

CEP *Creative* E

CITY OF BELLEVUE
CREATIVE ECONOMY STRATEGY
STUDY REPORT



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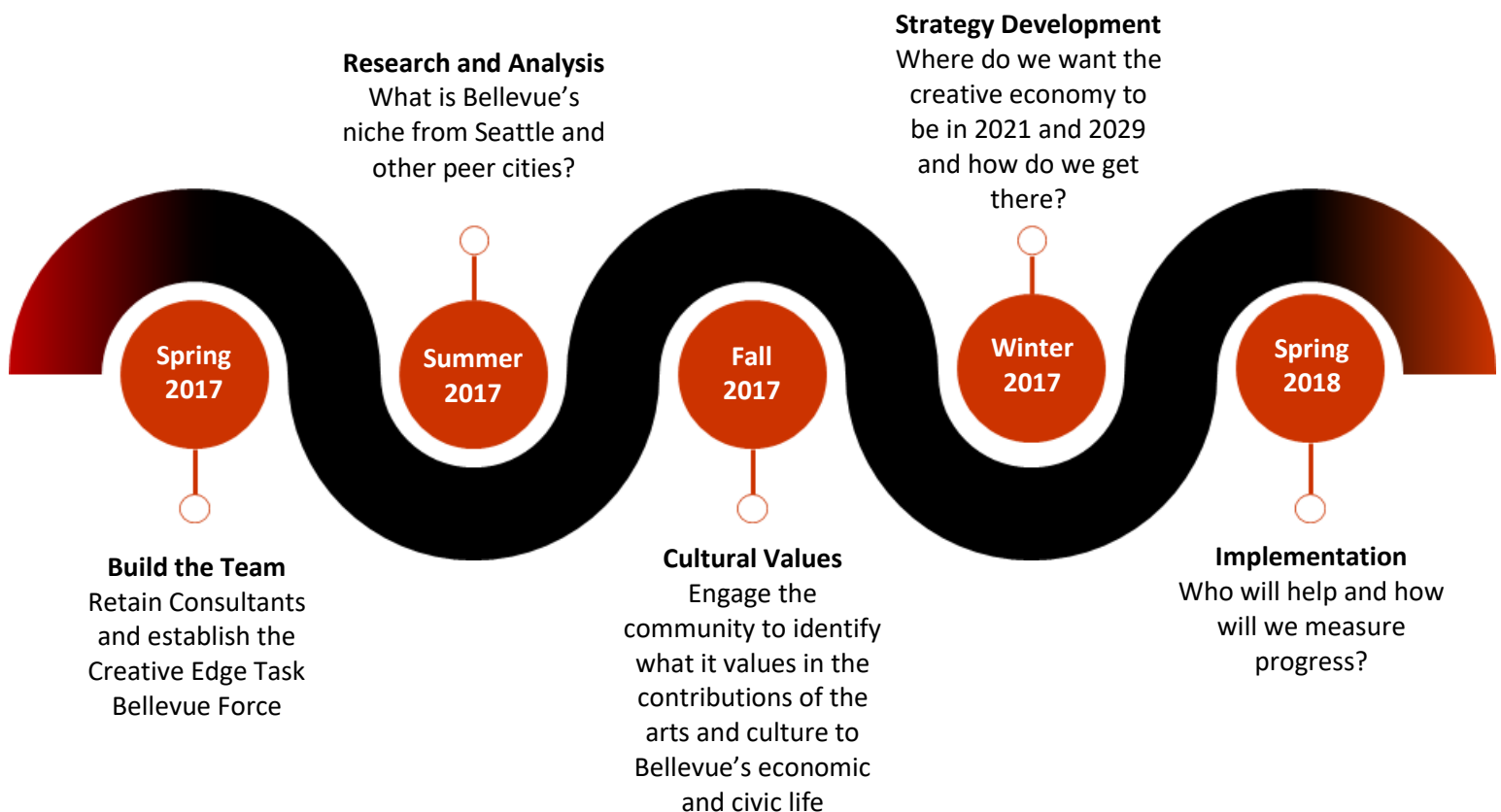
1 Introduction

1.1 Purpose

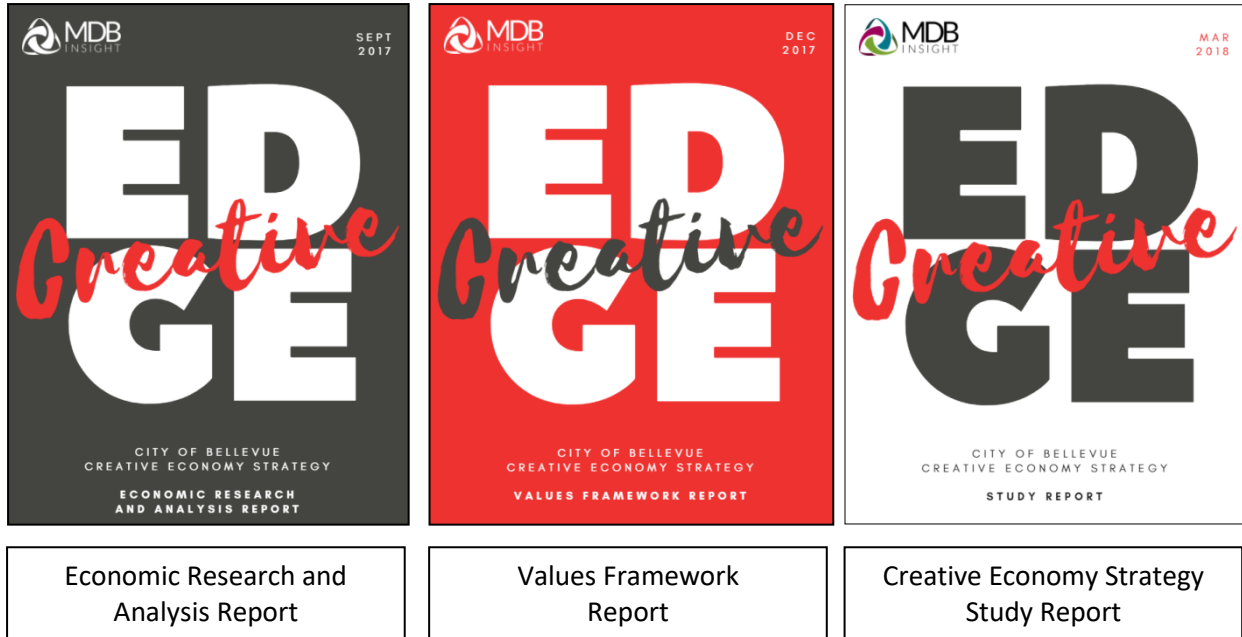
Creative Edge Bellevue is a project initiated by the City of Bellevue to identify how the arts, culture, and creative industries (creative cultural sector) contribute to Bellevue's community and economy. The outcome of the project is the *City of Bellevue Creative Economy Strategy (Creative Economy Strategy)*. Through the *Strategy*, the City of Bellevue seeks to foster a thriving creative sector and provide support for arts and culture, as well as to establish strategic partnerships and identify opportunities to integrate and embed individual artists, cultural organizations, and creative firms as fixtures in Bellevue's economy and civic life.

1.2 Project Process

The project has been implemented in five phases as seen below.



The *Creative Economy Strategy* sets forward a framework of Goals, Outcomes, Short-Term and Mid-Term Strategies and Actions. The strategy is a cumulative document that has been informed by a series of research and data-driven reports that highlight findings from the various elements of the project process. In total, three distinct documents were prepared that inform the *Creative Economy Strategy*.



The process began with an *Economic Research and Analysis Report* (August 2017). This report provided a statistical analysis of the current state of Bellevue’s creative economy, with comparisons to a dozen peer cities in the United States. The report also included highlights from cultural mapping research that identified and spatially mapped Bellevue’s creative and cultural resources.

A second document, the *Values Framework Report* (September 2017) drew forward key findings from the *Economic Research and Analysis Report* which were extended to include conclusions from two sources. The first was a statistically representative telephone survey of creative enterprises in Bellevue. This was followed by interviews with a range of stakeholders from the City (Council and staff), the arts, culture and creative industries sector, and from business, community, post-secondary stakeholders. The Report identified Value Propositions that defined Bellevue’s strengths as a creative economy, together with a series of Strategic Themes emerging from discussions.

Both reports informed a series of meetings and workshops in September 2017. Sessions were held with the Task Force, the Arts Commission, City staff, and a Community Workshop. These discussions affirmed much of what had been learned through earlier consultations while adding new insights and potential strategies for advancing the creative economy in Bellevue.

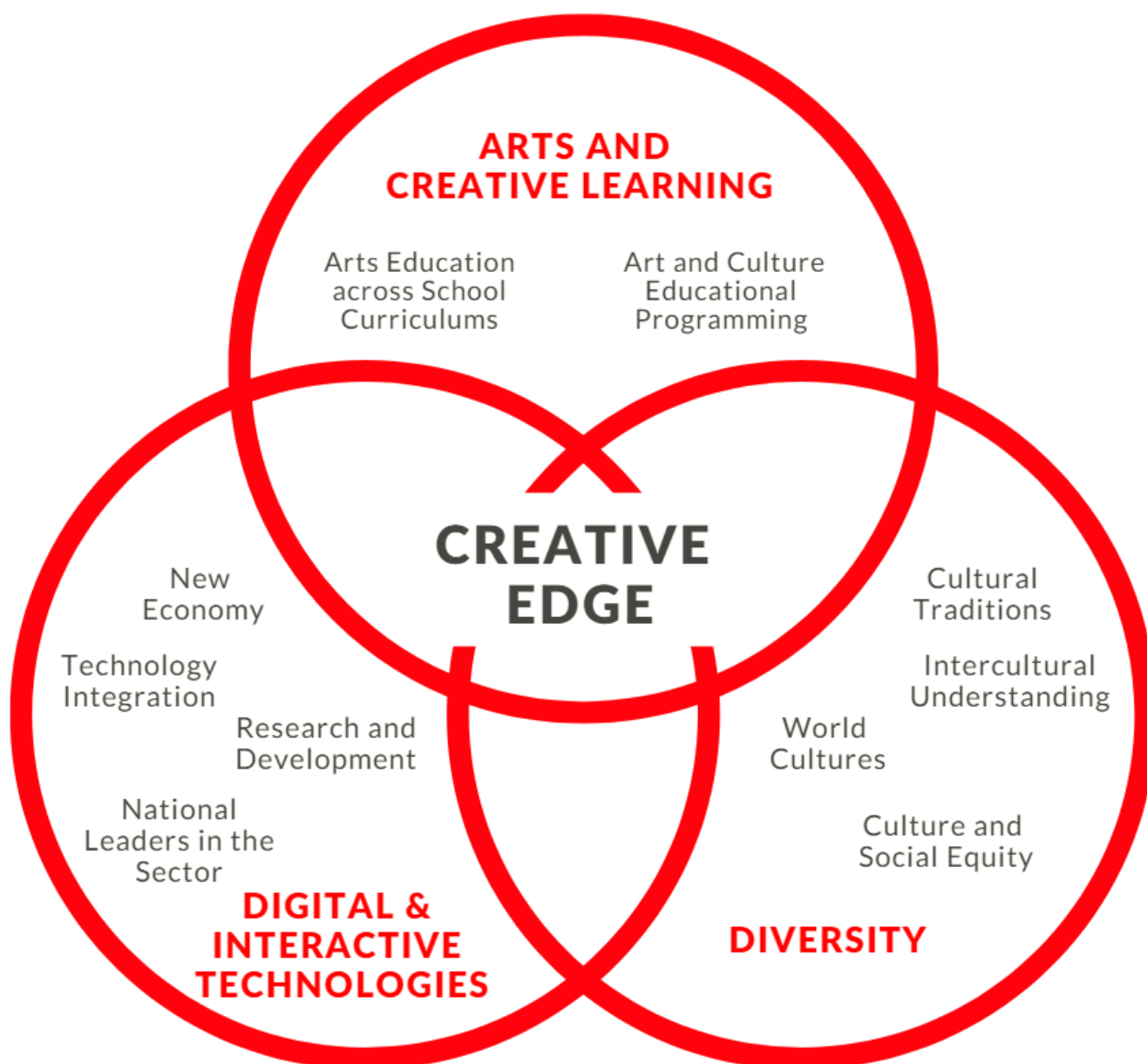
The third document, this document, the *Study Report* (March 2018) is a summary document that synthesizes conclusions and themes emerging from all research and engagement activity. The report is an evidence-based narrative for the *Creative Economy Strategy’s Goals, Outcomes, and Strategies*. An initial report was shared with the Task Force in February 2018. That input has informed this report and the *Creative Economy Strategy*.



2 Identifying Bellevue's Creative Edge

A core research question guiding the development of the *Creative Economy Strategy* has been “what is Bellevue’s creative edge?” The question sought to identify a vision for Bellevue’s creative economy that built on its unique strengths and attributes, and that could position Bellevue with a unique and aspirational identity as a creative city. Bellevue’s proposed creative edge is also the vision that will guide and animate the *Creative Economy Strategy*.

Emerging from the research and engagement activity were three distinct themes.





2.1 Creative Theme: Diversity

Bellevue's diversity is a defining feature of the city and a potentially powerful force in enriching and advancing the arts, culture and creative industries sector. This diversity provides exposure to a wide range of cultural traditions and forms of creative expression. Bellevue has established and cohesive diverse communities. Children from these communities are engaged with the arts through Bellevue's school system which is widely acknowledged as a leader in arts and creativity infused curriculum. Many children from these same diverse communities are engaged in more advanced study through Bellevue's commercial arts schools and academies, the number and quality of which stand out from the surrounding region.

The various communities have developed their own festivals and events that celebrate and preserve cultural traditions and forms of creative expression. These events could be better promoted and made known to other parts of Bellevue's population as one means of fostering greater intercultural communications and engagement. There are also opportunities to build on existing efforts by established cultural institutions and city festivals and events to make diversity a more prominent part of program offerings. The City's current and future public art program have identified as a priority giving the city's diversity greater visibility in public and private spaces in the city.

Finally, opportunities exist to connect Bellevue's diversity with its strengths in digital and interactive media and arts and culture educational programming.

Supporting Evidence

- Between the years of 2010 and 2016, there has been an increase in the proportion of the visible minority population within the City of Bellevue of 9%. Seattle, in comparison, has seen a minimal total increase of 1% during the same period.¹
- Over 40% of Bellevue's population is considered a visible minority.
- Over 35% of Bellevue's population was born outside of the country.
- Bellevue's share of the population by immigrant status is double the national average, suggesting it is also a national destination for immigrants moving to the United States.

Emerging Opportunities

- Bellevue's diversity provides exposure to a wealth of cultural traditions and heritage as well as exposure to diverse forms of contemporary creative expression from around the world.
- Children from Bellevue's diverse communities are actively engaged with the arts through Bellevue's school system which is widely acknowledged as a leader in arts and creativity infused curriculum. Many of these same children are engaged in more advanced study through Bellevue's commercial arts schools and academies, the number and quality of which are exceptional in the region.

¹ Visible minority includes Hispanic or Latino, Black or African American, American Indian and Alaska Native, Asian, Native Hawaiian, other races, and two or more races groups. Source: U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates.



- Various communities have established festivals and events that celebrate and help preserve their cultural heritage and traditions. These events could be better promoted and made known to other parts of Bellevue's population.
- Among the City's public art program is increasing the visibility of Bellevue's diversity in public and private spaces.

Present Challenges

- Recent research on US foundation funding patterns has confirmed that between 2011 and 2017 foundation funding to the arts overall has gotten less not more equitable in the context of diversity and culture-specific arts organizations. A larger percentage of funding is going to large Western European 'high culture' institutions than was the case in 2011.²

Synergies

- Attraction of World Talent
- Creation of Unique Cultural Experiences

A Creative Edge Story: Fuchsia Shoes

Fuchsia is a powerful symbol of the potential to connect diversity with developing creative cultural enterprises and growing the larger creative economy. Fuchsia produces traditional shoe wear made in Sangla Hill, a remote town in Pakistan with a history stretching back to the time of Alexander the Great. Here, each pair of flats is handcrafted in a traditional workshop by a group of artisans who are passionate about using their skills to support their families and community. Pakistani arts and crafts are valued all around the world. Among these arts and crafts is the beautiful range of Khussas (traditional embroidered ballet flats) that are a Punjabi specialty, and from where the inspiration for Fuchsia footwear began!

Afshan Abbas and Rameez Sajwani co-founded Fuchsia in Bellevue. They are committed to sustainable footwear which they describe as follows. "(People) want to know that their purchase actually benefits the artisans behind a product. Sadly, the footwear industry is filled with stories of labor abuse, sweatshop conditions, and unfair wages. But it doesn't have to be that way. That's what Fuchsia's sustainable footwear is all about: high-quality, environmentally responsible shoes which genuinely benefit the artisans who make them".

Additional information can be found at: <https://fuchsiashoes.com/>

2.2 Creative Theme: Digital and Interactive Technologies

The economic analysis confirmed Bellevue's strengths in the digital and interactive media sector. The various forms of digital media are a clear strength in the creative industries, with cross-over opportunities for the non-profit arts and culture sector and for individual artists and creators.

² "Cultural philanthropy is not effectively – or equitably – supporting the dynamic pluralism of our evolving cultural landscape". *Surdna Foundation. Not Just Money: Equity Issues in Cultural Philanthropy*, 2017, pg.1.



The various forms of digital media are among the fastest growing segments of the creative cultural industries globally and highly dependent on a range of artistic and creative disciplines (e.g., visual arts, animation, music, design, etc.). Digital media is also transforming the creation and distribution of a wide range of cultural content – in music, publishing and journalism, live performance, among others. Although companies in the creative cultural industries have historically operated in silos, convergence and interaction has been growing as new digital platforms act as common denominators for both the production and delivery of cultural products. Digital platforms are also blurring lines between non-profit and for-profit creative cultural enterprises.

Interactive digital media such as video games, augmented and virtual reality is a specific area of strength in Bellevue and a sector experiencing exponential growth globally, much of which is also dependent on cultural content. Building stronger bridges from coal artists and creators and this sector is an opportunity that must be advanced by the Creative Economy Strategy.

Supporting Evidence

- Seattle and Bellevue are ranked among the top five regions in the United States for gamer and development opportunities.
- The Massively Multiplayer Online (MMO) gaming market makes supports large number of players, typically at the same instance, across the globe. The MMO was USD 26.9 billion in 2016 and is estimated to reach USD 44.6 billion by 2022.³
- Economic analysis completed for Bellevue Creative Edge confirmed the city's strengths in the digital and interactive media sector in areas such as video games, augmented and virtual reality.

Emerging Opportunities

- Digital and interactive technologies are transforming the way cultural content is being produced, exhibited or staged, distributed and consumed. People speak of the “digitization of the cultural sector” globally. Connecting Bellevue’s strengths in digital media to its arts and culture sector presents a major opportunity.
- Creative cultural industries have historically operated in silos but digital platforms are acting as common denominators driving convergence and interaction in the production and delivery of cultural products.
- The various forms of digital media are the fastest growing segments of the creative cultural sector globally. They are also highly dependent on a range of artistic and creative disciplines (e.g., visual arts, animation, music, design, etc.).

Present Challenges

- Digital platforms are blurring lines between non-profit and for-profit parts of the creative cultural sector opening up opportunities for cross-sectoral connections and synergies.
- Digitization is posing new challenges to copyright and intellectual property laws, fostering an open content movement in which some content creators voluntarily give up some or all of their legal rights to their work.

³ Business Wire. November 15, 2017.



Synergies

- Attraction of World Talent
- Innovation through a Digitized Cultural Sector

A Creative Edge Story: Maja Petric, Ph.D. Digital Artist

Digital technologies are transforming the way art is created and experienced. Maja Petric is an artist working with cutting-edge technology to create transformative spatial experiences. She grew up in Croatia during the violent fragmentation of Yugoslavia. It is then that she became preoccupied with using art to elevate a sense of the surroundings. Maja's work focuses on transforming the poetic experience of space through the experimental use of technology. She explores various artistic methods to manipulate people's senses through which they experience space cognitively and emotionally. Emerging from her work, Maja has developed a body of theory and practice that she now teaches and exhibits internationally. Her work has received numerous awards.

One focus of her current work is on using Artificial Intelligence (AI) as a tool to create public art installations. "AI will shape our world more in the next 100 years than any other technology. The immersive art installations I am developing are intended to reach large audiences and provoke deeper thoughts and conversations about the artistic implementation of technology and its power to impact social change. As a woman working with art and technology, I am also invested in setting an example for young women and encouraging them to become artists, and especially artists working with technology."

Additional information can be found at: <https://www.majapetric.com>

2.3 Creative Theme: Arts and Creative Learning

Bellevue's school system is widely admired for its artistic and creativity infused curriculum. This curriculum is implemented as an artistic ecology that engages students throughout the school year and is linked to a teaching a variety of parts of the curriculum as part of the learning process. Outside the formal school system, Bellevue has an unusually large number (for its size) of commercial arts and culture schools and academies (e.g., music, dance) that offer various levels of instruction, including advanced study. The strength of arts education provides a point of entry to pathways for supporting the emergence of Bellevue-based professional artists nurtured through strategies such as the provision of affordable spaces for rehearsal or performance. Trends in arts and cultural education, particularly at a post-secondary level, is turning toward a creative industry perspective that connects education in a area of artistic practices to skill development in management, entrepreneurship and other competencies contributing to viable careers. There are also cross-over opportunities connecting arts and cultural education with competencies in digital and interactive media.

Digital and interactive media is also transforming how live art and culture programming is being experienced through strategies such as pre-performance or pre-exhibition audience engagement. The same media can also be a creative edge in Bellevue through its integration with public art and cultural programming agendas. The use of digital media in public art can provide immersive creative experiences that could be one of Bellevue's defining features. There are also cross-over opportunities connecting arts and cultural education with digital and interactive media. Education is one of the sectors that has



been most impacted by the emergence and use of these technologies to support program delivery.

Supporting Evidence

- Bellevue's school system is ranked #1 in the state and offers a diverse selection of arts education and related programs. This artistic and creativity infused curriculum is implemented as an artistic ecology that engages students throughout the school year
- Among the 28 arts and culture organizations funded by the City, 16 have a primary mission to provide arts education.
- The Pacific West Ballet School, with a location in Bellevue, is the third largest (by budget size) and one of the most respected ballet schools in the country following closely behind the San Francisco Ballet and American Ballet School.
- Outside the formal school system, Bellevue has an unusually large number (for its size) commercial arts and culture schools and academies (e.g., music, dance, theater) that offer various levels of instruction, including advanced study.

Emerging Opportunities

- Beyond gaining skills in a particular arts practice, educational research has confirmed that education in the arts builds the cognitive skills and capacities needed to excel in an ever-evolving knowledge-based and creative economy.
- Bellevue's strength in arts education and creative learning provides point of entry to pathways for Bellevue-based professional artists if supported by strategies such as providing affordable studio spaces for rehearsal or performance.
- Trends in education in various artistic and creative disciplines, particularly at a post-secondary level, is connecting artistic practice to skill development in management, entrepreneurship and other competencies to support viable and sustainable careers and enterprises.
- Infusing arts and cultural curriculum to reflect the diversity of communities is an opportunity and imperative.

Present Challenges

- Bellevue is not home to a post-secondary school that provided focused arts and creative related programs.

Synergies

- Innovation through a Digitized Cultural Sector
- Creation of Unique Cultural Experiences

A Creative Edge Story: Bellevue Music Collaborative

Innovation in arts and creative learning is a defining element in Bellevue's creative edge. Bellevue Music Collaborative (BMC) is a new Bellevue-based non-profit group dedicated to extending the reach of music education in Bellevue and the larger Eastside community. BMC does this by providing independent teaching artists with the resources they need to support high quality music education and performance.



These resources include space, marketing assistance and collaborative opportunities.

Lisa Deeter, one of the founding members of BMC, describes the group's vision. "We are excited to be formally launching the Bellevue Music Collaborative later in 2018. Independent music teachers are finding it an ever greater challenge to stay in the area with the high cost and lack of available space, but the Bellevue Music Collaborative is poised to meet that challenge, and have a positive impact on our cultural community." Lisa co-founded BMC with Laura Shepherd, Elizabeth Samse, and Eric Samse.

BMC seeks to make Bellevue a community where independent music teachers thrive, creatively and economically, and where their students benefit from collaboration with other young artists. Students study and perform all styles of music, including classical, jazz, musical theater, opera, pop and rock.

Additional information can be found at: www.bellevuemusiccollaborative.org

2.4 The Synergies

Attraction of World Talent

Bellevue's corporate community has demonstrated success in attracting talent from around the world to work in its creative sector. Building a "local" cultural scene that incorporates digital media and profiles the community's diversity can only add to the appeal of the community for talent from around the world. The opportunity may be to attract talent to help grow an entrepreneurial, start-up culture to expand the number of small and medium-sized creative enterprises (in addition to their attraction to large corporate entities). The city's other amenities – its admired parks system, emerging cultural corridors and arts districts can also act as magnets for attracting world talent.

Creation of Unique Cultural Experiences

When people do not see their values and preferences reflected in a place, they feel unwelcome. Creative placemaking puts a particular emphasis on engaging many different stakeholders, listening to their stories, and making recommendations reflective of their specific concerns and desires. Creative placemaking takes into account the need to create safe spaces where groups can celebrate and seek out their cultural peers. This can be fostered through public spaces but also through familiar cultural programming. Programs that offer educational experiences related to the history or the environment of a particular place have been shown to be effective in bringing people together. People want to learn, and when they come together to share the experience of knowledge, social divisions often dissolve. When spaces are programmed to celebrate diverse cultures and histories, there is an even greater impact. The power of learning and exploring should not be underemphasized

Innovation Through a Digitized Culture Sector

Digital and interactive technologies are transforming how live arts and culture programming is experienced through the incorporation of media within performances or exhibitions as well as the use of media to support pre-performance or pre-exhibition audience engagement. The use of digital and interactive media in public art installations could be one defining element of public spaces in Bellevue.

For many years the digitization of museum and gallery collections has been a priority, enabling access to arts and heritage experiences without physical attendance but positioned and presented as an introduction to the experience with actual material culture. Major performing arts companies have been



modeling the presentation of performances through cinemas, in many cases introducing the public to art forms heretofore inaccessible due to cost or attitudes of intimidation (of 'high art').

The Web 2.0 generation expects to participate in the creation of meaning: digital technology has created entirely new means to enable individuals to participate in and exchange the creation and recreation of creative product. Increasingly and especially among the emerging generation of younger artists, digital technology provides new tools with which to explore and develop their practice. "Digital Arts" includes, for example, electronic art, new media and interactive art, content development, digitization, but more generally is applied to contemporary art that uses the methods of mass production of digital media

A Creative Edge Story: Lunchtime Studios

Lunchtime Studios is a game company formed in 2009 with the mission of building high-quality, story-based games that are both innovative and memorable. Like their role-model companies, The Walt Disney Studios and Pixar Animation Studios, Lunchtime Studios puts a their focus on building compelling stories and then innovating the technology needed to realize their vision.

Dan Higgins leads the engineers to build their own game engine, tools and animation technology. "Our goal is to give new life to 2D animation, and allows for dynamic animation -- incorporating body language and reactive elements into what were once static pictures".

In 2014, Lunchtime Studios moved from Boston to Issaquah to be a part of the vibrant tech world growing here in Washington. It was their belief that Washington would one day become the top technology destination in the country, drawing in some of the top technical talent from around the world.

Additional information can be found at: <http://lunchtimestudios.com>

A Creative Edge Story: VX-Inc.

VX Inc. with its Bellevue headquarters is a leader in an exploding Virtual Reality (VR) and Augmented Reality (AR) industry. Kyle Cherry launched VX Ltd. in 2016 with a lofty goal to "shape the industry" by 2020 with a series of products that make AR and VR more accessible and mainstream. VX's flagship product is the Compact Near Eye Display (CNED). It's an augmented reality screen that is compact enough to fit into a standard pair of glasses.

"AR and VR are on the cusp of something great," he said. "While technological advancements have been made in recent years, most have been minor and easily predicted. We are here to make unpredicted change in a big and meaningful way." Beyond the CNED, VX is also working on a 360-degree thermal data sensor and a VR headset that is designed to be more comfortable than other devices on the market.

Additional information can be found at: <http://www.vx-inc.com/>



3 Conditions for Creative Growth in Bellevue

3.1 Measuring Creativity

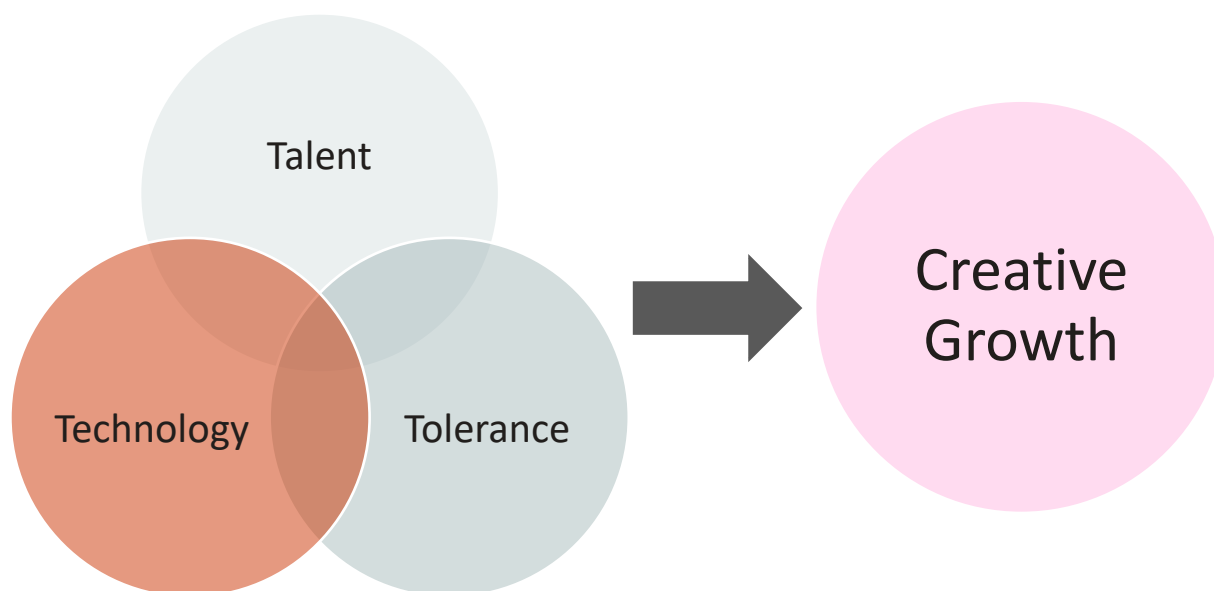
The focus of investigation for the Research and Analysis phase was the examination of the nature and current state of Bellevue's creative economy. The *Economic Research and Analysis Report* provide responses to several core questions identified for the Creative Economy Strategy:

- What is the nature/composition of Bellevue's creative industries?
- What role do creative industries play in the local and regional economy?
- How does creative sector employment compare to employment in the rest of the work force?
- Is the creative sector growing more or less than the rest of the economy?
- What specific creative occupations and industries are most growth oriented?

Answering these questions provides a solid statistical foundation to ground Bellevue's existing conditions for creative growth.

Introducing methods to understand and capitalize on creative economy strategies is a challenging endeavor. Commonly used methods such as judging a community by its total number of creative workers can only provide one perspective on the community's creative strengths. When examining the necessary conditions to support growth in the creative economy, economic developers often look to three types of measures: Talent, Tolerance and Technology (Figure 1).

Figure 1: Measuring Creative Potential



These '3T's' are part of an economic development theory that gives importance to the attraction and retention of creative capital. Creative capital is about the capacity to generate new ideas, concepts, products and processes that lead to unique characteristics and evolving technologies. As a final measure, the 3Ts combine to provide a score for the overall creativity of a community known as the Creativity Index. Communities that have a high creativity index score are well positioned to attract and



retain creative workers and businesses, including those working in the creative industries and occupations.

To examine Bellevue's Creativity Index and overall conditions for economic growth, peer regions and comparable cities were selected to provide a benchmark that Bellevue can track and evaluate over time.⁴ The index is designed to allow for any additional communities to be added into the analysis and benchmarked.

Talent Index

Bellevue's Talent Index is gauged by analyzing its share of knowledge workers and share of the population with a Bachelor's degree relative to the overall work force. Workers who rely on creativity and ideas to produce value are referred to as knowledge workers. These workers are heavily represented in the fields of science, engineering, architecture, design, education, arts, music, and entertainment.

The analysis of Bellevue's Talent Index confirms:

- Knowledge workers make up 38% of Bellevue's total workforce.
- Over 60% of Bellevue's population 25 years or older have a Bachelor's degree or higher.
- Bellevue's educated population is highly focused on Science and Engineering fields, followed (in ranked order) by Art, Humanities and Others, Business and Education.

The scoring suggests that based on these indicators, Bellevue is home to a highly talented workforce.

Tolerance Index

Tolerance is a measure of a community's diversity and openness to new ideas and concepts. Diverse communities are shown to be more open and accepting of different people and thoughts. This openness, in turn, allows more creative ideas to emerge and flow through the economy and the society. The higher a Tolerance Index a community has, the more supportive it is in driving growth in the creative economy.

The analysis of Bellevue's Tolerance Index confirms:

- Over 40% of Bellevue's population is considered a visible minority.
- Over 35% of Bellevue's population was born outside of the country.
- Over 25% of Bellevue's visible minority population have a Bachelor's degree or higher.
- Over 55% of Bellevue's female population have a Bachelor's degree or higher.

The scoring suggests that Bellevue is home to a diverse and welcoming workforce and population.

Technology Index

Communities cannot compete with, or gain access to the global economy without the necessary technology that supports information sharing and high-speed communication. Communities with large, well-developed tech sectors have the resources and capacities to sustain strong economic growth into the future. The Technology Index is based on a jurisdiction's share of high-tech establishments and the ranking associated with the high-tech location quotients.

The Technology Index shows that over 9% of all Bellevue businesses are defined as high-tech. The

⁴ Communities were selected based on total population and similar location characteristics i.e. adjacent to a large regional center. In total 14 communities were selected that have previously been benchmarked against Bellevue using other indicators.

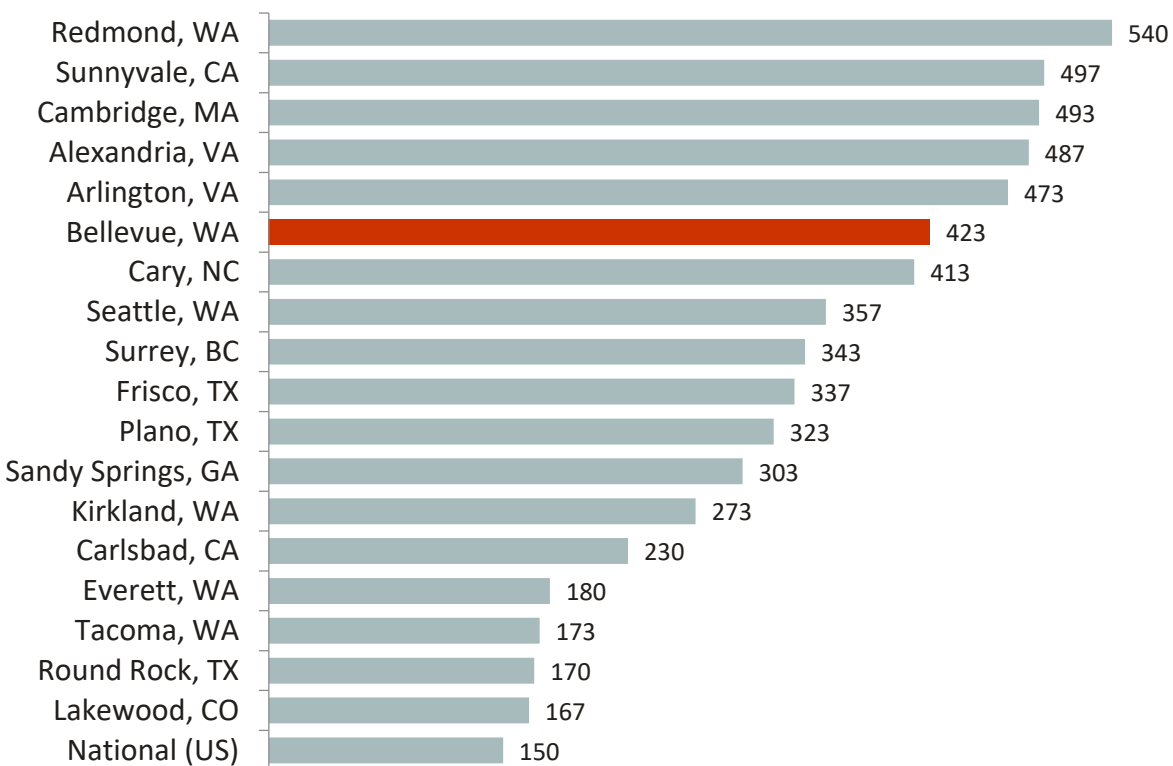


proportion of high-tech firms in Bellevue is greater than Seattle, Everett and Tacoma. This suggests that Bellevue is a destination for high-tech firms in King County. The scoring also suggests that Bellevue has well developed and sustainable tech sectors to support strong economic growth into the future.

Creativity Index

The creativity index is an overall ranking of the selected comparable communities and peer regions based on how well they score on each indicator. By analyzing the Tolerance, Talent, and Technology indices, the Creative Index Score of Bellevue relative to other peer cities is calculated and illustrated in Figure 2.

Figure 2: Creativity Index Score



The Creative Index demonstrates that Bellevue is one of the top jurisdictions in providing an environment that will attract and retain knowledge workers and drive growth in the creative economy.

With the concentration of talent, the diversity of the population that bring new perspectives and ideas, and the concentration of high tech firms, Bellevue is in a highly competitive position to attract and retain the talent and investment needed to support sustained creative economic growth. How to leverage these strengths in the larger economy to support a strong and sector will be a key focus for the *Creative Economy Strategy*.

Creativity Index

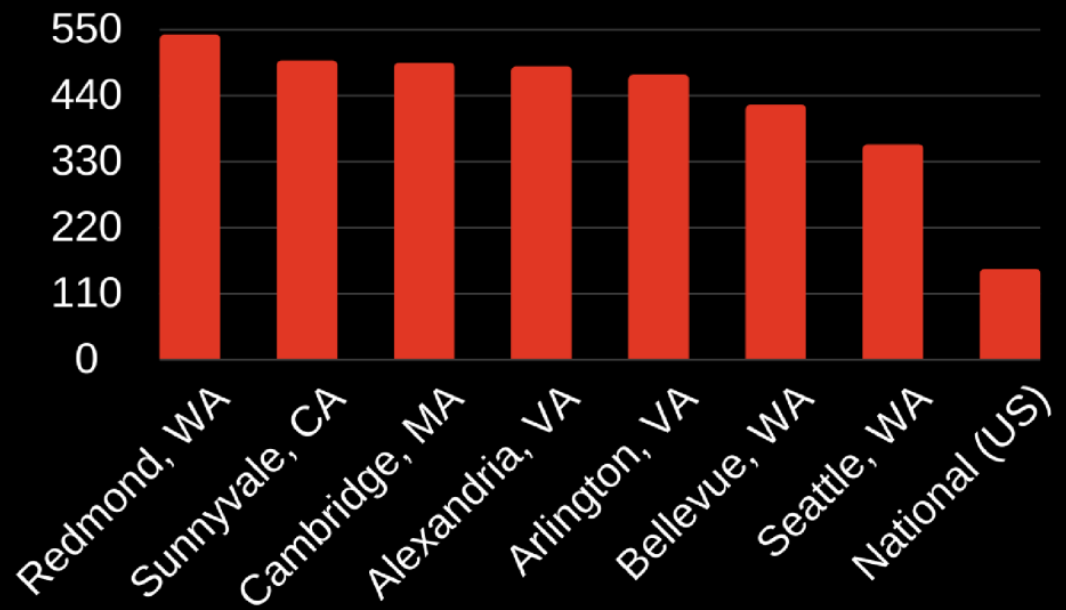
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A Creative Index is a gauge which measures a given community's creative economy by analyzing the amount and capability of its creative assets. Recognizing and quantifying a creative assets is often done through an analysis of the three "T's" of economic development: Tolerance, Talent, and Technology. These categories place the greatest value on the attraction and retention of creative capital. Creative capital differs from human capital in that its value lies not in a capability to produce, rather in an ability to create and develop ideas. The three T's are co-dependent; all three are necessary to promote creative growth, and no single one carries more importance or weight than either of the others. The Creativity Index is a measurement that scores these three levels through a series of indicators and presents a benchmark against select communities.



The creativity index indicates that Bellevue is comparably one of the top jurisdictions in presenting an environment that will attract and retain knowledge workers.

Creativity Index Score



Talent

- Knowledge workers make up 38% of Bellevue's total workforce.
- Over 60% of Bellevue's population 25 years or older have a Bachelor's degree or higher.
- Bellevue ranked 7th on the talent index score.

Tolerance

- Over 40% of Bellevue's population is considered a visible minority.
- Over 27% of Bellevue's visible minority population has a Bachelor's degree or higher.
- Over 58% of Bellevue's female population has a Bachelor's degree or higher.
- Bellevue ranked 7th on the tolerance index score.

Technology

- Over 9% of all Bellevue businesses are defined as high-tech.
- Comparatively, Bellevue has a higher concentration of high-tech firms than the national average.
- Bellevue ranked 7th on the technology index score.



3.2 State of Bellevue's Creative Economy

Data collected from the Census Bureau, Bureau of Labor Statistics, and the National Center of Charitable Statistics reveals the current state of Bellevue's population and its creative economy. Given the limitations of certain data sets, this analysis takes a broader look at the Seattle-Tacoma-Bellevue region and where applicable Bellevue directly.

Creative Industry and Occupation Characteristics

- Overall employment in the creative industries has risen significantly in relation to the overall economy, which has not increased significantly overall since 2007.
- Employment in the creative industries has nearly doubled since 2002. A large contribution to the sector's performance has been the emergence of a strong publishing industry, which includes firms that specialize in software development.
- Creative industries in 2015 are averaging about 1,000 more jobs (job gain) than 2006 figures.
- Individuals aged 25-34 are the fastest growing cohort in creative industries employment, accounting for about 85% of all new creative industry jobs in the region each quarter.
- Creative occupations in the area grew by 37%, triple the rate of growth experienced by the remaining sectors which grew at 11%.
- Creative occupations on average are commanding 44% more wages than the average median wage across the nation.
- Software developers represent approximately 45% of all creative occupations in Seattle-Bellevue-Everett.
- If software developers and computer programmers are removed from the total creative occupation count, the remaining creative occupations are still outpacing other sectors in growth (a 13% increase from 2007). This growth is characterized by significant increases in creative occupations related to design, marketing, and audio and video occupations.

Creative Business Characteristics

- Seattle-Tacoma-Bellevue region is home to 1,576 Creation businesses, 1,628 Production businesses, 948 Support services, 427 Manufacturing businesses, and 484 Distribution businesses.
- Creation industries account for 31% of all creative industries in the region.
- The Creation industries are well supported by the production industries which account for 32% of all creative industries in the region.
- Creation and Production industries continue to grow in the Seattle-Tacoma-Bellevue region, growing by a combined 8% from 2012 to 2015.
- Manufacturing and Distribution industries have begun to decline in the region. A variety of factors could be responsible. One factor to note is the increase in property values and rent in industrial employment areas (traditionally where manufacturing and distribution industries would operate).

Creative Not-For-Profit Characteristics

In 2015, King County accounted for 40% of all not-for-profit creative organizations in the State of Washington. King County not-for-profit creative organizations also secure a significant amount of charitable revenue in Washington State, accounting for 76% of all not-for-profit creative organization revenues in the state.

State of Bellevue's Creative Economy

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The Creative Economy Strategy has revealed palpable energy and excitement related to growth in creative industries and occupations in Bellevue. The data and analysis has showcased that Bellevue and its region are on a decidedly different trajectory in terms of drivers in the local and regional economy that has prevailed in the past. Below are some key findings drawn from the research that indicates the Creative Economy is well and healthy in the region.

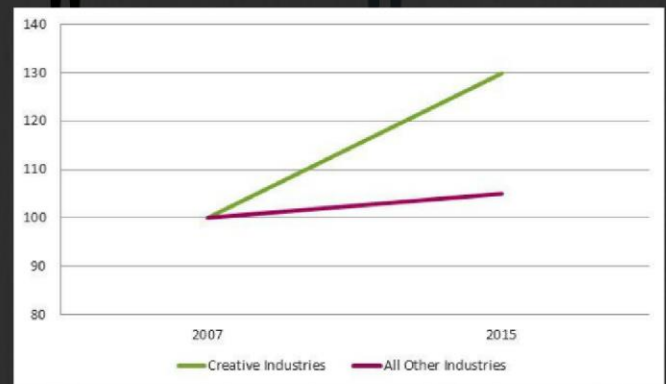


Employment in the creative industries has nearly doubled since 2002.

To place that in perspective, in 2015, the creative industries were averaging about 1,000 more hires (job gain) than 2006 levels.



Creative occupations across the region are also experiencing a shift as trends and technology impact the economy. From 2007-2016 occupations such as designers, architects, and writers were growing while artists, actors and reporters were declining.



Overall employment in the creative industries has risen significantly in relation to remaining economy which has remained largely stagnant in comparison.

Individuals aged 35-54 represented the largest proportion of creative industry employment. However, when examining new hires and total job change, the data highlights that individuals aged 25-34 is the growing trend in creative industries employment, accounting for about 85% of all new creative industry jobs in the region each quarter.

Creative businesses can be characterized into a series of inter-connected processes – which can be referred to as ‘the creative value chain’. Creation and production industries are primarily important in the role of creative idea development in a community.

Production
1,628 Businesses

Creation
1,576 Businesses

Other Creatives
1,859 Businesses



4 Creative Cultural Assets in Bellevue

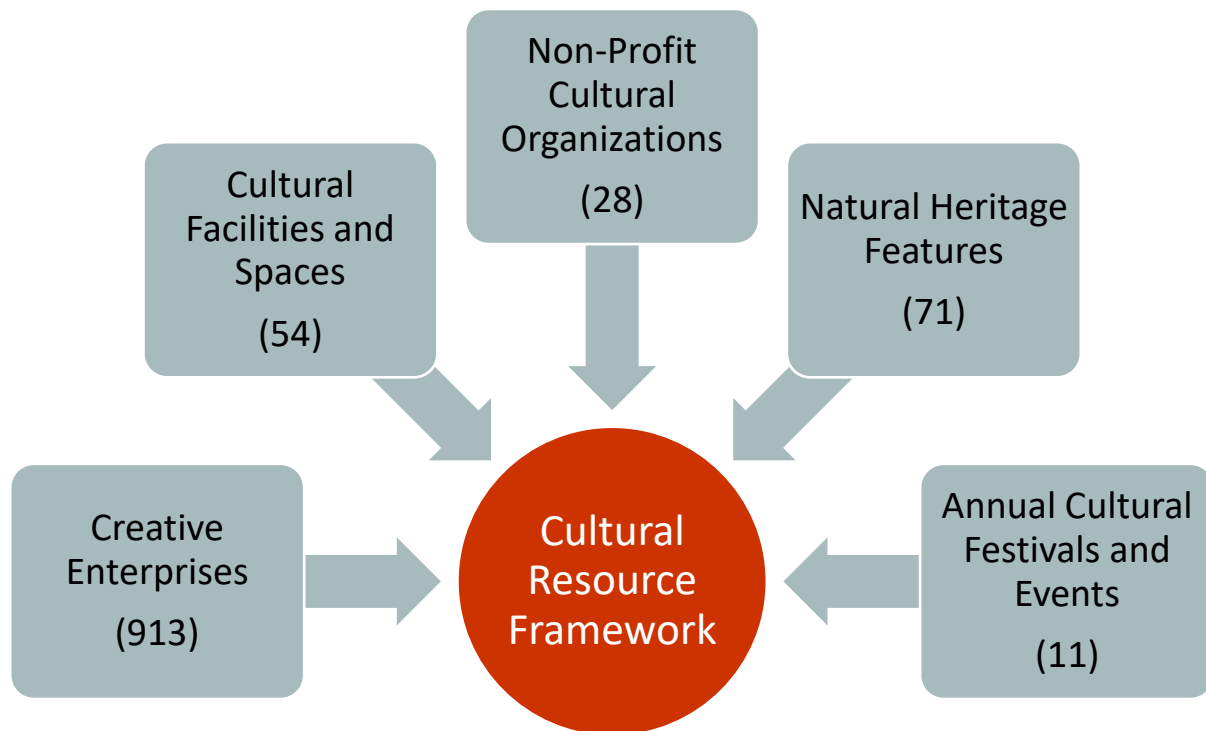
4.1 Bellevue's Creative Cultural Assets

Cultural mapping is an ongoing process that identifies current cultural resources in a community. Mapping provides benchmarks in time against which to assess change in the cultural resource base in a community. It is increasingly being embraced as an essential economic and cultural development tool in cities internationally.

For the purposes of the *Creative Economy Strategy*, cultural mapping is defined as a “systematic approach to identifying, recording, classifying and analyzing a community’s cultural resources”. It involves the spatial mapping of cultural resources using Geographic Information Systems (GIS).

The chart below summarizes the results of this baseline mapping of creative cultural assets across the five categories. The numbers in brackets represent the total number of assets identified in each category.

Figure 3: Overview of Cultural Mapping Findings



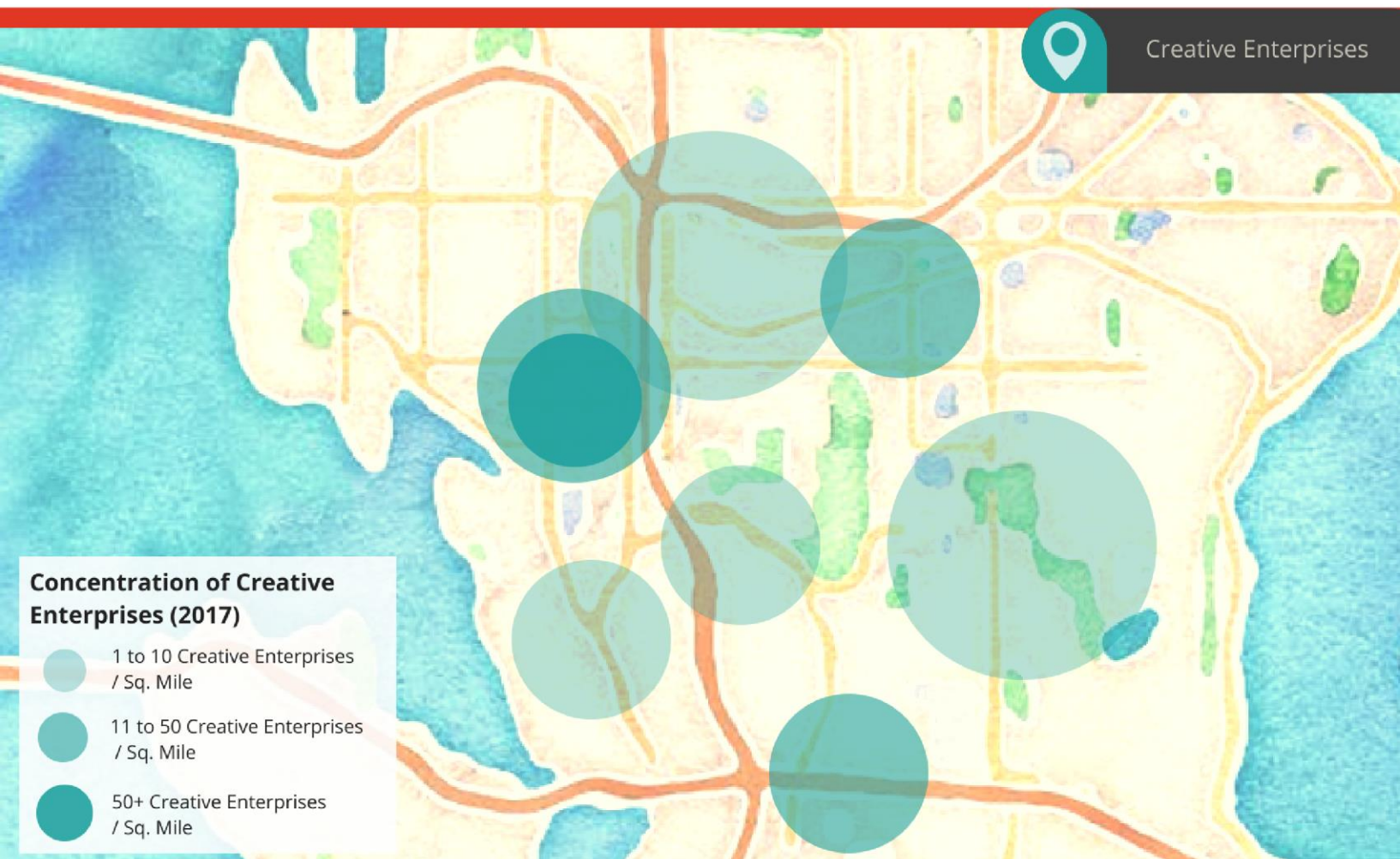
Mapping Bellevue's Creative Enterprises



With the recognition of the importance of creative cultural resources in enhancing both social and economic development in cities, has come the recognition of the need for new tools and assumptions for building integrated databases and spatially locating these resources. Cultural mapping is increasingly being embraced as an essential economic and cultural development tool in cities internationally. Cultural mapping is an ongoing process that provides insights into current conditions and provides benchmarks in time against which to assess progress. The first step in cultural mapping is determining a consistent set of categories of cultural resources or a 'Cultural Resource Framework' within which a wide range of existing information can be consolidated.



◀ Cultural Resource Framework ▶





4.2 Identification of Cultural Districts and Corridors

The point of cultural mapping is of course not simply to create databases of cultural resources but to spatially map those resources to provide insights into patterns and to enable cultural resources to be better integrated with land use and other important place-based planning processes. Key to this is identifying areas of concentration or clusters of cultural activity. Therefore, a second step after collecting and mapping cultural assets across the City was to identify patterns of concentrations and to map and examine them in more detail.

Two neighborhoods stood out as distinct cultural areas in Bellevue. Not surprisingly, the overwhelming concentration of assets in the Downtown Neighborhood made it one obvious district to study. Beyond the Downtown, the city-wide map did reveal an additional concentration of assets that suggested an obvious second district. Based on discussions with stakeholders and proposed district plans in place it was anticipated the data would reveal a concentration of assets in the Bel-Red Neighborhood, as it transitions into an area home to a significant diverse population with a range of small and exciting creative entrepreneurial enterprises and individual artists.

The two neighborhood and boundaries are illustrated in

Figure 4 (RED) and are further detailed in the *Economic Research and Analysis Report*.

The scope and parameters of the project have not made it possible to complete as thorough an examination of each area as would be ideal. While the data can provide some insights, a deeper analysis would require interviews and conversations with individuals in Bellevue familiar with the various areas. However, based on trends that suggest that successful cultural districts and corridors offer a distinct and evolving blend of community, educational, recreational, entrepreneurial, and entertainment venues, five additional neighborhoods were identified as potential future cultural districts.

These five neighborhoods (two of which contain more cultural resources) are beginning to provide the necessary workspaces, galleries, cafés, streets and public spaces that provide critical social and economic spaces of interaction among a varied mix of stakeholders and interest groups, cultural producers, artists, entrepreneurs and residents.

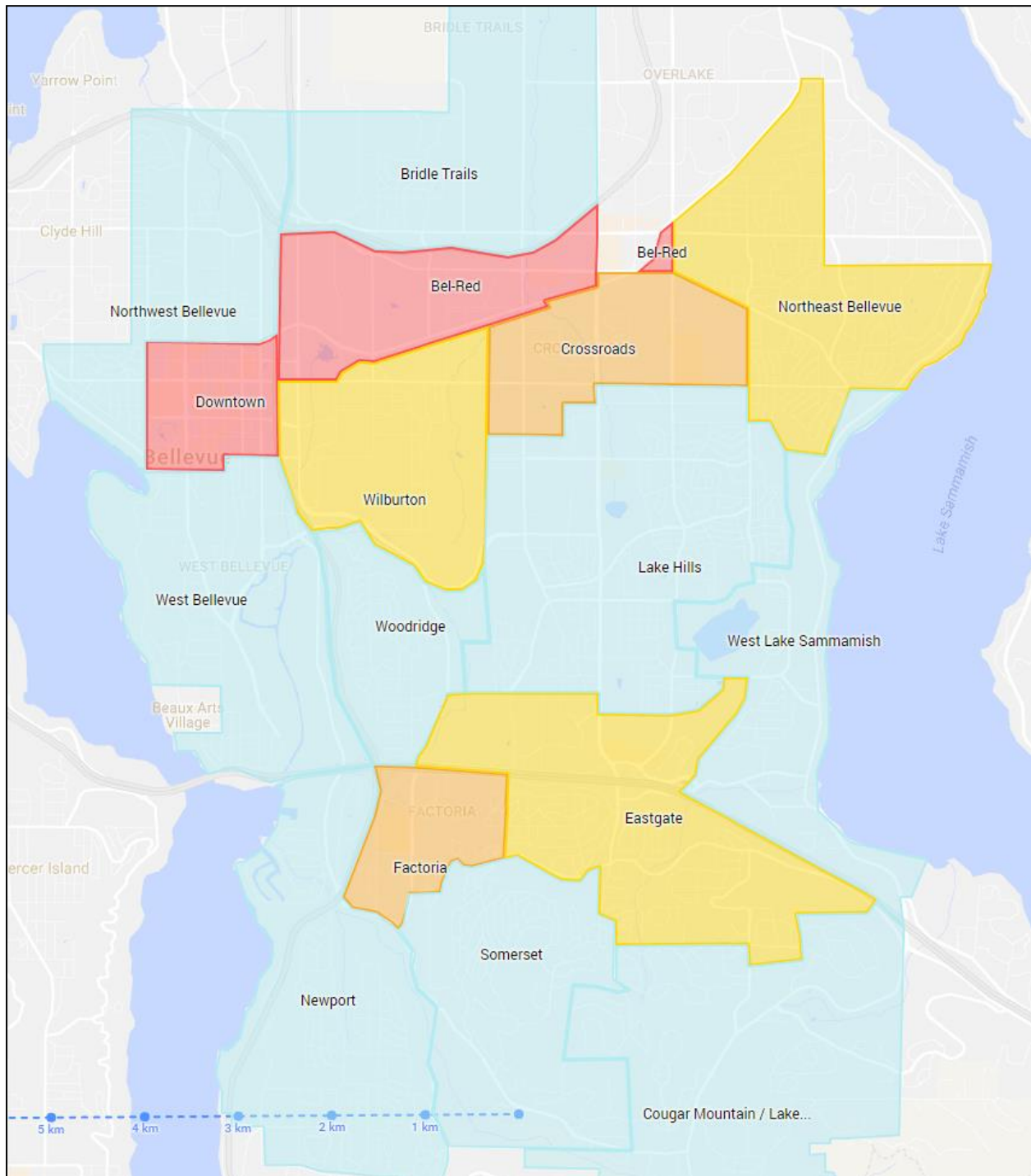
The five neighborhood and boundaries are illustrated in Figure 4 (Yellow and Orange).

- Crossroads – Concentration in multicultural cultural resources (both not-for-profit and for-profit)
- Factoria – Concentration in arts education, software publishers, and individual artists
- Northeast Bellevue – Concentration in motion picture and creative services
- Wilburton – Concentration in gaming and software publishers, multicultural schools, and natural heritage
- Eastgate – Concentration in event spaces, individual artists, and creative enterprises

How to formalize clear, consistent policies and tools to assist in the creation of strong cultural districts will be a defining feature of the *Creative Economy Strategy*, particularly as it relates to building Bellevue's identity and status as an international destination.



Figure 4: Districts and Boundaries For Identified Cultural Districts and Corridors





5 Bellevue's Community Voice On Creative Cultural Development

Approximately 25 interviews (representatives of cultural organizations and creative enterprises; elected officials from the cities of Bellevue, Kirkland, Redmond and King County; and leaders drawn from the business, educational and philanthropic communities) and a total of 100 creative sector businesses were consulted to provide their opinions on Bellevue's creative economy. This community input was complemented by advice and guidance from the Bellevue Creative Edge Task Force at several strategic milestones in the process. Combined the engagement process formed a series of strategic themes that underpin the *Creative Economy Strategy* goals. Each theme focuses on presenting existing strengths, opportunities, aspirations and results that would expand Bellevue's creative economy. The themes are summarized below and are further detailed in the *Values Framework Report*.

Creative Economy Strategy Goal One: Creative Placemaking and a Transformed Public Realm

Broaden the City's Leadership Role

The City's strategic leadership role should include that of 'facilitator' and 'convener', helping to create the supporting conditions necessary for a thriving and sustainable arts, culture and creative industries sector. Many commented on staff at the City who have created a more accessible and approachable atmosphere for all. There is solid support for the sector across departments. In addition to Arts and Culture support is found in Economic Development, Planning and Community Development, Parks and Recreation, among others. That said, there is a desire to have the City as a whole do more 'heavy lifting' in promoting the assets in the area, focusing on removing regulatory barriers ('getting out of the way'), and becoming a stronger advocate for the sector. The City must also assist in building and facilitating partnerships in the sector.

Embed the Arts and Creativity Throughout the City

One vision of creativity in the city expressed was spontaneous encounters with art and creativity across the city. This included expanding permanent public art installations across the city, supporting creative place-making initiatives and the creation of gathering places in neighborhoods, and increasing support for neighborhood cultural development. There is a need to do better at understand the conditions needed to sustain a healthy ecosystem of the arts, culture and creativity in the community. The fact that housing has increased in the downtown is increasing the vibrancy to the streets; the arts and culture have a strong role to play here in extending and enriching this vibrancy. Leverage the full artistic and cultural potential of the Grand Connection and Bel-Red district. There is also an opportunity with the East Side Rail Line to advance art and culture activities and potentially new arts spaces. Finally, many called on the City to implement a 1% public art policy to support permanent art installations (Seattle and Kirkland have implemented this policy).

A Creative Edge Story: A Cultural Corridor for the Grand Connection

The Grand Connection is one of Bellevue's most ambitious city building initiatives made to date. The aim is to establish Downtown Bellevue as a place to encounter cultural exchange, innovative immersive art experiences, music, and performance.



The City developed an *Art and Culture Plan* as a companion effort to the Grand Connection visioning process. The Plan serves as a connector as well as destination: a creative spine in the core of the city that draws a public audience— both casual passersby and visitors seeking a community driven experience.

Insert quote from the Mayor

At the core of the vision of the *Art and Culture Plan* is the belief that Bellevue's public art should be an integral part of the city that excites and promotes dialogue across cultures and generations. The Grand Connection reflects the City of Bellevue's diverse identity and an investment in contemporary public art and culture on par with the world's most innovative cultural center.

Additional information can be found at: <http://www.bellevuegrandconnection.com/art-on-the-grand-connection>

Creative Economy Strategy Goal Two: Creativity and Culture as a Key Driver in Innovation and Economic Growth

Shift Bellevue's Civic Image

Because Bellevue grew up quickly, and within recent history, there is a feeling that the community lacks authenticity. It is seen as a "totally planned" community which contributes to a sense of artificiality. Bellevue must counter its image as 'expensive and "shiny" city, tech focused, and white. Better promotion (across digital and other platforms) of existing arts and culture activities and experiences – across the city's many diverse cultures - can assist in shifting perceptions of the city. A priority in this is to reach out to the younger people in the community and to bring the diverse population into an integrated sense of identity in the city.

Shifting the city's image is key to strengthening tourism. For the city's tourism offer to go beyond retail and being known as a shopping destination, a vibrant arts and cultural scene is imperative. Ultimately, it is important to better understand how tourism can support the arts, culture and creative industries sector; how the sector can partner and grow opportunities; and gain a better sense of visitor impressions and interests in Bellevue.

Connect Bellevue's Diversity With the Creative Economy

Bellevue's tremendous diversity is one of the city's greatest strengths. While there has been great success in engaging children in educational programs in the art, there has been considerably less success in engaging parents and adults with the city's cultural life and activities. The city's 'diversity advantage' has yet to be fully leveraged. Many communities have arts and cultural groups rooted in their own cultures and traditions but to date there has not been relatively little intercultural communication and exchange. There are opportunities to support and connect Bellevue's diversity with the creative industries and broader creative economy. There is a need to bring Bellevue's diverse population into an integrated sense of identity in the city. A new signature event celebrating the city's diversity was proposed to celebrate diversity, support intercultural exchange, and contribute to defining a more distinct identity for the city



Strengthen the Arts, Culture and Creative Sector

The Bellevue Arts Museum, Bellevue Children’s Museum, Bellevue Festival of the Arts, Wintergrass Music Festival, among other of the city’s cultural assets has helped the city gain profile and prestige. Despite this, the city struggles to establish and sustain anchor cultural institutions. A persistent attitude exists in the community that professional quality arts cannot be home-grown in Bellevue but must be imported. More focus is needed on “art making” and not only “art showing”. This calls for establishing pathways for professional artists in Bellevue. There is a similar need to nurture the growth of smaller arts and culture organizations drawn from all communities in Bellevue. These can be the anchor institutions of the future. Existing major institutions have a mentoring role to play in this regard.

Distinguish Bellevue from Seattle by adopting a different cultural development model that doesn’t automatically assume the need for a symphony or other traditional facilities and programming. Articulate a “homegrown” vision of cultural development that speaks to Bellevue’s strengths – its diversity, its gaming industry, its parks and greenspaces, among others. Define a cultural development vision and model that matches Bellevue’s history and current realities.

Leverage the Strength of the Gaming Industry

Bellevue is a leader in video games which has many connections to various forms of artistic expression (i.e. graphic design, animation, music, etc.). Much of the industry flies under the radar for many in the arts community as well as the community-at-large. Despite its low profile in some quarters, the gaming industry is one thing that differentiates Bellevue. There is an opportunity to explore how the gaming industry can contribute to defining a distinct identity for the city and how it can be better leveraged to support the arts, culture and creative sector.

A Creative Edge Story: Wargaming Group Limited

This award-winning online game developer and publisher is an international leader in the free-to-play global Massively Multiplayer Online (MMO) gaming market. These gaming platforms enable large number of players to engage, typically at the same instance, across globe.

Forecast to reach \$44.6 billion in market size by 2022, MMO games are just one segment of the exploding interactive digital media sector. This sector draws on the work of artists and creators – visual artists, designers, musicians, and animators, among others - to generate the cultural content fueling leading-edge technologies. The company delivers compelling and authentic gaming experiences and services across PC, console and mobile platforms.

Headquartered in Nicosia, Cyprus the group operates across 16 offices and development centers with one located in Bellevue.

Additional information can be found at: <http://wargaming.com/en/>

Creative Economy Strategy Goal Three: A Resilient and Sustainable Creative Cultural Sector

Strengthen Leadership and Shared Governance

There is a feeling that there is no cohesive leadership or voice for the arts, culture and creative industries sector in Bellevue. There is a need for a leadership and shared governance model



implemented to lead the charge and support ongoing, cross-sector engagement and to link the sector to community, philanthropic and corporate interests. The City has a role to play here, but it cannot succeed working on its own. Many believed the Arts Commission was in a position to play this role but acknowledged the restrictions caused by limited resources. Any new leadership group or mechanism must represent artists, entrepreneurs and creative professionals across all disciplines and businesses. The inclusion and cultivation of young leaders should be a priority. The Cultural Compass strategy continues to be relevant and provides ideas for advancing the agenda and should be integrated with the Creative Economy Strategy.

Build Cultural Infrastructure

Several of those interviewed stated that for a city its size, Bellevue has relatively few purpose-built cultural facilities to meet local and regional needs. While there was praise for the City's investment in the Tateuchi Centre, there is also a need to support new cultural spaces and facilities in different places and at different scales. This should include new forms of cultural infrastructure that serve as learning platforms associated with arts, culture and creativity such as makerspaces. There was a suggestion the City seek private sector partners to establish a model of an indy-workshop incubator for transmedia entrepreneurs based on one established in Seattle. Overall, people expressed a facilities vision for Bellevue not driven solely by major new buildings, but rather by one that emphasizes a continuum of spaces and sizes of venues.

Increase Investment From All Sources

Responsibility for funding the sector cannot fall to the City alone. However, the City does have a leadership role to play in setting a precedent and leveraging resources from other corporate or philanthropic sources. There was a call for greater parity between investments in the arts, culture and creative industries sector, and investment in parks and recreation in the city. While there is a desire to claim the brand of the "Cultural Capital of the Eastside", greater investment from all sources is needed.

While there is some sponsorship and philanthropy in Bellevue supporting arts and humanities issues from the large corporations in the area (Microsoft, Amazon, Costco, Expedia), there is little to no corporate giving from Bellevue-based corporations towards arts and culture. Where sponsorships or giving does occur, it is directed towards the larger, professional arts organizations. Smaller, community-based groups are challenged to find resources from these. It was suggested the City convene discussions to think more creatively about how to support arts, culture, and creative industries sector as a whole (i.e. not only support for individual institutions or events).

Increase Collaboration Locally and Regionally

Leadership and governance is closely linked to the need identified for stronger collaboration. There is a diversity of cultural groups in the city that are not talking or integrating well with each other. This fragmentation is between large and small, between different arts/culture disciplines, between creative enterprises and for-profit groups and the not-for-profit sector, and between 'mainstream' cultural groups and those representing diverse communities. There needs to be a focus beyond the 'getting to know you phase' with a robust agenda that can encourage collaboration and partnership and create a collective momentum in the sector. Collaboration must extend beyond Bellevue to regional collaboration. There should be a regional group similar to the Innovation Triangle to ensure groups are not duplicating efforts and that new opportunities for collaboration and synergy are being realized. A number of other models supporting regional collaboration in other sectors should be examined.



Address Affordable Creative Space Needs

Access to affordable creative space was identified by many stakeholders as the number one challenge facing the future of the arts, culture and creative industries sector and the broader creative economy. The need for affordable space spanned a range of space needs including housing, live-work space, studios for individual artists, creative incubators, makerspaces, platforms for interaction and collaboration, among others. Low cost office space for start-up creative enterprises was identified as one of the largest barriers to establishing a creative business in Bellevue.

The City of Bellevue is working with Artspace to examine the feasibility of a facility to address a segment of affordable space needs. However, more systemic, long-term solutions must include revisions to zoning and a proactive approach by the City in approaching developers to incorporate creative spaces in new development. Many commented a 'space strategy' should be a priority of the Creative Economy Strategy.

A Creative Edge Story: Wintergrass Music Festival

One of the best examples of a creative, resilient and sustainable non-profit arts organization in Bellevue is Wintergrass Music Festival. First established in 1994, the Festival has grown from an attendance of 900 to over 12,000 people in 2017. The event is held annually in February at the Hyatt Regency Bellevue Hotel in downtown *Bellevue*. Over the course of four days and nights, the Hyatt is transformed into an indoor venue of five stages along with the lobbies, and every available space filled with the *sounds* and jams of bluegrass and *acoustic* music. The organizing agency for the Festival is Acoustic Sound, a non-profit organization committed to "preserving and promoting traditional acoustic American music through presentation and education, with special attention given to the bluegrass music community".

Founding member of Acoustic Sound and current Executive Director Patrice O'Neill on the Festival's sustained success. "In the age of screen time, it's notable to participate in an event that is built on active listening and eye to eye contact. Wintergrass had endured and thrived for twenty-five years because humans need and want the connection and community that live music provides. It stands in joyous, jostling, tuneful contrast to the sterility of modern life. Through the art of musical virtuosity and the invitation to file down your nails and pluck some strings yourself, Wintergrass answers a deeply human need for experience and serves as a reminder that life's best moments are shared moments.

Additional information can be found at: <http://wintergrass.com/>