



COUNCIL ON CULTURE & ARTS | TALLAHASSEE/LEON COUNTY

## The Economic Impact of For-Profit Arts and Culture and Heritage-Related Businesses in the Leon County Area



**Final Report by: The Florida State University Center for Economic Forecasting and Analysis (FSU CEFA)**

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*“Arts are the Heart of Society”<sup>1</sup>*

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<sup>1</sup> Dr. S.J. Trienekens, from the Hogeschool of Amsterdam, 2009. “Kunst in het hart van de samenleving over brugerschap en culturele dynamiek.”

## Executive Summary

In July 2016, the Council on Culture & Arts (COCA)<sup>2</sup> contracted with the Florida State University Center for Economic Forecasting and Analysis (FSU CEFA)<sup>3</sup> to conduct an economic impact analysis of individual artists and for-profit arts, cultural, and heritage-related businesses in Leon County. The economic impact study is based in part on client survey data collected by the COCA. The survey was implemented in June with final data provided to FSU CEFA in July 2017, by COCA. In addition, and separate from the survey, FSU CEFA performed analyses using three different databases; the National Establishment Time-Series (NETS) database of businesses, the Enterprise Florida's online business Data Center, and the YourEconomy Time-Series (YTS) database administered by the University of Wisconsin-Extension's Division for Business & Entrepreneurship.<sup>4</sup> All previous aforementioned databases were further filtered by the appropriate arts and culture-specific NAICS<sup>5</sup> codes, based on similar arts and culture and heritage-based businesses codes used by the Tallahassee-Leon county Office of Economic Vitality (OEV)).

COCA has been serving the Leon-County area since 1985, when it was created by a joint resolution of the City of Tallahassee and Leon County governments, as the designated local arts agency. The capital area's only umbrella agency for arts and culture, COCA works with and for those who produce, invest in, and experience the arts and culture in our area. COCA is not a government entity, but works hand-in-hand with the city, county, state, and local school district as their cultural industry partner. The City and County contract with COCA to access their expertise and provide specific services that benefit the community at large.<sup>6</sup>

The purpose of this study is to provide an economic impact analysis of for-profit arts and culture in Leon County. This is the first study of its kind to solely measure the economic impact of the for-profit arts and cultural businesses and independent artists in Leon County. This study serves as a counterpart to the recently released study "Arts and Economic

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<sup>2</sup> The Council on Culture & Arts (COCA): see: <http://coca.tallahasseearts.org>

<sup>3</sup> See: <http://www.cefa.fsu.edu>

<sup>4</sup> FSU CEFA is serving as a beta tester for business data provided by YTS.

<sup>5</sup> North American Industry Classification System (NAICS)

<sup>6</sup> From: <http://coca.tallahasseearts.org/about-coca>

Prosperity 5(AEP5), The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Leon County, Fl.” conducted by the *Americans for the Arts*.<sup>7</sup>

The survey data received by FSU CEFA tallied 275 responses to the survey questionnaire.<sup>8</sup> However, it is noted that many respondents only partially filled out the survey, with many missing responses related to financial data. Hence, the survey results were used to provide general information regarding the overall for-profits arts and culture population.<sup>9</sup> Using the available databases mentioned, and selecting on Tallahassee area and the NAICS codes provided by the OEV characterized as “creative economy” industries<sup>10</sup>, there were 3,327 for-profit arts and culture and heritage-related establishments that were used for the following economic impact analyses.

The survey results revealed that for-profit arts & culture and heritage-related businesses were about 61 percent female, with about one-third of the respondents being 61 years or greater. The for-profits arts & culture and heritage-related businesses are a highly educated group: about 78 percent of the respondents were college graduate, post-graduate, or professional degree earners. Thirty-six percent of the survey respondents were arts educators in the community. Over two-thirds of businesses were locally owned and operated, with one location. Just over one quarter of the responses identified their business as being in the “Independent Artists, Writers and Performers” category, with 11 percent of respondents providing “Graphics Design Services.” Forty-six percent of the respondents’ stated their annual gross income was less than \$20,000, and 19 percent listed between \$20,000 and \$50,000; whereas about 35 percent earned over \$50,000. On average, about 36

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<sup>7</sup> Americans for the Arts (2017), Arts & Economic Prosperity V (5): The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Leon County, FL. For summary see: [http://www.americansforthearts.org/sites/default/files/pdf/2017/by\\_program/reports\\_and\\_data/aep5/map/FL\\_LeonCounty\\_AEP5\\_OnePageSummary.pdf](http://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/FL_LeonCounty_AEP5_OnePageSummary.pdf)

<sup>8</sup> The survey responses represented a 95% confidence interval (5% level of significance) with a 5% margin of error.

<sup>9</sup> As the survey responses relating to financial data were well below being statistically valid in order to conduct the economic analyses, the research team needed to use the business database(s) relating to for-profit arts and culture financial data.

<sup>10</sup> For a list of creative economy industries, see Appendix. For the purpose of this study, the creative economy industries include only for-profit arts and culture businesses.

percent of their annual gross income is not related to for-profit arts & culture and heritage-related work. Over  $\frac{3}{4}$  of the respondents' stated that the annual wages of their employees were \$35,000 or less. According to the respondents, their in-state clients comprised about 80 percent, and out-of-state clients were 20 percent of their total clientele. Regarding their perception on the arts & culture and heritage-related businesses customer base over the last ten years, almost 60 percent responded that they perceived an increase in customers over time, whereas the remainder 40 percent saw either no change or a worsening, in equal proportions of 20 percent, respectively.

The total economic impacts of the for-profit arts & culture and heritage-related businesses in Leon County, including regional economic multiplier effects arising from supply chain activity (indirect effects) and employee household spending (induced effects) for new final demand generated by for-profit arts & culture and heritage-related business sales, are summarized in Table ES1. The industry output impacts were estimated at \$526.2 million, representing the sales revenues received for goods and services sold to the for-profit arts & culture and heritage-related businesses. The total employment impacts were estimated at 5,731 fulltime and part-time jobs<sup>11</sup>, representing approximately 3.9 percent of the Leon County workforce. The total value added impact of \$276.7 million represents the net value of total economic activity generated, and is also equivalent to 2 percent of the Leon County Gross Domestic Product (GDP). Labor income impacts of \$205.6 million represented wages, salaries and benefits received by employees and business owners, or 1.8 percent of the Leon County labor income.<sup>12</sup> In summary, the for-profit arts & culture and heritage-related businesses are an important contributor to Leon County's economy, both directly and indirectly through business sales and revenues.

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<sup>11</sup> Based on the survey results relating to the for-profit arts & culture businesses, the expectation is that businesses are comprised of about 60 percent, and 40 percent, full time and part time employees, respectively. Thus, it is estimated that the breakout would be about 3,439 FT, and 2,292 PT, employees.

<sup>12</sup> Note that these economic measures are independent and should not be summed together.

**Table ES1. Summary of Economic Impacts, by Economic Activity, of the For-Profit Arts & Culture and Heritage-Related Businesses in Leon County**

<b>For Profit Arts &amp; Culture Businesses in Leon County</b>				
<b>Economic Impacts</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
<b>Output</b>	\$312,199,849	\$105,419,392	\$108,587,337	\$526,206,578
<b>Employment</b>	4,045	825	861	5,731
<b>Labor Income</b>	\$135,891,320	\$35,684,804	\$34,058,384	\$205,634,508
<b>Value Added</b>	\$156,485,189	\$56,549,469	\$63,622,414	\$276,657,072

Values in June, 2017 dollars. Sources: FSU CEFA master database of arts & culture and heritage-related businesses.; IMPLAN software and most recent Leon county data (2015).

## Introduction

The Council on Culture & Arts (COCA) engaged the Florida State University Center for Economic Forecasting and Analysis (FSU CEFA) to conduct an economic analysis of relevant data and produce a report that estimates the overall economic impact of both individual artists and for-profit arts, cultural, and heritage-related businesses working and/or operating within the Leon County in Florida. COCA is presenting FSU CEFA's final report in conjunction with the data collected through the Americans for the Arts "Arts and Economic Prosperity"<sup>5</sup> study in order to announce the overall economic impact of the arts, culture and heritage industries in the Leon County area, in September 2017.

In order to conduct the economic analysis for COCA, the FSU CEFA research team conducted the following project tasks:

- Survey instrument development – created a baseline survey instrument which captured the necessary, relevant economic impact data for individual artists and for-profit arts, cultural, and heritage-related businesses in the area. FSU CEFA informed COCA of the survey collection criteria and statistical results. In addition, FSU CEFA compiled and further enhanced the "COCA baseline" database of arts and culture and heritage-based businesses, with additional sources of business data from their existing local databases.
- Economic impact analyses were based on the collected data (including the master database).
- The draft and final report(s) included economic impact estimates of both individual artists and for-profit arts, cultural, and heritage-related businesses working and/or operating within Leon County.

The Council on Culture & Arts (COCA) conducted the following tasks:

- Provided CEFA with an initial list of eligible artists and for-profit businesses to include in the study.



- Provided additional survey questions to the survey questionnaire,<sup>13</sup> and managed the survey distribution and data collection (electronically, via email) related to the study.
- Managed the questions and correspondence related to the study from study partners, community members and media.

## Literature Review

This section highlights some of the existing literature on the subject of the economic impact of arts and culture, primarily through the use of the following reports: (i) *Arts & Economic Prosperity III* conducted by Americans for the Arts; (ii) *Measuring the Economic and Social Impact of the Arts: a Review* by Michelle Reeves, and; (iii) *How the Arts Impact Communities: an Introduction to the Literature on Arts Impact Studies* by Joshua Guetzkow.

The first two studies are based on survey data analyses while the third and fourth studies were based primarily on data from existing literature, or “benefits transfer” analysis. These reports all illustrate the existing state of knowledge on the topic of the economic impact of arts and culture, including a discussion of the data limitations.

### Arts & Economic Prosperity V

Americans for the Arts conducted the *Arts & Economic Prosperity V* study in order to estimate the economic impact of nonprofit arts and culture for all states in the United States, including the District of Columbia. COCA also recently commissioned the Americans for the Arts to focus a study on the economic impact of nonprofit arts and culture in Leon County, Florida.

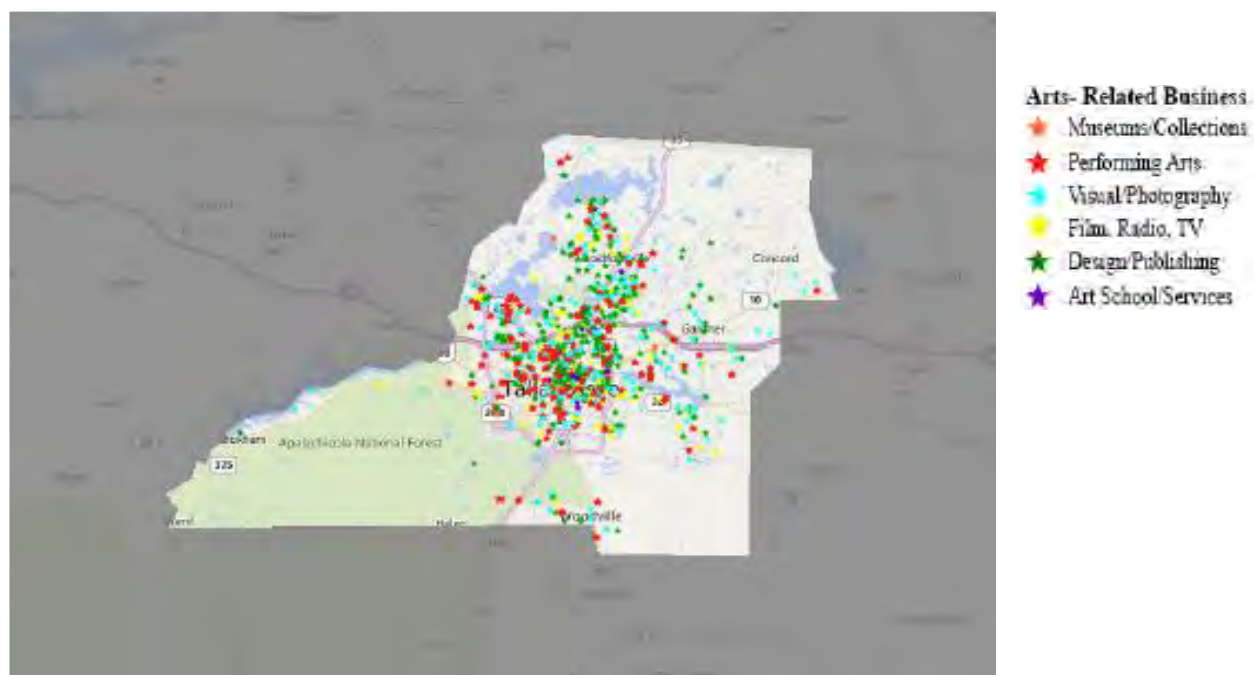
<sup>14</sup> The two methods used in Americans for the Arts’ study were: a written survey distributed to patrons of the arts following their participation in various local events, and; an online survey sent to various organizations in the arts and culture industry. The survey questions related to general demographic information as well as how much money was spent directly and indirectly through the event(s); e.g., entrance fees, and associated travel expenses (see

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<sup>13</sup> see Appendix A for a copy of the survey instrument.

<sup>14</sup> See: <http://www.americansforthearts.org/by-program/reports-and-data/research-studies-publications/creative-industries/view-the-reports/reports-by-state/florida>  
Or: [http://aftadc.brinkster.net/Florida/county/FL\\_Leon\\_County.pdf](http://aftadc.brinkster.net/Florida/county/FL_Leon_County.pdf)

Appendix B). One of the most difficult issues that all these studies encountered was how to measure not just the direct costs of the arts and culture industry on local areas, but also their associated indirect costs. Americans for the Arts address this issue by analyzing their survey data using input/output analysis (which is a mathematical method that can be used to estimate economic impact and monetary value). According to the report, this technique “... enables economists to track how many times a dollar is “re-spent” within the local economy, and the economic impact generated by each round of spending” (Americans for the Arts, 2017). Through a customized input/output model, this study is able to better estimate the full economic impact of the arts and culture industry and include findings by industry categories, including direct, indirect, and total economic impacts. The *Arts and Economic Prosperity V* study estimates the economic impact of nonprofit arts and culture in Leon County through total monetary value, number of jobs, and local and state government revenue, for year 2015. Their most recent study found the following (see Figure 1) regarding the creative economy industries in Leon County, Florida.



**Figure 1. Number of Creative Establishments in Leon County, Florida in 2015\*, \*\***

\*Reprinted from the American for the Arts Report, 2017

\*\*Originally published in the Creative Industries Report 2015

According to data from the study, Leon County had 860 arts-related nonprofit businesses that employed 3,236 people. The creative economy industries account for a total of 4 percent of the total number of businesses, and 1.6 percent of employment, in Leon County. This was very close to being representative of the nation, where 3.9 percent of all businesses (or 702,771 businesses) are involved in the creation or distribution of the arts.

In Leon County, the greatest number of creative economy industries was in Design and Publishing, with 867 employees. Following next were Visual Arts/Photography, Performing Arts, and Film, Radio and TV; with 672, 660 and 604 employees, respectively.

**The Creative Industries Represent  
4.0 Percent of All Businesses and 1.6 Percent of All Employees in  
Leon County, FL  
(Data current as of January 2015)**

<b>CATEGORY</b>	<b>BUSINESSES</b>	<b>EMPLOYEES</b>
<b>Arts Schools and Services</b>	<b>31</b>	<b>209</b>
Agents	1	1
Arts Councils	3	15
Arts Schools and Instruction	27	193
<b>Design and Publishing</b>	<b>299</b>	<b>867</b>
Advertising	46	275
Architecture	43	209
Design	205	375
Publishing	5	8
<b>Film, Radio and TV</b>	<b>105</b>	<b>604</b>
Motion Pictures	86	327
Radio	10	24
Television	9	253
<b>Museums and Collections</b>	<b>19</b>	<b>224</b>
Historical Society	1	2
Museums	17	220
Zoos and Botanical	1	2
<b>Performing Arts</b>	<b>165</b>	<b>660</b>
Music	65	240
Performers (nec)	68	110
Services & Facilities	29	306
Theater	3	4
<b>Visual Arts/Photography</b>	<b>241</b>	<b>672</b>
Crafts	19	38
Photography	170	548
Services	19	47
Visual Arts	33	39
<b>GRAND TOTAL</b>	<b>860</b>	<b>3,236</b>

\*Extracted from the American for the Arts Report, 2017

**Figure 2. The Creative Economy Industries in Leon County 2015\***

## Measuring the Economic and Social Impact of the Arts

The purpose of Michelle Reeves' study outlined in "*Measuring the Economic and Social Impact of the Arts*" was to gather existing research on the economic and social impact of the arts in the UK and to discuss key issues and possible methods to address them. This study was almost entirely literature-based so any numeric data collected was from outside sources. Reeves examined the history of arts impact research in the UK, clearly defined impact and value, and reviewed the pros and cons of models that have been used in different studies. Significant issues brought up in this report were: the need for common definitions in this field of study and more systematic and robust estimation methodologies. Reeves also mentioned that the majority of the studies in this sector only capture impact in one time period. A more thorough and systematic data collection of art and culture industries could potentially lead to data showing growth and other changes over time which could assist in more efficient data analysis in the future.

Reeves categorizes the impact of arts and culture on local, state, and national economies into typical direct and indirect impact evaluations. The direct impact of the arts on the economy includes any value-added by arts-related goods and services, employment and Gross Domestic Product growth, money multipliers, and investment potential. The indirect impact of the arts on the economy includes cultural credit added to a region, which may attract sponsors, collectors, or miscellaneous visitors that spend money in that region; this generates indirect economic impact through advertising and growth in the tourism industry. A 1995 impact study on the arts and culture industry (O'Brien 1995) indicated that 648,900 individuals are employed within the arts and culture sector in the United Kingdom, with creative economy industries defined as follows, non-inclusive of related markets within the tourism and hospitality industries:

- Entertainment
- Architects
- Librarians
- Archivists
- Authors
- Artists
- Industrial Design
- Clothing Design
- Acting/Stage Direction
- Musicians
- Photography
- Printing

- Film production
- Radio and Television
- Museums/Galleries

The study ranked the characteristics of local cultural economics on a scale of one to three on a “Creative City Development” scale. A score of one indicates that the economy displays basic activity with minimal support in which the cultural economy has little visibility and no public-sector encouragement. A score of two or three indicates that the economy has some visibility and public-sector encouragement but industry facilitators have to strategy with which to bolster the economy. A score of two or three indicates that there is minimal division of labor within the economy, therefore indicating that production is minimal and inefficient. A score of four indicates that the market has expanded and facilities have improved, while a five and six indicate that the market is becoming autonomous and is attracting inward movement, reversing leakages from earlier stages. A score of a seven or eight indicates that the industry is known as locally important, the location is attractive, and wealth generated by the industry is retained. A score of nine represents a cultural economy in which facilities are self-sufficient, whereas a score of ten represents a relatively prefect manifestation of a cultural industry; a level ten cultural economy will compete internationally, attract talent, minimize leakage and attract leakage from other economies, and maximize value added. Additionally, local cultural economics may be evaluated through quantitative analysis, which measures different characteristics of the economy. However, these analyses do not strictly provide economic impact and are most effective in providing descriptions of key characteristics of the economy as a whole, rather than providing detailed analysis of factors within the arts and culture sector.

In addition to the Creative City Development Scale, Reeves presents a twelve-facet evaluation method for assessing cultural impact economically and socially. These facets are holistically evaluated and contribute to the Creative City Development Scale, and include:

- Organization of art form and activities
- Contributed income, including grants, donations, sales, fees, and memberships
- Outgoing costs, such as wages, travel, and marketing
- Capital Improvements, including income and expenditures

- Attendances of cultural events
- Staffing and employment growth, including employees and board members
- Facilities development
- Cultural benefits and impact
- Social capital
- Community development
- Public awareness
- Human capital

### **How the Arts Impact Communities**

Joshua Guetzkow's report for the Princeton University Center for Arts and Cultural Policy Studies entitled *How the Arts Impact Communities*, is another study that discusses current research on the impact of the arts. Guetzkow underscores the issues with many broad claims that researchers have made on this subject that are not always backed up in the data. A major weakness in research involving the arts and culture sector is that many of the results are speculation. Since there is still a lack of formal approach or even a sense of standardization with respect to methodologies, it is even more important to effectively define the community of relevant respondents and make distinctions between direct and indirect values.

To determine the mechanisms of the impact of the arts, Guetzkow evaluates impacts based on measurement of material and health benefits, cognitive and psychological benefits, interpersonal benefits, and community benefits; economic, cultural, and social. Directly, the economic impact due to the arts and culture industry is quantified based on the wages paid to employees within the industry. Additionally, tourists and visitors spend money on businesses and organizations within the industry and generate indirect economic impacts due to multipliers.

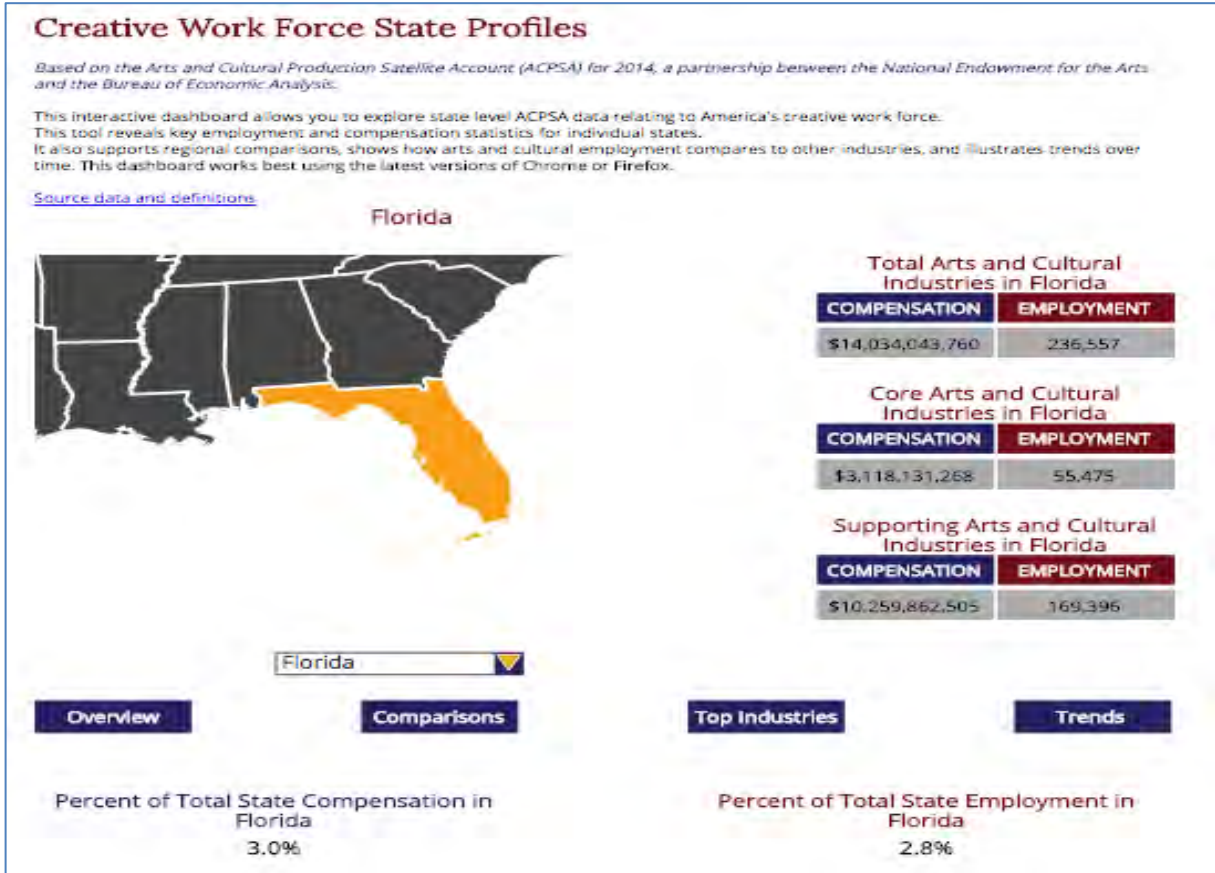
The arts and culture industry is defined in this study as an export industry; though it generates economic impact on its own, its impact can be extended to its effect on related industries. The arts industry attracts visitors for events, bolstering the tourism industry through local visitor spending at restaurants, shops, and lodging. The impact generated through this additional visitor spending is characterized in economic impact analyses as the indirect economic impact of the arts industry. In addition to visitors, the arts and culture industry attracts semi-permanent or permanent residents who will spend in the economy, as well as either generate economic impact through employment or through starting their own business within the arts industry. The economic expansion produced through industry growth and spending increases the likelihood of investment in that community; a strong

economy, specifically due to the presence of the arts, and further incentivizes people to move to the region and increase bank lending for property within the region.

### **Latest Economic Data Tracks Arts and Cultural Jobs per State**

A recent article by Victoria Hutter, *Latest Economic Data Tracks Arts and Cultural Jobs per State*, published on the National Endowment for the Art's website, has released findings from the Arts and Cultural Production Satellite Account (ACPSA), which was a collaborative effort between the National Endowment for the Arts and the U.S. Department of Commerce's Bureau of Economic Analysis (BEA). Hutter described the ASPSA as "the first federal effort to provide in-depth analysis of the arts and cultural sector's contributions to the U.S. economy." The latest ACPSA data found that the arts and cultural sector contributed 4.2 percent to the U.S. economy in 2014, and that this contribution to U.S. GDP has grown 35.1 percent between 1998 and 2014. The ACPSA measures the impact of the arts and culture sectors through data on 35 major industries that they define as being in the arts and culture sectors (including non-profit and for-profit businesses). Further, because this data was gathered on both the national and state level(s), the National Assembly of State Arts Agencies was able to use this information to produce an interactive website that shows a breakdown of major statistics and trends for each individual state in the U.S (see Figure 3).





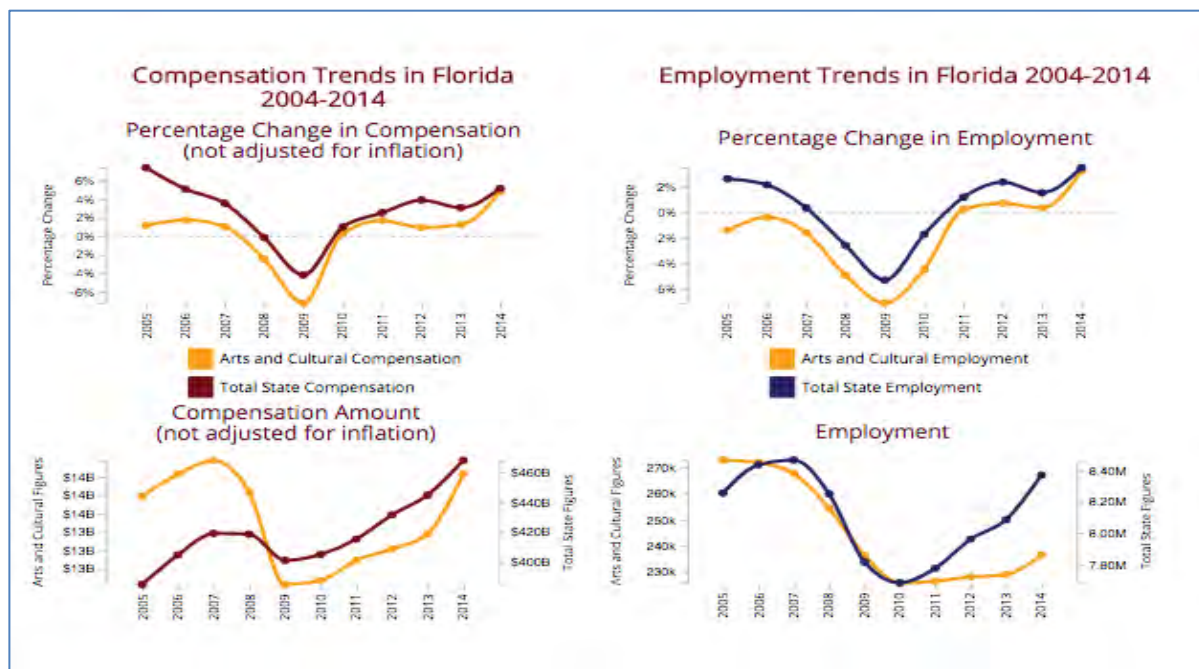
**Figure 3. The Creative Economy Work Force in Florida in 2015<sup>\*,\*\*</sup>**

\*Reprinted from the National Assembly of State Arts Agencies  
 \*\*Originally published by the National Assembly of State Arts Agencies

The National Endowment for the Arts and the Department of Commerce report that the Creative Economy contributed \$729.6 billion in value-added to the national economy in 2014; this indicates that the arts and culture industry, both for-profit and non-profit, comprised 4.2 percent of the total U.S. Gross Domestic Product. In addition, the arts and culture economic sector achieved a trade surplus of \$26.4 billion with continuous upward growth between 2006 and 2014; this surplus is primarily due to the mass-production of cinema from Hollywood (\$16.4 billion), as well as software and advertising from Silicon Valley (\$9.1 billion and \$8.0 billion, respectively). Of the total economic impact of the Creative Economy, approximately half was generated by the arts (\$453 billion) in 2014.



Nationally, the U.S Creative Economy generated \$355,213,442 in 2014 in compensation and wages. Top-compensation states included Washington (\$17,256,865), California (\$73,836,609), Texas (\$21,230,376), Florida (\$14,034,044), Georgia (\$8,749,400), Massachusetts (\$10,778,001), New York (45,515,233), New Jersey (\$10,867,194), Pennsylvania (\$10,676,812), Ohio (\$9,549,728), and Illinois (\$13,474,662). Additionally, the U.S Creative Economic generated 4,802,813 jobs in 2014. States with the highest compensation rates additionally generated the highest employment. Washington State generated 154,230 jobs, California: 674,865 jobs, Texas: 350,643 jobs, Florida: 236,557 jobs, Georgia: 126,519 jobs, Massachusetts: 128,349 jobs, New York: 259,942 jobs, New Jersey: 130,603 jobs, Pennsylvania: 169,761 jobs, Ohio: 171,902 jobs, and Illinois: 202,397 jobs.



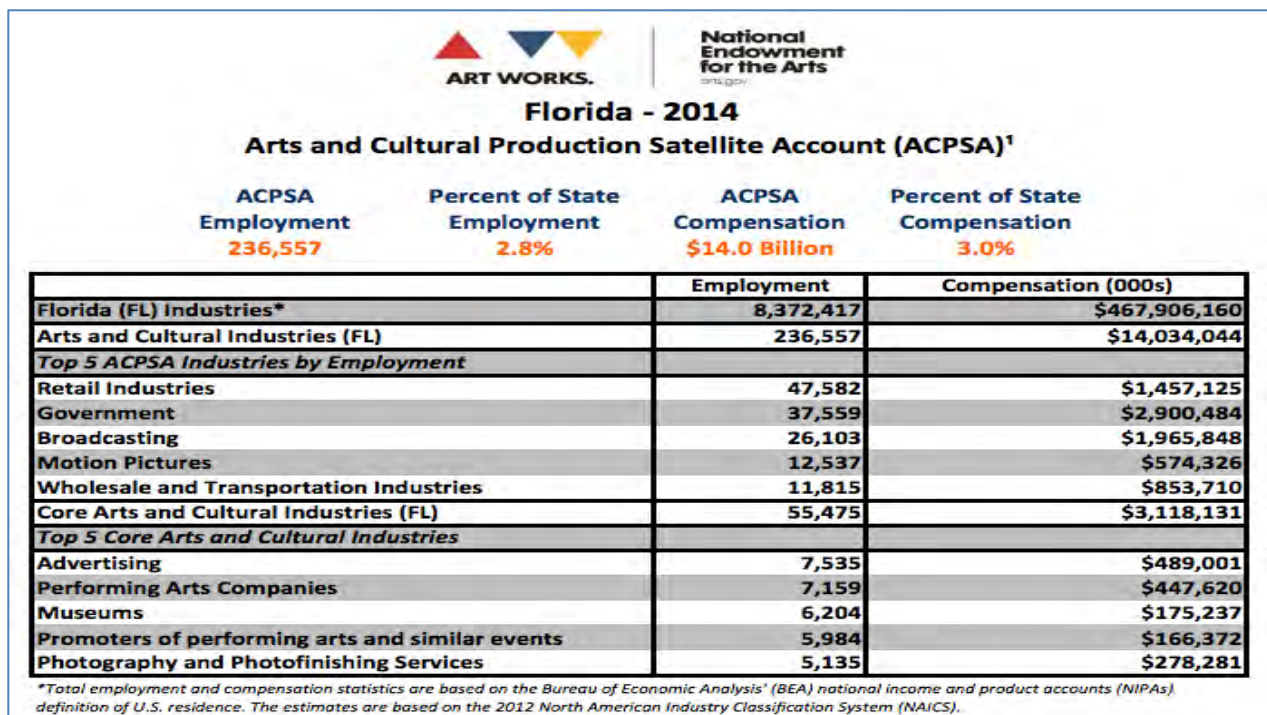
\*Reprinted from the National Endowment for the Arts

**Figure 4. The Arts and Culture Employment and Compensation Trends for Florida 2004-2014\***

Overall, New York and Wyoming exceeded the national per-worker index for the arts and culture industry by 28 to 47 percent. Wyoming surveyed to have the highest numbers of arts and culture-related construction, despite not having the highest employment rates or value-added in the arts and culture industry. This is partially due to the inclusion of nature parks in the arts and culture industry. Alaska, California, Colorado, Massachusetts, Oregon, Rhode

Island, and Utah exceeded the national average rate of arts and culture employment by nine to seventeen percent, with Utah producing the highest amount of jewelry manufacturing and design services nationally. Nevada compensated employees within the performing arts sector an average rate 500 percent higher than the national average for performing arts employees. In addition to Nevada; Rhode Island, and Hawaii produces the most performing arts employees. Hawaii’s museums, zoos, and gardens contribute to its high museum employment, which is 500 percent higher than the national average for museum employment.

Nationally, the arts and culture industry increased consistently from 2006 to 2014. In the 2013-14 fiscal year, employment growth in the sector only decreased by over one percent in twelve states, while growth in employment exceeded the national rate in seventeen states.



\*Reprinted from the National Endowment for the Arts

**Figure 5. The Total Arts and Culture Businesses in Florida\***

As shown in Figure 5, the percent of total state compensation for arts and culture in Florida was three percent, which is lower than the national total of 3.8 percent. The percent of total state employment in Florida was 2.8 percent, which is again, lower than the national total of

3.3 percent. The upward trends in the arts and culture industry were in general, following that of the rest of the Florida economy.

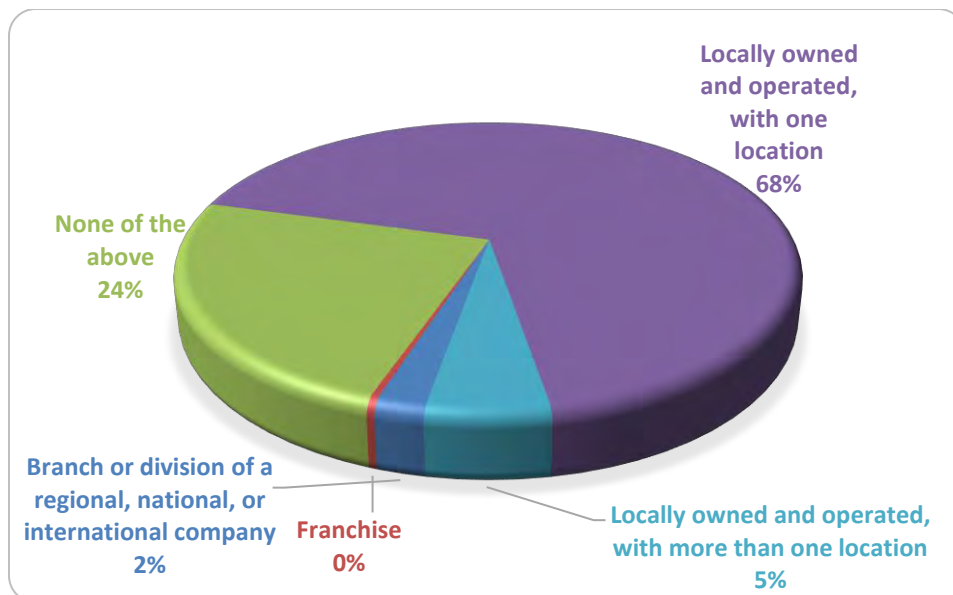
### **Statement on Arts, Jobs, and the Economy**

Another article published by Americans for the Arts titled: (Statement on Arts, Jobs, and the Economy), outlined the oft-overlooked importance of arts in the current economy as a means to job creation and overall monetary benefits. As stated in the article, “Research by the U.S. Bureau of Economic Analysis (BEA) shows that the nonprofit and for-profit arts is a \$730 billion industry that directly employs 4.8 million arts workers. This represents 4.2 percent of the nation’s GDP – a larger share of the economy than transportation, tourism, and agriculture” (Americans for the Arts). The arts also generate and drive trade both nationally, and internationally, which is especially beneficial for the U.S., as it consistently has a very high trade deficit. Finally, the arts promote tourism which attracts visitor spending and benefits local businesses.

## Survey Methodology

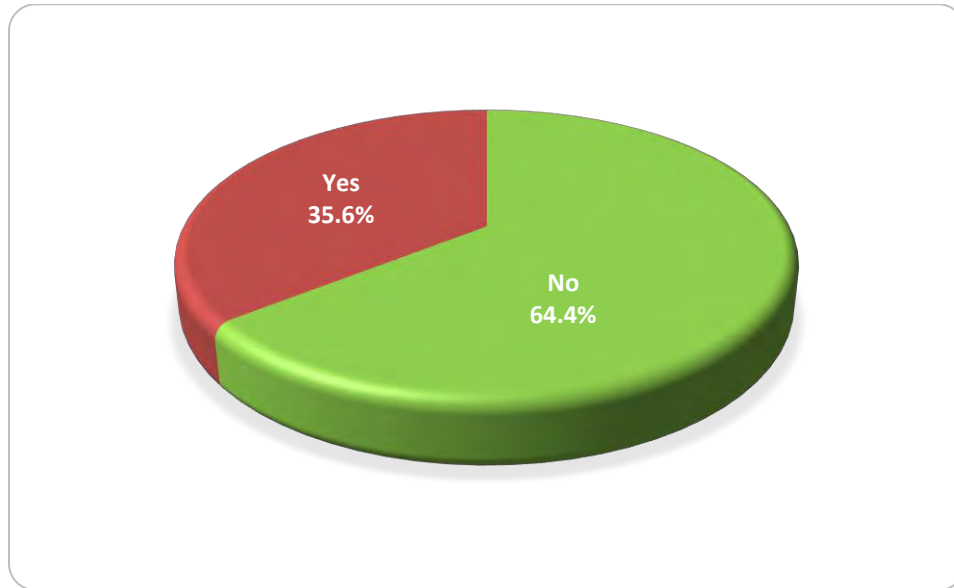
A survey of for-profit arts and culture and heritage-related businesses was conducted by COCA, using the master for-profit arts & culture database (described earlier in the narrative) in conjunction with COCA’s Artist Directory. COCA utilized their Constant Contact email list for the distribution of the survey, during the timeframe from June 5 to July 10, 2017 (see Appendix A, for a copy of the survey). Approximately 3,327 surveys were distributed, with follow up/reminders provided during that time period by COCA staff. The overall response rates were low, and although a total of 275 respondents responded to the survey, about 75 percent of the respondents only partially filled out the survey. The descriptive analyses below reflect some of the results, but these results did not meet statistical validity for the majority of the questions.

All respondents (N=275) gave a description of their business. Over two-thirds categorized their business as “locally owned and operated, with one location.” Apart from the category “none of the above”, the second category: “locally owned and operated, with more than one location” received five percent of feedback from the respondents. About a quarter of respondents marked the question with “none of the above”. The research team theorizes that they most likely were individual artists, not business owners.



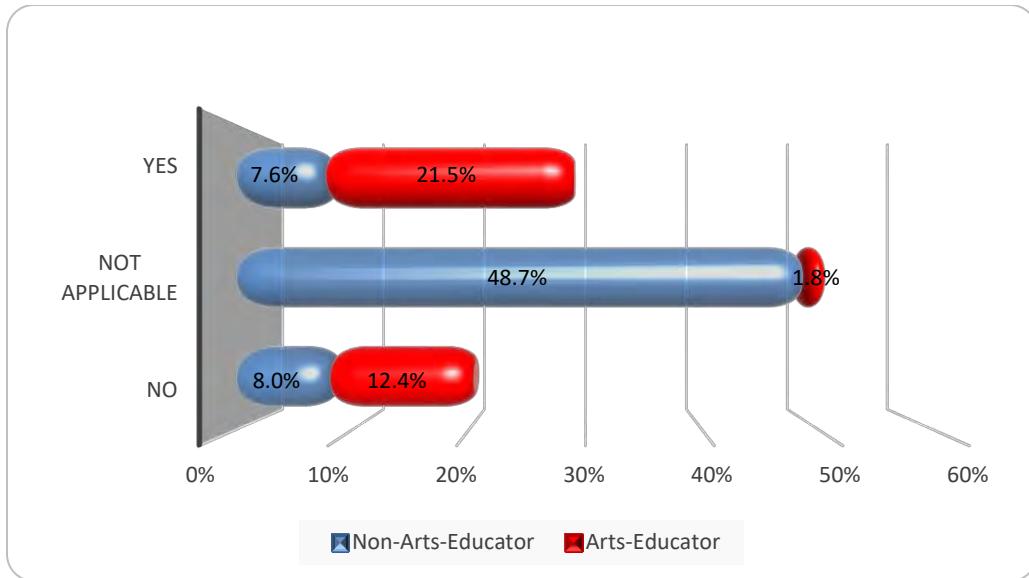
**Figure 6. Relative Distribution of Description of Business from Survey**

As shown in the following Figure, and regarding the next question on the survey, about 2/3 of total respondents are Arts educator(s).



**Figure 7. Relative Distribution of Arts Educator (or Not) from Survey**

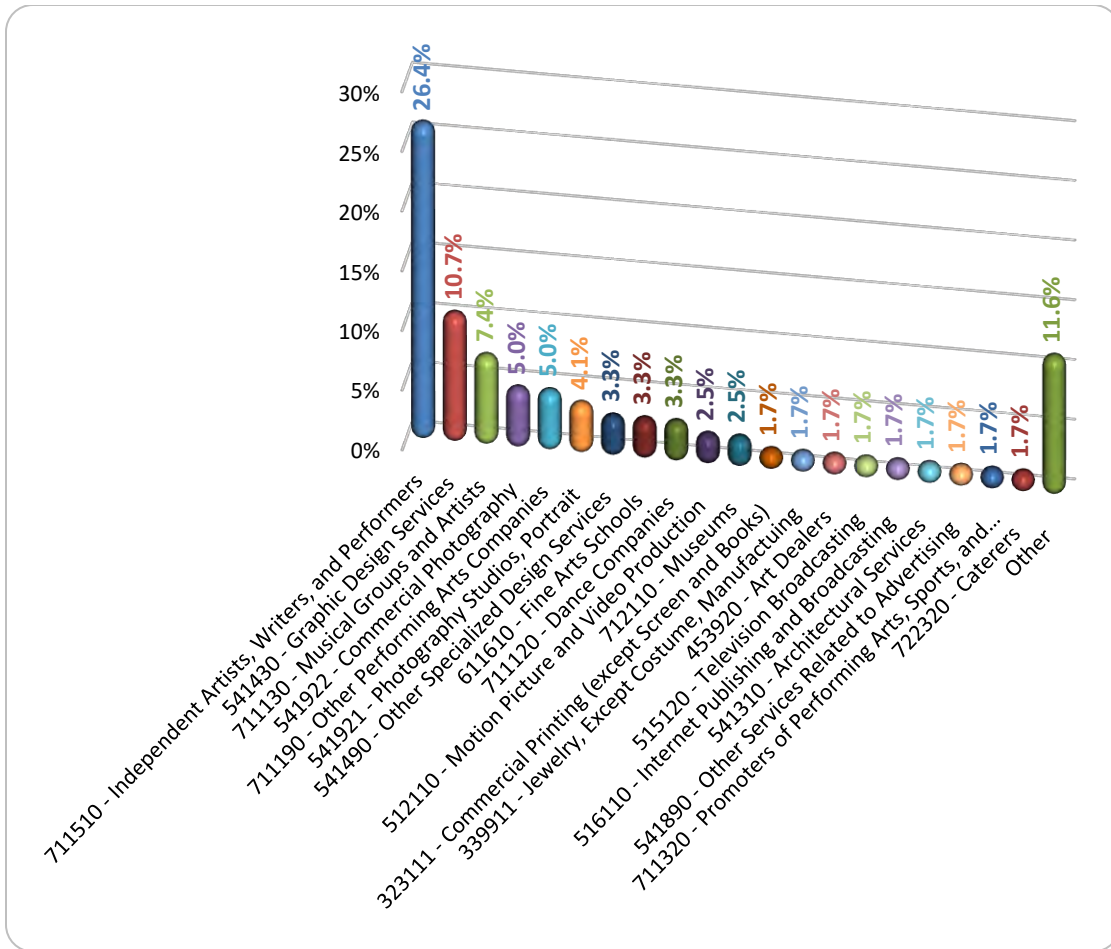
The conditional question: “If an arts-educator, do you earn any additional art-related income apart from your teaching salary throughout the year?” was also answered by all respondents (N=275). A little over half responded “not applicable.” Of those that responded affirmatively as being arts-educators, 64.4 percent stated that they do not earn any additional income apart from their teaching salaries (Figure 8).



**Figure 8. Relative Distribution of Arts Educator and Additional Arts Related Income**

One-hundred and thirty-one (N=131) respondents provided a zip-code, and one hundred thirty-five (N=135), provided a NAICS-code of their primary business. Figure 9 shows the top-20 NAICS codes corresponding to for-profit arts and culture businesses in Leon County. A remainder of fourteen codes, all with a frequency of one (i.e. each approximately 0.83%) were placed in the category “Other”. It can be observed that the 135 survey respondents identified 34 NAICS<sup>15</sup>, out of a possible 75 NAICS, based on the OEV list (see Appendix C). Thus, over 45 percent of the total identified “creative economy” industries NAICS codes were represented in this survey.

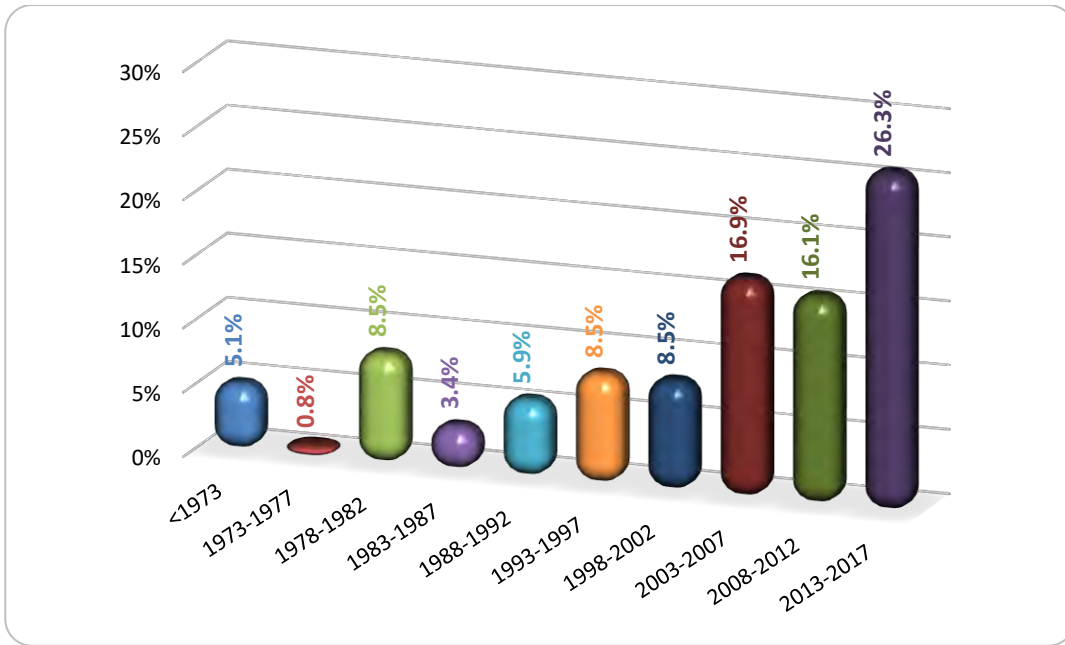
<sup>15</sup> In particular, NAICS code 711510 appeared to reflect a rather skewed perspective of the population. In this case, since this is the first study of for-profit arts and culture and heritage-related businesses, there was no ability to calibrate to external data (which is normally done). The highly distributed data doesn’t facilitate further sub-categorical analyses.



**Figure 9. Relative Distribution of Relevant NAICS from Survey**

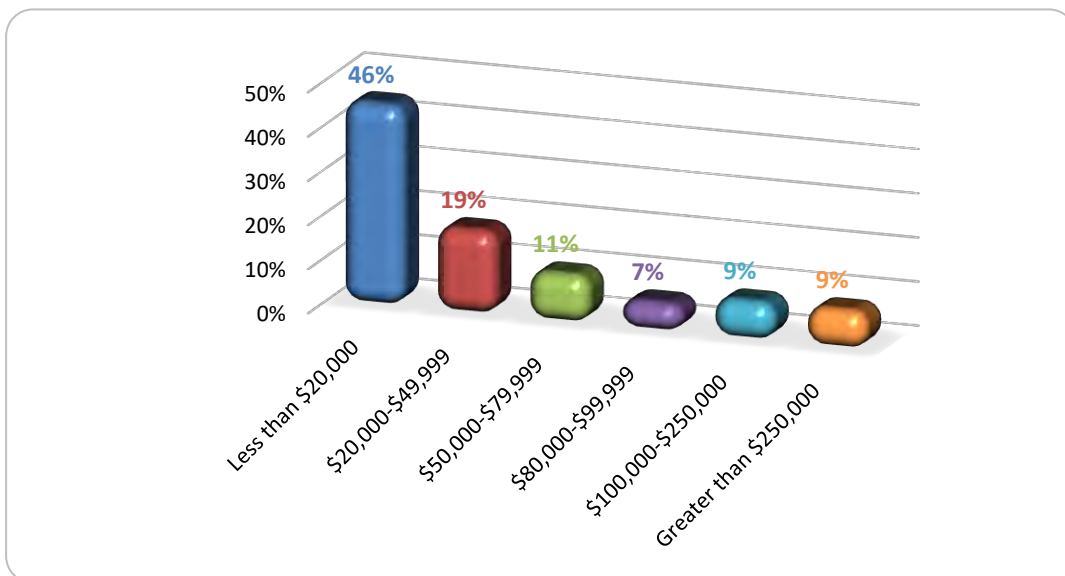
In the survey, the respondents (N=118) provided the year that their business was established. Figure 10 shows the relative frequencies in five-year categories recursive to the present. Many businesses are relatively young, with almost 60 percent being established in the last fifteen years or so.





**Figure 10. Relative Distribution of Year Established from Survey**

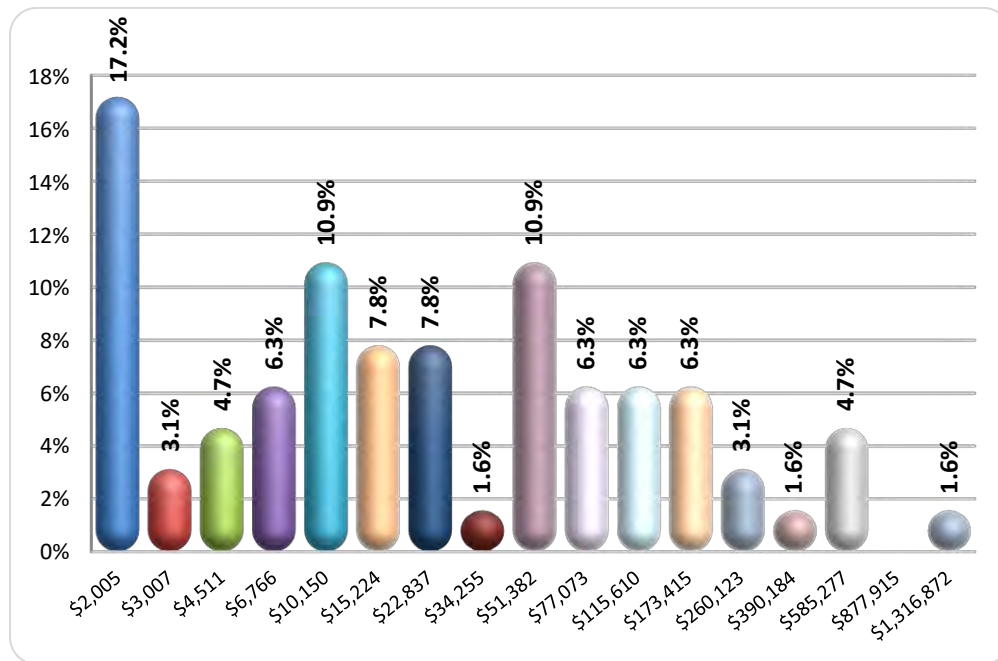
Figure 11 shows the relative frequencies of annual gross incomes by categories, based on 136 responses. The annual gross incomes of for-profit arts & culture businesses were 46 percent earning less than \$20,000, and 19 percent earning between \$20,000 and \$49,000, for a total of 65 percent. About 35 percent earned between \$50,000 and over \$250,000.



**Figure 11. Relative Distribution of Annual Gross Income from Survey**



Relating to Annual Company Sales, there were only 59 valid responses. As depicted in Figure 12, Company Sales showed the following relative distribution(s) per log-scale categories.<sup>16</sup>



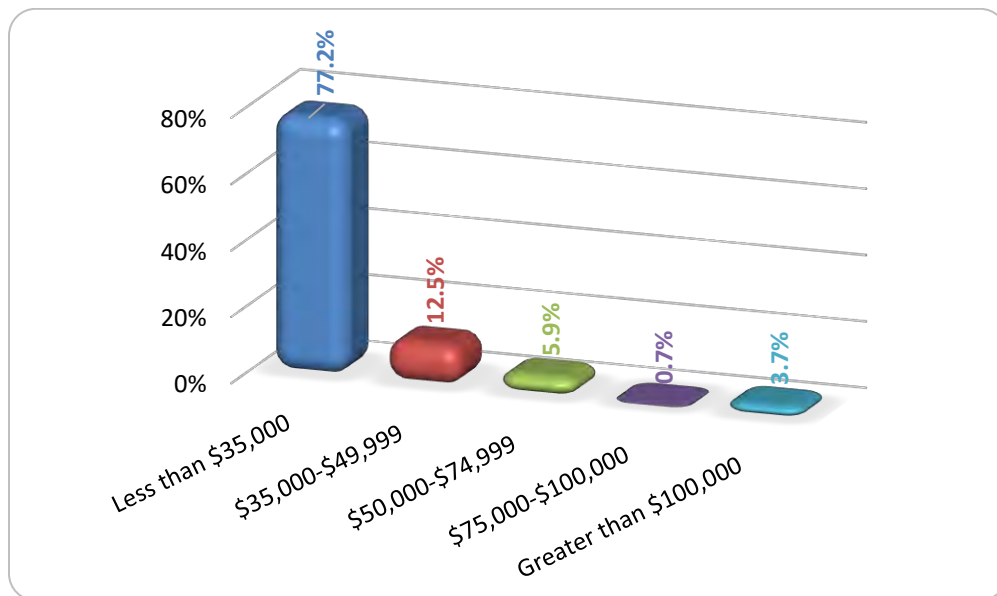
**Figure 12. Relative Distribution of Annual Company Sales from Survey**

There is clearly a double peaked distribution; one at approximately \$10,000, and another at a little over \$50,000.<sup>17</sup> The first peak may be interpreted as “non-self-sustainable” establishment endeavors with other activities likely “on the side”, and the second peak may be interpreted more as self-sustaining businesses. However, in combination with the average gross income data, mentioned earlier in Figure 11, the level of company sales appears to be at the lower end of the distribution. Thus, only a relative small percentage of establishments appear to be able to sustain both owner/proprietor and one or more (FTE/PTE) employees, concurrently. It should also be noted that the average annual wage of

<sup>16</sup> The horizontal axis shows class midpoints e.g. \$10,150 is the midpoint between \$8,287 and \$12,431, and \$51,382 is the midpoint of the category from \$41,954 to \$62,930.

<sup>17</sup> This study excluded the categories below \$2,005 and over \$1,316,872. The survey response data included \$0 (i.e., 198 responses) in the less than \$2,005 category.

employees, as shown in Figure 13, the majority of respondents reported earning “less than \$35,000” (77% of respondents; N=135).<sup>18</sup>



**Figure 13. Relative Distribution of Average Annual Wage of Employees from Survey**

Concerning the previous survey question relating to the annual gross income of the respondent, the following two questions, with corresponding analyses, will provide additional clarification.

*Q1: If you are an individual practicing artist/arts educator, what percentage of your annual gross income is independent from work you do with local arts or cultural non-profits, government, or schools/universities?*

Concerning this question, which included 79 responses, results showed that the average percentage was 11.1 percent of annual gross income is independent from other work with

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<sup>18</sup> Both questions on full-time and part-time employment numbers are not further discussed for reasons that responses left open the issue whether the proprietor is, or is not, included in employment. There are some survey comments with regard to this question, thus the research team made a decision to invalidate this response. In principle, if the combined cost components relative to sales would be in place, an interpretation by the research team could give some recourse on which response to adjust. However, neither part-time is defined (in terms of FTE equivalence, e.g. two PTEs are assumed equal to one FTE), nor are the other financial responses statistically valid.

non-profits, government or schools/universities. In other words, about 88.9 percent of individual practicing artist/arts educators derive their gross income from for-profit arts and culture and heritage-related businesses.

*Q2: If you are an individual practicing artist, what percentage of your annual gross income is NOT related to arts/cultural work? (For example, if you work full-time as an attorney, but you receive 20% of your annual income from your band, your answer here would be 20%. If you are an arts teacher, you should consider your teaching income under the category of "practicing artist".)*

Relating to the second question, the first part of the question directly contradicts the example. Thus, the responses to this question were inconsistent, and could therefore not be used for further survey analyses. If stated properly, it would have provided an essential part of information for the analyses. If the research team were confident in these responses, there would have been seventy-one respondents that answered with an average of 35.86 percent of their annual gross income as “not related to arts/cultural work.”

The next batch of questions starting with: “How much do you pay yearly in income taxes?” and ending with: “How much do you spend on other miscellaneous expenses?” was not further analyzed as the research team is in doubt with the respondent’s interpretation of the questions. The research team was unclear whether the respondent’s answered from a personal or for-profit business perspective, based on some comments from the survey.

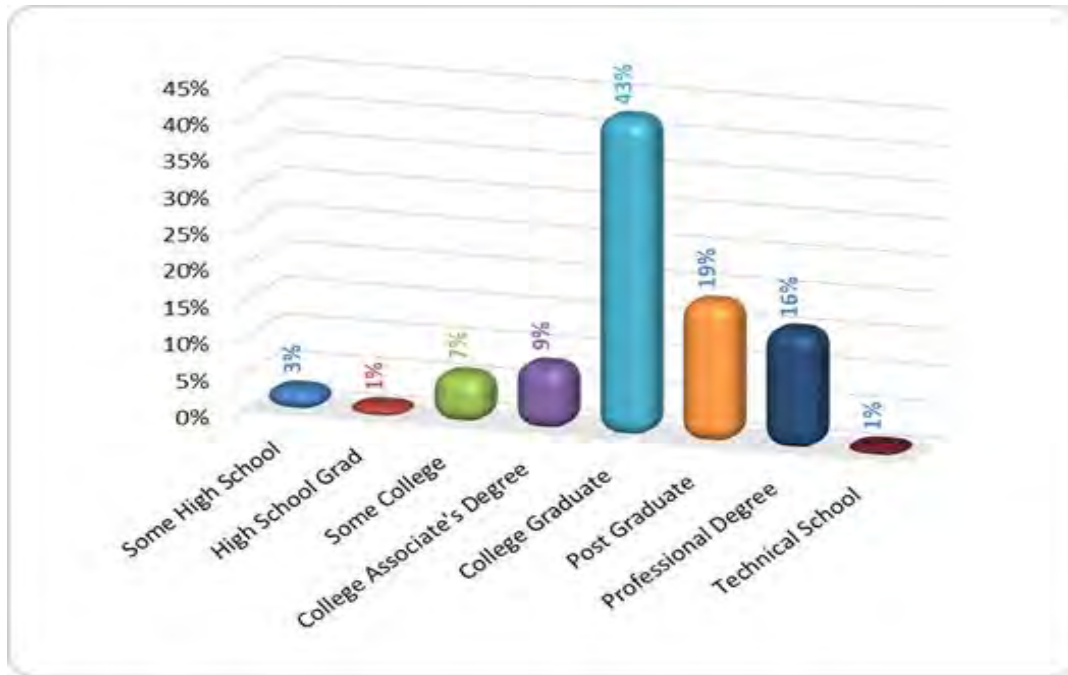
Relating to income, the general perception should be:

$$\text{Total Income} = \text{Income proprietor} + \text{average wage employees} \times \text{average number of employees} \quad (1)$$

Since wages of employees were expressed in broad categories, only a rough adjustment can be made for bringing full-time and part-time employees to a standard equivalent.

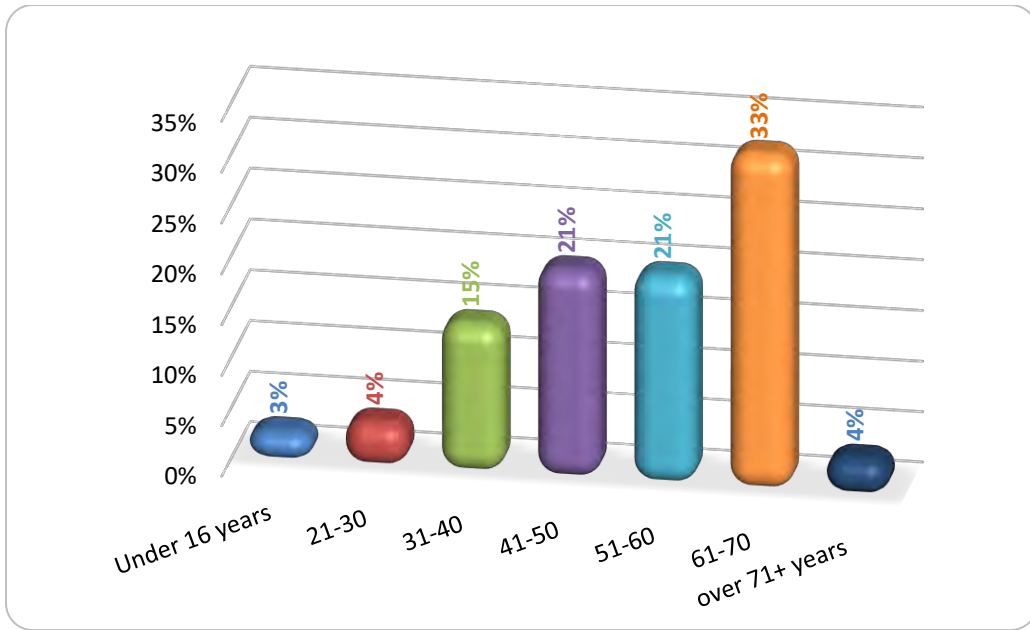
There are additional survey questions relating to the demographics of the for-profit arts & culture and heritage-related business respondents, including: level of education, age, and

gender. Figure 14 displays the relative distribution on the highest level of education of the respondent (N=136). The for-profit arts & culture community is highly educated, with about 78 percent of respondents being college graduate, post graduate or professional degree earners.



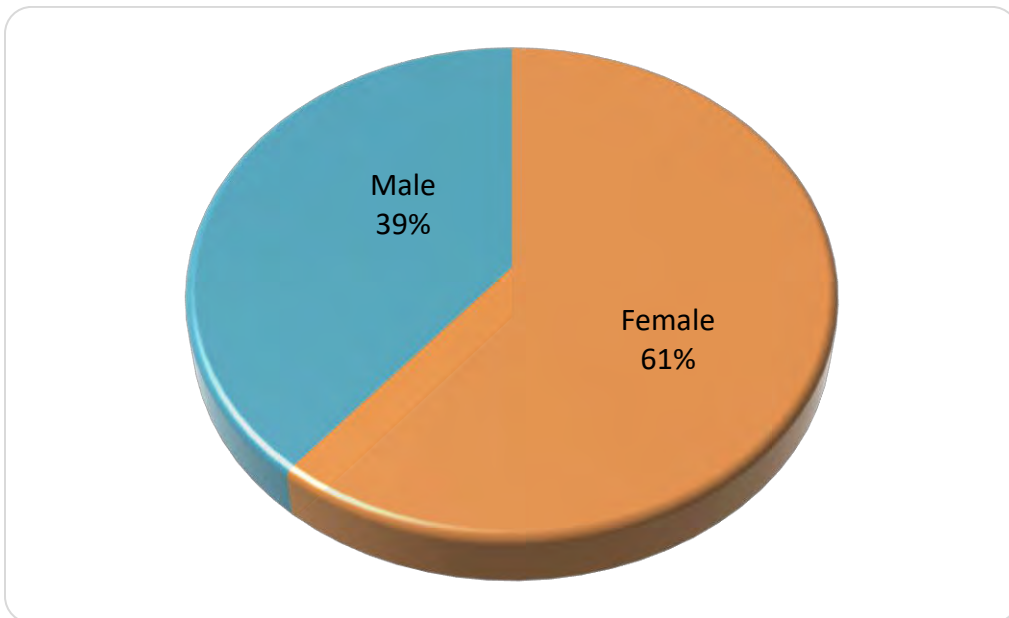
**Figure 14. Relative Distribution of Highest Level of Education from Survey**

Figure 15 shows the relative age distribution of respondents. About two-thirds of respondents fall within the ages of lifetime earners; from 21 to 60 years old. The remaining third were in the category of 61 to 70 years; near- or current retirees, or pensioners. Hence, the responses illustrate a “graying” status for-profit arts & culture and heritage-related establishments.



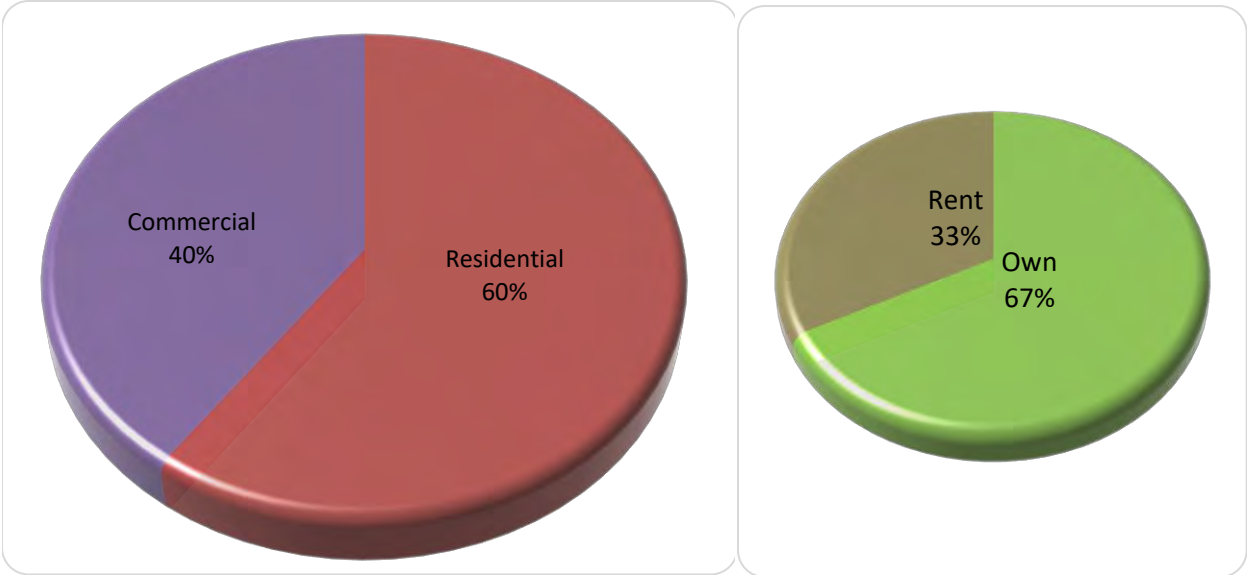
**Figure 15. Relative Age Distribution from Survey**

As depicted in Figure 16 concerning gender, the survey respondents (N=136) were 61 percent female, and 39 percent male.



**Figure 16. Relative Gender Distribution from Survey**

The next series of survey questions discussed the space used for the for-profit arts & culture and heritage-related businesses relating to commercial and residential space ownership or rental, and average monthly costs. As shown in the following Figure, 40 percent of respondents (at N=132) indicated using a commercial space, while 60 percent indicated using a residential space. One-third of survey respondents (N=132) indicated that their business space is rented and two-thirds responded that they own their business space.

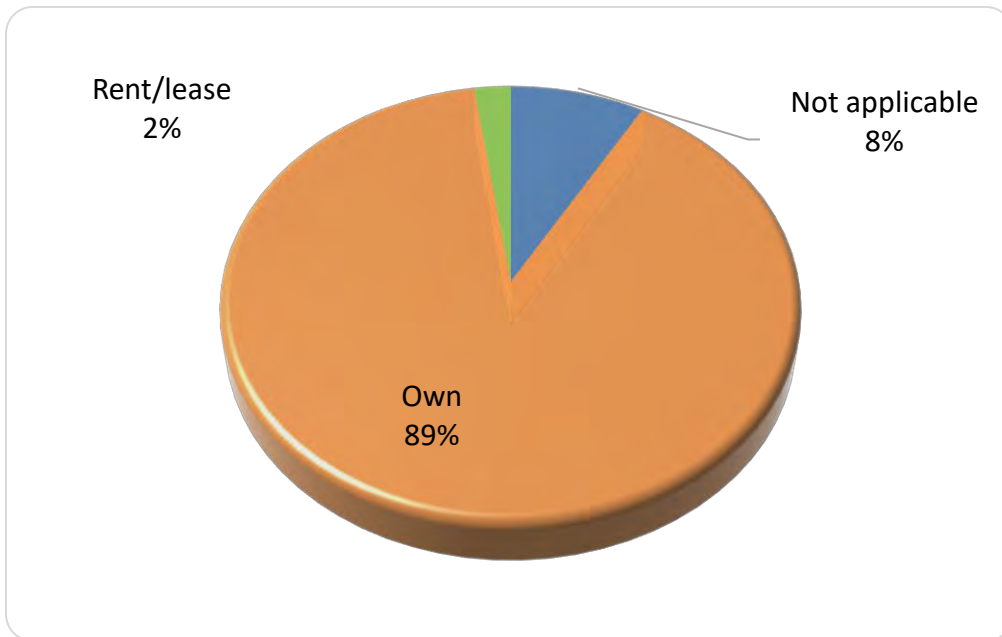


**Figure 17. Relative Distribution of Operating Space and Relation to that Space**

As presented in Figure 18, the responses relating to costs of arts & culture and heritage-related business space are shown for rental (N=34) vs. owned (N=39) space. The monthly mortgage payments averaged \$1,993, while rent payments averaged \$2,103. As depicted in Figure 19, Equipment (N=132) is overwhelmingly owned by the arts & culture and heritage-related business community, whereas two percent of respondents revealed they rented their equipment monthly for between \$80 and \$150.



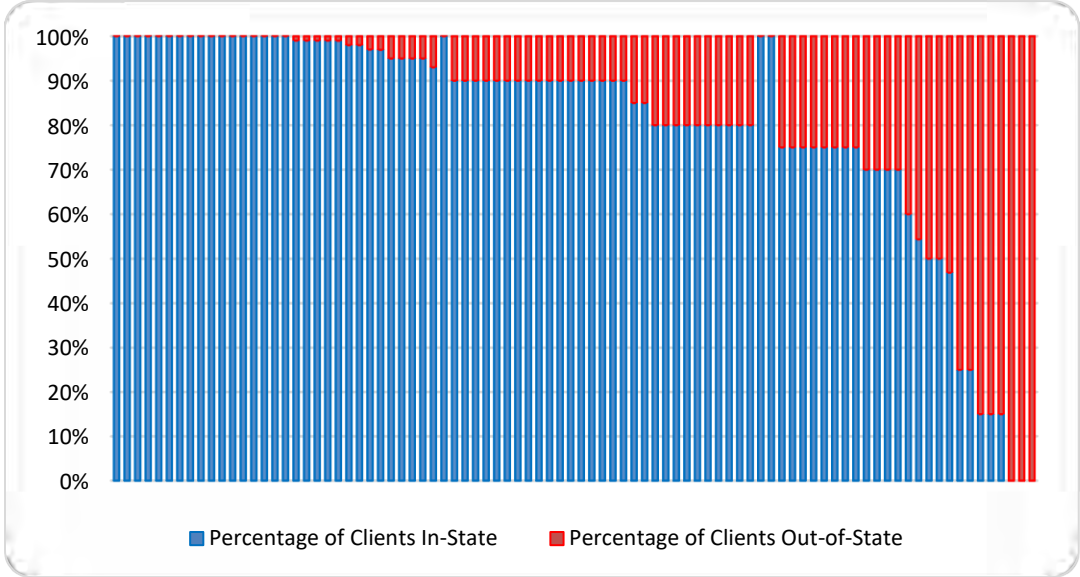
**Figure 18. Relative Distribution of Average Monthly Mortgage or Rent from Survey**



**Figure 19. Relative Distribution Ownership or Rental of Equipment from Survey**

There were 187 survey responses with “zero’s” on all four survey questions concerning the geographic location of clientele. The highest frequencies were shown to be in Leon County. Figure 20 shows the sorted overall outcomes in percentages per category. The horizontal

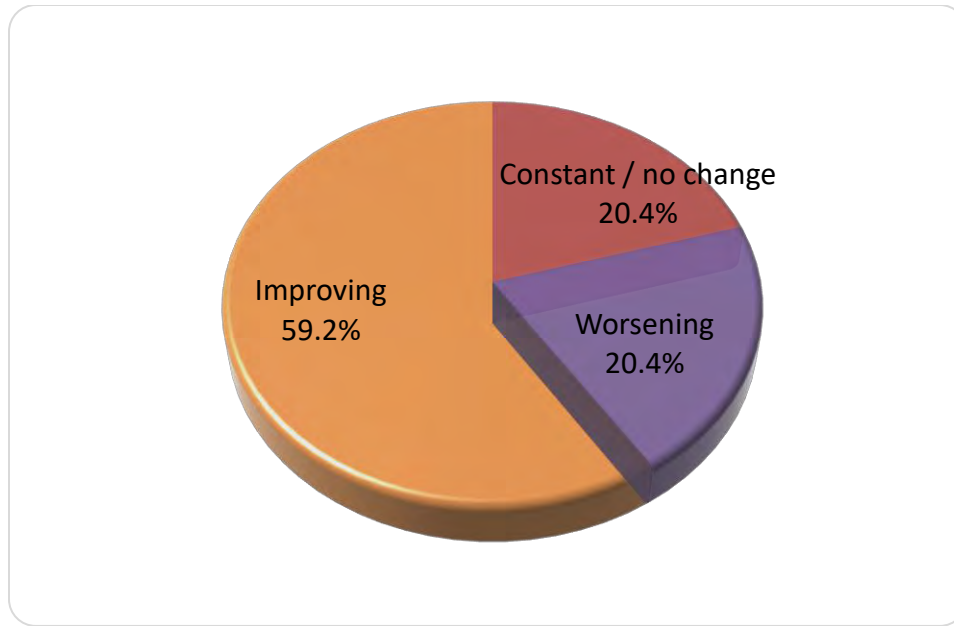
axis depicts the 88 sorted respondents, hence no scale was provided. The area In-State clients comprised 80 percent, while the Out-of-State clients were approximately 20 percent of the total.



**Figure 20. Relative Distribution of In-State versus Out-of-State Clients from Survey**

In a closing question, the survey respondents were asked for their perception of the arts & culture and heritage-related business customer base over the past ten years. As presented in Figure 21, almost sixty percent (of N=98) perceived an increasing customer base, while the remainder 40 percent either perceived a constant/no change, or a worsening, in equal proportions of 20 percent, respectively.





**Figure 21. Distribution on How the Arts & Culture Customer Base is Perceived**

The following section provides a description of the research team’s arts & culture and heritage-related business master database ultimately used for the economic impact analysis. As expressed previously, the research team was unable to conduct the economic impact analysis using data collected from the survey results, due to the incomplete financial, or economic data extracted the survey. A few advantages of the research team’s master database are that it provides a listing of a large number of arts & culture and heritage-related businesses, and includes at least 20 years of business data; e.g., sales/revenues, number of employees, among other for-profit arts & culture-specific data .

### **Database Measures**

The FSU research team compiled three existing databases into a master database, based on selected “creative economy” industries NAICS codes in Leon County (see Appendix C). The three databases were the National Establishment Time Series (NETS) database,<sup>19</sup> the

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<sup>19</sup> The National Establishment Time-Series (NETS) Database is a Walls & Associates database. They convert Dun and Bradstreet (D&B) archival establishment data into a time-series database of establishment information. The NETS Database provides longitudinal data on various dynamics of the U.S. economy that include establishment job creation and destruction, sales growth performance, survivability of business startups, mobility patterns, changes in primary markets, corporate affiliations that highlight M&A, and historical D&B credit and payment ratings. The NETS database covers businesses, non-profit and government

Enterprise Florida (e-Florida) database,<sup>20</sup> and the YourEconomy Time-Series (YTS) database from the University of Wisconsin-Extension's Division for Business & Entrepreneurship.<sup>21</sup> Three years of data were used (2012, 2013 and 2014) in order to have solid data on employment, and sales & revenues, for further analyses. The compiled dataset was un-duplicated, which required the research team to use some subjective interpretation on naming conventions.<sup>22</sup> In a second round, a dozen or so initially perceived duplicates were un-duplicated again based on non-matching of the first three digits of the NAICS codes.<sup>23</sup> The reason for using the three first digits of NAICS codes was that the NAICS codes associated with NETS are self-selected by establishments. Hence, an estimate was sought between first order errors on name and second order errors on NAICS. Under no circumstance was a double entry un-duped if they originated from the same source. There were some cases of a clear flip, or change, in NAICS code over time. In this case, the more recent self-assigned NAICS was used. Finally, some non-profits were selected in consultation with COCA, and removed from the list. In total, 3,726 initial establishments were found, while some 3,327 establishments remained after the process of un-duplication. On the 3,327 identified establishments; 3,213 had information on Employment, while 3,146 had information on Sales, and 3,213 had information on NAICS codes. The 3,327 uniquely identified establishments were assumed to be representative of the Leon County area for-profit arts & culture and heritage-related businesses, and were used further analyses.

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establishments, as well as sole proprietors, and contains data on over 44.2 million unique business, non-profit and government establishments, from 1990 onwards. Walls & Associates, 1700 Trestle Glen Road, Oakland, CA 94610-1846.

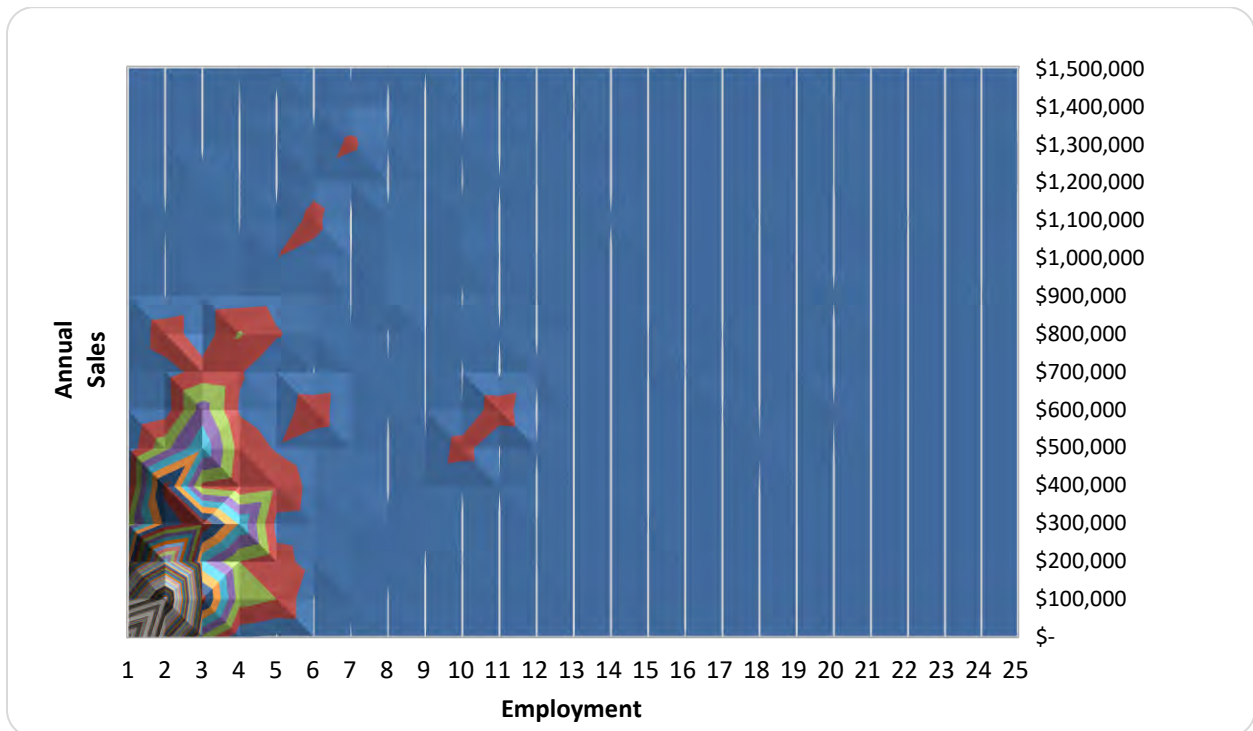
<sup>20</sup> Data retrieved from its online Data Center: see <http://www.enterpriseflorida.com/data-center/florida-companies/company-search/>

<sup>21</sup> YTS is a new establishment time series being developed by Business Dynamics Research Consortium and University of Wisconsin-Extension. YourEconomy.org (YTS or YE) is a longitudinal establishment-level online information tool that allows users to analyze business activity from the community level, to the state level, and across the country. YTS or "YE" tracks the performance of more than 61 million U.S. businesses from 2016 back through 1997, providing detailed information about jobs, sales and establishments. The specific data was received upon request: see <http://exceptionalgrowth.org/our-databases.iegc> and <http://business.uwex.edu/about-us/>

<sup>22</sup> Further checks on address or Duns number were not possible in YTS as these variables were not available.

<sup>23</sup> No address data was available from the YTS database, NETS uses DUNS-numbers, whereas YTS uses ABI numbers. In short, no other comparable variables were available.

Regarding the master database, the research team selected the variables Employment and Sales, and calculated a three-year average on the data points. It should be noted that no correction was made for establishment start-ups or those closing business within the three year timeframe. In addition, the variable “Employees” also included proprietor, in the master database. The research team decided to use the business “Sales” data as input data for the economic impact analysis. Figure 22 provides a Small-Business<sup>24</sup> perspective of the unadjusted master database.



**Figure 22. Subset of For-Profit Arts & Culture Establishments in Leon County**

Approximately 93 percent of the master database is represented within the boundaries of the above Figure. The color coding represents the businesses frequency distribution in 3-D perspective. It can be observed that for-profit arts & culture and heritage-related businesses are rather small operations. Slightly over 26 percent are one-person companies with less than \$100,000 in sales. Likewise, slightly over 53 percent fall within the one to two-person

<sup>24</sup> Small Business is defined by businesses with less than 25 employees and less than \$1,5 million annual sales.

and less than \$200,000 sales category. Almost two-thirds fall within the one to three-person, and less than \$300,000 in sales, category.

One issue that often arises is the degree to which a selected NAICS is representative of arts & culture and heritage-related businesses. There are some broad-based NAICS codes that could be only partly attributed to a for-profit arts & culture and heritage-related business. Thus, a second screening key, the Standard Occupation Codes (SOC; as shown in Appendix C) was also used. First, the SOC were selected with respect to its share in total employment in the Tallahassee Community College service area.<sup>25</sup> Likewise, it was used in calculating the arts & culture and heritage-related business share in total employment in the Tallahassee geographical area (Metropolitan Area), according to the Bureau of Labor Statistics.<sup>26</sup> The combined share resulted in a 2.12 percent share (or arts & culture and heritage-related businesses) of total employment in the area.<sup>27</sup> Assuming that the same percentage holds for variables as Gross Domestic Product (GDP) for Leon County, and for income, the three measures<sup>28</sup> were used to calculate the arts & culture and heritage-related businesses economic value, resulting in a final sales value of \$313.5 million. Next, the same SOC information was used to calculate the respective weights of key NAICS-SOC combinations.<sup>29</sup> As only a few fields contain sufficient data to obtain a level of confidence per subset, the available job totals were recalibrated, or redistributed, using a double weighting methodology, across both NAICS and SOC. The distribution per NAICS code was subsequently scaled up and used to determine NAICS breakouts to be used in the economic impact analyses. In short, the two aforementioned steps were completed in order to provide

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<sup>25</sup> The TCC service area consists of Gadsden, Leon, and Wakulla counties, using the most granular SOC employment data available from the DEO Employment Projections (2015 and 2023), using the 2015 or current year data.

<sup>26</sup> May 2016 Data retrieved from:

<https://data.bls.gov/oes/#/geoOcc/Multiple%20occupations%20for%20one%20geographical%20area>

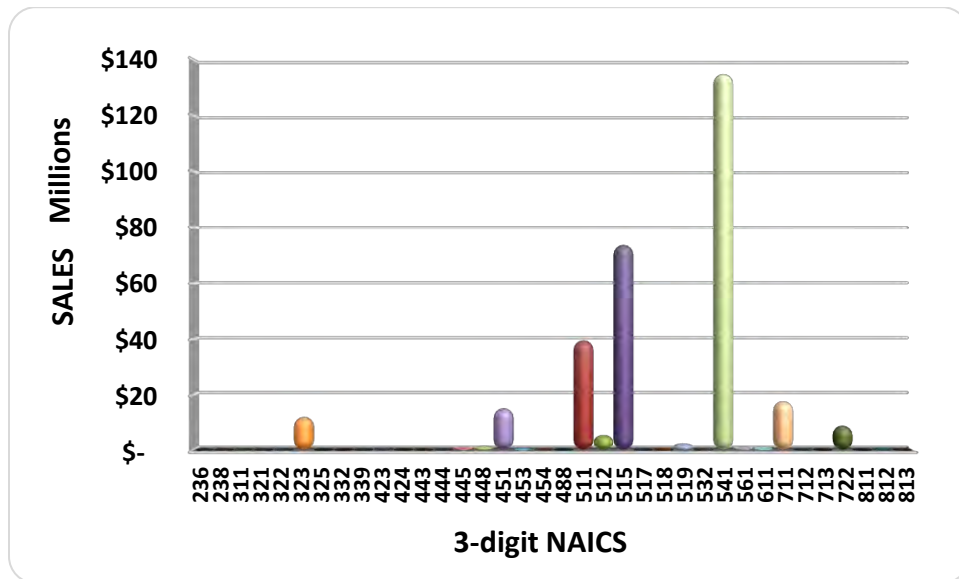
<sup>27</sup> In terms of the Arts & Culture SOCs, the average total wages (employment frequency times the average wage per SOC) expressed in the Tallahassee area total average wages; the percentage came out at 2.2246%. This percentage however is not used in the percentage calculation, as it is one of the measures used to calculate total arts value.

<sup>28</sup> All Industries Tallahassee GDP (BEA), Compensation (BEA) and Wages (BLS).

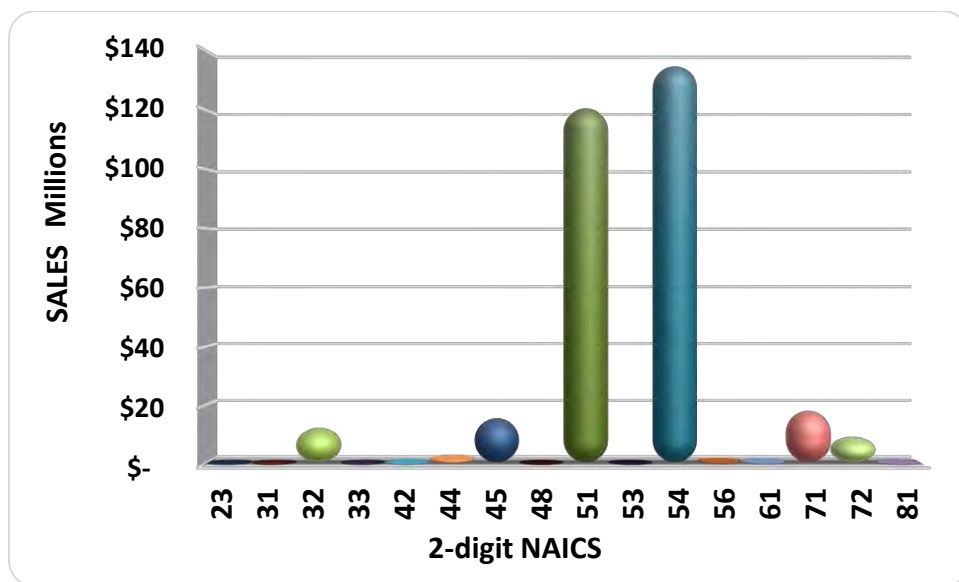
<sup>29</sup> Performed at the 3-digit level NAICS and SOC, and for five sectors only (namely NAICS 511 Publishing Industries (except Internet), 541 Professional, Scientific, and Technical Services, 561 Administrative and Support Services, 711 Performing Arts, Spectator Sports, and Related Industries, and 722 Food Services and Drinking Places) as further detail or additional business sectors produced too many gaps in the data.

the final estimation of the direct impacts of the arts & culture and heritage-related businesses in the Leon County area.

The following two Figures (23 and 24) depict the three digit, and two digit, NAICS-adjusted arts & culture and heritage-related business sales, used as the input data in order to perform the economic impact analyses.



**Figure 23. Distribution on Adjusted Sales Input at the Three Digit NAICS Codes**



**Figure 24. Distribution on Adjusted Sales at the Two Digit NAICS Code Level**

Finally, Tables 1 and 2 provide the used 3-digit and 2-digit NAICS weight factors per sector, used as direct input for the economic impact analyses.

**Table 1. NAICS 2-Digits and NAICS 3-Digits Sectors and Weight Factors**

Sector		Description	Factor	
2-digit	3-digit		2-digit	3-digit
23	<b>Construction</b>		<b>0.1%</b>	
	236	Construction of Buildings		0.1%
	238	Specialty Trade Contractors		0.0%
31	<b>Manufacturing</b>		<b>0.3%</b>	
	311	Food Manufacturing		0.3%
32	<b>Manufacturing</b>		<b>10.1%</b>	
	321	Wood Product Manufacturing		0.0%
	322	Paper Manufacturing		0.1%
	323	Printing and Related Support Activities		10.3%
	325	Chemical Manufacturing		0.0%
33	<b>Manufacturing</b>		<b>0.3%</b>	
	332	Fabricated Metal Product Manufacturing		0.3%
	339	Miscellaneous Manufacturing		0.1%
42	<b>Wholesale Trade</b>		<b>0.6%</b>	
	423	Merchant Wholesalers, Durable Goods		0.6%
	424	Merchant Wholesalers, Nondurable Goods		0.4%
44	<b>Retail Trade</b>		<b>2.7%</b>	
	443	Electronics and Appliance Stores		0.0%
	444	Building Material and Garden Equipment and Supplies Dealers		0.1%
	445	Food and Beverage Stores		3.0%
	448	Clothing and Clothing Accessories Stores		2.7%
45	<b>Retail Trade</b>		<b>8.1%</b>	
	451	Sporting Goods, Hobby, Musical Instrument, and Book Stores		8.8%
	453	Miscellaneous Store Retailers		0.8%
	454	Nonstore Retailers		0.0%
48	<b>Transportation and Warehousing</b>		<b>0.0%</b>	
	488	Support Activities for Transportation		0.0%
51	<b>Information</b>		<b>17.2%</b>	
	511	Publishing Industries (except Internet)		21.2%
	512	Motion Picture and Sound Recording Industries		6.4%
	515	Broadcasting (except Internet)		18.0%
	517	Telecommunications		0.0%
	518	Data Processing, Hosting, and Related Services		0.0%
	519	Other Information Services		9.6%
53	<b>Real Estate and Rental and Leasing</b>		<b>0.1%</b>	
	532	Rental and Leasing Services		0.1%
54	<b>Professional, Scientific, and Technical Services</b>		<b>19.2%</b>	
	541	Professional, Scientific, and Technical Services		19.2%
56	<b>Administrative and Support and Waste Management and</b>		<b>13.2%</b>	
	561	Administrative and Support Services		13.2%
61	<b>Educational Services</b>		<b>3.9%</b>	
	611	Educational Services		3.9%
71	<b>Arts, Entertainment, and Recreation</b>		<b>18.1%</b>	
	711	Performing Arts, Spectator Sports, and Related Industries		18.9%
	712	Museums, Historical Sites, and Similar Institutions		2.6%
	713	Amusement, Gambling, and Recreation Industries		0.1%
72	<b>Accommodation and Food Services</b>		<b>15.2%</b>	
	722	Food Services and Drinking Places		15.2%
81	<b>Other Services (except Public Administration)</b>		<b>1.7%</b>	
	811	Repair and Maintenance		0.0%
	812	Personal and Laundry Services		2.0%
	813	Religious, Grantmaking, Civic, Professional, and Similar Organizations		0.1%

## **Economic Impact Analyses**

The total economic impacts of for-profit arts & culture and heritage-related business spending was estimated with multipliers generated using a regional economic input-output model for the State of Florida constructed with the IMPLAN economic impact modeling system (IMPLAN Group, LLC, 2015). IMPLAN is a widely accepted integrated input-output model, used extensively by state and local government agencies to measure proposed legislative and other program and policy economic impacts across the private and public sectors. There are several advantages to using IMPLAN:

- It is calibrated to local conditions using a relatively large amount of local county level and state of Florida specific data;
- It is based on a strong theoretical foundation, and;
- It uses a well-researched and accepted applied economics impact assessment methodology supported by many years of use across all regions of the U.S.

The economic impact model used for this analysis was specifically developed for the counties of Florida (specifically, Leon County), and includes 536 business sectors (based on the North American Industrial Classification System, or NAICS) and latest dataset – year 2015 data. IMPLAN’s principal advantage is that it may be used to estimate direct, indirect and induced economic impacts for any static (point-in-time) economic stimulus. Through the estimation of economic multipliers, the “ripple” effects of supply chain spending for input purchases are captured (indirect effects), and household spending by employees (induced effects) for new final demand to the regional economy, as well as direct spending and employment. Economic multipliers for each business sector and household income category are used to estimate the following economic impacts: economic output or revenue, employment (fulltime and part-time jobs), value added, labor-income, among other economic impacts.

### **Economic Impact Model Input Data**

As mentioned previously in the report, the approach taken to this economic impact analysis was based on input data from the for-profit arts & culture and heritage-related business master database. This methodology is a viable approach given that the research team was unable to extract any useful or statistically valid input data from the survey instrument



(which is typically the standard approach). One advantage to using the master database is that the research team had comprehensive, and representative, data from the area's 3,327 for-profit arts & culture and heritage-related businesses. The input data used for the economic impact analysis was described earlier in the section on "database measures"; including sales, number of business establishments, number of employees, and type (NAICS code) of business. The respective sales data were assigned to appropriate industry sector categories using NAICS, and further translated into IMPLAN-specific industry sectors in the economic impact model. The share of spending inside Leon County was based on Leon County's average percentage of total purchases of each particular good or service. These shares are known as regional purchase coefficients, which were econometrically estimated by the IMPLAN software based on the balance of supply and demand in Leon County for each product or service.

### **Economic Impact Results**

The total economic impacts of the for-profit arts & culture and heritage-related businesses in Leon County, including regional economic multiplier effects arising from supply chain activity (indirect effects) and employee household spending (induced effects) for new final demand generated by for-profit arts & culture and heritage-related business sales, are summarized in Table 2. The industry output impacts were estimated at \$526.2 million, representing the sales revenues received for goods and services sold to the for-profit arts & culture and heritage-related businesses. The total employment impacts were estimated at 5,731 fulltime and part-time jobs,<sup>30</sup> representing approximately 3.9 percent of the Leon County workforce. The total value added impact of \$276.7 million represents the net value of total economic activity generated, and is also equivalent to 2 percent of the Leon County Gross Domestic Product (GDP). Labor income impacts of \$205.6 million represented wages,

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<sup>30</sup> Based on the survey results relating to the for-profit arts & culture businesses, the expectation is that businesses are comprised of about 60 percent, and 40 percent, full time and part time employees, respectively. Thus, it is estimated that the breakout would be about 3,439 FT, and 2,292 PT, employees.

salaries and benefits received by employees and business owners, or 1.8 percent of the Leon County labor income.<sup>31</sup>

**Table 2. Summary of Economic Impacts, by Economic Activity, of the For-Profit Arts & Culture and Heritage-Related Businesses in Leon County**

<b>For Profit Arts &amp; Culture Businesses in Leon County</b>				
<b>Economic Impacts</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
<b>Output</b>	\$312,199,849	\$105,419,392	\$108,587,337	\$526,206,578
<b>Employment</b>	4,045	825	861	5,731
<b>Labor Income</b>	\$135,891,320	\$35,684,804	\$34,058,384	\$205,634,508
<b>Value Added</b>	\$156,485,189	\$56,549,469	\$63,622,414	\$276,657,072

Values in June, 2017 dollars. Sources: FSU CEFA master database of arts & culture and heritage-related businesses.; IMPLAN software and most recent Leon county data (2015).

In summary, the arts & culture and heritage-related businesses are an important contributor to Leon County’s economy both directly and indirectly through business sales and revenues. As of June 2017, the total economic impacts of the for-profit arts and culture and heritage-related businesses were estimated at \$526.2 million (or over \$0.5 billion) in output or revenues, \$205.6 million in labor income, \$276.7 million in value added (GDP), and 5,731 jobs.

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<sup>31</sup> Note that these economic measures are independent and should not be summed together.

## Conclusions

The purpose of this study is to provide an economic impact analysis of for-profit arts & culture and heritage-related businesses, and individual artists, in Leon County. This study serves as the “for-profit arts & culture” counterpart to the recently released study “Arts and Economic Prosperity, The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Leon County, Fl.” conducted by the *Americans for the Arts*.<sup>32</sup> In addition to the use of a survey of Leon County individual artists and for-profit arts & culture and heritage-related businesses (with data received on 275 responses), the research team used three different databases compiled into a “master” database; the National Establishment Time-Series (NETS) database of businesses, the Enterprise Florida’s online business Data Center, and the YourEconomy Time-Series (YTS) database administered by the University of Wisconsin-Extension’s Division for Business & Entrepreneurship.<sup>33</sup>

The survey results revealed that for-profit arts & culture and heritage-related businesses were about 61 percent female, with about one-third of the respondents being 61 years or greater. The for-profits arts & culture and heritage-related businesses are a highly educated group: about 78 percent of the respondents were college graduate, post-graduate, or professional degree earners. Thirty-six percent of the survey respondents were arts educators in the community. Over two-thirds of businesses were locally owned and operated, with one location. Just over one quarter of the responses identified their business as being in the “Independent Artists, Writers and Performers” category, with 11 percent of respondents providing “Graphics Design Services.” Forty-six percent of the respondents’ stated their annual gross income was less than \$20,000, and 19 percent listed between \$20,000 and \$50,000; whereas about 35 percent earned between \$50,000 and over \$250,000. On average, about 36 percent of the total respondents’ annual gross income is not

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<sup>32</sup> Americans for the Arts (2017), Arts & Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Leon County, FL. For summary see: [http://www.americansforthearts.org/sites/default/files/pdf/2017/by\\_program/reports\\_and\\_data/aep5/map/FL\\_LeonCounty\\_AEP5\\_OnePageSummary.pdf](http://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/FL_LeonCounty_AEP5_OnePageSummary.pdf)

<sup>33</sup> FSU CEFA is serving as a beta tester for business data provided by YTS.

related to for-profit arts & culture and heritage-related work. Over  $\frac{3}{4}$  of the respondents' stated that the annual wages of their employees were \$35,000 or less.

According to the respondents, their in-state clients comprised about 80 percent, and out-of-state clients were 20 percent of their total clientele. Regarding their perception on the arts & culture and heritage-related businesses customer base over the last ten years, almost 60 percent responded that they perceived an increase in customers over time, whereas the remainder 40 percent saw either no change or a worsening, in equal proportions of 20 percent, respectively.

Using the for-profit arts & culture and heritage-related business master database, the research team identified 3,327 for-profit arts & culture and heritage-related establishments in the Tallahassee area. In addition to using supplemental data from the Bureau of Labor Statistics (BLS) and Florida Department of Economic Opportunity (DEO) Workforce Data, the research team estimated that for-profit arts & culture and heritage-related businesses represented 2.2 percent of the local economy in 2016. In direct terms, this constituted approximately \$313.5 million in sales/revenues in arts & culture and heritage-related businesses in the area. As the next step, in order to perform the economic impact analysis, the research team used the IMPLAN software, based on the sales data in the master for-profit arts & culture and heritage-related business database.

The total economic impacts of the for-profit arts & culture and heritage-related businesses in Leon County, including regional economic multiplier effects arising from supply chain activity (indirect effects) and employee household spending (induced effects) for new final demand generated by for-profit arts & culture and heritage-related business sales, are summarized in the following Table. The industry output impacts were estimated at \$526.2 million, representing the sales revenues received for goods and services sold to the for-profit arts & culture and heritage-related businesses. The total employment impacts were estimated at 5,731 fulltime and part-time jobs, representing approximately 3.9 percent of the Leon County workforce. The total value added impact of \$276.7 million represents the net value of total economic activity generated, and is also equivalent to 2 percent of the Leon

County Gross Domestic Product (GDP). Labor income impacts of \$205.6 million represented wages, salaries and benefits received by employees and business owners, or 1.8 percent of the Leon County labor income.<sup>34</sup>

**Table 3. Summary of Economic Impacts, by Economic Activity, of the For-Profit Arts & Culture and Heritage-Related Businesses in Leon County**

COCA For Profit Arts & Culture Businesses				
Economic Impacts	Direct	Indirect	Induced	Total
<b>Output</b>	\$312,199,849	\$105,419,392	\$108,587,337	\$526,206,578
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Values in June, 2017 dollars. Sources: FSU CEFA master database of arts & culture and heritage-related businesses.; IMPLAN software and most recent Leon county data (2015).

In summary, the arts & culture and heritage-related businesses are an important contributor to Leon County’s economy both directly and indirectly through business sales and revenues. As of June 2017, the total economic impacts of the for-profit arts and culture and heritage-related businesses were estimated at \$526.2 million (or over \$0.5 billion) in output or revenues, \$205.6 million in labor income, \$276.6 million in value added (GDP), and 5,731 jobs.

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<sup>34</sup> Note that these economic measures are independent and should not be summed together.

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## Appendices

### Appendix A-1. For-Profit Arts & Culture and Heritage-Related Businesses Survey

#### Dear Arts and Cultural Leaders,

Please take a few minutes to answer the following questions. This survey is part of a study to measure the economic impact of the for-profit, creative economy in Leon County, Florida. Your answers are anonymous and will be held strictly confidential. Please answer each question completely and return the survey by May 31<sup>st</sup>, 2017, to the attached Survey Monkey web link. Thank you!



1. What is the zip code of your primary business? \_\_\_\_\_
2. What is your type of business (NAICS<sup>35</sup> code)? \_\_\_\_\_
3. What year did your business startup? \_\_\_\_\_
4. What is your annual gross income (please circle)?
  - a. Under \$20,000
  - b. \$20,000-\$49,999
  - c. \$50,000-\$79,999
  - d. \$80,000-\$99,999
  - e. \$100,000-\$249,999
  - f. Over \$250,000
5. If you are an individual practicing artist/arts educator, what percentage of your annual gross income is independent from work you do with local arts or cultural non-profits or government? \_\_\_\_\_
6. If you are an individual practicing artist, what percentage of your annual gross income is NOT related to arts/cultural work? \_\_\_\_\_  
(For example, if you work full-time as an attorney, but you receive 20% of your annual income from your band, your answer here would be answer 20%). If you are an arts teacher, you should consider your teaching income under the category of “practicing artist”).
7. What is your education level (please circle)?

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<sup>35</sup> See: <https://www.census.gov/eos/www/naics/>



- a. Some High School
  - b. High School Grad
  - c. Technical School
  - d. Some College
  - e. College Associate's Degree
  - f. College Graduate
  - g. Post-Graduate
  - h. Professional
8. What is your age (please circle)?
- a. Under 16 years
  - b. 16-20 years
  - c. 21-30 years
  - d. 31-40 years
  - e. 41-50 years
  - f. 51-60 years
  - g. 61-70 years
  - h. Over 71+ years
9. What gender do you identify with (please circle)?
- a. Female
  - b. Male
  - c. Other
10. Do you operate in a commercial or residential space (please circle)?
- a. Commercial
  - b. Residential
11. Do you own or rent that space? (please circle).
- a. Own
  - b. Rent/Lease
12. If you own, do you have a mortgage?
- a. No
  - b. Yes (and provide estimated monthly mortgage) \_\_\_\_\_
13. If you rent, what is your total estimated monthly rent/lease? \_\_\_\_\_
14. Do you own or rent your business equipment (please circle)?
- a. Own
  - b. Rent/Lease
  - c. Not applicable
15. If you own your equipment, do you have a loan?

- a. No
- b. Yes (and provide estimated monthly loan amount) \_\_\_\_\_

16. If you rent/lease your equipment, what is your estimated monthly amount? \_\_\_\_\_

17. How many paid employees do you have in your business, and of those, how many are full- and part-time?

	Full-Time	Part-Time
a. One or fewer	_____	_____
b. 2-5	_____	_____
c. 6-10	_____	_____
d. 11-50	_____	_____
e. Greater than 50	_____	_____

18. Taxes: How much do you pay yearly in:

- a. Property Taxes \_\_\_\_\_
- b. Income Taxes \_\_\_\_\_
- c. Other Taxes (please specify) \_\_\_\_\_

**Relating to your Arts-Related Business and on a Monthly Basis:**

19. How much do you spend on eating/drinking? \_\_\_\_\_

20. How much do you spend on transportation<sup>36</sup> expenses? \_\_\_\_\_

21. How much do you spend on lodging expenses? \_\_\_\_\_

22. How much do you spend on arts-related supplies? \_\_\_\_\_

23. How much do you spend on arts-related marketing? \_\_\_\_\_

24. How much do you spend on entertainment? \_\_\_\_\_

25. How much do you spend on personal shopping/retail? \_\_\_\_\_

26. How much do you spend on other misc. expenses? \_\_\_\_\_

27. What percentage of your clients are:

- a. Local (Leon County) \_\_\_\_\_ %
- b. Out-of-State \_\_\_\_\_ %
- c. In-State \_\_\_\_\_ %

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<sup>36</sup> Transportation: e.g., car rental, car payment, plane, bus, and other transportation mode(s)

d. International \_\_\_\_\_%

28. In your perception, over the last ten years, is the arts & culture customer base (select one):

a. Increasing \_\_\_\_\_

b. Decreasing \_\_\_\_\_

c. Constant/No Change \_\_\_\_\_

29. Thank you for your time; please provide any further comments in the comment box below.

## Appendix A-2. Statistical Results for the For-Profit Arts & Culture Survey

Number of observations: 275

### General Demographic Information (Unconditional)

Gender:

Gender	Male	Female	N.A.	Total
<b>Number of obs.</b>	53	83	139	275
<b>&amp; percentage</b>	19%	30%	51%	100%

Age:

Age	Under 16	21-30	31-40	41-50	51-60	61-70	Over 71	N.A.	Total
<b>Number of obs.</b>	4	6	20	28	28	45	5	139	275
<b>&amp; percentage</b>	1%	2%	7%	10%	10%	16%	2%	51%	100%

Highest level of education completed:

Education	Number of obs. & percentage	
<b>College associate's degree</b>	12	4%
<b>College graduate</b>	59	21%
<b>High school grad.</b>	2	1%
<b>Post graduate</b>	26	9%
<b>Professional degree</b>	22	8%
<b>Some college</b>	9	3%
<b>Some high school</b>	4	1%
<b>Technical school</b>	2	1%
<b>N.A.</b>	139	51%
<b>Total</b>	275	100%

Annual gross income:

Annual gross income	Number of obs. & percentage	
<b>Less than \$20,000</b>	62	23%
<b>\$20,000-\$49,999</b>	26	9%
<b>\$50,000-\$79,999</b>	15	5%
<b>\$80,000-\$99,999</b>	9	3%
<b>\$100,000-\$250,000</b>	12	4%
<b>Greater than \$250,000</b>	12	4%
<b>N.A.</b>	139	51%
<b>Total</b>	275	100%

**Business Type**

Description:

Best description	Number of obs. & percentage	
<b>Branch or division of a regional, national, or international company</b>	6	2.00%
<b>Franchise</b>	1	0.36%
<b>Locally owned and operated, with more than one location</b>	15	5.00%
<b>Locally owned and operated, with one location</b>	187	68.00%
<b>None of the above</b>	66	24.00%
<b>Total</b>	275	100.00%

Arts educator and additional annual art-related income from the teaching salary:

Arts educator or not	Number of obs. & percentage		Additional annual art-related income from the teaching salary		Number of obs. & percentage	
<b>Yes</b>	98	36%	Yes	59	21%	
			No	34	12%	
			Not applicable	5	2%	
<b>No</b>	177	64%	Yes	21	8%	
			No	22	8%	
			Not applicable	134	49%	
<b>Total</b>	275	100%	<b>Total</b>	275	100%	

Individual artist:

Percentage	Individual artist educator's annual gross income, independent from non-profit organizations (frequency)	Individual artist's annual gross income, not related to art work (frequency)
0%	14	28
1%-24%	16	14
25%-49%	0	3
50%-74%	10	7
75%-100%	31	22
N.A.	204	201
<b>Total</b>	<b>275</b>	<b>275</b>

NAICS code:

NAICS code	Number of obs. & percentage	
<b>323111 - Commercial Printing (except Screen and Books)</b>	2	0.73%
<b>323115 - Digital Printing</b>	1	0.36%
<b>323121 - Trade binding and Related Work</b>	1	0.36%
<b>339911 - Jewelry, Except Costume, Manufacturing</b>	2	0.73%
<b>339914 - Costume Jewelry and Novelty Manufacturing</b>	1	0.36%
<b>445299 - All Other Specialty Food Stores</b>	1	0.36%
<b>451140 - Musical Instrument and Supplies Stores</b>	1	0.36%
<b>451211 - Book Stores</b>	1	0.36%
<b>453920 - Art Dealers</b>	2	0.73%
<b>512110 - Motion Picture and Video Production</b>	3	1.09%
<b>512199 - Other Motion Picture and Video Industries</b>	1	0.36%
<b>512230 - Music Publishers</b>	1	0.36%
<b>512240 - Sound Recording Studios</b>	1	0.36%
<b>515120 - Television Broadcasting</b>	2	0.73%
<b>516110 - Internet Publishing and Broadcasting</b>	2	0.73%
<b>541310 - Architectural Services</b>	2	0.73%
<b>541410 - Interior Design Services</b>	1	0.36%
<b>541430 - Graphic Design Services</b>	13	4.73%
<b>541490 - Other Specialized Design Services</b>	4	1.45%
<b>541810 - Advertising Agencies</b>	1	0.36%
<b>541820 - Public Relations Agencies</b>	1	0.36%
<b>541890 - Other Services Related to Advertising</b>	2	0.73%
<b>541921 - Photography Studios, Portrait</b>	5	1.82%
<b>541922 - Commercial Photography</b>	6	2.18%

<b>611610 - Fine Arts Schools</b>	4	1.45%
<b>711120 - Dance Companies</b>	4	1.45%
<b>711130 - Musical Groups and Artists</b>	9	3.27%
<b>711190 - Other Performing Arts Companies</b>	6	2.18%
<b>711310 - Promoters of Performing Arts, Sports, and Similar Events with Facilities</b>	3	1.09%
<b>711410 - Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures</b>	1	0.36%
<b>711510 - Independent Artists, Writers, and Performers</b>	32	11.64%
<b>712110 - Museums</b>	3	1.09%
<b>722320 - Caterers</b>	2	0.73%
<b>Please select from the choices below:</b>	15	5.45%
<b>N.A.</b>	139	50.55%
<b>Total</b>	275	100.00%

Creation time of business:

<b>Time</b>	<b>Number of obs. &amp; percentage</b>	
<b>Before 1949</b>	2	0.73%
<b>1950-1959</b>	1	0.36%
<b>1960-1969</b>	1	0.36%
<b>1970-1979</b>	9	3.27%
<b>1980-1989</b>	11	4.00%
<b>1990-1999</b>	19	6.91%
<b>2000-2009</b>	32	11.64%
<b>After 2010</b>	44	16.00%
<b>N.A.</b>	156	56.73%
<b>Total</b>	275	100.00%

## **Business revenue and cost**

### **Revenue**

Annual sales (same scale with annual gross income):

<b>Annual sale</b>	<b>Number of obs. &amp; percentage</b>	
<b>Less than \$20,000</b>	36	13.09%
<b>\$20,000-\$49,999</b>	10	3.64%
<b>\$50,000-\$79,999</b>	7	2.55%
<b>\$80,000-\$99,999</b>	3	1.09%
<b>\$100,000-\$250,000</b>	10	3.64%
<b>Greater than \$250,000</b>	8	2.91%
<b>N.A.</b>	201	73.09%
<b>Total</b>	275	100.00%

## Costs

### Employment:

- Average annual wage of employees

Annual wage	Number of obs. & percentage	
Less than \$35,000	105	38.18%
\$35,000-\$49,999	17	6.18%
\$50,000-\$74,999	8	2.91%
\$75,000-\$100,000	1	0.36%
Greater than \$100,000	5	1.82%
N.A.	139	50.55%
<b>Total</b>	<b>275</b>	<b>100.00%</b>

- Employee type

Employee type	Employee Number	Number of obs. & percentage	
<b>Full time</b>	0	17.45%	17.45%
	1	12.73%	12.73%
	2	1.45%	1.45%
	3	1.09%	1.09%
	4	1.45%	1.45%
	5	1.09%	1.09%
	6	0.36%	0.36%
	Above 6	1.82%	1.82%
	N.A.	62.55%	62.55%
<b>Total</b>	<b>275</b>	<b>100.00%</b>	
<b>Part time</b>	0	21.82%	21.82%
	1	5.82%	5.82%
	2	1.82%	1.82%
	3	1.09%	1.09%
	4	1.09%	1.09%
	5	0.36%	0.36%
	6	0.73%	0.73%
	Above 6	2.18%	2.18%
	N.A.	65.09%	65.09%
<b>Total</b>	<b>275</b>	<b>100.00%</b>	



Primary operation place:

Location Type	Number of obs. & percentage		Ownership	Number of obs. & percentage	
<b>Commercial</b>	53	19%	Rent	28	11%
			Own	25	9%
<b>Residential</b>	79	29%	Rent	15	5%
			Own	64	23%
<b>N.A.</b>	143	52%	N.A.	143	52%
<b>Total</b>	275	100%	Total	275	100%

Amount	Monthly Mortgage Frequency	Monthly Rent Lease Frequency
<b>\$0</b>	93	98
<b>\$1-\$999</b>	13	18
<b>\$1,000-\$1,999</b>	16	13
<b>\$2,000-\$2,999</b>	3	1
<b>\$3,000-\$3,999</b>	4	1
<b>Above \$4,000</b>	3	1
<b>N.A.</b>	143	143
<b>Total</b>	275	275

Business equipment:

Own or rent	Number of obs. & percentage		Loan or rent/lease	Number of obs. & percentage	
<b>Own</b>	116	42%	Yes	3	1.00%
			No	111	40.00%
			N.A.	2	1.00%
<b>Rent</b>	3	1%	\$0	2	1.00%
			\$1-100	1	0.36%
<b>Both own and rent</b>	2	1%	Yes & \$1-\$100	1	0.36%
			Yes & Above \$100	1	0.36%
<b>N.A.</b>	154	56%	N.A.	154	56.00%
<b>Total</b>	275	100%	<b>Total</b>	275	100.00%

Taxes:

Annual income taxes	Number of obs. & percentage		Annual property taxes	Number of obs. & percentage	
<b>\$0</b>	231	84.00%	<b>\$0</b>	229	83.27%
<b>\$1-\$1,999</b>	3	1.09%	<b>\$1-\$1,999</b>	21	7.64%
<b>\$2,000-\$3,999</b>	15	5.45%	<b>\$2,000-\$3,999</b>	11	4.00%
<b>\$4,000-\$5,999</b>	5	1.82%	<b>\$4,000-\$5,999</b>	7	2.55%
<b>\$6,000-\$7,999</b>	2	0.73%	<b>\$6,000-\$7,999</b>	2	0.73%
<b>\$8,000-\$9,999</b>	2	0.73%	<b>\$8,000-\$9,999</b>	1	0.36%
<b>Above \$10,000</b>	17	6.18%	<b>Above \$10,000</b>	4	1.45%
<b>Total</b>	275	100.00%	<b>Total</b>	275	100.00%

Annual other taxes	Amount	Number of obs. & percentage	
<b>Other taxes (Sales taxes)</b>	\$0	12	4.36%
	\$1-\$1,999	6	2.18%
	\$2,000-\$3,999	3	1.09%
	\$4,000-\$5,999	1	0.36%
	\$6,000-\$7,999	0	0.00%
	\$8,000-\$9,999	0	0.00%
	Above \$10,000	5	1.82%
	N.A.	5	1.82%
<b>N.A.</b>		243	88.36%
<b>Total</b>		275	100.00%

Other Expenses:

Other expenses including eating/drinking, transportation, lodging, supplies, entertainment, marketing, shopping/retail, and other miscellaneous items	Number of obs. & percentage	
\$0	198	72%
\$1-\$1,999	53	19%
\$2,000-\$3,999	9	3%
\$4,000-\$5,999	5	2%
\$6,000-\$7,999	2	1%
\$8,000-\$9,999	2	1%
Above \$10,000	6	2%
<b>Total</b>	275	100%

Clients

Range	Leon county		In--state		Out-state		International	
Client type percentage	Number of obs. & percentage		Number of obs. & percentage		Number of obs. & percentage		Number of obs. & percentage	
0%	193	70.18%	195	70.91%	207	75.27%	253	92.00%
1%-19%	7	2.55%	5	1.82%	35	12.73%	20	7.27%
20%-39%	1	0.36%	3	1.09%	20	7.27%	1	0.36%
40%-59%	11	4.00%	4	1.45%	5	1.82%	1	0.36%
60%-79%	15	5.45%	13	4.73%	2	0.73%	0	0.00%
80%-99%	38	13.82%	42	15.27%	3	1.09%	0	0.00%
100%	10	3.64%	13	4.73%	3	1.09%	0	0.00%
<b>Total</b>	275	100.00%	275	100.00%	275	100.00%	275	100.00%

## Appendix B. Americans for the Arts Example Survey for 2017

### Dear Arts Patron:

Please take a few minutes to answer the following questions. This survey is part of a study to measure the economic impact of the arts and culture in **Leon County, Florida**. Your answers are anonymous and will be kept strictly confidential. Please answer each question completely and return the survey to the person who gave it to you. Thank you!



**SECTION ONE: First, please tell us about today's visit to this arts/cultural performance, event, or exhibit ...**

**1. Including yourself, how many people are attending this arts event with you?**

Include only the people in your immediate travel party (e.g., not tour groups).

Adults: \_\_\_\_\_ Children (<18): \_\_\_\_\_

**2. List the estimated amounts of money that you and the members of your immediate travel party will spend in Leon County specifically as a result of your attendance at this arts/cultural performance, event, or exhibit.** Remember to include money spent before, during, and after the event. If exact figures are not available, use your best estimates.

- A. Admission/tickets for your travel party's attendance to this event \$ \_\_\_\_\_
- B. Refreshments and/or snacks purchased by your travel party while at this event \$ \_\_\_\_\_
- C. Food, drinks, or meals purchased before or after this event (e.g., at a local restaurant) \$ \_\_\_\_\_
- D. Souvenirs, gifts, books, recordings, and/or art \$ \_\_\_\_\_
- E. Clothing or accessories specifically for this event \$ \_\_\_\_\_
- F. Local transportation (e.g., gas, parking, tolls, rental car, taxi or bus fare -- not airfare) \$ \_\_\_\_\_
- G. Child-care specifically to attend this event \$ \_\_\_\_\_
- H. Overnight accommodations to attend this event (e.g., hotel, motel, inn) (include one night only) \$ \_\_\_\_\_
- I. Other (provide description): \_\_\_\_\_ \$ \_\_\_\_\_

**SECTION TWO: To finish the survey, please tell us a little bit more about YOU ...**

**3. What is the ZIP code or postal code of your primary home residence?** \_\_\_\_\_

(If you currently are staying in a vacation property or second home that you own, provide the ZIP code for that vacation/second home).

**4. Which of the following best describes your primary reason for being in Leon County today? (Check only one response)**

- |   |  |
|---|--|
| <input type="checkbox"/> a I am a full-time resident (e.g., I live here, I go to school here) | <input type="checkbox"/> e I am here to conduct business (e.g., meeting, conference) |
| <input type="checkbox"/> b I am a part-time resident (e.g., I own a vacation home here)       | <input type="checkbox"/> f I am here on a vacation/holiday                           |
| <input type="checkbox"/> c I am here specifically to attend this arts/cultural event          | <input type="checkbox"/> g I am visiting family and/or friends who live here         |
| <input type="checkbox"/> d I work here, but I live somewhere else                             | <input type="checkbox"/> h Other (Please specify): _____                             |

**5. How many nights away from your primary residence will you spend in Leon County specifically**

**because of your attendance at this arts/cultural event?** If you are a full-time or part-time resident, and you will not spend any nights away from your home, please respond with "0".

# of Nights: \_\_\_\_\_

**6. If this performance, event, or exhibit were not happening, would you have traveled to another community to attend a similar arts experience? (Check only one response)**

- a No, I would have skipped the arts experience altogether
- b No, I would have replaced it with another arts experience in this community
- c Yes, I would have traveled to a different community to attend a similar arts experience

**7. Is this your first time attending this arts event or facility?**

a Yes  b No

**8. Which of the following ranges includes your current age? (Check only one response)**

a Younger than 18  b 18-34  c 35-44  d 45-54  e 55-64  f 65+

**9. What is the highest level of education that you have completed? (Check only one response)**

a Less than high school  c 2-year college/technical/associates degree  e Masters degree  
 b High school  d 4-year college degree  f Doctoral degree

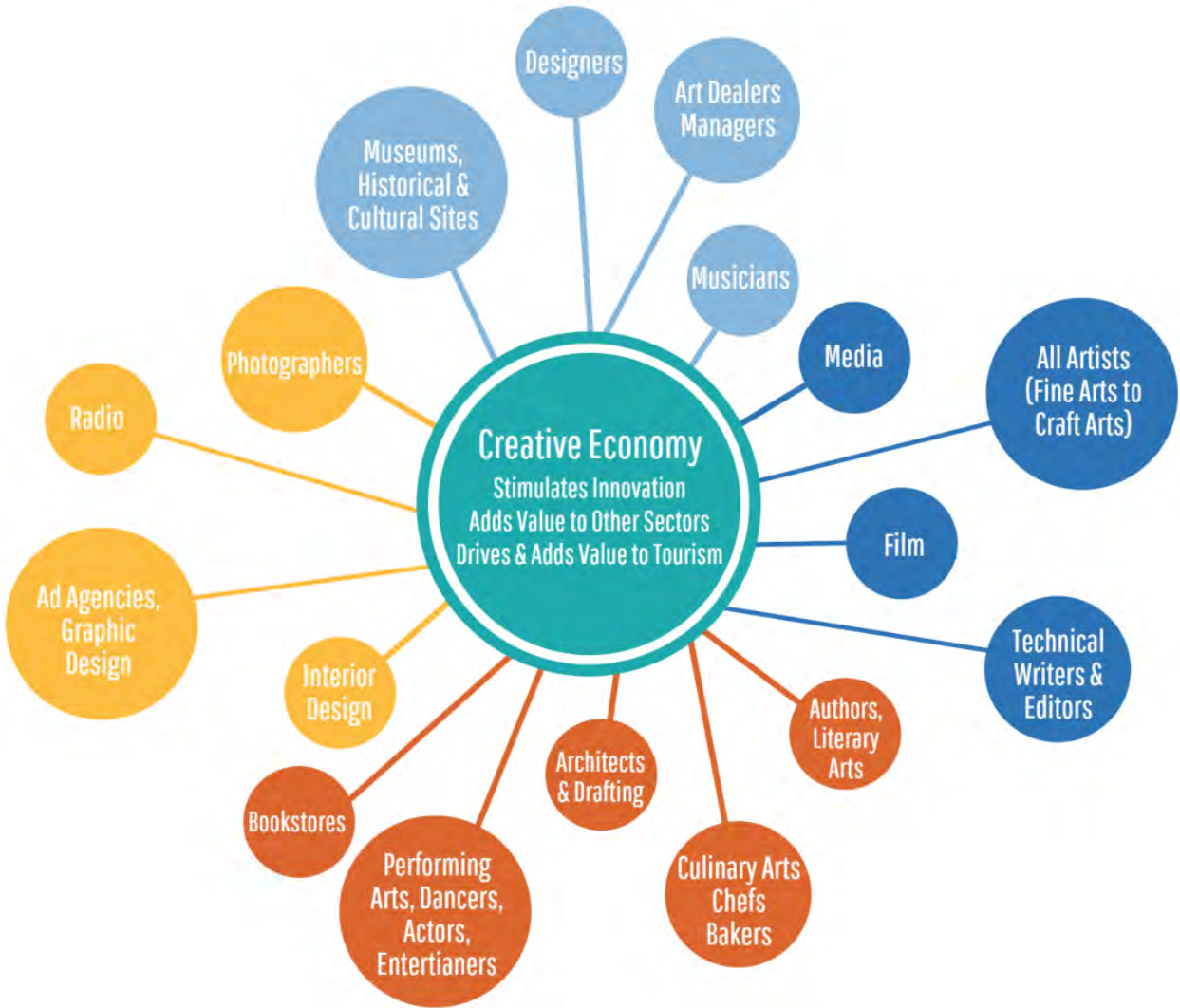
**10. Which of the following ranges includes your annual household income? (Check only one response)**

a Less than \$40,000  c \$60,000 - \$79,999  e \$100,000 - \$119,999  
 b \$40,000 - \$59,999  d \$80,000 - \$99,999  f \$120,000 or More

**11. Do you plan to vote in the 2016 United States presidential election? (Check only one response)**

a Yes, I plan to vote (or I have voted already)  b No  c I don't know/Undecided  d Not applicable

**Appendix C. OEV List of For-Profit Arts & Culture and Heritage-Related Businesses (or Creative Economy) Codes**



# Appendix C. OEV List of Arts & Culture and Heritage-Related Business (or Creative Economy) Codes, Cont.

Creative Enterprises by NAICS Code	Creative Occupations
<b>Culinary Arts</b>	<b>Artists</b>
445291 Baked goods stores	27-1011 Art directors
445292 Confectionery and nut stores	27-1012 Craft artists
445299 All other specialty food stores	27-1013 Fine artists, including painters, sculptors and illustrators
722320 Caterers	27-1014 Multi-media artists and animators
<b>Design</b>	27-1019 Artists and related workers, all other
332323 Ornamental and architectural metal work manufacturing	27-2011 Actors
337212 Custom architectural woodwork and millwork	27-2012 Producers and directors
541310 Architectural services	27-2031 Dancers
541320 Landscape architectural services	27-2032 Choreographers
541340 Drafting services	27-2041 Music directors and composers
541410 Interior design services	27-2042 Musicians and singers
541420 Industrial design services	27-2099 Entertainers and performers, sports and related workers, all others
541430 Graphic design services	27-3043 Writers and authors
541490 Other specialized design services	51-9071 Jewelers and precious stone and metal workers
541810 Advertising agencies	<b>Culinary Artists</b>
541820 Public relations agencies	35-1011 Chefs and head cooks
541830 Media buying agencies	51-3011 Bakers
541840 Media representatives	<b>Cultural</b>
541850 Display advertising	25-4011 Archivists
541860 Direct mail advertising	25-4012 Curators
541890 Other services related to advertising	25-4013 Museum technicians and
541922 Commercial photography	25-4021 Librarians
<b>Film &amp; Media</b>	25-4031 Library technicians
512110 Motion picture and video production	25-9011 Audio-visual collections specialists
512120 Motion picture and video distribution	<b>Designers</b>
512131 Motion picture theaters, except drive-ins	17-1011 Architects, except landscape and
512132 Drive-in motion picture theaters	17-1012 Landscape architects
512191 Teleproduction and postproduction services	17-3011 Architectural and civil drafters
512199 Other motion picture and video industries	27-1021 Commercial and industrial designers
512210 Record production	27-1022 Fashion designers
512220 Integrated record production and distribution	27-1023 Floral designers
512230 Music publishers	27-1024 Graphic designers
512240 Sound recording studios	27-1025 Interior designers
512290 Other sound recording industries	27-1027 Set and exhibit designers
515111 Radio networks	27-1029 Designers, all other
515112 Radio stations	<b>Media</b>
515120 Television broadcasting	11-2011 Advertising and promotions
515210 Cable and other subscription programming	11-2021 Marketing managers
516110 Internet publishing and broadcasting	11-2031 Public relations managers



517510 Cable and other program distribution  
519110 News syndicates  
711410 Agents and managers for public figures

**Cultural Heritage**

712110 Museums  
712120 Historical sites  
712130 Zoos and botanical gardens

**Literary Arts & Publishing**

323110 Commercial lithographic printing  
323111 Commercial gravure printing  
323112 Commercial flexographic printing  
323113 Commercial screen printing  
323115 Digital printing  
323117 Books printing  
323119 Other commercial printing  
323121 Tradebinding and related work  
323122 Prepress services  
424920 Book and periodical merchant wholesalers  
451211 Bookstores  
451212 News dealers and newsstands  
511110 Newspaper publishers  
511120 Periodical publishers  
511130 Book publishers  
511199 All other publishers  
519120 Libraries and archives

**Performing and Visual Arts**

339911 Jewelry, except costume, manufacturing  
339914 Costume jewelry and novelty manufacturing  
339992 Musical instrument manufacturing  
423940 Jewelry merchant wholesalers  
448310 Jewelry stores  
451140 Musical instrument and supplies stores  
453920 Art dealers  
541921 Photography studios, portrait  
611610 Fine arts schools

**Theater companies and dinner theaters**

711120 Dance companies  
711130 Musical groups and artists  
711190 Other performing arts companies  
711310 Promoters with facilities  
711320 Promoters without facilities  
711510 Independent artists, writers, and performers\*

13-1011 Agents and business managers of artists, performers, and athletes  
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  
27-3099 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

*\*Distributed throughout.*

*Source: NAICS RTS*

*Note: The NAICS codes and occupations reflected in the chart below should be considered a starting point.*