a good amount of guests with a positive feedback about the promotion."
- concierge team at Motif Seattle*

MARKETING / ADVERTISING CAMPAIGN

AUDIENCE

The Cloudbreak campaign focused on regional music lovers. Key markets included Vancouver, Portland, Spokane and Seattle.

APPROACH

Our paid media efforts kicked off in September and ran through November 21st. The campaign consisted of digital display, social media, articles, Google SEM and more.

KEXP PARTNERSHIP

As part of the paid media efforts, Visit Seattle partnered with KEXP for a 5-Week campaign. The campaign consisted of:

- 23 On-Air & Live Stream Spots
- Live Stream Pre-Roll
- Web Campaign

2,219,515

DISPLAY IMPRESSIONS

.05%

AVERAGE CTR

0.46% is the industry standard

33,548

ARTICLE IMPRESSIONS

9.34%

AVERAGE CTR

2.30% is the industry standard

458,577

EMAIL IMPRESSIONS

7.27%

AVERAGE CTR

2.62% is the industry standard

374,623

SOCIAL MEDIA
IMPRESSIONS

.55%

AVERAGE CTR

1.30% is the industry standard



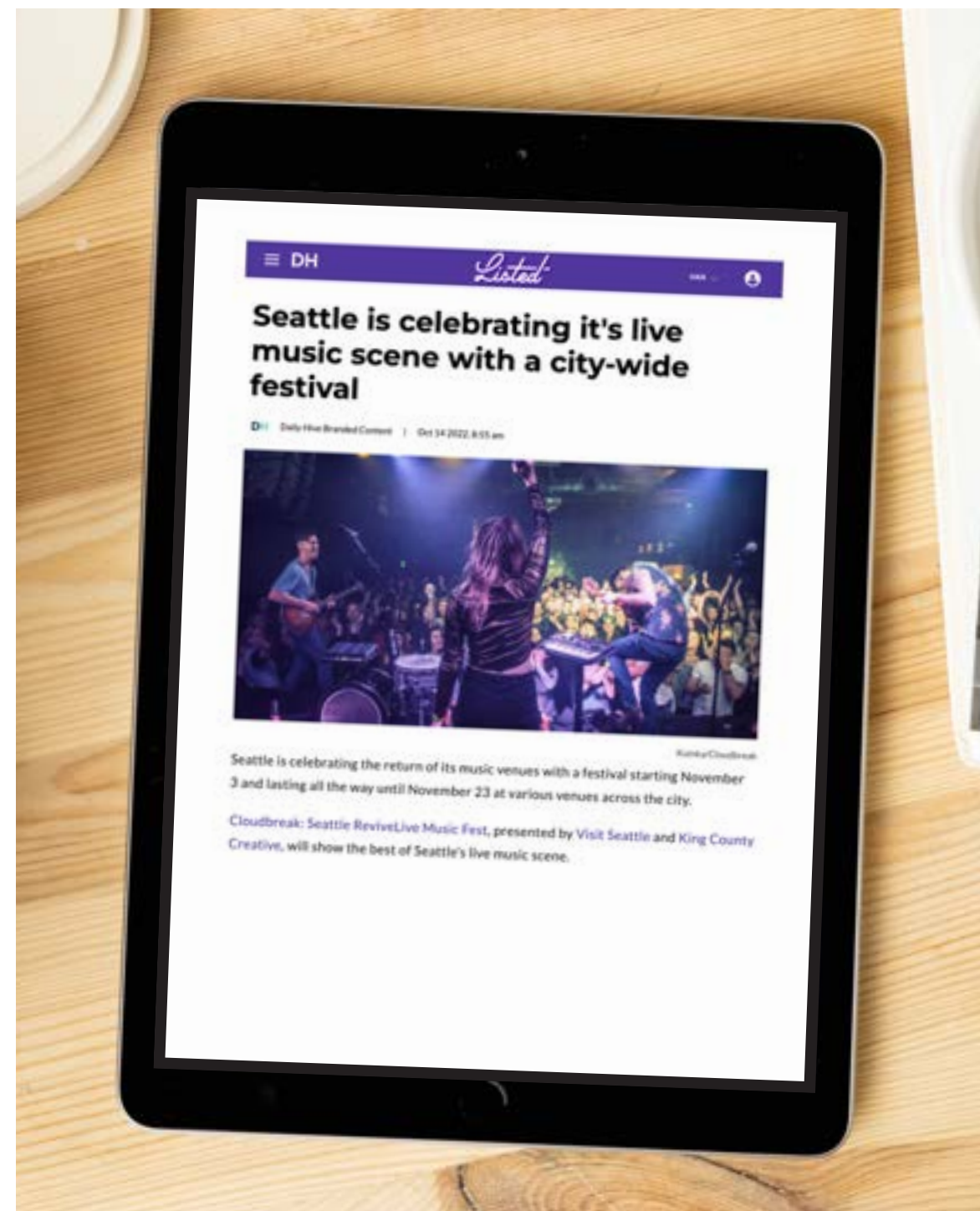
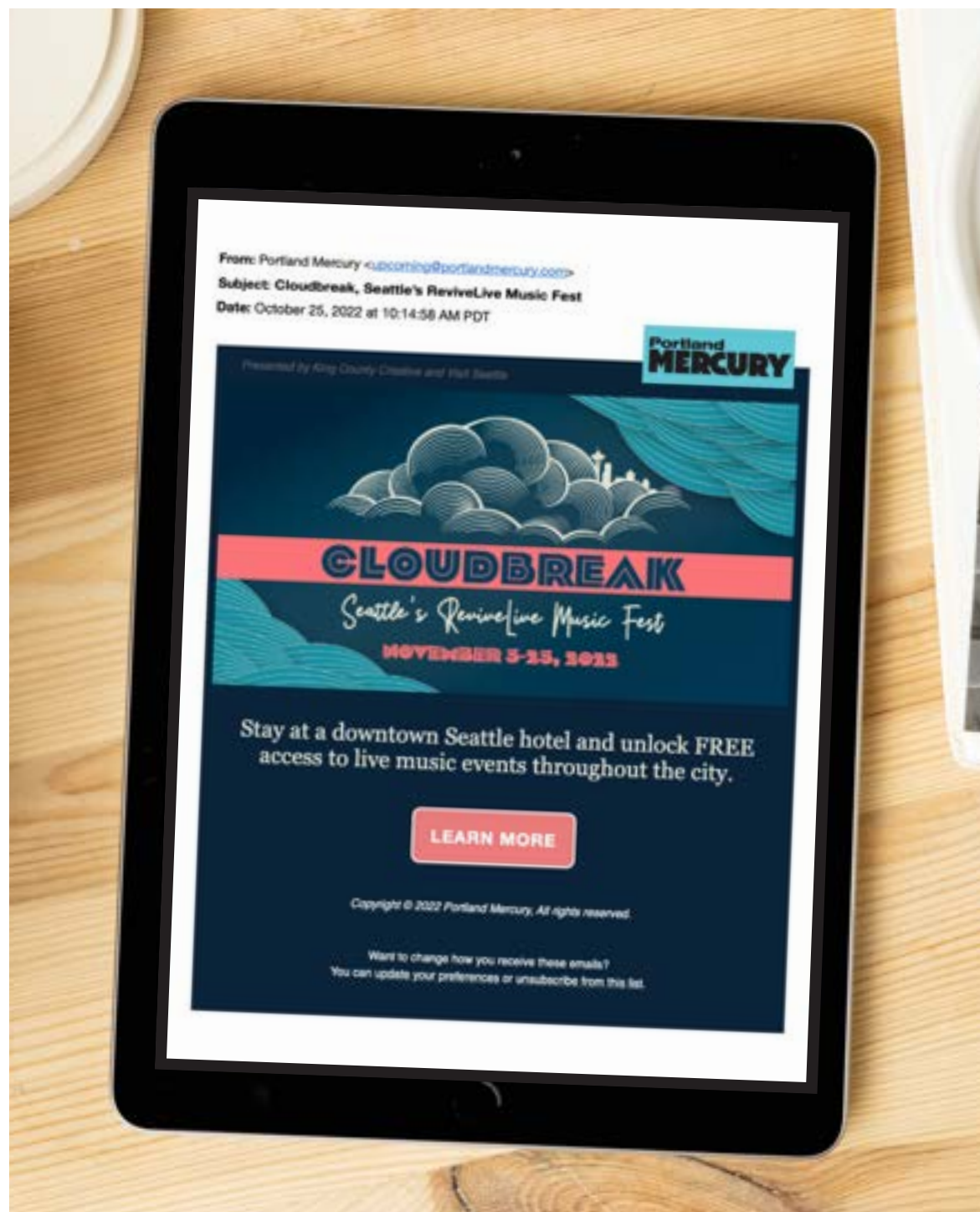
The Seattle Times



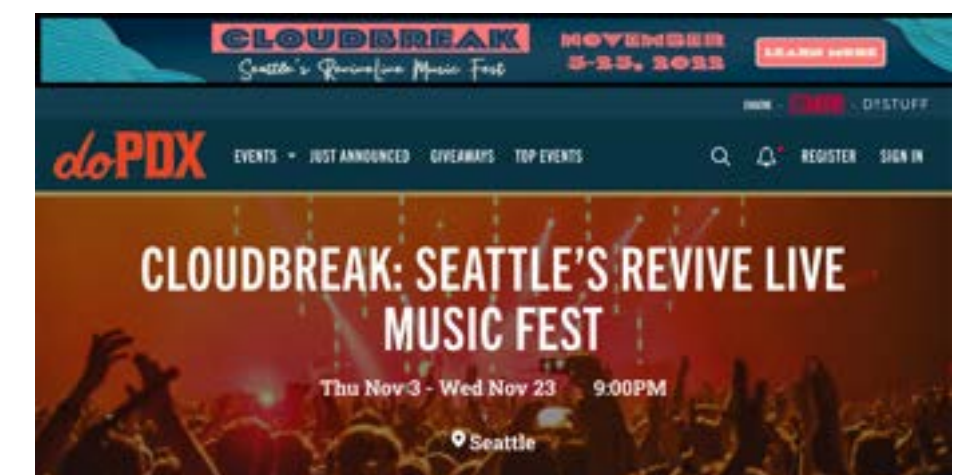
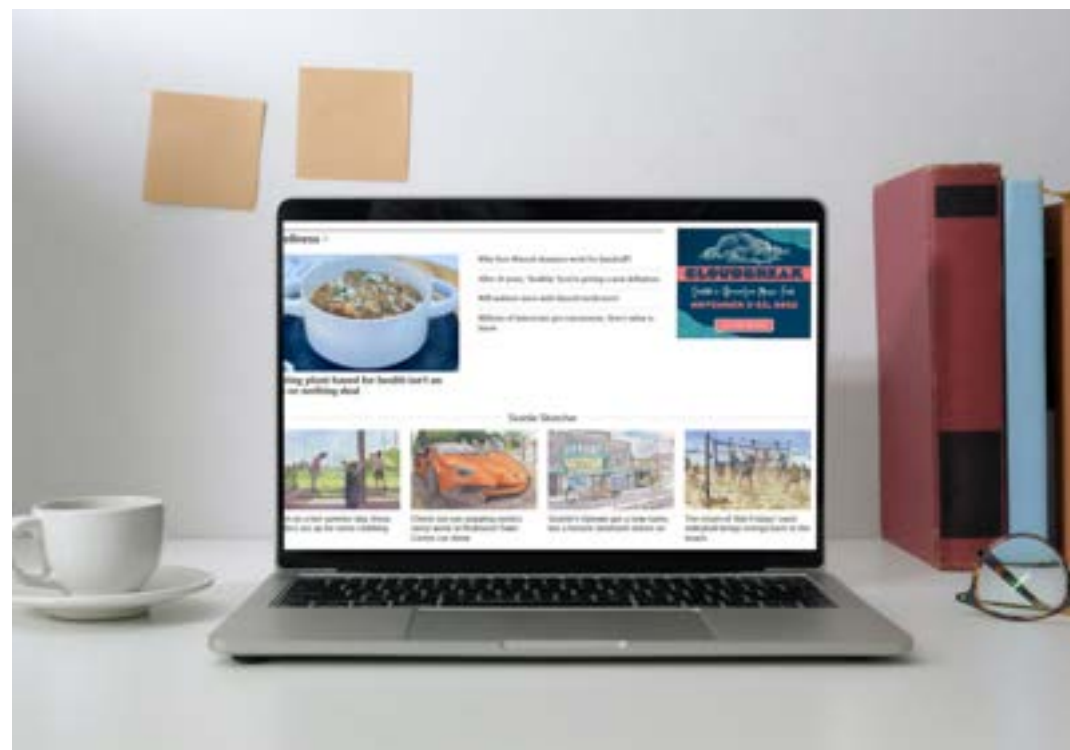
theStranger



MARKETING / ADVERTISING CAMPAIGN - EXAMPLES



MARKETING / ADVERTISING CAMPAIGN - EXAMPLES



MEDIA COVERAGE HIGHLIGHTS

45

PIECES OF COVERAGE

23.4 Million

MEDIA IMPRESSIONS

KEY HIGHLIGHTS:

- Coverage in key verticals including travel, entertainment, music and local.
- Outlets included the Boston Globe, Brooklyn Vegan, Pollstar/VenuesNow, The Seattle Times, KING-5, KUOW, KEXP, KIRO, Rainier Avenue Radio, KGW-TV (Portland), NW Meetings & Events and Broadway World.
- “You already know Seattle is a music-loving city. I mean, we literally birthed grunge. After 2.5 years of isolation, it's fair to say we are all craving an excuse to get out of the house and experience live music again. And Cloudbreak isn't messing around. The festival kicks off with the one and only Sir Mix-a-Lot at El Corazon.” –Seattle Refined
- “Seattle's Cloudbreak Music Festival is a little different than most musical festivals.” –Brooklyn Vegan

The Seattle Times

northwest
meetings + events

CURIOCITY

POLLSTAR

The Boston Globe

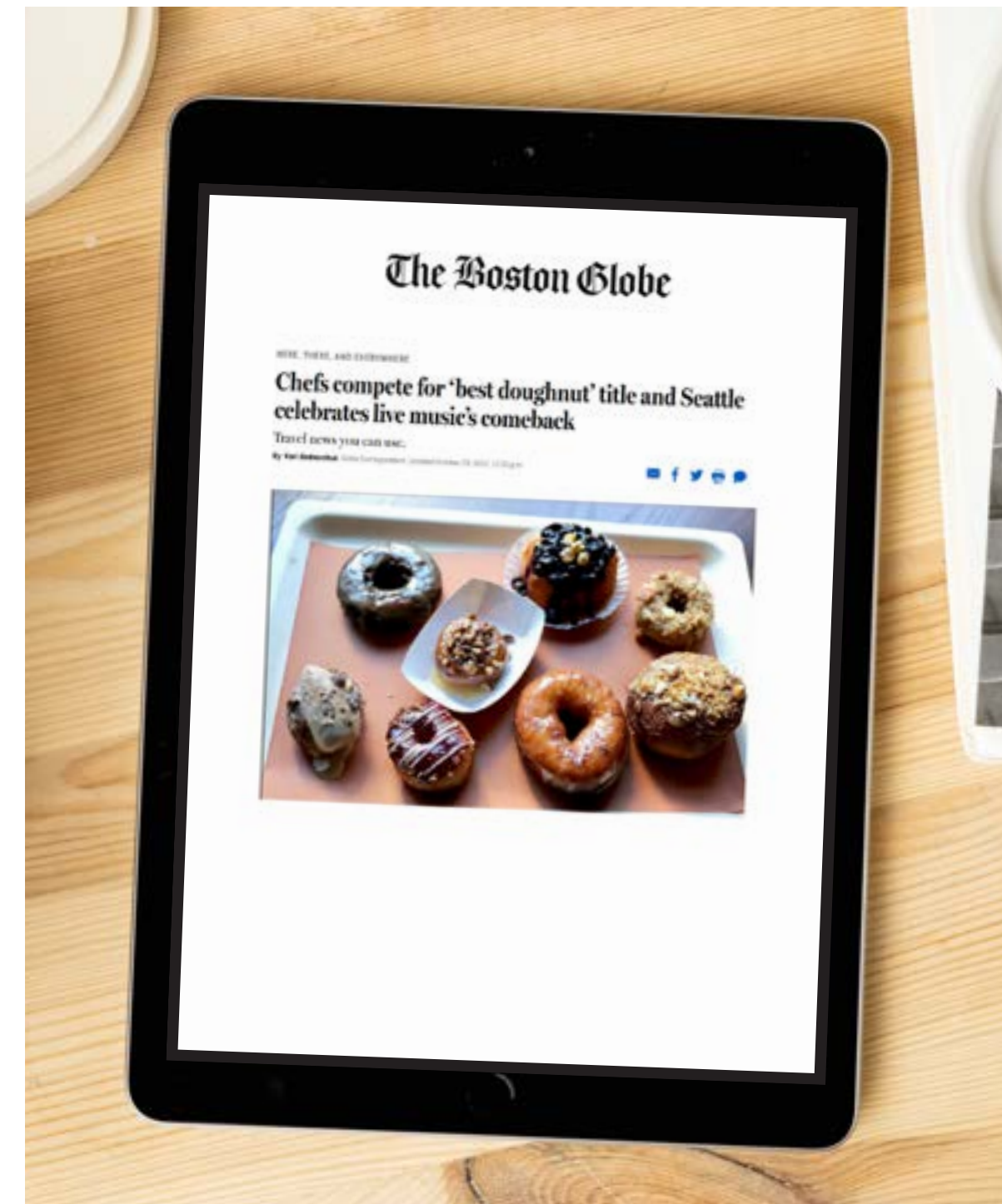
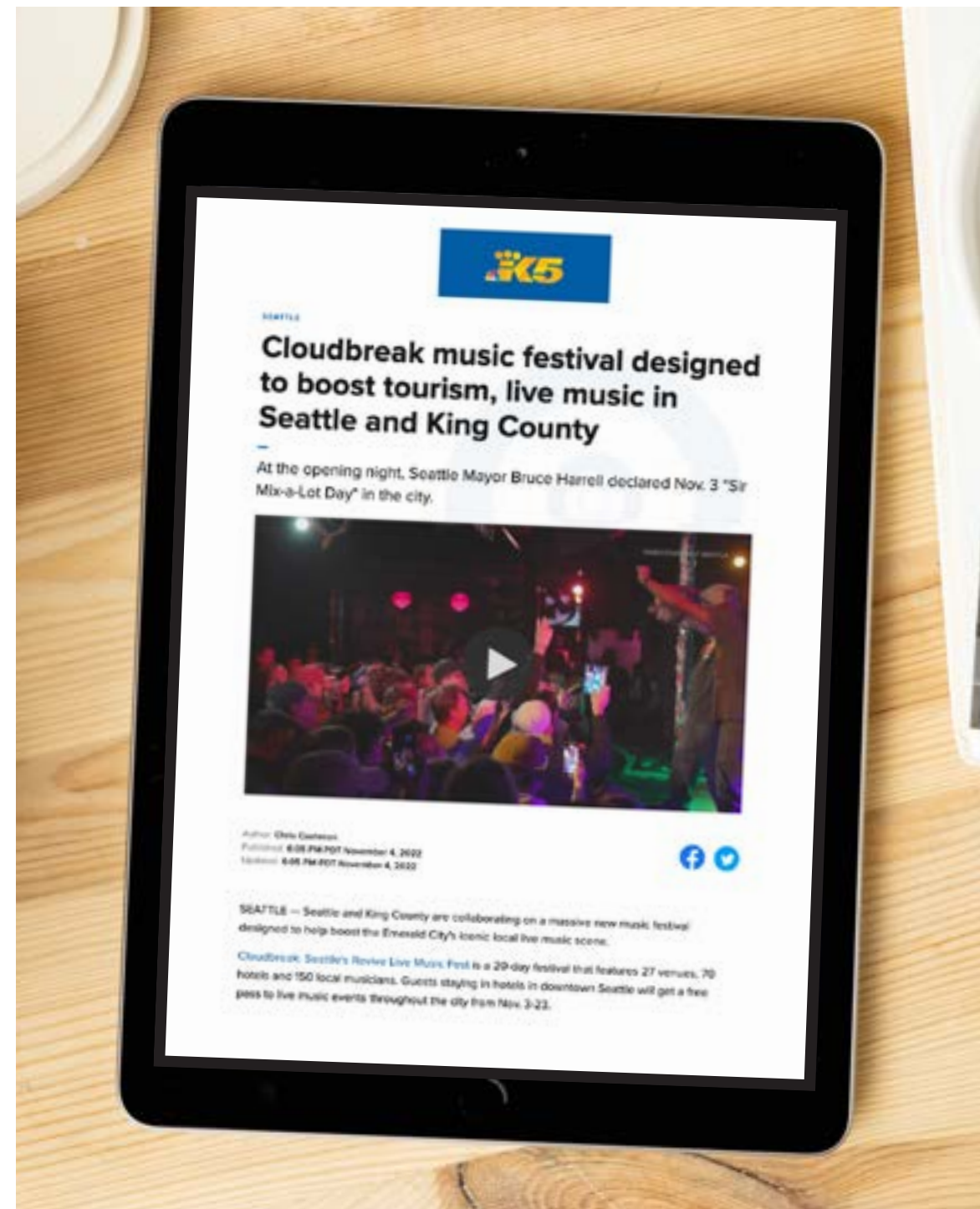
venues
NOW

K5 TD EverOut

S O U T H
SOUND
M A G A Z I N E

Brooklyn VEGAN

MEDIA EXAMPLES



PAID SOCIAL MEDIA HIGHLIGHTS

1,289,770
SOCIAL IMPRESSIONS

12,329
LINK CLICKS

\$0.71
COST PER CLICK
\$0.38 is the industry standard


13,758
POST ENGAGEMENTS



David Wiebe

Brilliant idea.


Like Reply Hide 4w



Road Runna

I wish there was a better representation of the Seattle hip hop community, but I'm glad any Seattle artist is getting some showtime!!!

Like Reply Hide 3w 10



Zane Baker

Nice poster and site, hats off to the designer or designers.

Like Reply Hide 3w 3



2022 RECAP REPORT - PROGRAM HIGHLIGHTS



45

TOTAL
PIECES OF COVERAGE



23,433,548

TOTAL
MEDIA IMPRESSIONS



2,253,202

TOTAL
ROS DISPLAY IMPRESSIONS



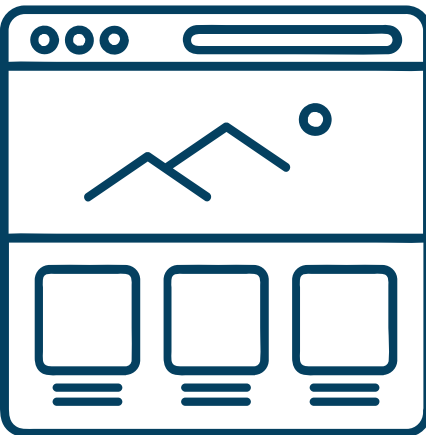
1,664,393

TOTAL
SOCIAL IMPRESSIONS



458,577

TOTAL
EMAIL IMPRESSIONS



21,0000

TOTAL
WEBSITE VISITS



297*

HOTEL GUESTS AT VENUES



\$207,900+

Artist Fees Paid To
Musicians

MARKETS REACHED
PORTLAND, VANCOUVER,
SPOKANE, SEATTLE

*This is an estimated amount based on
venue feedback

RECAP VIDEO





For more information, contact:

Tracey Wickersham

Senior Director, Cultural Tourism

Visit Seattle

twickersham@visitseattle.org

Kate Becker

Director, Creative Economy

Office of Economic Opportunity & Creative Economy

Office of King County Executive Dow Constantine

kate.becker@kingcounty.gov

VISIT
seattle

 King County **CREATIVE**



CLOUDBREAK

Seattle's Citywide Live Music Fest

2023 RECAP BOOK

IN PARTNERSHIP WITH:



King County



**Seattle Office of
Economic Development**

VISIT
seattle

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PHOTOS: MIKE R. MITCHELL

PROGRAM OVERVIEW

- Cloudbreak: Seattle's Live Music Festival celebrated local musicians and venues across three weeks in November 2023. This built on the success of 2022's inaugural event, produced by Visit Seattle and King County, and welcomed in our new partner the City of Seattle for 2023.
- The festival kicked off at The Crocodile with Rocky Votolato, Sea Salt, and Crushing, with remarks from King County Executive Dow Constantine
- Cloudbreak is possible due to funding in support of music tourism from King County Creative, OED, and Visit Seattle. King County and Visit Seattle also provide significant administrative and in-kind support. This program provides fair payment to all artists. A targeted campaign led by Visit Seattle was designed to drive downtown stays during November and shine a spotlight on Seattle's music community.
- Guests staying in 71 participating downtown Seattle hotels from November 1-22 received free access to over 60 live music events at 31 local venues. Guests also received free access to The Freakout Festival, a music festival held within the Cloudbreak dates.
- The program generated national press from a targeted media campaign and put Seattle's music culture in the spotlight.



PHOTO: JIM BENNETT



PHOTO: MIKE R. MITCHELL



PHOTO: JIM BENNETT

VENUE PARTICIPATION: 31 VENUES

- Independent music venues in metropolitan King County, accessible from downtown Seattle hotels, were invited to participate.
- Funding for artist fees and the overall marketing / PR initiatives were provided by the campaign.
- Venues held 10% of their capacity to allow for free admission for hotel guests with special Cloudbreak passes for designated Cloudbreak shows.
- Venues were supplied with toolkits and collateral during the scheduled events to help promote the program.



PHOTO: MIKE R. MITCHELL



PHOTO: MIKE R. MITCHELL



PHOTO: MIKE R. MITCHELL

VENUE PARTICIPATION: 31 VENUES

THE BALLARD SMOKE SHOP*

BELLTOWN YACHT CLUB

CAFFÉ UMBRIA*

CENTRAL SALOON

CLOCK-OUT LOUNGE

COLUMBIA CITY THEATER

CONOR BYRNE PUB

THE CROCODILE

DIMITRIOU'S JAZZ ALLEY

EL CORAZÓN

FREMONT ABBEY

THE FUNHOUSE

HERE-AFTER

HIGH DIVE

MADAME LOU'S

NECTAR LOUNGE

NEUMOS

THE RABBIT BOX

RED LOUNGE

ROYAL ROOM

SALMON BAY EAGLES*

SLIM'S LAST CHANCE

ST. MARK'S CATHEDRAL

SUNSET TAVERN

SUPERNOVA

TIM'S TAVERN

TRACTOR TAVERN

TRINITY NIGHTCLUB

THE TRIPLE DOOR

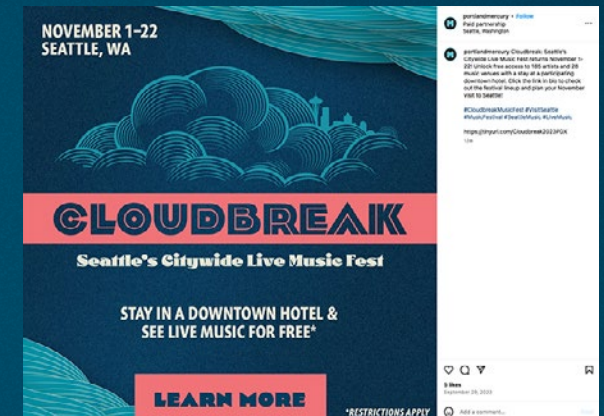
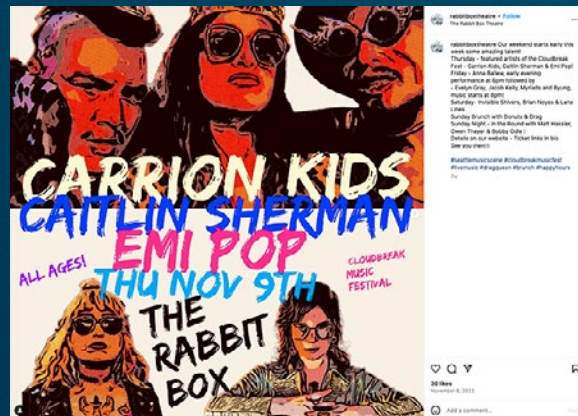
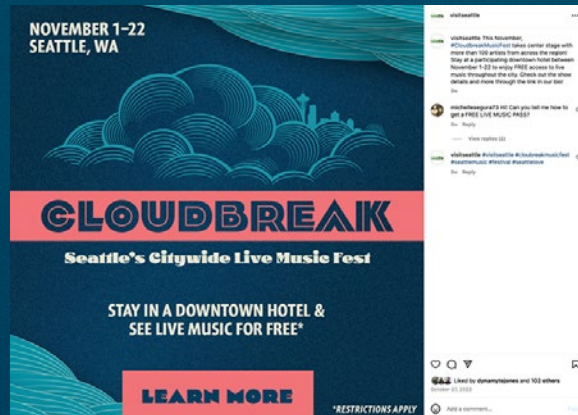
THE VERA PROJECT

VERMILLION

*A Freakout Festival location

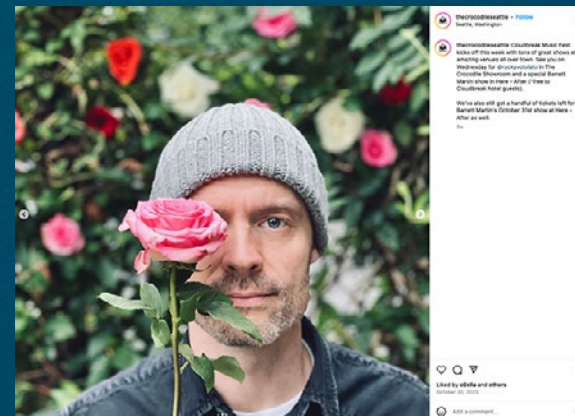
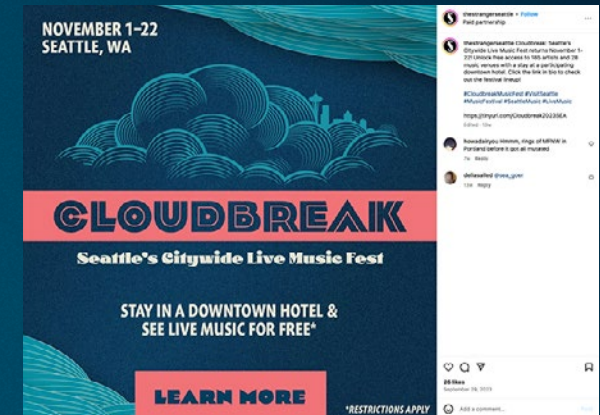
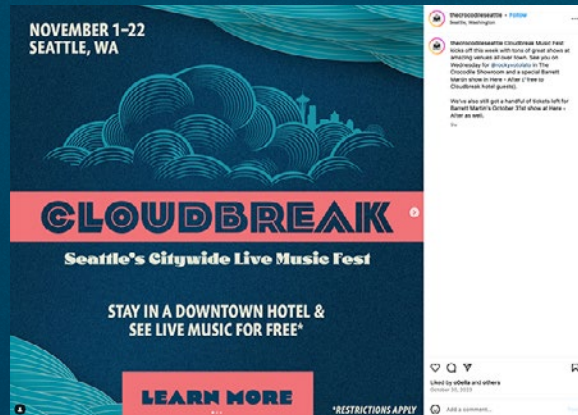
2023 RECAP BOOK

VENUE PROMOTION EXAMPLES



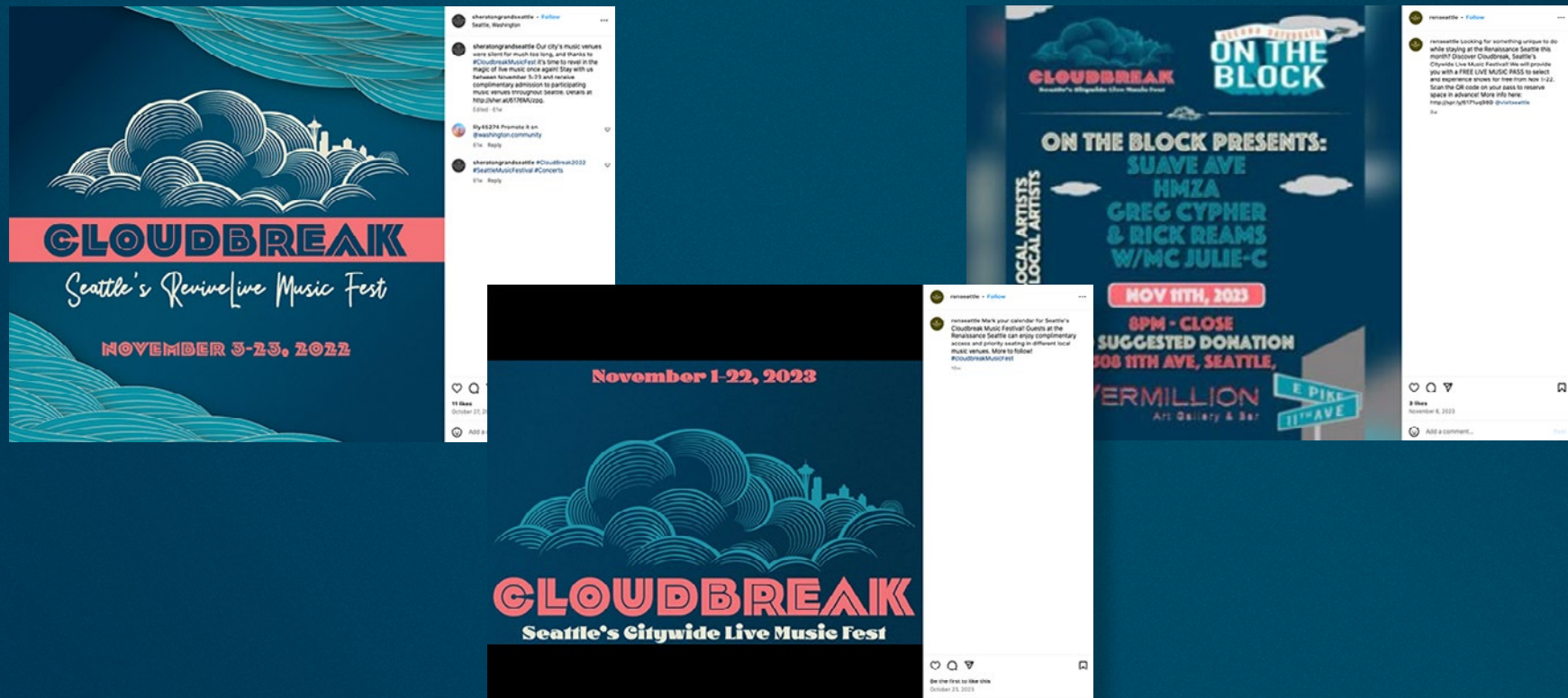
2023 RECAP BOOK

VENUE PROMOTION EXAMPLES



HOTEL PARTICIPATION: 71 HOTELS

- All Seattle Tourism Improvement Area (STIA) hotels were eligible to participate in Cloudbreak: Seattle's Citywide Live Music Fest
- Visit Seattle provided hotel partners with exclusive live music passes to distribute to guests, promotional tools, lobby signage, and a social media kit.



HOTEL PARTICIPATION: 71 HOTELS

ARCTIC CLUB HOTEL

ASTRA HOTEL,
A TRIBUTE PORTFOLIO HOTEL

BELLTOWN INN

BEST WESTERN PLUS
PIONEER SQUARE HOTEL DOWNTOWN

CITIZENM SEATTLE PIONEER SQUARE

CITIZENM SEATTLE
SOUTH LAKE UNION

COURTYARD SEATTLE
DOWNTOWN/LAKE UNION

COURTYARD SEATTLE
DOWNTOWN/PIONEER SQUARE

CROWNE PLAZA
SEATTLE - DOWNTOWN

EMBASSY SUITES BY HILTON
SEATTLE DOWNTOWN
PIONEER SQUARE

EVEN HOTEL SEATTLE
DOWNTOWN - LAKE UNION

EXECUTIVE HOTEL PACIFIC

FAIRFIELD INN & SUITES SEATTLE
DOWNTOWN/SEATTLE CENTER

FAIRMONT OLYMPIC HOTEL

FOUR POINTS BY SHERATON
DOWNTOWN SEATTLE CENTER

FOUR SEASONS HOTEL SEATTLE

GRAND HYATT SEATTLE

HAMPTON INN & SUITES
SEATTLE-DOWNTOWN

HILTON GARDEN INN
SEATTLE DOWNTOWN

HILTON MOTIF SEATTLE

HILTON SEATTLE

HOLIDAY INN SEATTLE
DOWNTOWN - LAKE UNION

HOMEWOOD SUITES
BY HILTON SEATTLE
CONVENTION CENTER PIKE STREET

HOMEWOOD SUITES
BY HILTON SEATTLE DOWNTOWN

HOTEL 1000, LXR HOTELS & RESORTS

HOTEL ÄNDRA SEATTLE -
MGALLERY HOTEL COLLECTION

HOTEL FIVE

HOTEL MAX

HOTEL SORRENTO

HOTEL THEODORE

HYATT AT OLIVE 8

HYATT HOUSE SEATTLE/DOWNTOWN

HYATT PLACE SEATTLE/DOWNTOWN

HYATT REGENCY SEATTLE

INN AT THE MARKET

KIMPTON HOTEL MONACO SEATTLE

KIMPTON HOTEL VINTAGE SEATTLE

KIMPTON PALLADIAN HOTEL

LA QUINTA INN AND SUITES
BY WYNDHAM SEATTLE DOWNTOWN

LEVEL HOTELS & FURNISHED SUITES -
SOUTH LAKE UNION

LOTTE HOTEL SEATTLE

MAYFLOWER PARK HOTEL

MOXY SEATTLE DOWNTOWN

PALIHOTEL SEATTLE

PAN PACIFIC SEATTLE

PARAMOUNT HOTEL SEATTLE

RENAISSANCE SEATTLE HOTEL

RESIDENCE INN SEATTLE
DOWNTOWN/CONVENTION CENTER

RESIDENCE INN SEATTLE
DOWNTOWN/LAKE UNION

SEATTLE MARRIOTT WATERFRONT

SHERATON GRAND SEATTLE

SILVER CLOUD HOTEL -
SEATTLE STADIUM

SILVER CLOUD HOTEL
SEATTLE - BROADWAY

SILVER CLOUD HOTEL SEATTLE -
LAKE UNION

SPRINGHILL SUITES SEATTLE
DOWNTOWN / SOUTH LAKE UNION

STAYBRIDGE SUITES SEATTLE
DOWNTOWN - SOUTH LAKE UNION

THE ALEXIS ROYAL SONESTA HOTEL
SEATTLE

THE CHARTER HOTEL SEATTLE,
CURIO COLLECTION BY HILTON

THE EDGEWATER HOTEL

THE INN AT THE WAC

THE INN AT VIRGINIA MASON

THE MAXWELL HOTEL

THE MEDITERRANEAN INN

THE MOORE HOTEL

THE SOUND HOTEL SEATTLE
BELLTOWN, TAPESTRY COLLECTION
BY HILTON

THE STATE HOTEL

THE WESTIN SEATTLE

THOMPSON SEATTLE

TRAVELODGE SEATTLE
BY THE SPACE NEEDLE

W SEATTLE

WARWICK SEATTLE

2023 RECAP BOOK

ASSETS CREATED



MUSIC PASSES



HOTEL TABLETOPS



LOGO



POSTER



T-SHIRTS – FRONT & BACK

MARKETING // ADVERTISING CAMPAIGN

Audience: The campaign for this program targeted regional music lovers in key markets including Vancouver, Portland, Spokane, and Olympia / Tacoma. Local Seattle residents were also targeted for hotel staycations.

Approach: The paid media campaign consisted of digital display, sponsored articles, emails, newsletters, social media, and search promotions, running from September 27 through November 21.

2.33MM
TOTAL PAID MEDIA
IMPRESSIONS

9,081
TOTAL CLICKS

0.91%
AVERAGE CTR

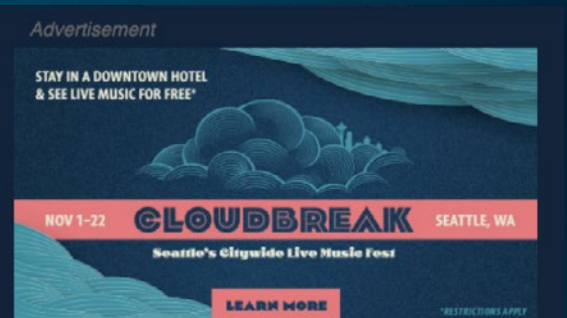
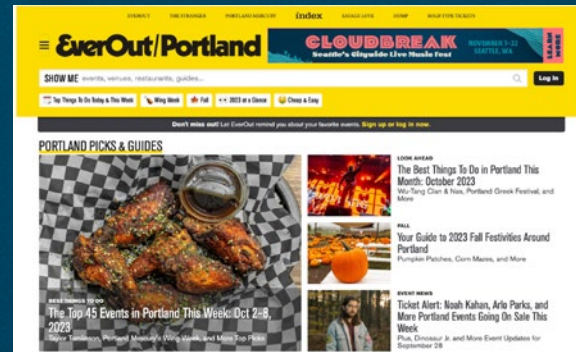
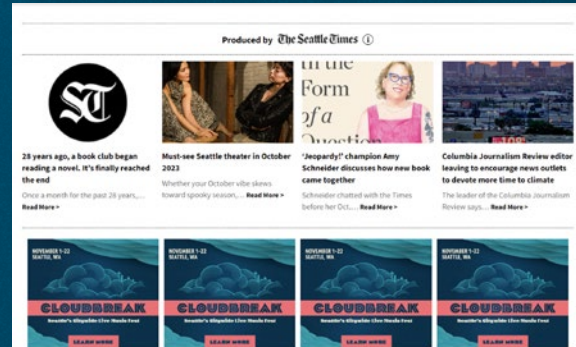
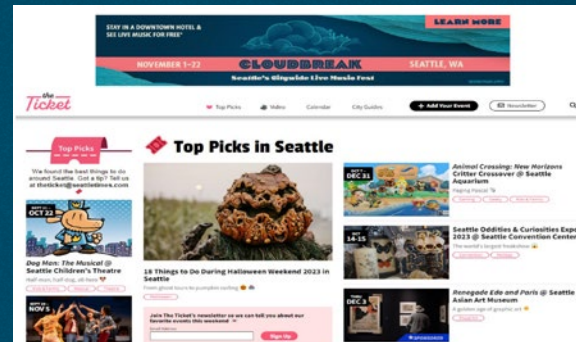
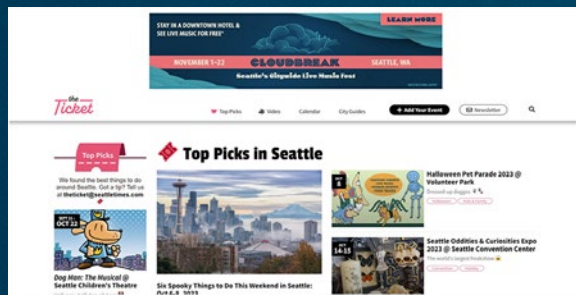
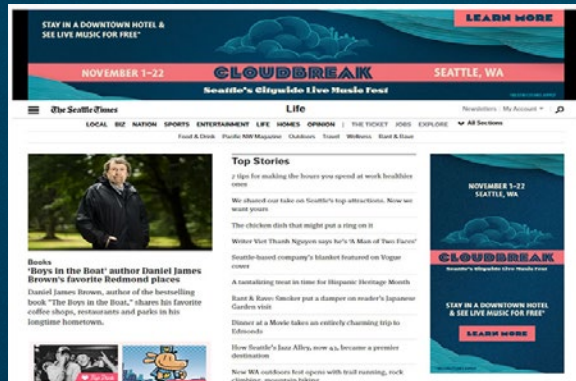
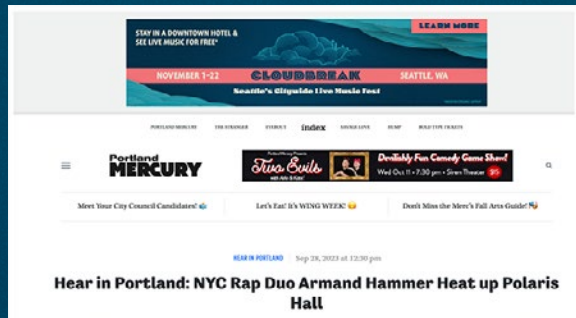


KEXP Partnership

As part of the paid media efforts, Visit Seattle partnered with KEXP for a 5-Week campaign. The campaign consisted of:

- On-Air & Live Stream Spots
- Live Stream Pre-Roll
- Web Campaign

PAID MEDIA EXAMPLES



Cloudbreak: Seattle's Citywide Live Music Fest is returning for a second year from Nov. 1-22, 2023, bringing a wide array of artists including legendary acts Mudhoney, Jenn Champion, The Fall of Troy and more to stages across the city. This year's festival kicks off on Nov. 1 with an exciting lineup at iconic Seattle venue The Crocodile, including **Kill Rock Stars & Friends Tour, Ben Hunter & Cameron Lavi-Jones, and Rocky Votolato.**

Introducing a new model to music festivals, Cloudbreak gives people staying at one of the 71 participating Downtown Seattle hotels free access to select concerts throughout the city. Festivalgoers simply show their pass and hotel key card at participating venue doors, unlocking access to 185 artists and 28 venues throughout the festival.

Cloudbreak allows visitors to explore Seattle's music scene, celebrating both the established and up-and-coming artists who continue the city's rich music legacy. Visit cloudbreakmusicfest.org to check out the Cloudbreak lineup and plan your November visit to Seattle.

Join in celebration of Seattle's live music scene.

Learn more at cloudbreakmusicfest.org.

LEARN MORE

PAID MEDIA EXAMPLES

THE 10 BEST BARS IN PORTLAND
10/10/2023 • By Katherine Chew Hamilton, Margaret Keller, and Matthew Treabey

These Portland Bars Serve Killer Food
10/10/2023 • By Katherine Chew Hamilton

FOOD WEEK 2023

CLouDBREAK
November 1-22
Seattle's Glagolden Live Music Fest

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

THE 10 BEST BARS IN PORTLAND
10/10/2023 • By Katherine Chew Hamilton, Margaret Keller, and Matthew Treabey

These Portland Bars Serve Killer Food
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STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

NOVEMBER 1-22 **CLouDBREAK** **SEATTLE, WA**
Seattle's Glagolden Live Music Fest

PORTLAND MERCURY **FOO FIGHTERS** **510 PORTLAND OR PROUDENCE PARK GET TICKETS NOW!**

Meet Your City Council Candidates! • Let's Eat! It's WING WEEK! • Don't Miss the Mer's Fall Arts Guide!

THE LATEST

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

NOVEMBER 1-22 **CLouDBREAK** **SEATTLE, WA**
Seattle's Glagolden Live Music Fest

REDUCE YOUR WATER USE

CLouDBREAK
November 1-22
Seattle's Glagolden Live Music Fest

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

DailyHive

MEET THE WOMAN WHO MAY JUST BE CANADA'S COSTCO QUEEN
10/10/2023 • By Sarah High

CLouDBREAK
November 1-22
Seattle's Glagolden Live Music Fest

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

VANCOUVER IS AWESOME

You can gain FREE access to this Seattle indie music fest by staying at select downtown hotels
The citywide live music festival is free with a select downtown Seattle hotel stay

KANE BROWN

CHRIS YOUNG

CLouDBREAK
November 1-22
Seattle's Glagolden Live Music Fest

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

DISPATCH

Taste Test

CLouDBREAK
November 1-22
Seattle's Glagolden Live Music Fest

STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*

MEDIA COVERAGE HIGHLIGHTS

28
PIECES OF
COVERAGE

33.8MM
MEDIA
IMPRESSIONS

Key highlights:

- The strategy focused on national, local, and regional (drive market) earned coverage in key music, arts, entertainment, and culture outlets. Pitching began in September with details on the festival lineup.
- Tactics included a long-lead press release, a small group press trip, and a media advisory inviting local media to cover the first evening of the festival.
- National outlets that covered or mentioned Cloudbreak included USA Today 10Best, Travel + Leisure, AntiMusic, and Boston Globe.
- Local outlets that covered Cloudbreak included EverOut, Daily Journal of Commerce, KING, KCPQ, The Stranger, Curiosity Seattle, and KUOW.
- Hosted two national music media press trips

MEDIA COVERAGE HIGHLIGHTS

AntiMusic

SEPTEMBER 7, 2023

**Mudhoney, Kill Rock Stars,
The Fall Of Troy Lead
Cloudbreak Lineup**

CIRCULATION: 25,881

Boston Globe

OCTOBER 19, 2023

**An inn-to-inn cookie tour,
Seattle's vibrant music scene,
and keeping warm with pizza**

CIRCULATION: 4,150,867

Travel + Leisure

SEPTEMBER 14, 2023

**The Best Times to Visit Seattle,
According to Locals**

CIRCULATION: 14,172,766

KING-5 New Day Northwest

NOVEMBER 2, 2023

**Rocky Votolato gives a preview
performance to Seattle's
Cloudbreak Music Festival**

CIRCULATION: 1,836,053

PAID SOCIAL MEDIA HIGHLIGHTS

2.33MM

**CAMPAIGN TOTAL
IMPRESSIONS**

37MM

TOTAL REACH

16.16K

TOTAL LINK CLICKS

18.46K

**TOTAL
ENGAGEMENTS**

18.46K

VIDEO THRUPLAY

The image is a screenshot of a sponsored social media post. At the top, it says "Visit Seattle" with a "Sponsored" tag and a close button. The text describes a music-filled getaway in Seattle from November 1-22, mentioning complimentary admission to the #CloudbreakMusicFest. Below the text is a graphic with the dates "NOVEMBER 1-22 SEATTLE, WA" and a stylized city skyline. The event name "CLOUDBREAK" is prominently displayed in a large, bold, sans-serif font, followed by the subtitle "Seattle's Citywide Live Music Fest". Below this, it says "STAY IN A DOWNTOWN HOTEL & SEE LIVE MUSIC FOR FREE*". A red button labeled "LEARN MORE" is present, with a small note "*RESTRICTIONS APPLY" below it. At the bottom, the website "cloudbreakmusicfest.org" is listed, along with the text "Explore Seattle's Music Scene" and another "Learn more" button.

Visit Seattle
Sponsored

Turn your hotel stay into a music-filled getaway this fall. Stay in a participating downtown Seattle hotel between November 1-22 and receive complimentary admission to #CloudbreakMusicFest, featuring live music from over 100 artists playing shows across the city.

NOVEMBER 1-22
SEATTLE, WA

CLOUDBREAK
Seattle's Citywide Live Music Fest

STAY IN A DOWNTOWN HOTEL &
SEE LIVE MUSIC FOR FREE*

LEARN MORE *RESTRICTIONS APPLY

cloudbreakmusicfest.org
Explore Seattle's Music Scene
Learn more

WEBSITE ANALYTICS

PULLED FROM 9/27/2023 - 11/23/2023



REFERRALS (# OF USERS)

PAID SEARCH:	2.6K
DIRECT:	5K
DISPLAY:	1.5K
ORGANIC SOCIAL:	14K
ORGANIC SEARCH:	4.2K
REFERRAL:	2K
UNASSIGNED:	2.9K

PROGRAM HIGHLIGHTS

28

**TOTAL PIECES
OF COVERAGE**

33.8MM

**TOTAL MEDIA
IMPRESSIONS**
(+44.3% TO 2022)

2.33MM

**TOTAL PAID MEDIA
IMPRESSIONS**
(+3.4% TO 2022)

567

**HOTEL GUESTS
AT VENUES**
(+90.9% TO 2022)

30K

**TOTAL
WEBSITE VISITS**
(+42.8% TO 2022)

2.33MM

**TOTAL PAID SOCIAL
IMPRESSIONS**
(+39.9% TO 2022)

\$193,900 IN ARTIST FEES PAID TO MUSICIANS, SUPPORTING 150+ ARTISTS.

PROGRAM HIGHLIGHTS

TRAVEL INDUSTRY IMPACTS FOR DOWNTOWN SEATTLE: NOVEMBER 2023

64.6%

HOTEL OCCUPANCY
(+9.0% TO 2022)

\$60MM

TOTAL REVENUE
(+14.3% TO 2022)

294.4K

ROOMS SOLD
(+7.6% TO 2022)

MARKETS REACHED: VANCOUVER BC
PORTLAND
SPOKANE
OLYMPIA/TACOMA

CLOUDBREAK PHOTOS



PHOTOS: MIKE R. MITCHELL

CLOUDBREAK PHOTOS



CONTACT INFORMATION



TRACEY WICKERSHAM

Senior Director, Cultural Tourism
Visit Seattle
twickersham@visitseattle.org



KATE BECKER

Director, Creative Economy
Office of Economic Opportunity & Creative Economy
Office of King County Executive Dow Constantine
kate.becker@kingcounty.gov

Appendix B.2

Washington Music Census Evans School Report



WASHINGTON MUSIC CENSUS

Assessing Washington's Diverse Music Industry

PREPARED FOR

Washington State Department of Commerce - Office of Economic Development & Competitiveness

King County - Office of Economic Opportunity & Creative Economy

University of Washington Evans School of Public Policy & Governance

PRESENTED BY

Karissa Braxton

Jess Juanich

Michael Price

Olivia Reed



WASHINGTON MUSIC CENSUS - ASSESSING WASHINGTON'S DIVERSE MUSIC
INDUSTRY

by Karissa Braxton, Jess Juanich, Michael Price, Olivia Reed

A capstone project submitted in partial fulfillment of the
Requirements for the degree of

Master of Public Administration

University of Washington
Daniel J. Evans School of Public Policy & Governance

2024

Approved by:

X

Joaquín Herranz
Capstone Advisor

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We would like to extend our heartfelt gratitude and appreciation to our clients: Shannon Halberstadt, the Creative Economy Director for the Washington State Department of Commerce; Kate Becker, the Creative Economy Director for the Office of King County Executive Dow Constantine; and Amie Danielewicz, the Program/Project Manager for Economic Opportunity at King County. We appreciate their expertise, grace, rapport, and support, which helped us shape our insights and learning into building this report.

We would also like to thank our stakeholders and community members who took the time to share their ideas, experiences, and wisdom with us on the state of the music industry in Washington State and related efforts in the Pacific Northwest region. The following individuals and groups provided an invaluable breadth of knowledge, and this report is more representative because of them:

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Nathan Marion, Fremont Abbey

Craig Jewell

Terry Morgan

Phil Elverum

Members of the Seattle Music Commission (SMC)

Members of the Washington Association for Nightlife and Music Association (WANMA)

Finally, we are deeply grateful to our faculty advisor at the University of Washington Evans School of Public Policy and Governance, Joaquín Herranz, for his knowledge, guidance, and time throughout our project. We would also like to extend our gratitude to our classmates and peers at the Evans School for their meticulous review and iterative feedback on this report and to our families, friends, and community for their support throughout this process.

AUTHOR BIOGRAPHIES

Karissa Braxton is a purpose-driven leader committed to driving positive change through strategic communication and public service. With a multifaceted career spanning roles in government, media, and politics, Karissa is passionate about systemic and cultural transformation. Karissa is a proud graduate of Howard University, currently serves as Senior Communications Advisor in Seattle Mayor Bruce Harrell's administration and has been instrumental in shaping public discourse and spearheading initiatives that address the city's most pressing challenges. Karissa was Communications Director for the Seattle Office of Economic Development and Strategic Advisor in the Seattle Human Services Department. Karissa's leadership extends beyond her professional roles; she is actively involved in church ministry at New Beginnings Christian Fellowship, is an active member of Delta Sigma Theta Sorority Incorporated, a board member of the KD Hall Foundation, and a member of the Songs of Black Folk Chorus.

Jess Juanich is a local Seattleite and attended Seattle University for his undergraduate degree majoring in Public Affairs and Political Science with a concentration in Urban Planning & Sustainability. He is completing his MPA at the University of Washington's Evans School of Public Policy & Governance. Jess previously worked at Slalom, ORS Impact, and Grow America supporting diversity and inclusion efforts, community development, and philanthropic evaluation research, respectively. He hopes to pursue a career as an attorney specializing in areas such as social impact, consulting, or social policy advocacy. Jess also grew up playing music with bands, both formal and informal, spanning the Filipino Community Center, Seattle JazzEd ensembles, Garfield High School's Jazz Band, and even playing music with his friends on the guitar, piano, ukulele, or drums.

Michael Price was raised in South Florida but decided to make Seattle his home in 2017. He received his undergraduate degree from the University of Washington, majoring in Economics & Policy Analysis. If you are reading this, he has completed his Master of Public Administration (Environmental Policy) from the Evans School of Public Policy and Governance at the University of Washington. Michael works as an Environmental Policy & Regulation Analyst at Alaska Airlines, focusing on integrating sustainable aviation fuel into daily business practices. Looking forward, Michael hopes to continue his career in environmental sustainability by contributing his knowledge and expertise via public policy initiatives. As a musician, Michael learned how to play the guitar at the age of ten and has been singing in bands since the age of twelve – currently, he fronts the local Seattle post-hardcore outfit “Birthday Girl.”

Olivia Reed has lived in Seattle for over ten years and was born and raised in Washington. She earned her Bachelor's degree in Community, Environment, and Planning from the University of Washington in 2016 and will earn her Master's in Public Administration from the Evans School of Public Policy and Governance this Spring, 2024. Before returning to UW as a full-time student, Olivia worked as a non-profit professional dedicated to youth and community engagement. At Evans, Olivia specialized in urban policy and program evaluation, and is passionate about creating more equitable, livable, and vibrant cities through progressive policy and advocacy. A pop-culture aficionado, Olivia spends her free time exploring new music, making playlists for every occasion, and going down celebrity drama rabbit-holes on the internet. She lives in Capitol Hill with her 30+ house plants and incredibly supportive partner.

POSITIONALITY STATEMENT

As authors, it is essential to acknowledge the privilege, power, and positions we hold.

In recognition of this, our approach to this work encompasses our individual unintentional biases and lived experiences and backgrounds. We also recognize that the study and process of research has intentionally and unintentionally harmed historically underrepresented and underserved populations, including but not limited to those identifying as Black, Indigenous, Latinx/Hispanic, Asian, Middle Eastern/North African, Pacific Islander, the LGBTQ+ community, people with disabilities, non-English speaking communities and rural communities. As graduate students at the UW Evans School of Public Policy & Governance, we acknowledge that we have access and privilege to resources that may not be as accessible to the broader community.

Through our research process, which consisted of reviewing the literature, conducting interviews, facilitating focus groups, and developing policy analysis recommendations, our perspectives have shaped each step in the report's development. We aim to mitigate our biases where possible, acknowledge the privileges and power we hold, and provide this report as a starting point for a conversation on the impact of Washington State's diverse and growing music ecosystem on individuals, organizations, and structures.

TERMS & ABBREVIATIONS

ACS: American Community Survey

AEP6: Arts & Economic Prosperity 6 - economic and social impact report published by the Americans for the Arts non-profit organization

BIPOC: Black, Indigenous, People of Color

Commerce: State of Washington Department of Commerce's Office of Economic Development and Competitiveness

COVID-19: Coronavirus 2019 Pandemic

ESD: Employment Security Department

Evans Team: University of Washington Evans School of Public Policy and Governance Consultant Team

GDP: Gross Domestic Product

King County: King County's Office of Economic Opportunity & Creative Economy

LQs: Location Quotients

MPA: Master of Public Administration

NAICS: North American Industry Classification System

NEFA: New England Foundation for the Arts

PUMS: Public Use Microdata Sample

SIC: Standard Industrial Classification

SMC: Seattle Music Commission

W-2: Tax form for employers to fill out on behalf of their employees

WANMA: Washington Nightlife Music Association

WMC: Washington Music Census

GLOSSARY

Washington Commercial Music Industry: Occupations and business types that contribute to the production, distribution, and consumption of music.¹

Historically Underrepresented: For the context of our research, ‘historically underrepresented’ refers to individuals and or businesses that have not been represented in previous census reports regarding the music industry, including those that have been historically denied access to economic opportunities, and that identify as belonging to BIPOC, LGBTQ, refugee/immigrant communities.

Rural Communities: Communities outside of Census Urban Areas with a population greater than or equal to 2,500; greater than or equal to 10,000; or greater than or equal to 50,000.²

¹ Brown, M. (2016, January 26, p.5). Seattle’s Working Musicians The Economic Impact of The Music Industry, Working Conditions of Club Musicians, and How Seattle Can Support Independent Musicians | PDF | Employment | Music Industry.<https://www.scribd.com/document/296662074/Seattle-s-Working-Musicians-the-Economic-Impact-of-the-Music-Industry-Working-Conditions-of-Club-Musicians-And-How-Seattle-Can-Support-Independent-M>

² Cromartie & Bucholtz, 2007

EXECUTIVE SUMMARY

PROJECT OVERVIEW

The Washington State Department of Commerce, Office of Economic Development and Competitiveness (Commerce) and King County's Office of Economic Opportunity & Creative Economy (King County) partnered with the Student Consulting Lab at the University of Washington Evans School of Public Policy and Governance (the Evans Team) to conduct foundational research to develop a framework for the design and implementation of a statewide music census – the Washington Music Census (WMC). The WMC will aim to assess Washington's music industry holistically. Key deliverables from this project include a literature review of past music industry assessment efforts nationally and in Washington State, equitable data collection methods, and equitable community engagement best practices. In addition to a literature review, The Evans Team analyzed the results of a beta tested WMC survey and delivered a final report for Commerce and King County with recommendations for WMC engagement and outreach, implementation, and future data analysis.

BACKGROUND

To date, Washington State's commercial music industry has not been comprehensively measured or documented. Commerce and King County have partnered to develop and implement the first comprehensive, statewide music industry assessment. The WMC will be a statewide survey that aims to measure the scope of Washington's music industry, including musical and performing artists, music educators, venues, and owners and managers of commercial music businesses. The data collected from the WMC will be used to develop an economic impact analysis. This analysis will assist policymakers and the public in holistically understanding the current state of Washington's music industry and in developing effective policies to equitably grow the music industry sector of the creative economy. One of the key barriers that has historically prevented the state from conducting a more comprehensive assessment is a gap in the data available through standard sources, such as NAICS codes. In addition, historically underrepresented and rural communities have had low outreach in similar efforts to researching the creative economy. Previous research shows that local music industries can be challenging to quantify and assess due to the prominence of gig workers and informal economic ecosystems not represented in existing datasets.

RESEARCH QUESTION

Primary Research Question

- How can King County and Commerce develop an equitable framework for designing, implementing, and assessing their upcoming music census?

Secondary Research Questions

- How can Commerce and King County improve outreach and engagement for WMC participation, particularly for rural and historically underrepresented groups?
- How can Commerce and King County design the WMC to collect holistic data representative of Washington's diverse music industry?
- How can Commerce and King County embed an equity framework into future economic impact analysis conducted based on data collected from the WMC?

To address our research questions, the Evans Team conducted a literature review of foundational state music census and economic impact analysis reports nationwide. Additionally, we consulted with various music industry stakeholders, including venue managers, independent musicians, music associations, and commissions. Stakeholder input was then analyzed for key themes to inform census survey design, community outreach, and implementation strategies. This feedback also helped develop a comprehensive list of community leaders and organizations from rural communities and those historically underrepresented in past efforts to assess Washington's music industry.

ANALYSIS AND RECOMMENDATIONS

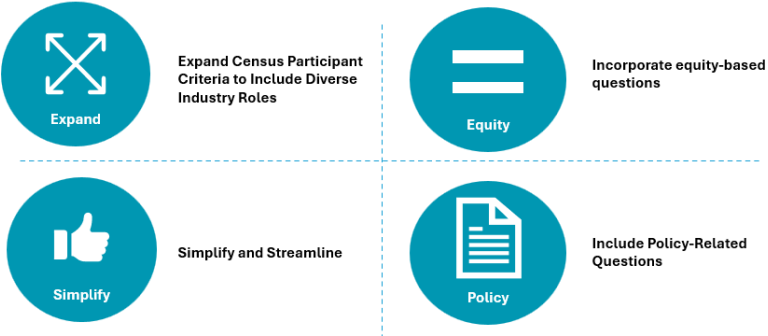
For our analysis, we examined stakeholders' subjective experiences and perceptions within Washington's music industry. Our findings aligned into three research categories, 1) survey design, 2) outreach and implementation, and 3) future analysis. We interviewed a diverse group of music industry stakeholders, each representing various roles within the sector, to gather data and feedback and inform recommendations. The rich qualitative data produced from these discussions allowed us to better comprehend the complex landscape of Washington's music industry holistically. Our findings captured the nuanced dynamics of the music industry and helped us develop a comprehensive framework for the WMC, with an emphasis on engaging historically underrepresented groups.

We conducted a mix of thematic and content analysis to identify key concepts and findings within our data. We examined our data for recurring words, phrases, and concepts, highlighting key concepts reflecting stakeholders' lived experiences in the music industry. We then developed a narrative analysis contextualizing the relationships between key players, significant challenges, and opportunities identified in our research within the larger context of our project and its surrounding policy problems.

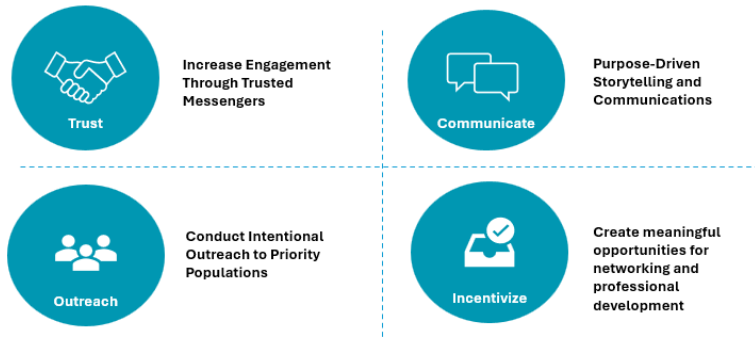
These themes, along with findings from our literature review, informed our recommendations on the WMC's survey design, outreach and engagement, and future analysis. For an expansive list of recommendations tied to interview themes and influence (*See Table 2 in the Appendix*). Figure 1 (see below) provides an overview of the key recommendations resulting from our research.

Figure 1:
Recommendations Table

Survey Design



Outreach & Implementation



Future Analysis



I. Introduction

OVERVIEW

To date, Washington's commercial music industry has not been comprehensively measured or documented. Previous studies show that local music industries are difficult to quantify and assess due to the prominence of informal economies within the industry and the poor representation of gig workers in existing datasets. As such, Commerce and King County have partnered to develop and implement the first comprehensive, statewide music industry assessment known as the Washington Music Census (WMC). To support the success of the WMC, Commerce and King County partnered with the University of Washington Evans School Student Consulting Lab to conduct foundational research to develop a framework for its design and implementation.

The foremost goal of our research was to develop a robust framework for the official WMC. This included identifying strategies and recommendations through literature reviews, stakeholder analysis, and qualitative research to inform the equitable design, outreach, and implementation of the Washington Music Census.

A key focus of the WMC is identifying and addressing the needs of racial, gender, and geographically underrepresented individuals, business owners, and music organizations within the music industry. Through the WMC, Commerce and King County seek to better understand and assess the extent of these underrepresented groups' participation and representation within the music economy, understand the unique challenges they face, and recommend strategies for more inclusive and equitable growth within the music industry ecosystem. Our foundational research will inform the development of final WMC survey questions, outreach strategies, and framework for future implementation and data analysis rooted in equity. It will also intentionally seek to understand and meet the needs of our diverse music industry and its workforce.

BACKGROUND

In today's dynamic economic landscape, state and local governments are critical in fostering sustainable communities and bolstering economic development through innovative policies and programs that support businesses, industries, and workers statewide. The WMC aims to collect robust data that holistically captures the scale of Washington State's music industry. This data will enable Commerce and King County to conduct a detailed economic impact analysis of the industry in the future and will provide essential information to advocate for policies, programs, and budgets that will support the growth of Washington's music industry. As the key organizations leading the charge of implementing the WMC, it is essential to highlight the specific functions and roles Commerce and King County play within the larger context of our research.

Commerce, tasked with delivering the WMC, is critical in synthesizing the data collected to inform state-wide economic strategies. This responsibility underscores Commerce's capability to integrate the census findings with broader economic policies, potentially influencing funding allocations and strategic policy reforms that could reshape the music industry's landscape across Washington State. Commerce serves as the lead economic development agency for the State; it is dedicated to enhancing economic prosperity by strengthening key industries, facilitating international trade, fostering small business growth, training a skilled workforce, offering financial assistance, and collaborating with local economic development partners across all 39 counties to build thriving communities in support of over 7.4 million Washingtonians.³ Commerce oversees a diverse portfolio of over 100 programs, various state boards and commissions, and partners with key stakeholders, including businesses, local governments, tribes, and community-based organizations.⁴ Commerce's policy agenda and investments help:

- Strengthen critical industries such as aerospace, agriculture, and tourism
- Expand international trade to create export opportunities for Washington businesses
- Support small business growth through financing, training, and technical assistance
- Develop a skilled workforce through training programs and partnerships with educational institutions
- Provide funding and technical assistance to local economic development partners across the state

King County brings the expertise of the local creative economy and its key stakeholders. This office's insights are invaluable for tailoring the Washington Music Census to reflect the unique characteristics and needs of King County's unique music scene. King County's knowledge aided the Evans Team in identifying gaps in the current market, understanding the dynamics of local music ecosystems, and ensuring that the census considers the nuanced contributions of diverse music stakeholders within the county and beyond. This perspective is crucial for developing targeted interventions that promote equitable economic growth and enhance the cultural richness of King County's music industry.

King County's team operates within the Executive's office, serving a population of more than 2.2 million residents.⁵ Its mission is twofold: (1) advance King County's regional economic development priorities aligned with Executive Dow Constantine's vision, and (2) set an equitable policy agenda that acknowledges the unique needs of the county through strategic partnerships with neighboring counties like Pierce and Snohomish, the King County Executive's office focuses on:⁶

³ <https://choosewashingtonstate.com/about-us/>

⁴ See Footnote 3

⁵ Becker, K., & Allison, A. (2024). Office of Economic Opportunity & Creative Economy—King County, Washington. Office of Economic Opportunity & Creative Economy. <https://www.kingcounty.gov/en/legacy/elected/executive/constantine/initiatives/economic-development>

⁶ See Footnote 5

- Developing and implementing policies that promote equitable economic growth and opportunity across diverse communities,
- Investing in key sectors like innovation, entrepreneurship, and workforce development, and
- Advocating for state and federal-level policies that support regional economic goals.

Together, the Washington State Department of Commerce and King County’s combined efforts ensure that the WMC maps the state’s musical landscape and propels meaningful economic and cultural advancements.

PROJECT SCOPE

The WMC will be designed for individuals and businesses that contribute to the creation, performance, recording, promotion, and management of the music industry. This includes, but is not limited to, music and performing artists, music educators, music venue owners and staff, and managers of commercial music businesses. Key deliverables produced by the Evans Team in this partnership include 1) a literature review on national, regional, and local music industry and creative economy assessments, equitable data collection, and equitable community engagement practices, 2) a beta tested WMC survey, and 3) a final report for Commerce and King County with recommendations for WMC engagement and outreach, implementation, and future data analysis.

The WMC intends to identify and quantify Washington State’s music industry and provide detailed analysis to help shape future policies, programs, and financial plans to support the industry's growth, various sectors, and workforce. As the music industry recovers from the impact of the COVID-19 pandemic, it is essential to understand the landscape of businesses, nonprofits, and the workforce that comprises our music ecosystem.

The future WMC will conduct a landscape analysis by collecting data through online surveys from anyone affiliated with the commercial music industry in Washington State. The Evans Team will conduct individual interviews and focus groups with key stakeholders statewide to inform the design of the beta WMC survey questions, outreach recommendations, and framework for future census implementation and data analysis.

ANALYTIC PURPOSE

The foremost goal of our research was to develop a robust framework for the official WMC. This included identifying strategies and recommendations via literature reviews, stakeholder analysis, and qualitative research to inform the equitable design, outreach, and implementation of the Washington Music Census.

A key focus of the WMC is identifying and addressing the needs of racial, gender, and geographically underrepresented individuals, business owners, and music organizations within

the music industry to better understand and assess the extent of their participation and representation within the music economy, understand the unique challenges they face, and recommend strategies for more inclusive and equitable growth within the industry. By doing so, our research will inform the development of WMC survey questions, outreach strategies, and a framework for future implementation and data analysis rooted in equity. It will also intentionally seek to understand and meet the needs of our diverse music industry and its workforce.

Figure 1:
Research Questions

Primary Research Question	Research Category	Secondary Research Questions
<i>How can Commerce and King County develop an equitable framework for designing, administering, and assessing a future music census?</i>	Outreach and Engagement	How can Commerce and King County facilitate inclusive outreach and engagement for census participation, particularly for rural and historically underrepresented groups?
	Survey Design & Data Collection	How can Commerce and King County design the census to collect holistic data representative of Washington’s diverse music industry?
	Future Analysis	How can Commerce and King County embed an equity framework into future economic impact analysis based on WMC data?

Once complete, the WMC will serve as a pivotal tool to assist policymakers and the public in holistically understanding the current state of Washington’s music industry and developing effective policies and investment opportunities to strengthen the state’s music industry, associated sectors, and dynamic workforce.

II. Literature Review

OVERVIEW

In this chapter, the literature collected consists of different music industry impact studies conducted at the **national, regional, state, and local** levels. Our literature review provides a broad understanding of how the state of Washington can approach the execution of a future music census and address gaps in the music industry, including but not limited to issue areas such as wages and employment, workforce development, access to performance opportunities, disproportionate representation for underrepresented groups in specific roles within the music industry, and accuracy in data collection. The literature reviewed reflects the following areas:

- Design, Implementation, and Assessment of Music Economy Impact Studies
- Outreach and Engagement Strategies for Underrepresented and Rural Groups
- Data Collection Methods for Representative Counting
- Equity Frameworks, Considerations, and Best Practices.

NATIONAL LEVEL

National Endowment for the Arts⁷

Research conducted on the music industry spans diverse topics, interest areas, and specialized data. One of the largest funders for arts and arts education in the United States, the National Endowment for the Arts, compiles national and state-level data on public participation in the arts and a workforce landscape analysis on the demographics of artists in the industry. Using data from the U.S. Census Bureau's American Community Survey (ACS) and the Public Use Microdata Sample (PUMS), the National Endowment for the Arts delves deep into the country's characteristics of artistry, employment, educational attainment, and other factors.

For example, one of the most prominent reports published annually by the National Endowment for the Arts is their Artists in the Workforce Report. This interactive report uses ACS data from 2015 to 2019, examining state-level estimates of artists and location quotients (LQs) as defined by ACS methodology. The purpose of this report is to view the counts of the specific "artist types" and to use the LQs to measure the concentration of a particular artist within a state's labor force compared to that of the national labor force. This "census" report captures data at the individual and state levels to examine the counts of population and occupation.

Americans for the Arts

Americans for the Arts is one of the largest nonprofit organizations in the country advocating for the sustained impact and advancement of the arts and arts education. The organization recently published its Arts & Economic Prosperity 6 (AEP6) report – an economic and social

⁷ National Endowment for the Arts. (2022, July). Artists in the Workforce: National and State Estimates for 2015-2019. Artists in the Workforce: National and State Estimates for 2015-2019. <https://www.arts.gov/impact/research/arts-data-profile-series/adp-31>

impact study focusing on the state of arts and culture for nonprofits on a national level.⁸ One of the most significant findings from the report was that in 2022, organizations contributed \$73.3 billion to the nation's economy, consisting of 1.6 million jobs, an estimated \$65.4 billion in household income, and \$18.3 billion generated in total tax revenue.⁹ From an economic perspective, for nonprofits to have such a high financial impact on the arts and culture industry at a national level is unprecedented.

The AEP6 report also delved into equity considerations for BIPOC communities regarding economic and community impact. The report found that attendees at BIPOC events spent \$38.29 per person, similar to the national average of spending at all events, which was \$38.46. These numbers highlight the importance of culturally representative programming in historically underserved and underrepresented communities to advance equitable funding for arts and culture organizations.

REGIONAL LEVEL

New England Foundation for the Arts

The New England Foundation for the Arts (NEFA) is an arts and culture organization that supports the enrichment and accessibility of the arts for communities in New England. The organization receives funding from the National Endowment for the Arts by providing programs and services for the New England region through grantmaking, events, resource-building, and partnering with other organizations and funders.¹⁰ NEFA also conducts extensive research on understanding the New England creative economy, which comprises data on economic vitality, cultural attractiveness, workforce development, and various creative industries.¹¹

NEFA's landscape analysis report published in 2017 entitled *The Jobs in New England's Creative Economy and Why They Matter* provides a snapshot of the current state of New England's various creative industries, its change over time, and demographic information provided on creative artists, organizations, and occupations. One of the most salient findings from the report highlights the characterization and classification of creative workers, noting that they are most likely to be self-employed and that "their sources of income reflect their employment types". Additionally, it was found that "creative workers spend over a quarter of their income on space, equipment, and materials for their work—an amount equal to their rent or mortgage

⁸ Americans for the Arts. (2022). Welcome | Arts & Economic Prosperity 6 (AEP6). Arts & Economic Prosperity 6. <https://aep6.americansforthearts.org/>

⁹ See Footnote 8, page 5

¹⁰ New England Foundation for the Arts. (n.d.). Mission, Values, & History | NEFA. Mission, Values & History. Retrieved May 3, 2024, from <https://www.nefa.org/about/mission-values-history>

¹¹ Economic and Public Policy Research Group of the UMass Donahue Institute, & New England Foundation for the Arts. (2017). *The Jobs in New England's Creative Economy and Why They Matter* (p. 6) [Creative Economy Landscape Analysis & Report]. New England Foundation for the Arts. https://www.nefa.org/sites/default/files/documents/NECreativeJobsMatter_Web.pdf

payments.”¹² This is interesting to note as self-employed creative workers may struggle to make ends meet due to financial constraints and instability faced within the creative economy to receive adequate compensation. Another finding found that survey respondents reported that “roughly one-third of their income comes from self-employed activities while nearly half comes from outside employment (i.e., wage and salary work where one receives a W-2)”.¹³ This finding reflects the discrepancy between creative workers who utilize their self-employment as secondary or supplemental income to their primary source of income, which could be a regular job providing a steady or consistent source. The report highlights an existing gap where it is difficult for creative workers to pursue their creative outlets as a full-time profession when the creative economy may offer scarce resources, limited job opportunities, and unstable sources of income.

Austin, Texas

In 2015, the city of Austin conducted one of the first instances of a music census in the United States, partnering with Titan Music Group LLC to develop a data-driven report assessing the city’s commercial music industry.¹⁴ The goal of the census and its respective report was to generate a database to help the city identify initiatives to grow the local music industry and establish a benchmark for future measurements. The Austin census resulted in nearly 4,000 survey respondents, eight focus groups, and 20 interviews.¹⁵ At its completion, it was the most detailed survey of the Austin commercial music industry; it provided other cities and states with a framework for conducting similar assessments.

Alaska

In 2021, MusicAlaska and the Alaska Independent Musicians Initiative (AKIMI) connected with Sound Diplomacy, a research consulting firm, to create a report on the music industry in Alaska as it related to themes of equity, sustainability, diversity of roles within the state, state reputation, culture, and programming.¹⁶ The report’s methods were influenced by a regulatory assessment, comparative analysis of regulations and policies, music asset mapping in the cities of Anchorage and Juneau, an economic impact assessment, and a strategic plan to implement in Alaskan communities.¹⁷ As a part of their research, they analyzed various municipal and local policies as they related to public performance, support for artists, event permits, and more to

¹² See Footnote 11, page 23

¹³ See Footnote 13

¹⁴ Rascoe, R. (2022, July 15). For the First Time Since 2015, a New Austin Music Census Is Now Open: Survey seeks measurable industry feedback to guide policy and support—Music—The Austin Chronicle. The Austin Chronicle. <https://www.austinchronicle.com/daily/music/2022-07-15/for-the-first-time-since-2015-a-new-austin-music-census-is-now-open/>

¹⁵ Swiatecki, C. (2023, February 3). Five Takeaways From the New Austin Music Census: 2022 survey shows musicians moving farther from city core—Music—The Austin Chronicle. The Austin Chronicle. <https://www.austinchronicle.com/music/2023-02-03/five-takeaways-from-the-new-austin-music-census/music/2022-05-27/faster-than-sound-the-austin-music-census-returns-while-the-live-music-fund-faces-delays/>

¹⁶ Music Strategy in Alaskan Communities, 2023, p.4

¹⁷ See Footnote 17, page 5

compare the state's performance with other use cases across different cities around the world with thriving music industries.

The report gathered data from their research methods and compiled a list of recommendations that were grouped into six thematic strategies: governance and leadership, grants and funding, music education and professionalization, music-friendly policies; infrastructure, and diversity.¹⁸ One of the most salient approaches in the recommendations revolved around an inclusive strategy targeting urban and rural communities. Alaska identified a gap between urban and rural communities where rural communities faced barriers to engagement due to remote locations and geographical challenges. They recommended the creation of a 'Music Officer' to act as a liaison between the broader music industry and the local communities within these pockets of the state, providing opportunities and workshops essential to the vitality of the smaller music communities in rural areas.¹⁹

Oregon

Following suit, Business Oregon conducted its first music census in 2022 in partnership with the non-profit MusicOregon. The Census was active from December 2, 2022, through January 15, 2023, and collected 3,116 responses, nearly 2,431 of which were from respondents who met the survey's inclusion criteria.²⁰ After compiling the resulting census data, the State partnered with Portland State University's Northwest Economic Research Center (NeRC) to publish an economic impact analysis report to provide a framework and baseline to understand the economic significance of Oregon's commercial music industry. Key topics identified in this analysis included: 1) the issue of low and stagnant wages, especially for artists that primarily perform in mixed-use venues; 2) the relative lack of all-ages venues; 3) the strength and resilience of music communities and industry networks; 4) the assorted challenges venues face, especially in recovering from pandemic-related closures; 5) the opportunities to foster diversity and inclusion across racial, gender and age groups; and the significance of economic activities associated with live performance attendees' off-site consumption.²¹

Based on a Portland State University capstone project, the following are some of MusicOregon's best practices for engagement that should align with the future work of the WMC:²²

1. Early Engagement and Scripting: Before the official launch of the music census in Oregon, outreach began with scripted phone calls to gauge community interest and gather contacts. For the WMC, consider developing a set of phone call or email scripts

¹⁸ See Footnote 17, page 57

¹⁹ See Footnote 17, page 59

²⁰ Liu, Jenny H., Marotta, Steve, Brophy, Emma, Khanvilkar, Rohan and Kim, Hyeoncheol. (2023, p.20) The Power of Music – An Economic Analysis of Oregon's Emerging Commercial Music Industry. Northwest Economic Research Center (NERC) Report. https://pdxscholar.library.pdx.edu/nerc_pub/

²¹ See Footnote 17, page 50

²² Kromer, E. (2023). MusicPortland PA509 Project Summary Memo (p. 43). MusicPortland. [file:///C:/Users/jjuan1/Downloads/PSU%20Capstone%20-%20Census%20Work%20Summary%20\(1\).pdf](file:///C:/Users/jjuan1/Downloads/PSU%20Capstone%20-%20Census%20Work%20Summary%20(1).pdf)

tailored to address the interests and concerns of different community champions within the music industry.

2. Customized Pitches: Different pitches were evaluated to see which resonated most with the community, with adjustments based on feedback. This strategy can be effectively adapted for the WMC by crafting multiple versions of its message to see which is most effective at engaging different target audience segments.
3. Use of Social Media: The outreach strategy included using social media platforms and digital submissions via contact forms to invite participation and inform the community about the census. The WMC should similarly leverage social media channels and other popular digital platforms within target communities to maximize reach and engagement.
4. Follow-up Communications: Once the census was live, follow-up calls and emails were sent to ensure that music businesses were aware of the census and encouraged survey completion. For the WMC, regular follow-up communications can help keep the community engaged and encourage full participation in the census process.
5. Public Service Announcements and Media Engagement: Efforts were made to clarify misunderstandings with media outlets to ensure broader coverage and correct information dissemination. The WMC should also consider a proactive media engagement strategy to manage public perceptions and provide accurate census coverage.

Sacramento, California

The 2022 Sacramento Music Census provides comprehensive insights into the city's music ecosystem, highlighting demographics, industry structure, and regulatory environment. Key findings of Sacramento's census highlight an excess of music creatives compared to industry and venues, the effects of regulation on live music, and striking gender and racial imbalances within the ecosystem.²³ These insights offer valuable parallels to our report on Washington's creative economy, especially when addressing diversity, regulatory challenges, and sector balance.

The Sacramento census gathered data through an online survey targeting residents involved in the music industry, ranging from musicians to music support services. Sacramento's comprehensive census information-gathering, which included professional and semi-professional participants, was crucial for understanding the broader music ecosystem. Like the Sacramento Census, which Sound Music Cities administered in collaboration with local departments and over 50 community partners, the Washington Music Census should engage with local music industry stakeholders, academic institutions, and government agencies for a collaborative approach.

²³ Sound Music Cities, & City of Sacramento, Convention & Cultural Services. (2023, p.13). Sacramento Music Census [Summary Report]. City of Sacramento, Arts & Culture.
<https://www.cityofsacramento.gov/content/dam/portal/ccs/office-of-arts-and-culture/music-census/2023-August-Sacramento-Music-Census-Summary-Report-PRINT.pdf>

Sacramento's music industry is dominated by music creatives, and there is a significant imbalance in racial diversity compared to the general population. The Sacramento Census' primary concerns highlight a lack of local gigs, diverse income sources, and affordable professional services.²⁴ Regulatory challenges also significantly impact the local music ecosystem, indicating a need for a better-designed regulatory framework.

Like our Washington Music Census, the Sacramento study highlights the importance of a balanced music ecosystem and the need for diverse opportunities and resources. Similar challenges, such as demographic imbalances, will arise in evaluating Washington's music industry. The Sacramento Census suggests that policies should focus on empowering music professionals, addressing demographic disparities, and reforming regulatory frameworks to support local music scenes. These insights could be instrumental in influencing policies and practices in Washington's music industry. The Sacramento Music Census offers valuable lessons on the interdependencies within a music ecosystem and the importance of strategic support for its various sectors. Understanding these dynamics is crucial for developing regional music industries – notably, Washington's creative economy.

WASHINGTON STATE

This partnership between the Washington Department of Commerce and King County to produce the Washington Music Census is a targeted model to research the economic and cultural impact of the creative economy as its rapid growth provides a promising future in the Pacific Northwest. Commerce recently published its Creative Washington Strategic Plan in December 2023, highlighting the vision, values, conditions, strategies, and implementation of the state's plan to address the opportunities and challenges for the creative economy.²⁵ The strategic plan is aligned to focus on job creation and support small businesses in the creative economy related to entrepreneurship, sustainability, and a diverse workforce. The report defines Washington's creative economy as comprising various industries representative of their Total GDP and GDP Per Capita, (*See Table 1, Appendix A*).

From an economic standpoint, the Music, Performing, and Visual Arts sector makes up 15.4% of employment (including creative technology) in the state's creative economy.²⁶ The State of Washington also published its Economic Model and Ecosystem Analysis report in October 2022, highlighting the macroeconomic scale, supply chain, demand, and employment of the various creative economy sectors. Regarding Music, Performing, and Visual Arts, this industry pulled in \$4.7 billion in 2019 for the Washington Creative Economy's Gross Domestic Product (GDP),

²⁴ See Footnote 20, page 9

²⁵ Washington State Department of Commerce. (2023, p.4). Creative Washington: Growing and Strengthening the Creative Economy—A Strategic Plan for Washington, December 2023. <https://choosewashingtonstate.com/wp-content/uploads/2024/02/WACESP-FinalReport-122623-reduced.pdf>

²⁶ See Footnote 22, page 8

representing only 0.007% of the overall 19.6% of state GDP representing the entire share of the whole Creative Economy.²⁷

The report also highlighted demographics unique to each creative economy. The music, performing, and visual arts sector encompassed around 50,474 people, which brought in 48.04% of the state's jobs within the creative economy.²⁸ In addition, the report suggests the state's strides in gender diversity as 59.9% of artists in this sector identify as female, and 40.1% identify as male. However, regarding race and ethnic diversity, this industry comprises 20% of Black, Indigenous, and People of Color (BIPOC) communities compared to greater diversity in other creative economy sectors such as creative technology (46%), culinary arts and beverage (34%) and fashion (30%), respectively.²⁹ The creative economy in Washington State is thriving, and the music, performing arts, and visual arts sectors will have the opportunity to show positive growth within the next decade.

More analysis needs to be done in Washington State to analyze the economic impact of demographic data in specific parts of the music industry in mid-size to local markets. In addition, music businesses and individuals affiliated with the music industry are varied and are entirely unsupported by traditional industry analysis with measures such as the North American Industry Classification System codes (NAICS) and other quantitative metrics.³⁰ Other challenges for the state include Washington's unique location in the Pacific Northwest, which isolates its cities' music economies from larger music markets such as Los Angeles and New York City. According to a report conducted by the Washington Post, only 0.09% of working musicians comprised Washington State's share of the workforce between 2012 and 2021.³¹ While Washington's size and role in the creative economy may have a minor impact compared to larger states and markets, it shows promise as its creative economy and diverse industries remain competitive.

KING COUNTY AND SEATTLE

In 2008, student researchers from the University of Washington conducted an economic impact assessment report on the music industry in Seattle and King County and was prepared for the Mayor's Office of Film & Music, respectively. The study compared data from a 2004 study where the researchers found that the 2008 data saw an increase in sales by 17%, an increase in

²⁷ Washington State Department of Commerce. (2022a, p.2). Economic Model and Ecosystem Analysis—Macroeconomic Scale, Supply Chain, Demand, and Employment [State of Washington Creative Economy Strategic Plan]. State of Washington. <https://cdn.userway.org/auto-remediations/pdf/2666717/original/Creative-Economy-Economic-Model-and-Ecosystem-Analysis.pdf>

²⁸ See Footnote 24, page 14

²⁹ See Footnote 24, page 19

³⁰ See Footnote 22, page 6

³¹ Van Dam, A. (2023, September 29). The states that produce the most musicians, and more! - The Washington Post. The Washington Post. <https://www.washingtonpost.com/business/2023/09/29/states-that-produce-most-musicians-more/>

labor income by 72%, and worker's earnings increase by 75%.³² The report also draws upon similar studies conducted earlier in cities such as Austin (2001), Chicago (2007), Georgia (2002 & 2005), and Nashville (2006). The researchers identified gaps in the music industry, one of which was that smaller subsets of industries did not "fit neatly into any of the existing categories of economic activity."³³ NAICS codes were used to identify the subsets, but there were challenges for leftover industries that did not have a clear classification. The researchers relied on the City of Seattle's Music Advisory Committee to help identify data using codes and data from other sources such as Standard Industrial Classification (SIC) codes and additional data from the Washington State Employment Security Department (ESD), American Community Survey (ACS), and ReferenceUSA.

The report emphasizes the work done by ArtsFund, a local nonprofit dedicated to advocating for the arts on the local, regional, state, and national levels. Three sets of economic impact studies were conducted on arts and cultural organizations in King County in 1993, 1999, and 2004, collecting data on revenues and expenses, employment for performers and artists, and classification data for organizations in the industry.

EQUITABLE DATA COLLECTION

For research that involves data collection from underrepresented and underserved populations, it is essential to understand the equity considerations that stem from data collection and analysis. Data collection and analysis can evoke feelings of "extraction," "transaction," and "satisfaction." It is important to note that when it comes to projects spearheaded by government entities, there are often implicit power dynamics, inequities, and discrimination that can stem from structural conditions. In our research, we met with community members whose individual backgrounds stem from a diverse set of identities, lived experiences, and ways of life. Frequently, the definitions set forth by a governing body or agency do not accurately reflect that of the public.

In a study published out of California, researchers studied the impact of scientific research and how its aims can connect with policy solutions to help "improve problems" experienced in low-income and rural communities. The researchers emphasized that biases and gaps were present in the research and recommended that to amplify the voices of stakeholders; they address "place-specific nuances and co-occurrence of structural inequities" with the given community.³⁴ Since our research seeks to understand the perspectives of underrepresented and rural communities, we use approaches such as connecting with trusted community members,

³² Beyers, W. B., Fowler, C., & Andreoli, D. (2008). The Economic Impact of Music in Seattle and King County.

³³ See Footnote 29, page 8

³⁴ Angel Santiago Fernandez-Bou, J. Pablo Ortiz-Partida, Kristin B. Dobbin, Humberto Flores-Landeros, Leigh A. Bernacchi, Josué Medellín-Azuara, Underrepresented, understudied, underserved: Gaps and opportunities for advancing justice in disadvantaged communities, *Environmental Science & Policy*, Volume 122, 2021, Pages 92-100, ISSN 1462-9011, <https://doi.org/10.1016/j.envsci.2021.04.014>. (p.92)

acknowledging limitations and challenges in collection, and providing all stakeholders with transparent communication and progress updates throughout the process.

OUTREACH AND ENGAGEMENT

Effective outreach and engagement strategies rooted in equity are crucial for comprehensive data collection efforts; this is particularly true for statewide efforts like WMC that seek to foster participation from Washington’s diverse communities. According to the Simon Fraser University’s Morris J. Wosk Centre for Dialogue, “Equity in public engagement exists when resources and opportunities for participation are distributed in a manner that responds to historic and ongoing disadvantages faced by marginalized groups. Equitable public engagement provides mutually beneficial opportunities for people to contribute and is mindful of power and privilege within engagement processes, institutions, and broader systems.”³⁵

In 2023, the City of Philadelphia launched a comprehensive Equitable Community Engagement Toolkit Beta Website, providing 29 guides, 35 tools and templates, community stories, and learning resources to help government institutions, engagement practitioners, and community members center, design, facilitate, and administer equitable community engagement.³⁶ Their Collecting Input Guide offers comprehensive resources, engagement methods, and best practices to collect and assess community “feedback, preferences, or reactions.” Additionally, the toolkit provides resources to aid in developing and deploying methods that meet “specific digital, disability, and language barriers” for inclusive and equitable engagement processes.

In the 2022 report *Strengthening Models of Civic Engagement*, researchers assert the necessity of partnering with trusted intermediaries to “help bridge the gap between governments and communities in delivering information and services, boosting participation, and other functions.”³⁷ The report suggests using a tripartite model, in which a government body partners with non-profit organizations and community-based entities to build a relationship and trust with community members and “incentivize community members to invest time in engagement and feedback activities.” Furthermore, the report asserts the importance of local intermediaries in engaging with tribal and rural communities, who often feel urban communities and governments do not understand or meet their needs. In addition to trusted intermediaries with local ties, partnering with other trusted platforms, such as local newspapers and media outlets, can aid governments in reaching their “civic and operational” engagement goals with tribal and rural communities.”

³⁵ Armos, N. (2023, August). *Beyond Inclusion*—Morris J. Wosk Centre for Dialogue, Simon Fraser University. *Beyond Inclusion - Equity in Public Engagement: A Guide for Practitioners*. <https://www.sfu.ca/dialogue/what-we-do/knowledge-practice/beyond-inclusion.html>

³⁶ City of Philadelphia. (n.d.). *City of Philadelphia—Equitable Community Engagement Toolkit*. Equitable Community Engagement Toolkit. Retrieved May 3, 2024, from <https://main.d37cs8g9kg5fnl.amplifyapp.com/>

³⁷ Fung, A., Gilman, H. R., & Schmitt, M. (2022). *Strengthening Models of Civic Engagement: Community-Informed Approaches to Inclusive and Equitable Decision-Making* (p. 16) [Brief]. Ash Center for Democratic Governance and Innovation. <https://nrs.harvard.edu/URN-3:HUL.INSTREPOS:37372782>

The Urban Institute’s Community-Engaged Resource Center developed the Equitable Compensation for Community Engagement Guidebook. This toolkit provides guidance and best practices for creating equitable compensation for “community engagement and community-engaged research methods.”³⁸ The guide provides a framework for practitioners to design monetary and non-monetary compensation plans for stakeholders that offer their time, experiences, expertise, and perspectives for institutional processes. The framework identifies sample guiding principles, sample payment structures, guidance for determining payment amounts, and non-monetary compensation examples to inform the development of “compensation efforts [that] are anchored in transparency, flexibility, and respect for community voices and expertise.”

SUMMARY

This literature review offers a comprehensive exploration of the music industry's impact studies on a national, regional, state, and local level. Existing literature provides vital insights on designing, implementing, and assessing an equitable music census, aligning closely with our primary and secondary research questions. At the national level, insights from organizations like the National Endowment for the Arts and Americans for the Arts provide valuable methodologies and findings for structuring and evaluating a future music census in Washington State. Their emphasis on workforce demographics, economic impact, and equity considerations lays a solid foundation for our research objectives.

Regional examples, such as the music censuses conducted in Austin, Sacramento, Alaska, and Oregon, demonstrate effective data collection methods, engagement strategies, and the economic significance of music industries at the local level. These case studies offer actionable insights for improving outreach, engaging underrepresented groups, and understanding the diverse needs and challenges within regional music ecosystems.

Furthermore, existing literature highlights the importance of equitable data collection practices and effective outreach strategies, drawing from examples like the Equitable Community Engagement Toolkit Beta Website in Philadelphia and guidance on compensating stakeholders for their engagement efforts. By synthesizing national, regional, and local insights, King County and Commerce can develop a robust framework for designing, implementing, and assessing the WMC that fosters inclusivity, representation, and meaningful participation from all segments of Washington's diverse music industry.

³⁸ Langness, M., Cedano, S., Morgan, J. W., & Falkenburger, E. (2023, August 23). *Equitable compensation for community engagement guidebook*. Urban Institute. <https://www.urban.org/research/publication/equitable-compensation-community-engagement-guidebook>

III. Research Methods

OVERVIEW

To explore how King County and Commerce can develop an equitable framework for designing, implementing, and assessing their upcoming music census, the Evans Team developed and executed a qualitative research plan using the following methods: 1) Focus Groups, 2) Interviews, and 3) Survey Testing. These qualitative methods best fit the scope and goal of our research, as they allowed the Evans Team to gather detailed, nuanced, and rich data from key stakeholders in the music industry.

ANALYTIC PURPOSE

The analytic purpose of the Evans Team's research was to capture insights and feedback from a diverse range of music industry stakeholders to explore and answer our research question. We focused on connecting with stakeholders representing major music hubs, communities across Washington State, and groups representing contrasting music industry sectors (*See Table 2, Appendix B for a table highlighting stakeholders*).

Primary Research Question

- How can Commerce and King County develop an equitable framework for designing, implementing, and assessing their upcoming music census?

Secondary Research Questions

- How can Commerce and King County improve outreach and engagement for WMC participation, particularly for rural and historically underrepresented groups?
- How can Commerce and King County design the WMC to collect holistic data representative of Washington's diverse music industry?
- How can Commerce and King County embed an equity framework into future economic impact analysis conducted based on data collected from the WMC?

METHODS OF ANALYSIS

Focus Groups

The Evans Team facilitated focus group sessions with The Seattle Music Commission (SMC) and The Washington Nightlife Music Association (WANMA). These groups were identified due to their ability to represent a diverse variety of perspectives within the music industry, both geographically and within different subsectors of the industry. Focus group participants were provided with an overview of the Evans Team's research and then asked questions about survey design, census outreach and engagement, and the larger music industry landscape in Washington.

These focus groups allowed the Evans Team to gather input and feedback from many key players in one sitting. They also helped The Evans Team identify additional stakeholders from rural and underrepresented communities, thereby expanding our networking for outreach and engagement.

Interviews

The Evans Team conducted individual and group interviews with people engaged in the state's music industry, spanning distinct roles and professions. These individuals were identified through snowball sampling rather than random sampling or quota sampling. We used this sampling strategy for several reasons. First, we were interested in hearing specifically from stakeholders with perspectives representing rural communities and underrepresented groups in the industry. Secondly, The Evans Team focused on collecting feedback from stakeholders with major influence and or leadership roles within the industry. We connected with interviewees via recommendations from our clients, and once we started our first round of interviews, we connected with others via word of mouth from interviewees. Like the focus groups, interviewees were asked questions about survey design, census outreach and engagement, and Washington's larger music industry landscape (*see Table 3, Appendix C for a complete list of interview questions*).

These interviews aimed to capture more nuanced and rich qualitative data to help identify best practices for census design, implementation, outreach, and engagement with communities historically underrepresented in the state music industry. The Evans Team conducted seven interviews with stakeholders from diverse backgrounds, including venue managers, artist managers, union representatives, musicians, music commission members, festival managers, and those considered leaders in their communities.

Beta-Survey

Another method of analysis conducted was the creation and testing of beta surveys. Due to the restrictive timeline for the Evans Team, we believed it was prudent to create beta-surveys, a foundational survey before final administration, to help Commerce and King County gather feedback on the implementation and survey design of questions asked that would be relevant to understanding the landscape of the state's music industry. Our goal number of participants is five, with our sample population representative of the participants from interviews and focus groups we have conducted. The survey design was created within FormSite and was informed by the survey administration of the Oregon Music Census conducted by the non-profit organization MusicOregon between January and March 2023. The questions reflect workforce development, performances, and demographic data specific to the music industry in Washington State.

STRENGTHS AND WEAKNESSES

This research design's greatest strength is its potential to collect rich and nuanced data with high content validity. The focus groups and semi-structured interview questions will encourage participants to elaborate and dig deep to explain their perspectives.³⁹ However, the success of

³⁹ Johnson, G. (2014, p.2). *Research Methods for Public Administrators: Third Edition* (3rd ed.). Routledge. <https://doi.org/10.4324/9781315701134>

gathering this nuanced data is contingent on how prepared and practiced the interviewers are. To increase levels of trust between the interview participants and interviewers, the Evans Team sent participants interview questions ahead of time and allowed them to discuss how their feedback would be used in the final report.⁴⁰ This allowed participants to come to the interview feeling well-prepared and provided opportunities for participants to ensure their input was not taken out of context. Clearly defining our project scope and goals beforehand, including key terms, also increased criterion validity by providing all participants with an equal baseline of understanding of our research.

LIMITATIONS

The most significant area for improvement of this design is measurement reliability. Most notably, we used snowball sampling to identify stakeholders for interviews rather than quota or random sampling. This means our methods are not replicable, nor are they representative of Washington at large. Furthermore, our data cannot be generalized across interviews because focus groups and semi-structured interview methods do not involve reading questions verbatim. However, our research and analytical purpose is exploratory in nature; therefore, we are not seeking to make any causal claims. To address some of these limitations, our team conducted a mix of qualitative methods and is providing recommendations for further data triangulation in our next steps. Conducting additional quantitative analysis will provide a more comprehensive picture of Washington's music industry when put in context with the detailed and personal accounts and perspectives portrayed in our qualitative data.⁴¹

⁴⁰ See Footnote 37, page 6

⁴¹ Helen Noble & Joanna Smith. (2015, p.2). Issues of validity and reliability in qualitative research. *Evidence Based Nursing*, 18(2), 34. <https://doi.org/10.1136/eb-2015-102054>

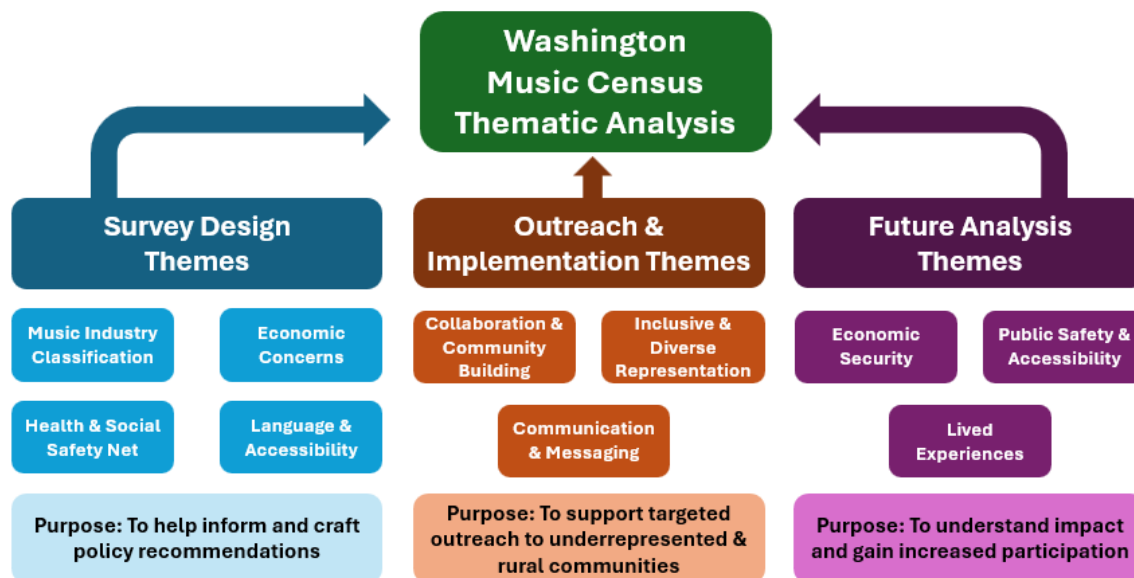
IV. Analysis

OVERVIEW

For our analysis, we examined our interviewee's and focus group participant's subjective experiences and perceptions of Washington's music industry. Our findings aligned into three categories, 1) survey design, 2) outreach and implementation, and 3) future analysis. We then extracted key themes within these categories through inductive content analysis of focus group discussions and stakeholder interviews transcripts (*see Figure 2 below*). By focusing on recurring words, phrases, and concepts, we identified sub-themes that supported the analytic purpose of our research, paying close attention to data that emphasized the lived experiences of underrepresented groups.

We spoke with a diverse group of music industry stakeholders, each representing various roles within the sector, to gather data and feedback for our analysis. The rich qualitative data produced from these discussions allowed us to better comprehend the complex landscape of Washington's music industry holistically. Our findings captured the nuanced dynamics of the music industry and helped us develop a comprehensive framework for the WMC, with an emphasis on engaging historically underrepresented groups. These insights included recommendations for WMC survey design and themes, gaps in existing assessment, missing data, and equitable outreach strategies. Themes were then developed into a narrative analysis, contextualizing the relationships between key players, significant challenges, and opportunities identified in our research and within the larger context of our project and its surrounding policy problems.

Figure 2
Thematic Analysis Flowchart



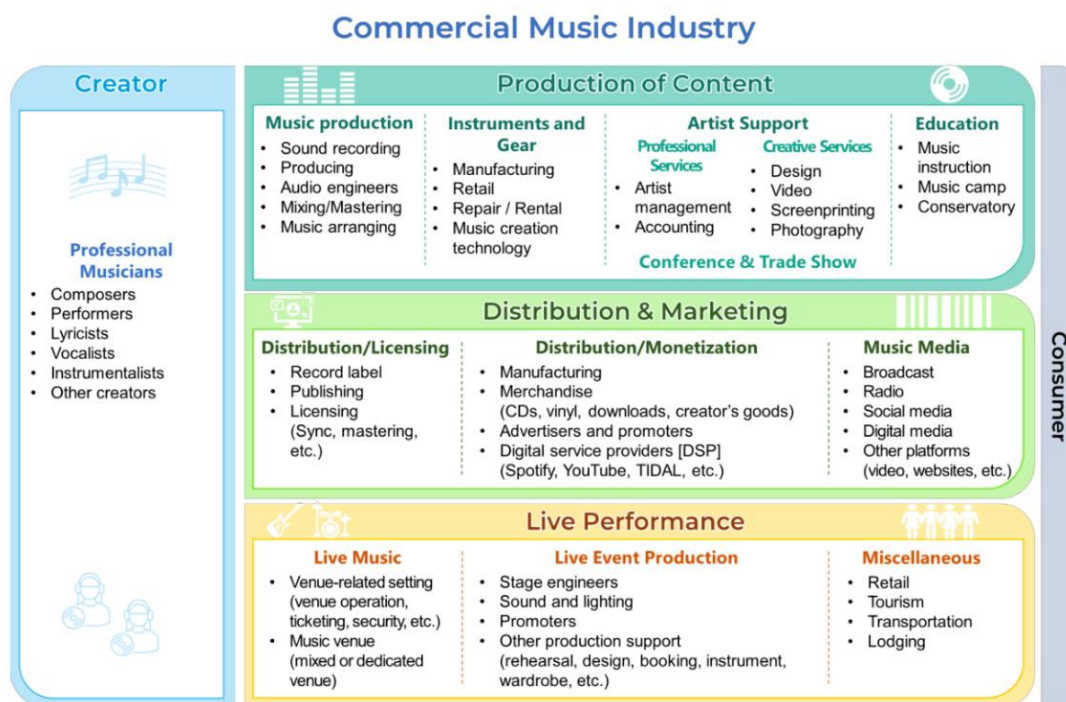
SURVEY DESIGN

Classifying the Music Industry

Recognizing that the music industry ecosystem comprises more than just artists and business operators is notable. Our data emphasized the importance of including and highlighting roles like sound engineers, merch sellers, music supporters, and those involved in streaming services. This data highlights stakeholders' awareness of the broader ecosystem that supports and interacts with the music industry. Other notable insights around classification included the importance of clarifying and articulating whether those practicing as hobbyists qualify to take the survey. Lastly, we received input about taking measures to ensure the study does not exclude people who do not see themselves as professionals but are still contributing to the music economy. Figure 3 (see below) depicts the diverse range of roles prevalent in the commercial music industry and reinforces the patterns we saw in our findings.

Figure 3:

Commercial Music Industry Conceptual Diagram - Produced by the Northwest Economic Research Center⁴²



⁴² Liu, Jenny H., Marotta, Steve, Brophy, Emma, Khanvilkar, Rohan and Kim, Hyeoncheol. (2023, p.2) The Power of Music – An Economic Analysis of Oregon’s Emerging Commercial Music Industry. Northwest Economic Research Center (NERC) Report. https://pdxscholar.library.pdx.edu/nerc_pub/

Capturing Social and Economic Conditions

Capturing social and economic concerns was a significant theme portrayed in our data. Many stakeholders provided insights on the challenges musicians face regarding financial stability and social well-being. This included relying on multiple sources of income for financial stability, a lack of access to benefits and institutional support for gig and part-time workers, and a general gap in educational resources supporting managerial, administrative, and operational needs between venues, musicians, and all other critical roles.

*“In the venue industry, almost everyone is part-time, and people are working at all different venues, doing all these different jobs. So, I would just say that, when designing survey questions, **don’t stick too hard to the standard of what has been [done in past assessments]**. This gives the impression that there are a bunch of people working full time in this industry, right? But there just isn’t. I would be more interested to know, how many employees do you have? And not averaged out to an FTE. **Not many labor hours do you have in your payroll, but how many employees do you have?** There’s something in there, telling the story of ‘Oh, 200 people work here, but they’re all only working two hours a week’ (Wells Interview).*

Another issue that was brought up was the failure of previous surveys and assessments to capture the barriers those in the industry face legitimizing their work and qualifying for business write-offs and tax returns. Lastly, our data identified a need to capture the reality those in the music industry face when it comes to health care and personal wellbeing.

*“If somebody gets laid off or develops a disability, [say] they trip and fall, or a stage light falls on them, **they don’t have enough contact hours to recoup that income back**, even though we’re [venue managers] required to pay it as a trade as employees.... Nobody has health insurance. It would be really great for the state to know how many [people working in the music industry], who are generating billions of dollars for their economy, **can’t find affordable housing, and they can’t afford practice space or studio time or health insurance**” (Wells Interview).*

These findings reflect a significant concern about the sustainability of a music career and the practical aspects of making a living as an artist in Washington.

Language and Accessibility

While input around language and accessibility in survey design was not as prevalent as the themes mentioned above, it is worth noting considering Commerce and King County’s equity

goals. Our data also found that providing the option to take the survey in other priority languages, conducting outreach in priority languages, and providing educational materials on understanding terminology and navigating the survey itself would increase survey accessibility and equity.

*“I noticed [Oregon] **made videos about how to go through the survey.** And they explained the questions. Music Portland made the video. I thought this was a great way for people to walk through it and see if they have questions ... and explain it in everyday terms” (Wells Interview).*

Stakeholder input also mentioned involving music industry stakeholders in the survey design process to help ensure that the survey is asking the right question, and that the questions are perceived as intended across different individuals and groups.

*“When we asked businesses, ‘How do you characterize yourself?’, we workshopped that language really hard. And when we asked musicians ‘What activities or what work do you do’, we worked very hard on the wording of those categories [within the survey]. **We did community advisory meetings where we invited musicians we trusted, to sit in on a zoom and look over different segments of it [the survey] with us and make sure that the language was clear, accessible, not too academic, that it was not the kind of language that makes someone leave a survey or feel uncomfortable**” (Miriam Interview).*

This feedback reinforced our initial recommendation of doing beta survey testing. However, time permitting, it could be worthwhile to reiterate this process and reach a wider audience.

OUTREACH AND ENGAGEMENT

Inclusive and Diverse Representation

This was one of the most prevalent themes within our research on outreach and engagement. There is a strong emphasis on reaching a diverse range of musicians and ensuring broad representation in the WMC survey, including capturing voices from different genres, mediums, income levels, and backgrounds and considering language barriers and the experiences of youth and part-time musicians. This theme underscores the Seattle Music Commission’s concern of equity and inclusivity in understanding the music industry’s landscape. Figure 3 provides a more exhaustive list of the positions and roles stakeholders identified as often overlooked in traditional census and survey assessments.

*“It's middle aged piano teachers in small towns. It's people that own **private recording studios in Enumclaw**. It's folks like myself, that maybe work for a nonprofit or a union and **do band coaching on the weekends, those people don't get the attention, and the spotlight shone on them in studies like this....** You drop your kid off at the music school, you go grocery shopping for an hour, you come pick the kid back up and go home, you know what I mean? That is a big part of the industry. It's not sexy, it's not exciting. It doesn't get you autographs, but pays your bills for an entire lifetime” (Omdal Interview).*

*“But I would say **managers get missed off top almost every time**. And it's so interesting to me because outside of the artists themselves, I would say... managers are probably the second or third most important piece. And so I think there are more managers in Washington than we realize, we just have not done a very good job of bringing them together, or even having like a center thread for them, to engage with each other. So I'm going to say managers, and then I'm going to **say anybody really on the business side, so that includes like, music attorneys, that includes like, people that do the PR work for artists, that includes creative directors for artists, which is a very real role and gets missed all the time...** We have to engage more women and we have to engage more diversity because a lot of the areas that I am speaking about, it's pretty much white male dominated across the board” (Ryker Interview).*

Another important and recurring theme highlighted in our data was the importance of identifying and working with trusted industry leaders in outreach and engagement efforts, particularly regarding engaging historically underrepresented communities. Our data shows that these leaders are crucial in building trust and legitimacy in communities impacted by legacies of institutional racism and marginalization.

*“One of the things that we prioritized as far as getting responsiveness from rural communities, and from traditionally underrepresented communities was our collection mechanism included... **We hired ambassadors and paid them.** And we targeted ambassadors **from specific music communities, and cliques that we knew would require trust** and faith in the person talking to them.... And it meant that instead of trying to do outreach to thousands of people, we were trying to do outreach... to like 15 people who knew those people. So we got those 15 people really, **really on board and really knowledgeable and caring about this data collection**” (Miriam Interview)*

Our data shows that hiring community representatives is a more equitable way of sharing information with rural and historically underrepresented communities that encourages transparency and helps build sustainable relationships across the state that extend beyond the census survey itself.

Collaboration and Community Building

When asked about strategies for improving survey participation, multiple stakeholders mentioned community building and networking as powerful tools for engaging potential participants. Stakeholders identified networking events such as mixers and panels as opportunities to build awareness around the census survey and communicate its larger purpose, in turn encouraging survey participant buy-in. Furthermore, these events can also serve as data-collecting tools by gathering information via email lists and employing QR codes that direct potential participants to the survey landing page and other resources. Throughout our interviews, we gathered a diverse list of potential organizations and individuals to collaborate with (see Table 4 in Appendix for the complete list).

*“I would **hold networking nights**... I would hold **open houses**, I would hold **educational panels**... stuff that doesn't take a lot of effort or energy. How do we engage Smash? How do we call up Thunderpussy and do a girls only networking educational night? How do we empower women? How do we empower the Native Americans? How do we empower the POCs? How do we empower groups that continue to get missed in communities and... **make them feel like they're centered and they're focused?** Instead of feeling like, when they show up, they're going to be the only one in the room, which can be debilitating.*

*Pair up with Fremont Friday, I would pair up with Terrain over here in Spokane, pair up with whatever is a staple in the scene. The Tri Cities, that's another huge miss, there are so many people that live down there, and most of them are people of color, mostly from the Hispanic community. It's mostly the Native American community. **I am excited that we are focusing on more than King County because I have always thought that it has been such a problem coming from somebody who hasn't lived in King County**” (Ryker Interview).*

Another theme was creating opportunities for educational cross-generational and cross-cultural exchange. Various stakeholders discussed how integral mentorship, networking, and knowledge sharing are within the music industry.

*“So start showing up for the 16 to 25 year olds. **How do we get everybody that's been doing it, to talk to the ones that are trying to break into it?**”*

Because if we don't, we're going to keep looking at the same issue: we're not breaking people out of our state [i.e. connecting young talent to larger scale opportunities]. If the guys from Pearl Jam don't randomly show up to the Sonic Guild event every once in a while (which they do), how do we inspire kids [that it's possible to make it]? (Ryker Interview).

There was also an emphasis on recognizing the power imbalances present in the industry and the need to create intentional spaces for relationship building for groups with marginalized identities, which feed into larger networking opportunities to engage with individuals and organizations that hold more institutional power.

*“Collaborate with a queer org and bar [like Spectrum or Nine] and hold a music event for queer people in a queer space, connected with a queer org. So all the queer people feel like it's okay to come outside. And **then invite them to the larger networking night that's going to include everybody**, right? So some of the pre work you do is with these individual communities that are getting looked over. Collaborate an organization that works with all the tribes in a creative way already, and then hold an event with them that's going to draw out their audience. How do you get with, you know, the black and brown community, the POC **community in ways that are authentic and organic to them in places that they're comfortable with and used to, with leaders that look like them**. I think that it's about **speaking to people in a way that feels more authentic and natural to them, instead of asking people to come out of their comfort zones** and be the only one in a room that they already feel uncomfortable being. Let's just put it in their backyard, you know? **And I think my biggest message is King County got to start leaving King County. That's how we have a better Washington as a whole**” (Ryker Interview).*

Communication and Messaging

A common theme in feedback from stakeholders was emphasizing the purpose of the WMC and ensuring that the purpose of the census and its subsequent analysis was tangible and meaningful to the target audience of survey participants. In other words, homing in on why participants should care about the census and how it will benefit them.

*“If you can show them [people working in the music industry] **how a study like this is going to result in advocacy that will make them have more access to funding, make their lives easier, that's the common ground** that we always speak to in labor organizing. You can be red or you can be blue. But I think **we all want to take a little more money home in our paychecks**. So let's start there” (Omdal Interview)*

*“But I also think **what's important about the outreach of this census is informing people about jobs that they can do in the industry**, they might not even be aware of at all. Because right now in Washington, the biggest problem, I think, that we have, is that everybody thinks that they either have to be a manager, a producer, or the musician on stage... and if you don't fall under one of those categories, most people don't really think that there's like a legitimate job out there for you. And that's just so untrue ” (Ryker Interview).*

Barriers

There is a notable concern about identifying and addressing the barriers to entering and thriving in Washington’s music industry, such as access to supportive infrastructure, educational resources, and systemic issues (like urban vs. rural representation).

*“I think the **[venue] industry also hires unqualified people and promotes unqualified people** and does not provide any training to be effective supervisors and managers. One of your questions was something about what barriers in our current systems are preventing these **[underrepresented] communities from participating? It's coming from the top, partly from their lack of experience in this area. So when we talk about workforce development, because I hear this word a lot, what does that mean? And who are you training? And what are you training for? That? If you want to talk about barriers, then you kind of need to go to the top?”** (Wells Interview).*

We also heard feedback identifying power dynamics as a barrier that may be preventing people from underrepresented communities from engaging with larger institutions. Especially after the restrictions present during the COVID-19 pandemic, people feel more isolated and anxious to get outside their comfort zone. Our data found that creating safe spaces and opportunities for underrepresented groups to connect to each other and share resources would strengthen long-term representation and engagement.

FUTURE ANALYSIS

Policy and Advocacy Implications

Stakeholders expressed the importance of connecting the survey to real-world issues and potential policies that could help address these challenges. Some of the policy issues that were brought up included promoting all-ages venues, providing avenues for gig workers to file W-2's to increase job visibilities and alleviate tax burdens, address the rising costs of owning and operating venues (such as high insurance rates and rising rents), improve ADA accessibility at

venues, and prioritize public safety initiatives that encourage safe nightlife transportation and pedestrian only streets.

“[If gig workers were able to file for a W2] then not only does the person get, you know, a couple \$1,000 back every year in taxes, that they [otherwise are] gonna have to pay as self-employed workers, **their income has also been seen by the state**” (Omdal Interview).

Many felt that the WMC was also an important opportunity to share information and spread awareness around issues that could be addressed on a policy level.

Storytelling and Framing

Stakeholders identified the importance of the WMC not focusing solely on the music industry's economic impact but also telling an honest and holistic story of the people who comprise the industry.

“I personally don't like all of the framing as consumption, and music, consumers, and all of that, even though I know this is talking about commercial business... **There's value in music beyond just monetizing it. And so this is an opportunity also to tell the story of how, hand to mouth, people are living in these creative economies, like I feel like there's this rush to say, 'Oh, look, how much money have jobs contribute to the state of Washington.'** But the other part of the story is that **there's zero safety net for any of the people working in these industries. And they're doing it because they love the work**” (Wells Interview).

“We forged parts of our culture and heritage through the arts. And if we discount that from the impact of it, I think it actually weakens our case, because we're not encompassing all the reasons that people engage in” (Reese Interview).

The above quotes emphasize the multifaceted value of music beyond its commercial aspects, highlighting its role in both economic and cultural spheres. This feedback critiques framing the music industry merely in terms of consumption by focusing mainly on monetary contributions to the economy. Instead, this feedback suggests to highlight the struggles of individuals within creative economies face, many of whom often lack a social safety net. Furthermore, this input emphasizes the importance of recognizing heritage and cultural roots of Washington's music industry as essential for painting a comprehensive picture of the industry's significance in society.

BETA SURVEY

The beta survey was developed based on major findings from stakeholder interviews, focus group feedback, and findings gleaned from this report's literature review. To ensure the questions developed during the project were reflective of this feedback, the beta survey was evaluated on a small group of stakeholders. Beta survey testers were asked to provide feedback on whether the survey captured themes encompassing both economic impact (e.g., income, revenue etc.), and economic conditions (e.g., financial security, wellbeing, equity). We also asked beta survey testers to provide feedback on whether the survey design itself, and language used was clear and culturally appropriate.

These strategies can help bridge the gaps between data collection and understanding the diversity of Washington's music industry. Through a test run of survey questions, Commerce and King County can identify themes that resonate with our beta-survey testers and edit questions to reflect their role within the industry more accurately and comprehensively.

SUMMARY

Our analysis and insights from our stakeholders and interviewees provide critical information needed to inform survey design and policy recommendations for a growing community of creators, artists, commercial business owners, and others who interact within Washington's music industry. The implementation and design of the Washington Music Census needs a representative count and to gather input from those historically marginalized in conversations around workforce development, access to healthcare, and employment within many different facets of the music industry. Specifically, historically underrepresented, and rural communities deserve a voice in this process through meaningful engagement, trusted messengers, and feedback at each step of the process. This approach is crucial in understanding the context and nuances that numbers alone cannot provide.

V. RECOMMENDATIONS AND NEXT STEPS

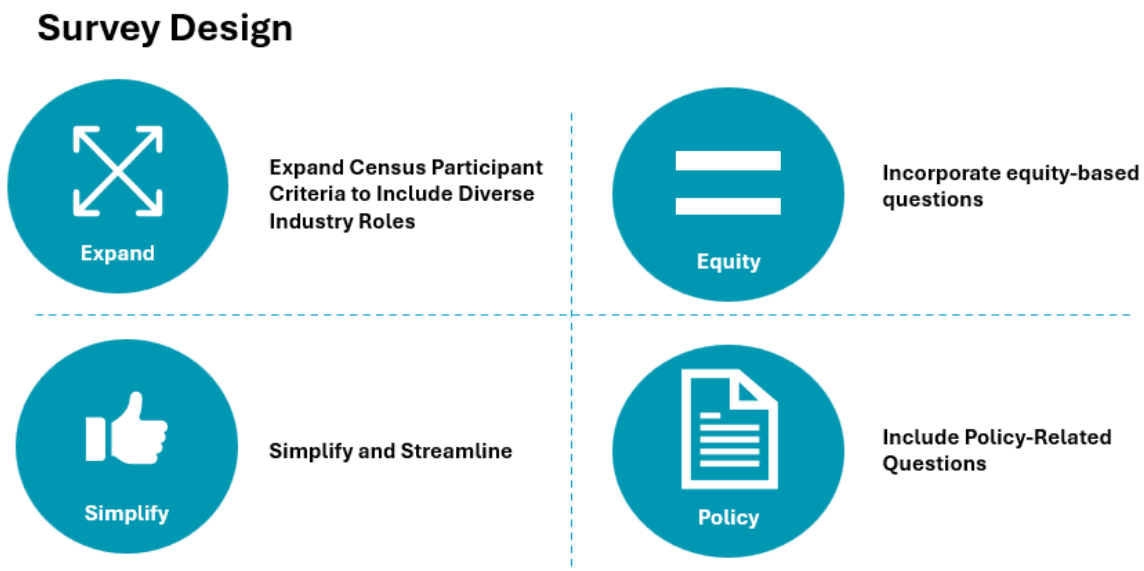
OVERVIEW

Our recommendations and next steps delve into policy implications from our interviewees and account for future directions of where this research can go. Drawing insight from our focus groups, interviews, and surveys, we provide evidence-based recommendations for policymakers and industry stakeholders to develop a comprehensive, impactful Washington Music Census. Our recommendations are distinct between two areas, both informed by our research question: survey design and, outreach and implementation. In addition, recognizing the dynamic nature of Washington’s music industry, we propose areas for future research and continuous monitoring, ensuring the long-term effectiveness of the Washington Music Census.

SURVEY DESIGN

The Survey Design process remains an integral part of the development of the Washington Music Census. The core themes of the survey design implementation consist of expansion of relevant criteria to inform a representative count, simplification of language to streamline the survey administration, providing insight around equitable strategies to gain an understanding of a music industry stakeholder’s wellness, and to advocate for policies that affect everyday operations of venue owners, staff, and those who participate within the music industry externally (*See Figure 4 below*).

Figure 4:
Survey Design Recommendations



Expand Census Participant Criteria to Include Diverse Industry Roles

Broaden the scope of census participants to include gig workers, security staff, sound and lighting engineers, and other support roles like food and beverage suppliers and ride-share operators. A more inclusive census that captures the full spectrum of industry roles will provide a comprehensive understanding of the ecosystem, aiding in developing more targeted and effective policies.

Simplify and Streamline

Do not overburden businesses with requests for information that is time-consuming, tedious, and complicated. Avoid confusion or misreporting of employee hours by not asking for FTEs. Clearly define who is eligible to take the census survey and ensure not to use alienating language. This will help ensure the survey captures those who do not see themselves as professionals but still earn some income from working in the music sector. Allow a business owner or artist to self-identify under multiple roles or sectors in the census, allowing businesses and artists to be tagged geographically for future analysis. This also allows questions to be delineated by business categories, and participants can provide iterative feedback on questions. Focus on priority questions and do not overburden census takers. Try to reduce the survey time to less than 15 minutes and keep the questions as concise as possible. This will decrease survey fatigue by implementing steps to ensure an accurate and representative count.

Health, Equity, and Financial Stability

Include questions that prompt participants to consider equity issues, particularly workforce development for businesses. Ask survey questions that capture the social and economic challenges musicians face (e.g., questions around financial stability, health insurance, etc.).

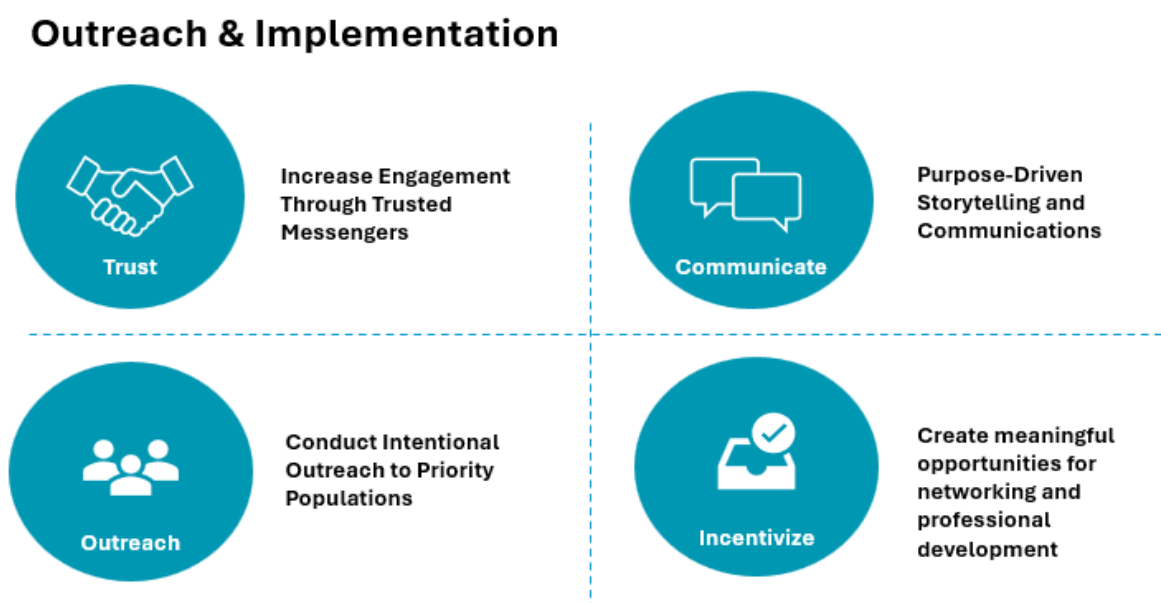
Include Policy Related Questions

Advocating for inclusive policies and venue practices can create the groundwork for more engagement within underrepresented and rural communities. Asking survey participants for their opinions on policies to adjust venue practices to accommodate younger musicians and address cultural barriers can gain perspective on attendees and performers. Adjusting venue policies and practices will help to better enhance accessibility for musicians of all ages and cultural backgrounds, promoting a more vibrant and diverse music scene. Asking survey participants their opinion on policy changes to allow all-ages access to music venues like breweries, enhanced news coverage of events, improving transportation options for late-night events, and ensuring ADA compliance in venue designs can address accessibility and public safety gaps. These changes will make music events more accessible and inclusive, promoting broader participation and a more vibrant nightlife that accommodates all community members, including those with disabilities. Strengthening connections between programs and local scenes can bridge the gap in regional representation. Asking survey participants their opinions on deepening the involvement of state and federally run music programs with local music communities can ensure support mechanisms are grounded in real, street-level experiences. Lastly, enhanced engagement with local scenes will improve the relevance and effectiveness of music programs, supporting sustainable growth and development within the industry.

OUTREACH AND IMPLEMENTATION

To enhance participation in the Washington Music Census (WMC), it's essential to engage local intermediaries who are trusted within their communities to advocate for the census's significance. Drawing from successful models like Music Alaska's music census, Washington should establish a network of ambassadors, dubbed 'community champions' to support the statewide survey efforts and increase awareness. This grassroots approach is crucial for involving historically underrepresented and rural communities and building trust in government processes. Prioritizing outreach to overlooked sectors and marginalized communities, using purpose-driven storytelling and communications, and incentivizing survey participation through community-building and compensation are key strategies outlined. By tailoring outreach, developing compelling narratives, and offering equitable compensation and incentives, King County and Commerce can better ensure diverse participation and accurately reflect the music industry's breadth in shaping inclusive policies (See *Figure 5 below*).

Figure 5:
Outreach and Engagement Recommendations



Increase Engagement Through Trusted Messengers

To effectively increase participation in the WMC, engaging with local intermediaries who have trust within local communities and can champion the importance and impact of the census project for local communities is crucial. Drawing inspiration from Music Alaska's recent music census that mobilized local musicians and music businesses community ambassadors and best practices outlined in the 2022 report *Strengthening Models of Civic Engagement*, Washington should establish a network of intermediaries—branded as census community champions—who can support Commerce and King County's efforts to conduct the statewide survey and increase awareness and participation in the process. This grassroots engagement strategy is essential for

engaging with and including historically underrepresented and rural communities and establishing trust in government processes. A “Community Champion” network should represent the demographic, geographic, and industry diversity WMC seeks to capture, with participants from backgrounds such as local musicians and artists, music venue owners, music educators, business management, sound or lighting technicians, licensing professionals, and influential social media personalities within the music community to name a few. By partnering with these local figures, the WMC can leverage its networks and credibility to promote the census through formal and informal channels.

Table 5 (*see Appendix E*) provides a list of potential champions identified during our research. King County and Commerce should build on this list to develop an equitable and representative statewide network.

Conduct Intentional Outreach to Priority Populations

Commerce and King County should prioritize industry professionals from commonly overlooked or underrepresented sectors and roles when conducting outreach. Further, an equity lens should be applied through a prioritization process to seek the involvement of underrepresented communities—such as those that identify as Black, Indigenous, other persons of color, LGBTQIA+, immigrant, refugee, and individuals from rural communities—as both “community champions” and survey respondents. Outreach should be tailored for respective communities and be co-designed with local champions to ensure responsiveness from communities statewide. This will help King County and Commerce ensure the inclusion of diverse community voices and address specific needs so that census results authentically reflect the broader industry to better shape policies that foster a more inclusive and thriving local music ecosystem.

Generate Buy-in through Purpose-Driven Storytelling and Communications

King County and Commerce should prioritize the development of a compelling campaign, including a narrative, WMC website, and other print and digital assets that build awareness of the census effort. These resources should clearly explain why people working in the music industry sector should care about the census and drive individuals statewide to complete the WMC survey. The narrative should underscore essential policy issues and the lived experiences of those working in the music industry across sectors. King County and Commerce should develop a campaign that supports outreach and engagement strategies and utilizes trusted platforms and media mediums to share compelling stories and key messages of the WMC. Effective and diversified communication strategies will enhance and strengthen outreach and engagement, ensure the census reaches a broad audience, and improve the accuracy and inclusiveness of the collected data. Finally, King County and Commerce should develop an approach to following up with participants on survey outcomes and results, policy updates, ongoing public policy, and programmatic wins. Appendix G provides examples from the Greater Nashville Music Census for compelling communications and social media graphics.

Incentivize Survey Participation through Community Building and Compensation

Incentives can be helpful tools to encourage broad participation in the WMC efforts. Incentives

can take on different forms based on the target audience and the intended outcome of the engagement. King County and Commerce should prioritize community-building efforts to foster broad survey participation and develop an equitable compensation framework to help establish and support a reliable network of “community champions.” Community-building efforts include but are not exclusive to, collaboration with recording academies and local organizations to create and leverage existing networking opportunities and educational events for artists to build awareness and generate interest in the WMC process. Additionally, events and spaces that cater to specific communities, such as Black, Indigenous, people of color (BIPOC), queer, and rural communities can help King County and Commerce foster a sense of belonging and safety for marginalized groups, socialize the WMC survey, its importance, and establish or strengthen relationships with potential community champions.

Building on best practices outlined in Urban Institute’s Community-Engaged Resource Center’s Equitable Compensation for Community Engagement Guidebook, King County and Commerce should establish a compensation framework to support the community champion network commensurate to stakeholder participation in the engagement process. Such a framework could explore monetary and non-monetary forms of compensation and should include guidelines that promote equitable compensation among community champions. Furthermore, King County and Commerce could explore other incentives for survey participants, such as free tickets to local shows and festivals and other benefits to encourage participation.

FUTURE ANALYSIS

Advocating for state-level policies like a paymaster system for gig workers and creating a framework for guaranteed basic income for musicians in Washington's music industry can provide economic security and tangible benefits. Recognizing the impact these policies have on lived experiences of survey participants can help increasing support for the census. Key issues identified in our research include the instability of 1099-work and the need for livable wages, establishing a performer compensation program with holistic benefits can address gaps in well-being. Additionally, advocating for all-ages venues can enhance access to music and the arts, particularly for youth performers. Future analysis should focus on disparities within the industry beyond just economic impact, highlighting lived experiences and advocating for fair compensation policies (*See Figure 6 below*).

Figure 6:
Future Analysis Recommendations

Future Analysis



Economic Security

Advocating for state-level policies that create a paymaster system or similar structures to formalize gig income can provide visibility and information on eligibility for state benefits. This could provide economic security for gig workers, could help gain broader support for the census by showing tangible benefits to participants. Advocating for and creating a framework for a guaranteed basic income for musicians and performing artists within the WA music industry can address challenges such as reducing the gap in meeting essential needs like access to housing, healthcare, and education. 1099-work can be dependent on hours available, venue operations, and season schedule. This instability cannot be a long-term solution in providing a livable wage in cities with a medium to high cost of living. Establishing a performer compensation program that evaluates total income and percentage of income from the performing arts to provide a livable wage with health insurance and holistic benefits can address gaps in livability and well-being. Many artists work multiple jobs outside of performing or participating in the arts space. Providing stability through a livable income can narrow the gap between work and life.

Public Safety, Accessibility, and All-Ages Venues

All-ages venues can provide more equitable access to music and the performing arts. 21+ venues cannot fully accommodate youth performers and musicians due to regulations on alcohol sales to minors. Eliminating this for venues that do not sell alcohol can alleviate the burden for youth to find spaces to perform. Improved ADA accessibility at venues, prioritizing public safety initiatives such as safe nightlife transportation and pedestrian only streets, can address gaps for venue and safety accommodations.

Lived Experiences over Economic Impact

Use future analysis as an opportunity to highlight disparities within the music sector and advocate for policies that champion fair compensation for creative professionals. To ensure that future analysis does not focus solely on economic impact, it is important to gain perspective of the social and financial experiences of those who make up the industry. Pairing survey data with more in-depth qualitative interviews can help capture lived experiences regarding equity, financial security, health, and community.

NEXT STEPS

Throughout this project, the Evans Team connected with individuals representing a diverse range of experiences as musicians, nonprofit leaders, educators, venue managers, promoters, and many more occupations, to inform the framework for the music census's design and implementation. However, as determined by our research, there are other research methods that Commerce and King County can undergo to ensure a fair, accurate, and representative Washington Music Census. To help ensure the timeliness, continuity, and accuracy of this project and any future economic impact analysis conducted using data from the WMC, we propose the following next steps:

Implement a Search Engine Optimization (SEO) Plan

Using a search engine optimization (SEO) tool will allow Commerce and King County to direct individuals and businesses in Washington's music industry to the WMC landing page. This will help paint a fuller picture of Washington's music ecosystem and will help the survey reach a wider audience. By utilizing a search engine optimization (SEO) plan, Commerce and King County can conduct targeted outreach by developing a solid framework on keywords and identifying target audiences that would help build an equitable model for the WMC. Below is an outline of what a foundational SEO plan could look like to support content analysis and audience insight efforts:

- **Keywords:** rural, urban, music, creative economy, small business, diverse, underrepresented
- **Target Audience:** Individuals interested in the creative economy in Washington state, with a focus on:
 - Rural and urban communities: highlighting opportunities and challenges in both settings
 - Music industry professionals: musicians, music businesses, and organizations supporting the music scene
 - Entrepreneurs and small businesses: Emphasizing resources and support for creative businesses
 - Individuals from underrepresented communities: Highlighting BIPOC-owned businesses/organizations that serve BIPOC communities and historically underserved communities in rural areas

- **Content Analysis:**
 - Analyzing top-ranking content to provide insights into:
 - Existing research and data
 - Gaps in knowledge
 - Effective communication strategies
- **Audience Insights:**
 - More relevant and impactful research findings
 - Identification of key stakeholders and communities (using our stakeholder list) to engage with during our research

Budget for Implementation and Data Analysis

After speaking with stakeholders that conducted similar statewide census surveys, we received feedback on how time consuming and intensive it is managing the data collection process and conducting thorough analysis once the survey is closed. We highly encourage Commerce and King County to proactively seek out stakeholders that will be responsible for managing these stages of the WMC assessment, and budget for the time and costs required to collect the survey data, create a usable database, and conduct a thorough analysis. In addition to this, we recommend seeking funding to support the costs of hiring ‘community champions’ or consider in kind incentives such as concert tickets to compensate these pillars in the music community. This will reinforce Commerce and King County’s commitment to equity by compensating music industry workers for the expertise and leadership. This is an especially important consideration when asking leaders or ‘champions’ from historically underrepresented communities to conduct outreach to their networks. Recognizing the history of tokenizing and exploiting BIPOC community members and other marginalized leaders to provide their skills and expertise without pay, for the sake of community engagement, is a crucial step in creating with authentically engaging in this work.

Future Research

Operationalizing and regularly administering a statewide music census is a crucial step in accurately capturing and measuring Washington’s music industry. The WMC will help create a pipeline of historical data that will allow the state and other advocates to advance policies that support the equitable growth of Washington’s music industry. However, to ensure that WMC is as representative and equitable as possible, we recommend that Commerce and King County continuously explore ways to improve their engagement with those that have been historically underrepresented in the music industry. To ensure that future economic impact analysis captures the lived experienced of the community, we recommend condition additional interviews to supplement and support findings from the WMC. Research questions to consider for future qualitative research that highlights lived experiences and complements quantitative data from economic impact analysis are listed below:

1. *What brought you to this career?* Justification: Start out with a simple, welcoming question to make participants feel comfortable and at ease
2. *What does work in the music industry mean to you?* Justification: Gather context around why participants engage in this industry

3. *How would you describe the role that community and networking play in your career?* Justification: Prompt participants to start thinking about the music industry within the context of their community and personal experiences
4. *How would you describe your experience accessing resources and support for economic opportunities in your industry?* Justification: This question starts addressing the purpose/research question by encouraging participants to think about accessibility and economic opportunities
5. *What challenges or barriers have you faced operating within the music industry?* Justification: This question acts as a follow up to the previous question, prompting participants to consider specific barriers they may have experienced on a personal level
6. *What has been your experience with this industry providing equitable economic opportunities for businesses or individuals from diverse backgrounds?* Justification: This question encourages participants to think about the music industry on a more systemic level
7. *What does 'historically underrepresented' mean to you within the context of the music industry?* Justification: Define what 'historically underrepresented' means within the context of the music industry, from those with firsthand experience
8. *Are there any specific resources or programs that you believe would help support underrepresented individuals and businesses in this industry?* Justification: Address second part of research question by identifying strategies for improving equitable support and growth of the music industry
9. *What does an equitable music industry look like in your opinion?* Justification: End interview on the bigger picture, and provide context for long-term policy/program goals

SUMMARY

We hope that the input gained from the policy implications and future directions can help inform the next iteration of the Washington Music Census. With the right tools and next steps provided, the census design and administration can be adequately researched and built out, keeping equity considerations for both underrepresented and rural communities in Washington State in mind.

VI. Conclusion

The WMC represents a monumental step in holistically understanding and addressing the multifaceted needs of Washington's diverse music economy. This capstone project, undertaken by the Evans Team in partnership with Commerce and King County, has been crafted to ensure that the voices of all stakeholders, particularly those from underrepresented communities, are heard and valued in creating the WMC. Through literature reviews, stakeholder interviews, focus groups, and beta survey testing, we have gained valuable insights into the challenges and opportunities facing musicians, venue operators, and other key players in Washington's music ecosystem. Our extensive research and engagement efforts have underscored a clear theme: the music industry in Washington is as dynamic as it is diverse, and it requires nuanced, equitable policies to foster sustainable growth and inclusivity. Tailoring the WMC to reflect these themes is vital for encouraging equitable growth and successful policy outcomes in Washington's creative economy.

The findings from this project highlight several critical areas that demand attention and action. These include better financial stability and health standards for musicians, more inclusive and accessible venue practices, and comprehensive support systems that recognize and address the unique challenges faced by underrepresented and rural communities. Our recommendations on survey design, building trust, establishing champions, and communication provide a robust framework for designing, implementing, and assessing the WMC in an inclusive, representative manner. At the heart of our research is the recognition that the WMC is not just a data collection exercise but a transformative tool for advocacy and change.

By capturing the lived experiences and economic realities of those working within the music industry, the WMC can inform policy decisions that benefit the creative community directly and have a lasting impact. By designing the WMC survey in this manner, advocating for policies that provide economic security for gig workers and ensuring equitable access to resources and opportunities across the state become more tangible and within reach. The WMC has the power to shape a more inclusive and vibrant creative economy in Washington. By embedding an equity framework into every stage of the census, from survey design to data analysis, we can ensure that the resulting policies reflect the true diversity of the music industry. This approach not only addresses historical inequities but also promotes a thriving music ecosystem that supports artists, enhances cultural richness, and drives economic growth in Washington.

In conclusion, the successful implementation of the WMC hinges on the commitment of policymakers, industry leaders, and community stakeholders to prioritize equity and inclusion. The recommendations provided in this report offer a clear roadmap for achieving these goals. By leveraging the insights gained from our comprehensive research, the WMC can catalyze meaningful policy changes that elevate the voices of underrepresented musicians and contribute to a robust and equitable creative economy in Washington. As we move forward, we will continue to engage with the music community, build on the foundations laid by this project, and advocate for policies that support the diversity of Washington's music industry. The Evans Team is confident that the WMC will lead to transformative outcomes with continued effort and collaboration, ensuring that Washington State leads nationally and becomes a role model for the creative economy sector.

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Appendix

APPENDIX A:

Table 1

Washington Creative Economy Gross Domestic Product (GDP): 2019

State of Washington Creative Economy - Industries	Total GDP	GDP Per Capita
Creative Technology	\$89,607,297,008	\$11,767
Architecture and Living Spaces	\$9,347,801,149	\$1,228
Fashion	\$7,548,592,133	\$991
Publishing	\$5,474,829,158	\$719
Culinary Arts and Beverage	\$4,910,021,805	\$645
Music, Theater, Dance, and Visual Arts	\$4,725,154,129	\$621
Design and Advertising	\$2,309,782,506	\$303
Cultural Institutions	\$1,311,467,424	\$172
Creative Economy Total	\$119,246,980,389	\$15,680
State Economy Total	\$609,036,281,410	
Creative Economy Share State Economy	19.6%	

APPENDIX B:

Table 2

Interview Thematic Breakdown, Key Takeaways, & Influence on Recommendations

Interview	Key Takeaways	Influence on Recommendations
Nate Omdal (MLK Labor State Council Trade Rep)	<p>Geographic Diversity: Engage with music stakeholders across diverse regions, from urban centers like Seattle to rural areas like Centralia and Spokane.</p> <p>Representation of Underrepresented Groups: Focus on groups traditionally overlooked in music industry studies, such as middle-aged professionals and educators, not just young, emerging artists.</p> <p>Policy Advocacy for Economic Contributions: Advocate for policies that recognize the economic contributions of gig workers, similar to California's paymaster system, to formalize income via W2 tax filing and make it visible for state benefits.</p> <p>Future Incentives for Census Participation: Communicate the direct benefits of survey participation, such as potential policy changes that could improve financial security and access to benefits.</p> <p>Timing for Survey Distribution: Distribute the census during slower business periods, particularly after tax season, to maximize response rates.</p>	<p>Develop Targeted Outreach Strategies:</p> <ul style="list-style-type: none"> • Recommendation: Implement tailored outreach programs for underrepresented and rural communities, leveraging local champions and stakeholders like Nate Omdal to enhance participation and trust. • Rationale: Nate's connections and willingness to help could be instrumental in reaching diverse music industry participants across the state. <p>Policy Advocacy for Economic Security:</p> <ul style="list-style-type: none"> • Recommendation: Advocate for state-level policies that create a paymaster system or similar structures to formalize gig income, making it visible and eligible for state benefits. • Rationale: This could provide economic security for gig workers, as emphasized by Nate, and could help gain broader support for the census by showing tangible benefits to participants.

	<p>Specific Policy Suggestions: Recommend policy changes like reclassifying gig income to alleviate tax burdens and recognizing musical instruments as professional tools like other trades.</p> <p>Formalization of Gig Work: Emphasize the need for legal recognition and proper classification of gig work to enhance advocacy and support structures for music professionals.</p>	
Seattle Music Commission	<p>Evaluate the contract-worker/gig-worker space within the music industry: How many 1099 workers does a venue use over the course of a year?</p> <p>Most music and performing spaces are 21+ and are inaccessible to youth</p> <p>There is a stigma for the performing arts being a “low-paying” or “unstable” source of income or opportunity.</p>	<p>Advocate for and create a guaranteed basic income for musicians and performing artists within the WA music industry:</p> <ul style="list-style-type: none"> • Recommendation: The creation of a guaranteed basic income can reduce the gap in meeting essential needs like access to housing, healthcare, and education. • Rationale: 1099 work can be dependent on hours available, venue operations, and season schedule. This instability cannot be a long-term solution in

	<p>Accessibility within the built environment: For venues and spaces in cities, how can public transportation and walkable neighborhoods increase access to shows, events, and concerts?</p>	<p>providing a livable wage in cities with a medium to high cost of living.</p> <p>Advocate for the creation of all-ages venues:</p> <ul style="list-style-type: none"> • Recommendation: The creation of all-ages venues can provide more equitable access to music and the performing arts. • Rationale: 21+ venues cannot fully accommodate youth performers and musicians due to regulations on alcohol sales to minors. Eliminating this for venues that do not sell alcohol can alleviate the burden for youth to find spaces to perform.
Shannon Wells	<p>Capturing all Roles: Acknowledging and valuing roles beyond musicians and managers, such as venue staff, security, technicians, merch sellers, and other support personnel - roles that are integral to the music ecosystem but often overlooked.</p> <p>Value Beyond Monetization: Recognizing the intrinsic value of music beyond its commercial aspects, honoring that music holds meaning and significance beyond its monetary worth, and people are drawn to the industry for its creativity, excitement, and meaningful experiences.</p> <p>Economic and Financial Challenges: Importance of capturing the challenges faced by gig workers in the music industry, including low wages, lack of benefits, and inadequate support systems like the unemployment</p>	<p>Survey Design</p> <ul style="list-style-type: none"> • Recommendation: Include roles beyond musicians and businesses owners in survey • Recommendation: Ask survey questions that capture the social and economic challenges musicians face (i.e. questions around financial stability, health insurance etc). • Recommendation: Simplify language for businesses reporting on employee hours (don't use FTE). • Recommendation: Clearly define who is eligible to take the census survey and make sure not to use alienating language. This will help ensure the survey is capturing those that don't see themselves as professionals, but still earn some income from working in the music sector. • Recommendation: Include questions that prompt participants to consider equity

	<p>system and the financial risks and instability faced by many workers in the industry, particularly during times like the pandemic.</p> <p>Lack of Safety Net: Data that captures barriers workers in the industry face accessing health insurance and earning livable wages.</p> <p>Policy Implications: How can data survey and data collection be used to inform policy decisions and attract funding to address the needs of the everyday people in the industry, rather than focusing only on the industry's economic output</p> <p>Nuanced Narrative: Paint a fuller picture of the music industry and the experience of those working in it. Communicate who is hurting and struggling in the industry, and the implications for the music ecosystem at large.</p> <p>Non-Traditional Employment: Ensure survey accurately captures the non-traditional nature of employment within the music industry, particularly in venues where many workers are part-time and employed across multiple establishments.</p> <p>Employee Count vs. Full-Time Equivalent (FTE): Using FTE metrics in data collection may not accurately represent the employment landscape in the music industry, where many workers are part-time. Taking a</p>	<p>issues, particularly workforce development for business I</p> <p>Outreach and Engagement</p> <ul style="list-style-type: none"> • Recommendation: Develop a compelling narrative around why people working in the music industry sector should care about the census. Tie narrative back to important policy issues and the lived experiences of those working in the music sector. <p>Future Analysis</p> <ul style="list-style-type: none"> • Recommendation: Use future analysis as an opportunity to highlight disparities within the music sector and advocate for policies that champion fair compensation for creative professionals. • Recommendation: Ensure future analysis doesn't focus solely on economic impact, but paints a picture of the social and financial experience of those that make up the industry. Pair survey data with more in depth qualitative interviews that capture lived experiences regarding equity, financial security, health, and community.
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	<p>more straightforward approach to counting employees may help avoid misrepresentation.</p> <p>Defining Hobbyists vs. Professionals: Categorization within the music industry is complex, individuals may engage in music-related activities with varying degrees of commitment and aspiration. There is a gray area that exists between hobbyists and professionals.</p> <p>Private vs Nonprofit: Recognizing the difference in perception and priorities between the nonprofit and for-profit sectors within the music industry. For-profit entities, such as music venues, may prioritize profit-making and audience demographics over equity and inclusivity.</p> <p>Workforce Diversity and Hiring Practices: There is a lack of diversity in the workforce of music venues, particularly the dominance of white males in management positions. Additionally, hiring practices within the industry often rely on word-of-mouth referrals, leading to homogeneity in staff demographics. Furthermore, the venue industry often hires and promotes unqualified individuals without providing adequate training for effective management and supervision.</p> <p>Barriers to Participation: Systemic issues, such as inadequate HR practices and a lack of commitment to equity and</p>	
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	<p>inclusion, hinder the participation of marginalized groups in many spaces within the industry.</p> <p>Workforce Development and Equity Training: Workforce development initiatives that focus on training owners and managers of music businesses in areas such as HR practices and equity could help address systemic barriers to diversity and inclusion within the industry.</p> <p>Storytelling and Communication: Need for compelling narratives to motivate participation and convey the importance of the data collected and the benefits of participation, beyond just monetary considerations. Foster a sense of ownership and commitment among participants.</p> <p>Narrative Framing: Ensuring nuanced discussion of data in future reports that acknowledges differences between sectors such as fine arts and technology. Address disparities and advocate for fair compensation for creative professionals, especially those in underpaid sectors like fine arts.</p> <p>Tech Sector Inclusion in the Creative Economy: Clearly distinguish the experiences and disparities between tech sector within the creative economy and other creative fields. Don't present a skewed picture of the creative economy's overall economic impact and the financial experience of those in it.</p>	
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<p>Cascadia Music Corridor (Music Oregon Music Idaho Music Alaska)</p>	<p>Survey Administration - Business Categorization: There are many ways businesses can be connected to the music industry and there is not one singular role or sector that they neatly fall under.</p> <p>Survey Administration - Survey Fatigue: Surveys can be inaccessible due to their length of time to complete and complex questions.</p>	<p>Identify Overlap and Gather Feedback from those in the Music Industry:</p> <ul style="list-style-type: none"> • Recommendation: Allow a business owner or artist to self-identify under multiple roles or sectors in the census. • Rationale: This allows businesses and artists to be tagged geographically for future analysis. This also allows questions to be delineated by business categories and participants can provide iterative feedback on questions. <p>Focus on priority questions and do not overburden census takers:</p> <ul style="list-style-type: none"> • Recommendation: Try to cut the survey time down to less than 15 minutes and keep questions as concise as possible. • Rationale: Decrease survey fatigue by implementing steps to ensure an accurate and representative count.
<p>Michael Igano (Big Secret Collective)</p>	<p>Integrating Underrepresented Groups: Highlights the gap between local and major acts, advocating for policy advocacy that includes diverse groups to help local music thrive.</p> <p>Engagement Depth with Programs: Criticizes the shallow engagement of state and federally-run programs with local scenes, emphasizing the need for deeper connections.</p>	<p>Advocate for Enhanced Engagement with Diverse Musical Communities:</p> <ul style="list-style-type: none"> • Recommendation: Implement targeted outreach and policy development strategies involving underrepresented groups, youth, and culturally diverse musicians. • Rationale: This ensures that all community voices are heard and their specific needs are addressed, which will help shape policies that foster a more inclusive and thriving local music ecosystem.

	<p>Youth and Venue Accessibility: Discusses the challenges posed by venue age restrictions on youth participation, proposing policy changes and staff training to address these issues.</p> <p>Cultural Inclusivity: Stresses the importance of addressing cultural and language barriers, using events like Festal to support and unify diverse musicians.</p> <p>Building Trust and Effective Outreach: Recommends authentic engagement strategies involving scene-level representatives and suggests using varied outreach methods, including direct venue engagement and event co-sponsorship.</p> <p>Leveraging Established Musicians for Support: Suggests engaging well-known musicians for mentoring programs to support emerging artists.</p> <p>Multicultural Organizations in Census Development: Advocates for involving multicultural organizations like Festal in survey development to ensure inclusivity and effective reach.</p>	<p>Advocate for Inclusive Policies and Venue Practices:</p> <ul style="list-style-type: none"> • Recommendation: Ask surveyors their opinion on policies to adjust venue practices to accommodate younger musicians and address cultural barriers of attendance/performance. • Rationale: Adjusting venue policies and practices will enhance accessibility for musicians of all ages and cultural backgrounds, promoting a more vibrant and diverse music scene. <p>Strengthen Connections Between Programs and Local Scenes:</p> <ul style="list-style-type: none"> • Recommendation: Ask surveyors their opinion on deepening the involvement of state and federally-run music programs with local music communities to ensure support mechanisms are grounded in real, street-level experiences. • Rationale: Enhanced engagement with local scenes will improve the relevance and effectiveness of music programs, supporting sustainable growth and development within the industry.
Washington Nightlife & Music Association (WANMA)	<p>Comprehensive Coverage and Accessibility: Emphasizes the importance of news coverage for events, advocating for less restrictive age policies in venues and improving late-night</p>	<p>Enhance Survey Design for Accessibility and Engagement:</p> <ul style="list-style-type: none"> • Recommendation: Ask surveyors their opinion on policy changes to allow all ages access to music venues similar to breweries,

	<p>transportation options. Calls for better ADA accessibility at venues to ensure inclusivity for all attendees and performers.</p> <p>Inclusive Representation of Industry Workers: Suggests including a wide range of industry workers in the census, such as gig workers, event production and security staff, sound and lighting engineers, food and beverage workers, and support services like ride-share and AV companies.</p> <p>Diverse and Incentivized Engagement: Recommends using multiple trusted platforms across the ecosystem, engaging neighborhood alliances, and partnering with local economic development offices. Proposes incentives like free tickets and visible QR code posters in strategic locations to encourage participation.</p>	<p>enhance news coverage of events, improve transportation options for late-night events, and ensure ADA compliance in venue designs.</p> <ul style="list-style-type: none"> • Rationale: These changes will make music events more accessible and inclusive, promoting broader participation and a more vibrant nightlife that accommodates all community members, including those with disabilities. <p>Expand Census Participant Criteria to Include Diverse Industry Roles:</p> <ul style="list-style-type: none"> • Recommendation: Broaden the scope of census participants to include gig workers, security staff, sound and lighting engineers, and other support roles like food and beverage suppliers and ride-share operators. • Rationale: A more inclusive census that captures the full spectrum of industry roles will provide a comprehensive understanding of the ecosystem, aiding in developing more targeted and effective policies. <p>Optimize Outreach and Engagement Strategies:</p> <ul style="list-style-type: none"> • Recommendation: Utilize multiple trusted platforms for diverse outreach, engage community alliances, and offer incentives like free tickets or
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		<p>exclusive access to encourage census participation.</p> <ul style="list-style-type: none"> • Rationale: Effective and diversified outreach strategies will enhance engagement, ensuring that the census reaches a broad demographic and improving the accuracy and representativeness of the collected data.
Ryker	<p>Roles that are overlooked in the music industry: Importance of acknowledging roles beyond artists, producers, and managers such as music attorneys, creative directors, session musicians, indie labels, and social media marketers, sound engineering, stage management, tour driving, merchandising, hospitality, security, and promoters/talent buyers. Identified a need to create space for more women and more diversity in the industry.</p> <p>Collaboration: Sharing resources, knowledge, and expertise across different organizations and regions is an impactful way to reach people in the industry. Leveraging existing networks and platforms will help maximize outreach impact and reach a broader audience.</p> <p>Community Building and Networking: Opportunities where artists, especially newcomers, can connect with experienced professionals and mentors. This involves creating open and accessible spaces for networking and learning.</p>	<p>Survey Design</p> <ul style="list-style-type: none"> • Recommendation: Include roles beyond musicians and businesses owners in survey <p>Outreach and Engagement</p> <ul style="list-style-type: none"> • Recommendation: Seek out commonly overlooked sectors and roles within the industry when conducting outreach • Recommendation: Collaborate with recording academies, and local organizations, to create networking opportunities and educational events for artists. • Recommendation: Create events and spaces that cater to specific communities, such as queer, indigenous, and people of color (POC) communities. Foster a sense of belonging and safety for marginalized groups by hosting events for networking and use these events to share information and survey. Bring these events to communities outside of Seattle and King County.

	<p>Representation: Need for authentic engagement with communities and leaders who understand the unique challenges faced by their respective groups</p> <p>Geographic Diversity: Not just focusing on major urban centers but also engaging with communities in smaller cities and rural areas, such as Tri Cities, to ensure inclusivity and representation across regions.</p> <p>Addressing Regional Barriers: Empower and support music communities outside of major urban centers like Seattle by hosting events in smaller cities like Spokane and Tri Cities to reduce barriers to participation and provide opportunities for local talent</p>	
Reese Tanimura	<p>Historically underrepresented communities in Washington’s Music Industry:</p> <ul style="list-style-type: none"> • Indigenous artists, folk artists, ethno-cultural musicians, women, non-vocal music, session musicians, Black and Brown communities • Community choirs, church choirs, sacred music • Bookstores (less-traditional music venues) • Professional and Hobbyist musicians <p>Barriers to Participation:</p> <ul style="list-style-type: none"> • Musicians who live in the Olympic Peninsula • Cultural organizers within their spaces 	<p>Recognize the need for livable wages and comprehensive benefits:</p> <ul style="list-style-type: none"> • Recommendation: Establish a performer compensation program that evaluates total income and percentage of income from the performing arts to provide a livable wage with health insurance and holistic benefits • Rationale: Many artists work multiple jobs outside of performing or participating in the arts space. Providing stability through a livable income can narrow the gap between work and life.

	<ul style="list-style-type: none"> • Small-towns outside of the Seattle metro area 	
Terry	<p>Industry Mapping</p> <ul style="list-style-type: none"> • Primary: Artists/musicians → management → publicist/promotion → publishers → agent → attorney → accountant → record label → tour manager → roadies → techs/audio engineer → front of house → bus drivers/truck drivers, equipment loaders, catering, personal assistants/artist handler → music distribution → field/radio promoters → video producers (cameramen, editors, special effects, digital teams), influencers, street team/events work (more entry level) • Secondary: Promoters → ticketing → venues/managers → production manager → tech support (house lighting director, audio, other tech), stagehands, lineman, house managers, ushers, operations team, maintenance team • Studio owners, engineers, producers, interns <p>Engagement and Outreach</p> <ul style="list-style-type: none"> • Incentivize people to participate through outcomes. • Couple census outreach efforts with other industry networking events. 	<p>Expand Census Participant Criteria to Include Diverse Industry Roles</p> <ul style="list-style-type: none"> • Recommendation: Broaden eligibility to capture a broad range of occupations and business types that contribute to the production, distribution, and consumption of music. • Rationale: A more inclusive census that captures the full spectrum of industry roles will provide a comprehensive understanding of the ecosystem, aiding in developing more targeted and effective policies. <p>Incentivize Survey Participation through Community Building and Compensation</p> <ul style="list-style-type: none"> • Recommendation: Community-building efforts such as collaboration with local organizations to create and leverage existing networking opportunities and educational events for artists to build awareness and generate interest in the WMC process. • Rationale: Events and spaces, particularly those that cater to specific communities, such as Black, indigenous, other people of color (POC), queer, and rural communities can help King County and Commerce foster a sense of belonging and safety for marginalized groups, socialize the WMC survey, its importance, and establish or strengthen relationships with potential community champions.

APPENDIX C:

Table 3

List of Interview Questions

Data and Future Economic Analysis:
<ul style="list-style-type: none">• How can we better capture data that is reflective of the diverse perspectives and experiences of those within the music industry?• What indicators or benchmarks would you suggest to measure the success of the outreach and implementation efforts?• Beyond the census itself, what do you believe are the key factors in sustaining engagement and representation in Washington's music industry?
Engaging Rural and Underrepresented Communities:
<ul style="list-style-type: none">• How do you (or your organization) define historically underrepresented communities within the context of Washington's music industry?• What has been your experience with reaching/engaging historically underrepresented communities in your work?• What has been your experience with reaching/engaging rural communities in your work?• In your experience, what barriers in our current systems are preventing these communities from participating? Do you have any suggestions to overcome them?
Community Outreach and Communication Strategies:
<ul style="list-style-type: none">• Which communication channels or methods do you think would be most effective in reaching the music industry community?• What leaders/organizations, especially from rural and/or historically underrepresented communities, should be engaged for outreach and implementation?• Do you know of any leaders/organizations, especially from rural and/or historically underrepresented communities, that might be interested in engaging in our research/planning process?
Organizational Expertise
<ul style="list-style-type: none">• We'd love to hear about recent initiatives/work you or your organization has done to assess the local music industry.<ul style="list-style-type: none">○ What were major successes and challenges you experienced?○ What lessons can we learn from past experiences to improve the design and implementation of this census?

APPENDIX D:

Table 4

Organizations and Individuals to Collaborate with for Outreach & Engagement

Org/Company	Name	Role	Email	City
Inlander	Seth Sommerfield	Music Writer	seths@inlander.com	Spokane
The Chameleon	Josh Lorenzen	Venue Owner	Chameleonspokane@gmail.com	Spokane
rosethrow	rosethrow	Curator	darrimack@gmail.com	Spokane
TPG	TPG Radio	Events Organization	thepalimpsestgroup@gmail.com	Spokane
Spectrum	Spectrum		kj@spectrumcenterspokane.org	Spokane
Amplified Wax	Jimmy Hill	Studio Owner	jimmy@amplifiedwax.com	Spokane
A Frick Take	Jusitin Frick	Videographer	africktake@gmail.com	Tri Cities
Neumos / Capitol Hill Block Party	Evan Johnson	Talent Buyer	evan@daydreamstate.com	Seattle
London Bridges Studio	Eric Lilavois	Studio Owner	info@ericlilavois.com	Seattle
Ruby Room Recordings	Nima Skeemz	Manager / Producer	nimaskeemz@gmail.com	Seattle
The Residency	Luiz Lopez	Program Director		Seattle
Respect My Region	Taylor Hart	Music Journalist	taylorhaart@gmail.com	Seattle
Freakout Music Festival	Ross Albrechtson	Festival Director	ross@freakoutrec.com	Seattle
KEXP	Eva Walker	Artist / Radio Host	eva@kexp.org	Seattle
Cafe Beebe	Nick Beeba	Artist / Curator		Seattle
	Alina Nicole	Manager	Alinaaashleynicole@gmail.com	Tacoma

South Sound Block Party	Christian Greene	Festival Owner	cg@team-tomorrow.com	Olympia
Blue Room	Martijn	Talent Buyer	booking@blueroombham.com	Bellingham
Everett Music Collation		Fisherman's Festival		Everett
Wild Buffalo				Bellingham
McMenamins				Tacoma
Jazzbones				Tacoma
Jazz in the Valley Festival				Ellensburg

APPENDIX E:

Table 5

List of Potential Champions

Champion	Referred By	Role	Org/Business	Contact Info	Location
T.S. The Solution	Ryker	Festival Owner	Roots Festival	tsthesolution@gmail.com	Spokane
Lucas Brown	Ryker	Artist		lucasbrownmusic@gmail.com	Spokane
James Pakootas	Ryker	Festival Owner	Roots Festival		Spokane
Terrain	Ryker	Arts Non-Profit	Terrain	team@terrainspokane.com	Spokane
Lindsey Luna	Ryker	Events Organizer	Sounds of the People	luna@soundsofthepeople.com	Tri Cities
Seth McDonald	Ryker	Talent Buyer	Artist / Seattle World Tour	sethkmcdonald@gmail.com	Seattle
Marshall Hugh	Ryker	Events Coordinator	Marshall Law Band	justmarshallmusic@gmail.com	Seattle
Jessica Toon	Ryker	Executive Director	Recording Academy	Jessica.Toon@recordingacademy.com	Seattle
Jace	Ryker	Community Leader	The Residency / and more	jace@theresidencyseattle.org	Seattle
Ben London	Ryker	Sonic Guild Director	Sonic Guild		Seattle
Mira Kraft	Ryker	Manager / Producer		mira@mirakraft.com	Seattle
SMASH	Ryker	Artist Services	SMASH	Nikki@smashseattle.org	Seattle
Darryl Crews	Ryker	Curator	The January Group / Apple Music	iamdcrews@gmail.com	Tacoma
TeZATalks	Ryker	Artist		tezataalks@gmail.com	Tacoma

Ben Hunter	Terry	Director	Folklife		Seattle
Kevin Surr	Terry	Founder	Timber Festival		Seattle
Karen Hanan	Terry	Executive Director	WA State Arts Commission		Port Angeles
Erica Olson	Terry	Festival Director	Winthrop Blues		Winthrop
Vivian Huang	Terry	Program Manager	Festal - Seattle Center		Seattle
Kim McGyer	Reese				Kitsap Peninsula
John Cooper	Reese	President	Yakima Central Valley Tourism		Yakima
Bruce Skinner	Reese	Executive Director	Washington Festivals & Events Association		Port Angeles
Steven Severin	WANMA	Owner/Captain	Neumos/NIVA		Seattle

Appendix F



PAGE 1

Thank you in advance for participating in the Washington Music Census! Please answer all questions to the best of your ability, and press "submit" at the end. **The deadline is TBD.**

The State of Washington's commercial music economy and impact have never been examined. Existing at the crossroads of business and culture, the economic realities of professional, independent music have never been counted, so your voice matters to understand what the music industry in our state represents. This work is a continuation of state censuses that represent the Cascadia Music Corridor with previous music census survey administrations from MusicOregon, MusicAlaska, and MusicIdaho.

This *brief (<10 minute) ANONYMOUS music census* will collect the state's first quantified information about the economic, employment, and demographic scope of Washington's music economy.

The census will be used by the Washington State Department of Commerce, King County and researchers at the Evans School of Public Policy & Governance (Evans School) at the University of Washington to complete the state's first economic impact studies of Commercial Music and Live Performance. With the information you provide, we can tell our collective story to Washington policymakers and better advocate for music-supporting policies, programs, and funding that our music community deserves.

YOU NEED TO COMPLETE THIS CENSUS IF YOU

- Earn ANY income from any music-related venture,
- Are an income-generating recording, composing, performing **musical artist, or musician,**
- **Teach any form** of music/ music educator (of any age group),
- Own or operate a **business that hosts live music** (everything from a dedicated concert hall to occasional live music programming at a bar or restaurant),
- Own, manage, or work for any kind of **commercial music business**, including (but not limited to) a recording studio, record label, music retailer, instrument or gear maker or fixer, professional support (manager, agent, lawyer, etc.), distribution & marketing, creative support (video, photography, graphic design, etc.).

Once you have finished, please share this link (TBD) via your social channels and with all of your Washington professional music peers to strongly encourage them to do the same by TBD.

Thank you again for helping make Washington State a place where working music businesses and professionals can truly succeed.

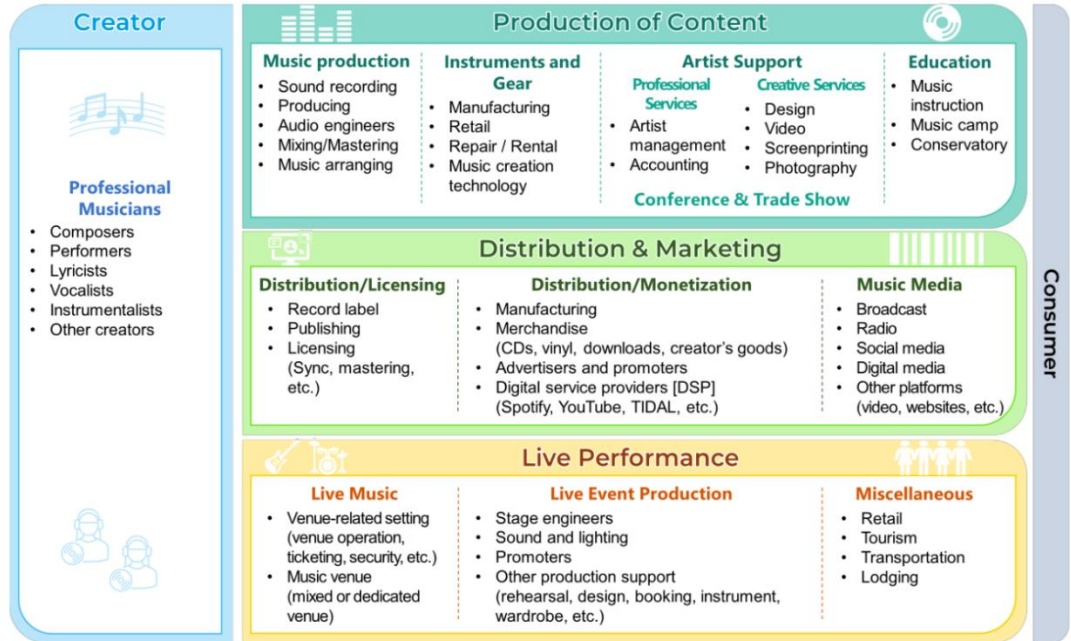
PAGE 2: How Are You Involved?

Tell us how your professional music endeavors impact the economy. We will ask questions specific to the various roles you may play in the music economy.

For all of the questions that follow, please be completely honest. Under or over-reporting can skew results. Remember, this census is completely ANONYMOUS, so there is no reason to be anything but candid. No information about you or your business will ever be linked to your response. All data will be used in a report that combines the totals of all responses.

1. What profession or sector of the music industry are you a part of? Please refer to the chart below to look at roles within each music industry sector/ Select any to all that apply*:

Commercial Music Industry



* Please note, your specific role may not necessarily fit under a specific sector so if you feel that none of these apply select **OTHER**.

- Creator/Musical Artist**
 - Writing and Recording**
 - Marketing and Promotion**
 - Release and Distribution**
 - Working the Copyrights**
 - Live Music**
 - Income Collection and Distribution**
 - Personal Representation**
 - Other**
- Are you a musical artist? Do you earn any income (reported or otherwise) for music you compose, record or perform?
 - Yes
 - No
 - Do you own or manage ANY commercial venture involved in musical instruments or gear, creating, presenting, producing, distributing, or promoting new music in Washington that generates revenue and/or employment for yourself or others?
 - Yes
 - No
 - Are you a non-managing employee or self-employed worker of ANY commercial music venture such as (but not limited to) venue staff, security, stage design and set-up, sound/light/stage technician, business management (e.g., accountant, attorney, personal manager)? (SKIP TO PAGE 8 **Tell us about your work as a non-managing employee**)
 - Yes
 - No
 - How is your business organized?
 - Sole Proprietor / Independent

- b. LLC/General Partnership
- c. Corporation
- d. Nonprofit Organization
- e. None of the above
- f. Do not know
- g. Other
- 6. Do you know about the business' finances, staffing, or other key decisions for the business(es)?
 - a. Yes
 - b. No
- 7. What is your title/role? (optional)
- 8. What are the most pressing challenges or policy issues facing the music industry today? (optional)
- 9. If you are neither an artist nor the owner/manager of a music business, you are unable to participate in this particular survey. If you would like to remain connected to the work of King County and Commerce, please leave your email below.

PAGE 3: Tell us about your work as an artist

- 10. How will you be answering these questions?
 - a. I will answer for my personal income and data not for my entire band or collaborators (Questions 16, 17, & 24 for Individuals) (Q.24 for BOTH)
 - b. I will answer for my entire band as we manage our money as a business
- 11. Did you personally or your band/act/collaborators generate revenue from music in 2019 through the present?
- 12. For both 2019 (if applicable) and 2024, please estimate your GROSS **personal** music income:

(Consider all performance, sales, streaming, licensing, merch, and royalties income before expenses)
- 13. For both 2019 (if applicable) and 2024, please estimate your GROSS revenue as a **band/act/group**:

(Consider all performance, sales, streaming, licensing, merch, and royalties income before expenses)
- 14. How many people are in your band/group (including yourself)?

(this should include performers, consistent crew, tour managers, artist management, booker, etc.)
- 15. Estimate the percentage of your total music revenue that was earned outside of Washington. (consider online music sales, streaming, and out-of-state performance income)

(Please enter a number between 0 and 100)
- 16. Is your career as an artist your primary source of income? (Individual)
 - a. Yes
 - b. No
- 17. How many separate occupations or roles do you have within the music industry that earn you income? Individual (Text Box)
- 18. Check where you have performed professionally
- 19. The Cascadia Music corridor seeks to increase effective touring within the region, including Alaska, British Columbia, Washington, Oregon and Idaho. Please check the Cascadia State(s) or Province(s) outside of Washington where you have performed to date.
- 20. Excluding Covid relief programs, have you received grants between 2020 and the present?
- 21. What percentage of your total music income do these grant awards represent?
- 22. Please share the sources of your successful grant funding (optional)

23. What is the likelihood of...
 - a. Suspending your pro music endeavors altogether?
 - b. Moving (within Washington) to another location to further your musical career?
 - c. Leaving Washington to further your music career
24. Do you or your band/act/group have access to the following benefits? Select all that apply:
 - a. Health insurance
 - b. Dental and Vision
 - c. Parental Leave
 - d. 401k or Retirement Contribution Equivalent
 - e. Mental Health Support/Services

PAGE 4: About Your Business

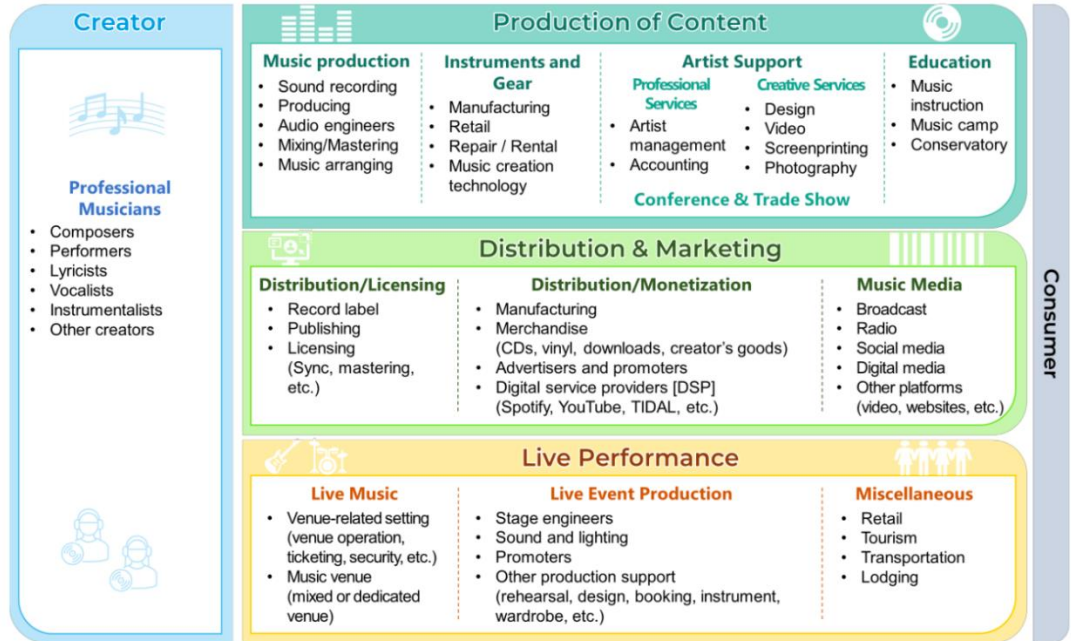
Independent music is a unique industry where professionals tend to have multiple businesses and wear many different hats. With that in mind, this census seeks to capture the maximum economic and employment impact from all music business enterprises to reveal the true scope of the music sector in Washington State.

1. Do you own or manage more than one music business?
 - a. Yes
 - b. No
2. Would you like to complete census data for each business separately or combine the data for more than one business in this census response? *Answer "Select the first option when you still have additional businesses to enter separately, but select the second option when entering data for the last of your businesses."*
 - a. Combine data for multiple ventures into a single response
 - b. Complete a census for each individual enterprise
3. How many different ventures will your combined data represent?

If you are combining data for multiple businesses, please answer the questions such as business category and business zip code to reflect the largest of your enterprises. If it is too difficult to combine businesses, consider changing your approach to enter them separately.

4. Business zip code
5. Year business established

Commercial Music Industry



6. Which category BEST describes your music business(es)?
 - a. Production
 - b. Live Music Venue
 - c. Mixed-Use Music Venue
 - d. Annual Music Festival
 - e. Music Event Promoter
 - f. Instruments and Gear
 - g. Professional Services
 - h. Creative Services
 - i. Distribution
 - j. Music Education
 - k. Music Media
 - l. Other
7.
 - a. Creative Services
 - b. Photography
 - c. Video Production
 - d. Screenprinting
 - e. Graphic Design
 - f. Web Design
 - g. Packing & Merch
 - h. Stylist
 - i. Dancer
 - j. Other
8. Professional Services
 - a. Music Law
 - b. Accounting
 - c. Artist Management

- d. Artist Booking
- e. Publicist / PR
- f. Music Marketing
- g. Social Media Marketing
- h. Other
- 9. Distribution
 - a. Record Label
 - b. Sync Licensing
 - c. Publishing
 - d. Distribution DSP
 - e. Physical Media Replication
 - f. Record Store
 - g. Other
- 10. Music Education
 - a. Private Lessons
 - b. Group Lessons
 - c. Teach in School
 - d. Camp
 - e. Other
- 11. Instrument or Gear
 - a. Manufacturing
 - b. Rental
 - c. Retail
 - d. Repair
 - e. Music Technology
 - f. Luthier
 - g. Other
- 12. Mixed-Use Venue
 - a. Mixed-Use Music Program (hosting live music 2 or more times per week)
 - b. Mixed Use Occasional Music (bar, restaurant, hotel with <2 shows per week)
- 13. Music Venue
 - a. Concert Arena
 - b. Dedicated, ticketed music venue
 - c. Theater/Event Space
 - d. Other
- 14. Studio Production
 - a. Recording Studio
 - b. Producer
 - c. Audio Engineer
 - d. Mixing
 - e. Mastering
 - f. Studio Design & Acoustics
 - g. Music for Film, TV, Games
 - h. Musical Arrangement
 - i. Other
- 15. What percentage of your business is directly or indirectly involved in the music sector?

PAGE 5: About Your Staff

1. Have you had any paid employees (excluding yourself) at any time from 2019 through the present?
 - a. Yes
 - b. No

Washington's commercial music sector **creates jobs**

Our industry employs a huge number of workers in the state, but traditional methods of economic analysis fail to correctly categorize music businesses, leaving our workforce woefully undercounted. To give policymakers a more accurate sense of jobs created by the music industry, provide the information below. If you are unsure, please give your best estimate rather than leaving blank.

VENUES & PROMOTERS: The following questions explore your labor expenditures but please DO NOT include payments made to performers even when paid on a 1099 contract. We will ask about those in aggregate later.

MIXED-USE VENUES - The following questions are for businesses that offer live music performances, but hosting music is not your primary business. This might be a bar or restaurant, a hotel, a coffee shop, a wine bar, or an event space.

2. Total Weekly Operating Hours
3. Total Weekly Operating Hours that feature Live Music
4. On average, how many **additional** staff (including contractors, like sound crew) do you have on duty during live music compared to operating hours without performances?

IMPORTANT - Since you have previously noted that only a portion of your business is associated with the music sector, please complete the following staffing questions for your entire business (music and everything else). we will apply the factor you have given to roughly estimate music staffing

MIXED-USE Venues - If you host live music that happens regularly, but is not your primary business (which might be as a bar or restaurant, coffee shop, or hotel) please list your **total employment** for your business in the fields below. We will use your answers above to calculate your labor specific to music activities.

5. Estimate the number of paid workers (including yourself) in 2019 and 2024 (in none, mark "0")
 - a. # Full-Time W-2 Employees (30+ hrs/week)
 - b. # Part-Time W-2 Employees (including seasonal, less than 30 hrs/week)
 - c. # 1099 contracted workers (excluding performers)
6. Total Expenditure on labor for 2019 and 2024
(This data helps us remind policymakers how much the state earns from income taxes in our sector)
7. What is your primary recruitment method for hiring new employees? Select one:
 - a. Professional referral
 - b. Friends or Family
 - c. Job Boards (Indeed, LinkedIn, Poached)
 - d. Social Media (Instagram, Facebook)
 - e. Hiring Events (Job/Career Fairs, etc.)

- f. Other (please describe)
- 8. Please rank the following issues or challenges from most (1) to least (4) important to the success of your music industry business:
 - a. Public safety
 - b. Lack of workforce development opportunities
 - c. Operational Costs (Rent, Insurance)
 - d. Venue age restrictions
 - e. Other (write-in)

PAGE 6: About Your Revenue

Washington's commercial music sector **creates direct revenue**.

Washington's commercial music sector **creates direct revenue**.

Traditional approaches to economic analysis have failed to accurately assess the Washington commercial music sector because government tracking tools have not kept pace with the evolution of the music industry. A recent analysis of hundreds of well-known music brands by the Oregon State Workforce Agency revealed that more than 60% were not categorized as anything related to music.

These errors have led to severe underestimations of the music industry's economic power. By telling us about your revenue, we can provide policymakers with a much more accurate estimate of the economic impact of music in Washington State. Remember, we will not ask for any business name/identifying information, and these responses are **completely anonymous**.

IMPORTANT! - Since you have previously noted that only a portion of your business is associated with the music sector, please complete the following revenue questions for your GROSS (entire business, including music and everything else). We will apply the factor you have given to extrapolate your contribution to the music economy.

MIXED-USE VENUES - Please give your TOTAL Revenue for your business (including non-music revenue).

1. **Estimated Annual Revenue 2019 and 2024** *(Please be as candid and complete as possible. Consider all revenue streams for your business. Remember that this data is anonymous and will only ever be used in the aggregate to demonstrate the total scope of Oregon's commercial music sector)*
2. **MIXED-USE VENUES ONLY** - Roughly estimate the difference in hourly sales/receipts during operating hours with live music performances compared to the average sales during the hours without music performances.
 - a. I sell half of my normal sales when music is performed
 - b. I sell the same with or without music performed
 - c. I sell 1.5 times as much when music is performed
 - d. I sell twice as much when music performed

- e. *I sell more than twice as much when music is performed*

*Washington's music industry **brings in new dollars.***

Traded-Sector Income is the amount of revenue businesses generate from out-of-state.

*While precise figures may be unknown, **please estimate the amount of your sales/client base that originates from out of state.** This can include not only sales of goods, but services provided to clients from outside Washington, such as out-of-state artists who work with Washington producers and recording studios, albums sold or distributed out of state by Washington record labels, performance tickets sold to tourists, and more.*

3. 2019 Out-of-state business
4. 2024 Out-of-state business

Page 7: Hosting Live Music

Please answer these questions about your live music hosting activities. Whether you are a **dedicated ticketed venue, an annual music festival, a performing arts center, a bar or restaurant with a consistent music program, or a coffee shop with occasional live music**, we'd like to hear about it.

If you own or manage more than one venue ...

You have opted to enter individual census forms to reflect different enterprises, please remain consistent as you complete these venue-specific questions.

Since you are entering combined data about multiple (venue) businesses, please continue to aggregate for the same number of businesses as you described in your revenue section.

1. Is your venue or festival operated as a nonprofit or municipally owned?
 - a. Yes
 - b. No
2. What percentage of our gross revenue is subsidized with grants, government assistance (excluding Covid Relief), or donations?
3. Do you own the venue building?
 - a. Yes
 - b. No
4. How many shows do you host on average NOW?
5. Each
 - a. Week
 - b. Month
 - c. Year
6. How does this compare to the number of live music shows you hosted in 2019?
 - a. More performances now than in 2019
 - b. The same number of performances now as 2019

- c. Less performances now than in 2019
- 7. What percentage of your annual shows would you estimate are booked by promoters from outside of Washington?
- 8. Audience capacity
- 9. Average ticket price or cover charge
- 10. Please roughly estimate, your annual capacity fill rate for music performances for the last few years. *(for all shows you host in any given year, estimate an average fill rate of your total capacity at those shows)*
- 11. Estimated Alcohol Sales Revenue in 2019 and 2024

*Washington's music venues **bring in performers – and their purchasing power***

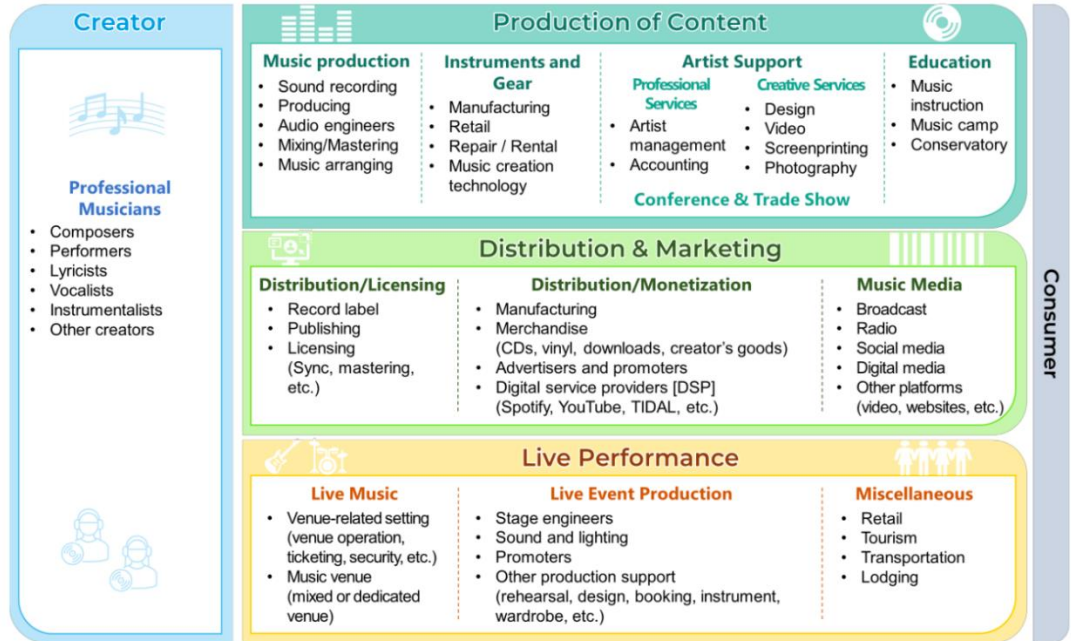
Washington venues bring in tens of thousands of touring artists, and the musicians and crew who come to the state to perform, record, and promote also purchase food, stay in hotels and spend money in ways that contribute to the local economy. However, this impact (called Traded-Sector Income) has never been captured and credited. For example, these types of expenditures by out-of-state film productions have led to millions of dollars in incentives and tax breaks for the film industry. Providing your data helps us to educate policymakers about the full scope of music-generated economic activity.

- 12. How many booked acts per month on average feature performers and crew that come from out-of-state?
- 13. How many individuals (performers and crew) do these touring bands include on average? (Even a very rough estimation will help to convey this ignored, but important, economic impact)
- 14. Festival future plans
 - a. Continue to run the festival as we did pre-pandemic
 - b. Stop producing the festival
 - c. Reduce the size of the festival
 - d. Move the festival within Washington
 - e. Move the festival outside Washington

PAGE 8: Tell us about your work as a non-managing employee

Please answer the following questions if you work as a non-managing employee or staff member in a music industry-related role, such as venue security or staff, bartending, food and beverage, or any non-managing employee or staff role within a commercial music business such as a recording studio, record label, music retailer, instrument or gear maker or fixer, professional support (manager, agent, lawyer, etc.), distribution & marketing, creative support (video, photography, graphic design, etc.).

Commercial Music Industry



- Is your role in the music industry
 - Full-time (30+ Hours)
 - Part-time (<30 Hours)
 - Contractor/Freelancer (Variable Hours)
- Is your role in the music industry your primary source of income?
 - Yes
 - No
- How many separate occupations or roles do you have within the music industry that earn you income? (Text Box)
- For both 2019 (if applicable) and 2024, please estimate your GROSS personal income from the music industry:
- Does your employer provide the following benefits? Select all that apply:
 - Health insurance
 - Paid time off (separate from sick leave)
 - Dental and Vision
 - Parental Leave
 - 401k or Retirement Contribution Equivalent
 - Mental Health Support/Services
- Please indicate how you were connected to your primary music industry employment?
 - Professional referral
 - Friends or Family
 - Job Boards (Indeed, LinkedIn, Poached)
 - Social Media (Instagram, Facebook)
 - Hiring Events (Job/Career Fairs, etc.)
 - Other (please describe)

PAGE 9: About Yourself

Demographic questions are vital to benchmarking our industry for inclusivity and access – issues of significant interest to policymakers. As a reminder: the entirety of this survey, including this section, is completely anonymous and will not be linked to you or your business in any identifiable way. The information you provide will only be used in aggregated reports about the total music economy.

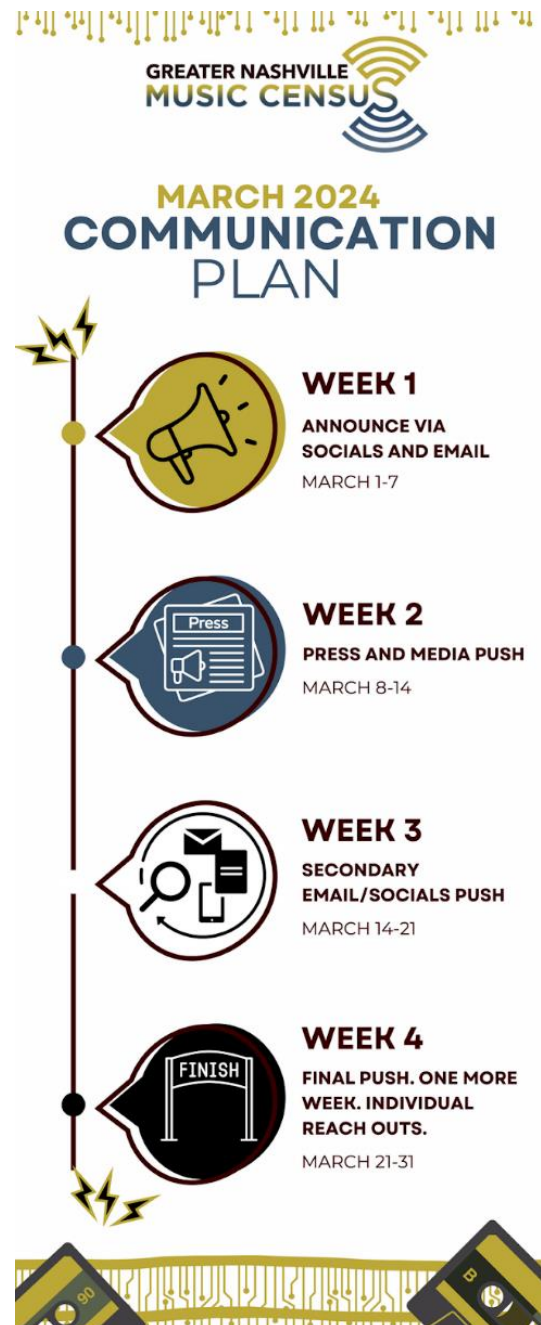
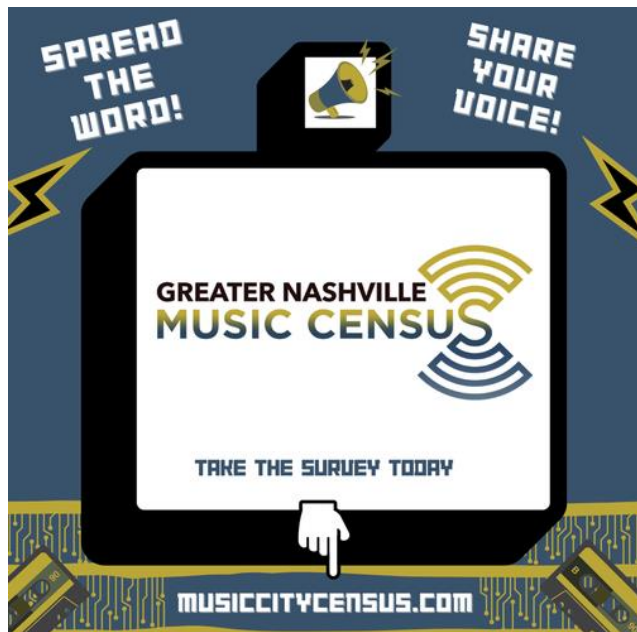
1. How old are you?
2. What is your gender identification?
3. How do you define your race and ethnicity? (select all that apply)

IMPORTANT: If you hope to secure targeted funding or advocacy for YOUR area, then we really need your zip code. Please do not leave it blank or options for investment and support of smaller music clusters across the state are lost.

4. What is your home zip code?
5. Is there anything else you think we should know about your experience or challenges in Washington's professional music ecosystem that this survey didn't give you a chance to share?
6. **OPTIONAL:** Would you like to stay connected to learn more about the Washington Music Census and receive updates on reporting, results, and connect with a wider network within the Washington music community? Please provide your email address here:

Appendix G

Greater Nashville Music Census Communications Graphics





EMBARGOED MARCH 1ST 2024 6AM

Contact:
Jamie Kent
Backstage Strategies
jamie@backstagestrategies.com

Kelly M. Walberg
Community Foundation of Middle Tennessee
kelly@cfmt.org

Greater Nashville Music Census Officially Goes Live

March 1st, 2024, Nashville, TN – With nearly 100 Community Engagement Partners and Creatives Connectors signed on, the Greater Nashville Music Census officially opened its doors today and will begin accepting survey respondents for the next four weeks.

“We are excited to welcome so many important new voices to this initiative,” said Kelly Walberg, VP of Communications for the Community Foundation of Middle TN. “The mix of national, statewide, and local stakeholders is truly a testament to how important our industry views this Census and its potential impact.”

The census is now open to anyone that is over 18 years old and identifies as being a part of Nashville music industry in any way. It is also open to anyone living in the 14 counties in and around Nashville. A full list is available on the census website.

“The Census will officially be live and collecting data for the month of March,” said Chris Cobb, President of the Music Venue Alliance of Nashville. “We are now calling on all of our community partners, friends, neighbors, and coworkers to fill it out and spread the word to every corner of our music industry. It’s time to let our voices be heard.”

Announced only one month ago, the coalition behind the Greater Nashville Coalition has grown astronomically, welcoming the likes of established Nashville power players like CMA and Visit Music City, down to individual creatives hoping to spread the word within their networks.



SOCIAL MEDIA MESSAGING

Calling All Music Industry Pros 📱 Kicking off March 1st, for three weeks, join us online from anywhere, on any mobile device, to shape the future of Nashville's music scene. If you're involved in making music happen, your insights are crucial. To contribute visit >> www.musiccitycensus.com #MusicCityCensus #NashvilleMusicCommunity

Unlock Nashville's Potential 🌟 Let's dive deep into the economic impact and growth of Nashville through the Music Census. If you are 18+ and work in any facet of the industry, please help us understand how to support our city's evolution with policies that resonate. Your voice is vital. Learn more >> www.musiccitycensus.com. #MusicCityCensus #ProtectPreservePromote

A Census for Every Music Professional 🎧 Whether you're an artist, writer, manager, sound technician, merchandiser, agent, buyer, or venue owner ... (you get it) ... we need you! This March, take part in the Greater Nashville Music Census. Let's make Nashville's music scene even more vibrant, together. >> www.musiccitycensus.com #EveryVoiceCounts #MusicCityCensus

Partners Powering Progress 🤝 With nearly 100 community engagement partners and creative connectors, including Music Venue Alliance of Nashville, Nashville Musicians AFM Local 257, Visit Music City, CMA, National Museum of African American Music, Backstage Strategies, TN Entertainment Commission, Belmont University, Community Foundation of Middle Tennessee, Americana Music Association, Broadway Entertainment Association, our coalition is STRONG. But we're looking for more voices to join us! For a list of partners and to help spread the word, visit >> www.musiccitycensus.com. #JoinTheMovement #MusicCityCensus

Diversity in the Spotlight 🌈 How inclusive is Nashville's music scene? From March 1st through March 21, help us gauge the temperature of diversity and inclusivity across our music community through your lived experience as an industry professional. Your feedback is vital. >> www.musiccitycensus.com. #InclusiveNashville #MusicCityCensus

Who's Making Music Happen? YOU Are! 🌟 This March, every voice from every role in the music industry counts. From luthiers to lighting technicians, your experience shapes Nashville's music ecosystem. Be part of the census >> www.musiccitycensus.com. #NashvilleMusicMakers #MusicCityCensus

📢 **Calling All Nashville Musicians and Industry Pros!** From artists to engineers and every role in between, we need YOU to fill out the Greater Nashville Music Census. If you live in and around the Greater Nashville region, this is your chance to impact the future of our music scene. Visit >> www.musiccitycensus.com now. #MakeMusicBetter #MusicCityCensus

GREATER NASHVILLE MUSIC CENSUS

TALKING POINTS

1

WHY ARE WE DOING THIS? - There is wide ranging concern over the direction Nashville's music ecosystem is headed, and how many of its members are being left behind amidst our city's tremendous economic growth. We need data to help back up many of these assumptions and drive real policy solutions that help nurture, protect, and grow all parts of our music ecosystem.

2

WHO IS INVOLVED? - Over 60 orgs/groups have signed on as partners already, including the Community Foundation, Musicians Assoc., Music Venue Alliance, MusiCares, CMA, Lightning100, Americana Assoc. and Black Opry.

3

WHO CAN TAKE CENSUS? - The census will survey anyone 18+ that identifies as being a part of the Nashville music industry in any way. It will also cast a wide net throughout the Greater Nashville region, which includes the 14 counties in and around Nashville.

4

WHEN DOES CENSUS GO LIVE? - The Census goes live March 1st and will be open for 3 weeks.

5

HOW CAN FOLKS HELP? - Spread the word far and wide on socials and email. A social media kit and communications kit have been created to make that easy! Visit link below to learn more and download. **MAKE YOUR VOICE HEARD!**

GREATERNASHVILLEMUSICCENSUS.ORG

Appendix B.3

Washington Music Census Description

In 2024-2025, the State of Washington and King County are partnering to complete the Washington Music Census, a comprehensive, statewide music industry impact study modeled after the recently completed 2023 Oregon Music Census ([Oregon Music Census](#)) and the 2024 Alaska Music Census ([Alaska Music Census](#)). The Washington Music Census will gather quantitative and qualitative data to assess the scope of WA state's music industry, including independent working musicians, music businesses, and music venues statewide. The resulting Washington Music Census report can be used to inform State and local policy and program development to support and grow the industry.

In September 2024, a collective of regional music industry strategists, including OEOCE, were awarded a grant from Washington Department of Commerce to execute the statewide music census in late 2024 and 2025.

The professional music industry in Washington State (including but not limited to music production, venues, manufacturing, professional and creative services, and recording and performing artists) is a tightly woven ecosystem, with each component integral to a vibrant music economy. The industry is an unacknowledged economic driver that has evolved organically, often outside the traditional industry tracking systems.

Traditional tools for economic development have not historically or accurately measured music industry jobs and economic impact. Studies show that the best-known music brands are often miscategorized as non-music businesses in North American Industry Classification System (NAICS) data, making the actual economic impact in the region difficult to define. The Washington Music Census will employ both quantitative and qualitative data to better assess Washington's music industry footprint and impact.

The Washington Music Census will not only quantify jobs and revenue from existing music endeavors, but also present a first look at the trade-sector impact, informing policymakers, industry participants, economic developers, and tourism agencies with data to support collective branding, policy, and programs to support and build the music industry in Washington State. This study will also have a broader regional impact, contributing to the efforts of The Cascadia Music Corridor, a coalition of music industry advocates from Alaska, Washington, Oregon, and Idaho who collaboratively develop strategic, regional vision for the commercial music industry.

UNIVERSITY OF WASHINGTON EVANS SCHOOL OF PUBLIC POLICY & GOVERNANCE STUDY

King County and WA Department of Commerce worked together to recruit a cohort of UW Evans School Master of Public Administration (MPA) degree candidates to conduct critical research needed for the Washington Music Census as their capstone project for their MPAs. Four students partnered with OEOCE and WA Department of Commerce as project coordinators for the study, establishing milestones, deliverables, and timelines. This grad student cohort also engaged in qualitative research and structured the methodology for implementing a statewide music census. Their work initiated in January 2024, and concluded at the end of May 2024.

This study began with a detailed conceptualization of the commercial music industry, which informs economic impact analysis to estimate the economic footprint of the commercial music industry in Washington.

The qualitative phase supplemented the quantitative research with survey and interview data, resulting in a more comprehensive summary of economic activity related to commercial music production in the state. This qualitative research included interviews of selected industry stakeholders.

The Evans School cohort drafted the online survey mirroring Oregon Music Census methodology and beta tested it locally with key industry representatives. They delivered their final capstone report on 5/28/24. This capstone is the blueprint for executing the music census in 2024.

The Evans School report is included in this package as **Appendix B.2**.

Appendix F.1

King County Music Venues



Why Live Music Venues?

At the heart of this region's international reputation and identity is music.

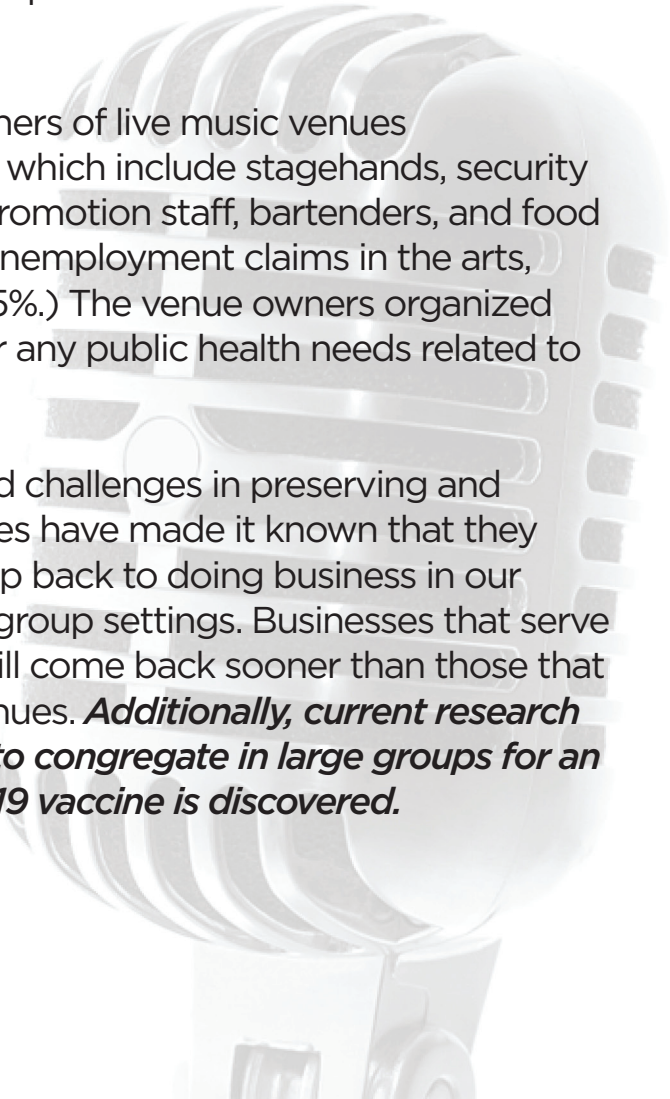
When one travels and talks with people from around the world, one of the things we are known for are our notable musicians. We have been fortunate to have so many legendary performers come from this region – from our jazz greats, to our renowned symphony, to our rock and hip hop giants. What all of these performers had as they made their way to their successful careers, was access to a live music venue, and a stage to perform on.

When COVID-19 came to King County, these independently-owned live music venues, like many small businesses throughout King County, had to close due to government directives. On March 11, most of the live music venues announced their closure within hours of King County Public Health Officer Dr. Duchin prohibiting gatherings of more than 250 people.

By March 16th, they were all closed.

Over the course of the next few weeks, owners of live music venues postponed shows, laid off their staff teams, which include stagehands, security professionals, audio engineers, ticket and promotion staff, bartenders, and food cooks and servers. (Between March 15-21, unemployment claims in the arts, culture and entertainment sector rose 2,375%.) The venue owners organized and offered their venues to King County for any public health needs related to COVID-19.

While many businesses face unprecedented challenges in preserving and sustaining their businesses, live music venues have made it known that they anticipate a particularly challenging on ramp back to doing business in our region, once we begin to socialize again in group settings. Businesses that serve smaller crowds, and have seated venues, will come back sooner than those that serve large, social crowds like live music venues. ***Additionally, current research indicates that the public may be reluctant to congregate in large groups for an extended period of time, or until a COVID-19 vaccine is discovered.***





Live Music Venue Issues

Many of our independent regional live music venues have a business model that relies on touring bands to bring the large crowds that pay the bills, and allow the venues to do smaller shows featuring local musicians. Given that the tours and shows that canceled or postponed were planned and promoted months, if not a year in advance, and given that it is unknown when we will transition back to a state where we are allowed to gather in groups, it is unknown when these venues can begin booking again. ***National tours are canceled, and the live music industry has come to a halt.***

Music venue owners and operators currently have to carry significant expenses (mortgages, rents, insurance, etc) through an unknown number of months in order to preserve their business. With no stay-at-home end date in sight, it makes it extremely challenging for venue owners to calculate whether to take the risk of a time sensitive CARES Act loan. ***Knowing that live music venues will come back on line much later than other businesses with smaller crowds, this presents a unique challenge, laden with significant risk.***

What is the public benefit of live music venues?

- ★ Live music venues are cultural gathering spaces that allow people to come together with a common goal – to witness artists perform, in community with others
 - ★ Live performances are one of the reliable ways for artists to generate income in the age of streaming. Artists rely on performance to build audiences, hone their craft and make an income.
 - ★ Independent live music venues are talent development platforms for regional artists
 - ★ Live music venues are economic hubs that employ music workers, generate tax revenue, and contribute to the nighttime culture and economy
- Live music venues are a core part of a fragile regional music ecology
- ★ Live music venues support the talent that keeps this region on the map as an important music destination, contributing significantly to cultural tourism
 - ★ Our live music scene is commonly used as a talent recruitment magnet by local corporations





Live Music Venue Survey Results

Methodology

A total of 51 responses were collected from independent live music venue owners over a period of two weeks in April 2020. The goal of the survey was to measure the impact of COVID-19 on King County's regional music ecosystem with a specific focus on live music venues.

Summary

Most respondents expressed that the stay at home order has had a profoundly negative impact on their ability to collect revenues. At the same time, many are unable to find financial support to meet their current liabilities. About half of the venues have been able to defer but not waive some costs such as rent, mortgage, utilities, payroll and taxes. Among those that gave details, deferrals tended to be for a period of two to three months. Even absent the threat of COVID-19, many venues expressed that getting back to full operations would take up to a year or more. The combination a long term absence of revenues, pressing liabilities, and uncertainty of when they might resume normal operations, pose an existential threat for many venues.





Quantitative Findings

- Respondents estimate that on average, venues will lose out on approximately \$370,000 in revenue between March 1, 2020 and June 30, 2020¹. Estimated total revenue lost during this period is over \$14 million.
- Over 650 people employed at local venues have been laid off or furloughed.
- The venues that responded estimate that more than 17,000 performers would have graced their stages in King County from March through June, if shows hadn't been canceled due to the stay at home order.
- While a quarter (25%) of venues indicated that they do have business interruption insurance, only 1 venue indicated that they have a policy that covers pandemic related interruption.
- Over the months of April, May, and June, venues have had to cancel or postpone an estimated 2,100 shows².
- Twenty one out of the 51 venues indicated that they've had some expenses waived or deferred. In a follow-up question, only 2 venues indicated that rent, mortgage, utilities, payroll and taxes had been waived.
- Most (76%) of the venues that responded to the survey have applied for the PPP loan.

Comment Themes

- Smaller venues and venues that have been in operation for less than five years are particularly vulnerable. **Smaller venues also help with developing up and coming artists by helping build their fan base.**
- Even when the stay at home order relaxed, **music venues will have a much longer time frame for resuming operations compared to other businesses.**
- Venue owners feel that the services they provide are necessary for **creating a vibrant local music scene.**

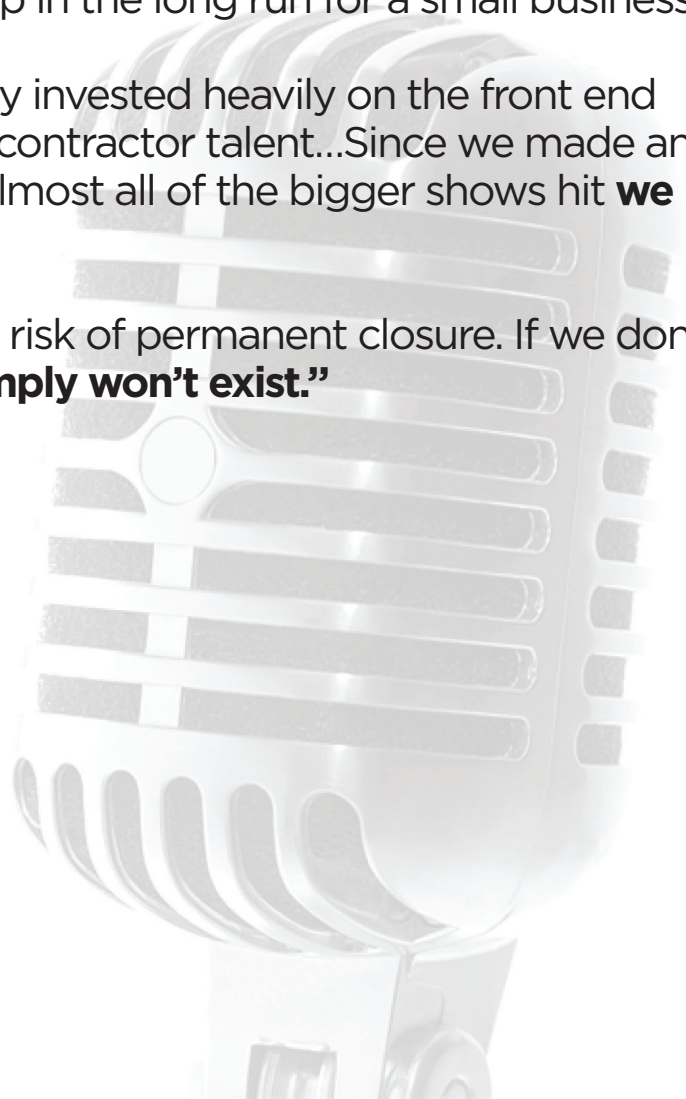
¹This estimate is likely lower than the real number. Where respondents gave a range the mid-point was chosen. Ten of the respondents did not provide an estimate.

²This estimate is likely lower than the real number. Where respondents gave a range the mid-point was chosen. In some cases respondents replied with answers such as "All shows were cancelled". These responses were excluded from analysis.



Selected Comments

Impact on Small Venues

- **“Small music venues assist in developing up and coming artists.** We also aid in nurturing their fan base. Without these venues opportunities for artist and audiences to connect will disappear. If we don’t receive help now many spaces will close permanently and won’t have the ability to reopen. **If we don’t get the help we need now there will be no going back.”**
 - **“The impact on a small music venue like ours is devastating.** We operate as a restaurant as well but the events that we have here are what bring the crowd out and sustain the business. We are also one of the only all ages venues that provide a stage for people of all ages. The loans available are a stop gap but don’t help in the long run for a small business.”
 - “We are a young venue that recently invested heavily on the front end in expansion, growth, and employee contractor talent...Since we made an investment on the front end before almost all of the bigger shows hit **we have really been left high and dry.”**
 - “Small music venues face imminent risk of permanent closure. If we don’t get immediate assistance, **venues simply won’t exist.”**
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Extended timeframe for resuming normal operations

- “Without cash assistance (mostly for rent and also insurance and utilities) we will not be able to last long if mandated business closures continue. **It will also take a while once we can return to business to return to a normal amount of activity since we do touring concert shows and the planning involved will not produce these shows in our venues immediately after the ban is lifted**”
 - “**It could take us as much as a year out before our businesses return to what the new normal is. I’ll be a million dollars in the hole just by the end of the year.**”
 - “Even when we reopen, business may not be as steady as it originally was and **might take months to build back up.** Larger gatherings will most likely not be allowed until a vaccine is available.”
 - “It will take much longer for venues to weather this storm than other types of businesses. We won’t be able to throw open our doors when the social distancing guidelines are lifted. **It will take considerable time for our industry to normalize after this.**”
 - “Going to be a slower rebound for venues and concerts (assuming some sort of an all clear, which frankly I don’t see for many months, and possible have to open with reduced occupancy)”
 - “Once live music venues start reopening there will still be struggles. **These events get booked months in advance. We will not be able to open the doors and have a full calendar.** This will have a serious impact on our revenue.”
 - Our business relies on a web of touring bands/events from all over the world. With much of the world on lockdown indefinitely, **it will be quite some time before we’re able to conduct business as usual.**
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Music venues are part of the community culture

- “We feel that **music is a part of Seattle’s community and culture**, and our duty is to the community. We are all born and raised Seattleites, live and work in the neighborhood that our venue is in, and have been involved with music in Seattle all of our adult lives. We want to continue to serve our community and humbly act as role models to our community, however we really need financial assistance to survive. We’ve put our nest eggs, blood, sweat, and tears into this business and will continue to do so until we can’t any longer.”
 - “**Music is vital to Seattle** and the community of artists that depend on it.”
 - “We are a major industry and contribute a lot of dollars to the economy and immense happiness which you can’t measure. **The Nightlife scene is what makes Seattle what it is.** Imagine no Nirvana? They played on small stages for a long time. We are producing those next bands all of the time and if there’s no venues, then there’s no bands.”
 - “We need to assure our small businesses and artists that they have a place, a PERMANENT place, on the Seattle map, and we need to also plan to ensure this is a community we can always, include, and support because **it doesn’t just support one artist or business owner, it supports our collective mental health and economy.**”
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- “Music IS culture, and the independent music venues throughout King County are part of the cultural fabric that keep the County a vibrant, supportive place for arts and music. **The County will suffer greatly if the only music venues to survive this pandemic are those supported by worldwide corporations...**”
 - “It affects the community, who thrive on an active live music scene - what Seattle and King County has come symbolize to the world. **We need places to gather and celebrate when it is safe to do so again. We need live music venues.**”
 - “Our cherished music scene is built and sustained in these halls and rooms - and they support a vibrant community of staff, security, sound crew, monitoring engineers, promoters and more. **In essence... our music scene would be devastated without their presence.**”



Designed with intent by Mike Klay of
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