

SUMMIT COUNTY
PROJECTABC
ART BEAUTY CULTURE



State of the Arts 2020

Produced by the Arts Council in partnership with Summit County and Park City Municipal

SUMMIT COUNTY

STATE OF THE ARTS

DATA BASED ON 2019 IMPACT

PRODUCED BY THE ARTS COUNCIL IN PARTNERSHIP
WITH SUMMIT COUNTY AND PARK CITY MUNICIPAL

Arts and Culture industries in Summit County produce a total of **4,243 jobs** (including Arts and Culture jobs and non-Arts and Culture occupations).

This represents a **40.7% increase** since 2010 which is **6.7% greater** than Summit County's job growth across all industries.

This growth is also **6% greater** than the national rate of increase for jobs within Arts and Culture industries since 2010.

Projected growth of jobs in Arts and Culture industries produce an estimated **\$1,800,000 in local taxes.**

Arts and Culture industries generate **\$499,506,373 in total sales.**

1,727 people in Summit County are directly employed in Arts and Culture occupations which represents a **56% increase** since 2010 – outpacing the overall employment growth of Summit County by 22%.

Arts and Culture jobs in Summit County expected to grow at an approximate rate of **20% over the next nine years.**

Local Arts and Culture organizations received **\$2,806,091** in funding from local and state grants.

Park City is making a large investment in the Bonanza Park Arts and Culture District anticipated at **\$60-\$80 million.**

Park City and Summit County both contribute significant funding to Public Art. Summit County has a public art budget of **\$286,000** and Park City has a budget of **\$250,000.**



Each year the Arts Council releases a State of the Arts report that assesses the impact of the arts in the previous year. This State of the Arts report provides a look into the 2019 economic impact of the Arts and Culture Sector in Summit County as well as local investments made into the arts during the same year.

Arts and Culture is a vital part of Summit County's identity, quality of life, and economy. 2019 was a year of growth, bringing an increase of jobs, industry earnings, public investment, and overall momentum. As we look toward an unknown future in 2020 and beyond, we know that the Arts and Culture sector will be a critical facet of how our community pulls together emotionally, culturally, and economically. We recognize that the conditions surrounding COVID-19 will dramatically change 2020 numbers as our Arts and Culture sector has seen significant impacts. This report as well as data tracked in the previous two years will provide a vital benchmark from which we can work to quantify the impact of COVID-19 on our local Arts and Culture sector. A preliminary look into the impact of COVID-19 is included toward the end of this report. The 2021 State of the Arts report will be released in Spring of 2021 and will look at 2020 numbers using the same methodologies as this report. This will provide a clearer picture of the impact of COVID-19 on the local Arts and Culture sector.

Data for this report was generated by the Arts Council of Park City | Summit County, Summit County Economic Development Department, and Park City Municipal Corporation using data from Emsi, Creative Vitality Suite, and internal budgets. This State of the Arts report is divided into three primary categories: industry data, occupation data, and local investment. Each category is explained briefly below.

ARTS AND CULTURE INDUSTRY DATA

Arts and Culture industries are industries with a primary function based in the broad Arts and Culture sector. While there is no singular definition of these industries, we have developed a methodology based on national and regional standards with adjustments made for Summit County's unique economy. In total, our methodology recognizes 57 industries as "Arts and Culture" industries. These spread across a broad range of disciplines and include industries such as: art dealers, music publishers, advertising agencies, museums, architectural services, graphic design services, book stores, and restaurants. A complete list of the 57 industries used in this methodology can be found at the end of this document.

ARTS AND CULTURE OCCUPATION DATA

Arts and Culture occupations are occupations based in Arts and Culture activities within a multitude of industries. These occupations may be found within the entities categorized as Arts and Culture but may also be found in non-Arts and Culture industries. As an example, a graphic designer working for a real-estate agency would be considered an Arts and Culture occupation even though the real-estate agency is not classified as an Arts and Culture industry. Similarly to industry data, there is not a single definition or standard from which Arts and Culture occupations can be defined. Our methodology is, again, a mix of national and regional standards with adjustments made for Summit County. Our methodology recognizes 68 occupations as "Arts and Culture." Examples of these occupations include: writers, dancers, curators, artists, fashion designers, bakers, and chefs. A complete list of the 68 occupations used in this methodology can be found at the end of this document.

LOCAL ARTS AND CULTURE INVESTMENT

In addition to economic impact data about industries and occupations, this State of the Arts report includes an assessment of local Arts and Culture investment. Local Arts and Culture investment data includes: public art contributions, special services contracts, and funding awarded to Arts and Culture organizations and projects within Summit County from local and state grants.



ARTS AND CULTURE INDUSTRY DATA

In total, Summit County Arts and Culture industries produce 4,243 jobs. This represents a 40.7% increase since 2010 which is 6.7% greater than Summit County's job growth across all industries. This growth is also 6% greater than the national rate of increase for jobs within Arts and Culture industries since 2010.

Jobs within Summit County Arts and Culture industries are projected to increase by an additional 14% by 2025. This projected increase will produce an increase in local earnings of \$41,298,912. While the projected increase is a good demonstration of continued growth, the growth rate is below Summit County's overall projected job growth which will outpace Arts and Culture industry jobs by 1.2%. The 14% projected increase of Arts and Culture industry jobs by 2025 will yield a total of 838 new jobs in Summit County (609 initial, 106 direct, 28 indirect, and 95 induced). The projected increase of Arts and Culture industry jobs will generate \$1,800,000 in local taxes, \$1,500,000 in state taxes, and \$727,000 in federal taxes.

Total sales generated by Arts and Culture industries in 2019 totaled \$499,506,373.

ARTS AND CULTURE OCCUPATION DATA

In 2019, there were 1,727 people in Summit County employed in Arts and Culture Occupations which represents a 56% increase since 2010. This increase is outpacing the growth of Summit County's overall occupation growth by 22%.

Summit County is a prime locality for Arts and Culture talent. In 2019, we outpaced the national average for communities of a similar size by 386 jobs. Arts and Culture jobs in Summit County will continue to grow by a rate of approximately 20% over the next nine years with 2,076 jobs being projected by the year 2025. This compares to a 15.6% projected increase for overall job growth in Summit County.

While the number of Arts and Culture jobs and projected growth in Summit County is healthy, the earnings within the sector are lacking compared to national averages. Median salary for these jobs in Summit County is \$36,885 which is 17.4% lower than the national average.

Summit County RAP Tax Cultural Grants	\$943,000
Summit County Restaurant Tax Grants	\$1,297,714
Special Events Grants (Chamber)	\$257,577
Park City Rotary	\$7,000
Sunrise Rotary	\$8,100
Utah Arts & Museums	\$76,200
Park City Community Foundation	\$39,000
Promontory Foundation	\$85,000
Park City Municipal Grants	\$92,500
TOTAL	\$2,806,091

LOCAL ARTS AND CULTURE INVESTMENT

In 2019, local Arts and Culture organizations received \$2,896,091 in funding from local and state grants. The chart below outlines the local and state sources used for this calculation as well as the amount each entity granted into Summit County's Arts and Culture organizations. This is not an exhaustive list of all grants received by local Arts and Culture organizations, but represents a range of funding sources that consistently fund local Arts and Culture organizations for purposes of year-over-year comparisons in the future.

Public Art is a significant way our local governments support the arts in our community. Summit County's 2019 Public Art budget was \$286,000 and Park City's was \$250,000.

Park City also provided approximately \$1.3 million in City Service Fee Reduction for Events, \$92,500 in arts-related Special Services contracts, and is in process of making a significant investment in the Bonanza Park Arts and Culture District with an anticipated value of approximately \$60-\$80 million.



PRELIMINARY ASSESSMENT OF THE IMPACT OF COVID-19

The COVID-19 pandemic is having a significant impact on many sectors in Summit County including Arts and Culture. While a full assessment of the impact of COVID-19 on the Arts and Culture sector has not yet been conducted, preliminary data point to Arts and Culture being one of the most negatively impacted. A recently issued report from Summit County based on data from the Utah Department of Workforce Services shows that Arts, Entertainment, and Recreation combined experienced a devastating 50.4% decrease in jobs from March 2020 to May 2020. This accounts for a reduction of 1,902 jobs in Summit County. The Arts, Entertainment, and Recreation sector combination experienced the greatest loss of any sector in Summit County. The data inputs for this metric are different from those used to generate this State of the Arts report. Most notably, this metric includes recreation data while our methodology for producing the State of the Arts report leaves out recreation data. Despite the differences, there is significant overlap in the data sets used and this loss of jobs tells the sobering beginning of an important story.

The 2021 State of the Arts report will look closer at the impact of COVID-19 using the same methodologies as this report. This will provide a more complete view of the impact of COVID-19 on the local Arts and Culture sector.

CONCLUSIONS

The Arts and Culture sector in Summit County is growing with both occupations and industries currently outpacing overall growth countywide. Arts and Culture has become an increasingly important piece of Summit County's economy and will continue to grow in importance over the coming years.

The greatest concern when looking at the data in this analysis is the average wages in both Arts and Culture occupations and Arts and Culture industries. In both instances, Summit County is well below the national average. Given that Summit County's cost of living is approximately 40% higher than the national average, a significant disparity has been created. This makes living and working in Summit County difficult for Arts and Culture employees and has likely limited the sector's growth and will continue to do so into the future without intervention.

The methodology used to produce this State of the Arts Reports will be utilized annually for direct and consistent comparison year-over-year. The Arts Council, Summit County, and Park City will continue to work together to annually assess and report on the local impact of the Arts and Culture sector.

OCCUPATION AND INDUSTRY CODES

North American Industry Classification System (NAICS)

332323 – Ornamental and Architectural Metal Work Manufacturing | 334614 – Software & Other Pre-recorded Compact Disc, Tape, Record Reproducing | 337212 – Custom Architectural Woodwork and Millwork Manufacturing | 339910 – Jewelry and Silverware Manufacturing | 339992 – Musical Instrument Manufacturing | 423410 – Photographic Equipment and Supplies Merchant Wholesalers | 424920 – Book, Periodical, and Newspaper Merchant Wholesalers | 451140 – Musical Instrument and Supplies Stores | 451211 – Book Stores | 453920 – Art Dealers | 511110 – Newspaper Publishers | 511120 – Periodical Publishers | 511130 – Book Publishers | 511191 – Greeting Card Publishers | 511199 – All Other Publishers | 512110 – Software Publishers | 512110 – Motion Picture and Video Production | 512120 – Motion Picture and Video Distribution | 512131 – Motion Picture Theaters (except Drive-Ins) | 512132 – Drive-In Motion Picture Theaters | 512191 – Teleproduction and Other Postproduction Services | 512199 – Other Motion Picture and Video Industries | 512230 – Music Publishers | 512240 – Sound Recording Studios | 512250 – Record Production and Distribution | 512290 – Other Sound Recording Industries | 515111 – Radio Networks | 515112 – Radio Stations | 515120 – Television Broadcasting | 515210 – Cable and Other Subscription Programming | 519110 – News Syndicates | 519120 – Libraries and Archives | 519130 – Internet Publishing and Broadcasting and Web Search Portals | 532282 – Video Tape and Disc Rental | 541310 – Architectural Services | 541320 – Landscape Architectural Services | 541410 – Interior Design Services | 541420 – Industrial Design Services | 541430 – Graphic Design Services | 541490 – Other Specialized Design Services | 541810 – Advertising Agencies | 541921 – Photography Studios, Portrait | 541922 – Commercial Photography | 611610 – Fine Arts Schools | 711110 – Theater Companies and Dinner Theaters | 711120 – Dance Companies | 711130 – Musical Groups and Artists | 711190 – Other Performing Arts Companies | 711310 – Promoters of Performing Arts, Sports, and Similar Events with Facilities | 711320 – Promoters of Performing Arts, Sports, and Similar Events without Facilities | 711410 – Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures | 711510 – Independent Artists, Writers, and Performers | 712110 – Museums | 712120 – Historical Sites | 721210 – Zoos and Botanical Gardens | 722511 – Full-Service Restaurants | 722513 – Limited-Service Restaurants

Standard Occupation Codes (SOC)

11-2011 – Advertising and Promotions Managers | 11-2021 – Marketing Managers | 11-2031 – Public Relations and Fundraising Managers | 13-1011 – Agents and Business Managers of Artists, Performers, and Athletes | 15-1131 – Computer Programmers | 15-1132 – Software Developers, Applications | 15-1134 – Web Developers | 17-1011 – Architects, Except Landscape and Naval | 17-1012 – Landscape Architects | 17-1021 – Cartographers and Photogrammetrists | 25-4011 – Archivists | 25-4012 – Curators | 25-4013 – Museum Technicians and Conservators | 25-4021 – Librarians | 25-4031 – Library Technicians | 25-9011 – Audio-Visual and Multimedia Collections Specialists | 27-1011 – Art Directors | 27-1012 – Craft Artists | 27-1013 – Fine Artists, Including Painters, Sculptors, and Illustrators | 27-1014 – Multimedia Artists and Animators | 27-1019 – Artists and Related Workers, All Other | 27-1021 – Commercial and Industrial Designers | 27-1022 – Fashion Designers | 27-1023 – Floral Designers | 27-1024 – Graphic Designers | 27-1025 – Interior Designers | 27-1027 – Set and Exhibit Designers | 27-1029 – Designers, All Other | 27-2011 – Actors | 27-2012 – Producers and Directors | 27-2031 – Dancers | 27-2032 – Choreographers | 27-2041 – Music Directors and Composers | 27-2042 – Musicians and Singers | 27-2099 – Entertainers and Performers, Sports and Related Workers, All Other | 27-3011 – Radio and Television Announcers | 27-3021 – Broadcast News Analysts | 27-3022 – Reporters and Correspondents | 27-3031 – Public Relations Specialists | 27-3041 – Editors | 27-3042 – Technical Writers | 27-3043 – Writers and Authors | 27-3099 – Media and Communication Workers, All Other | 27-4011 – Audio and Video Equipment Technicians | 27-4012 – Broadcast Technicians | 27-4013 – Radio Operators | 27-4014 – Sound Engineering Technicians | 27-4021 – Photographers | 27-4031 – Camera Operators, Television, Video, and Motion Picture | 27-4032 – Film and Video Editors | 27-4099 – Media and Communication Equipment Workers, All Other | 35-1011 – Chefs and Head Cooks | 35-2012 – Cooks, Institution and Cafeteria | 35-2013 – Cooks, Private Household | 35-2014 – Cooks, Restaurant | 47-2044 – Tile and Marble Setters | 47-2161 – Plasterers and Stucco Masons | 51-3011 – Bakers | 51-6041 – Shoe and Leather Workers and Repairers | 51-6051 – Sewers, Hand | 51-6052 – Tailors, Dressmakers, and Custom Sewers | 51-7011 – Cabinetmakers and Bench Carpenters | 51-7021 – Furniture Finishers | 51-7031 – Model Makers, Wood | 51-9051 – Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders | 51-9151 – Photographic Process Workers and Processing Machine Operators | 51-9194 – Etchers and Engravers | 51-9195 – Molders, Shapers, and Casters, Except Metal and Plastic

