



ARTS &

ECONOMIC PROSPERITY 5

THE ECONOMIC IMPACT OF NONPROFIT ARTS & CULTURAL ORGANIZATIONS & THEIR AUDIENCES



in the State of North Carolina

Arts and Economic Prosperity® 5 was conducted by Americans for the Arts, the nation's nonprofit organization for advancing the arts in America. Established in 1960, we are dedicated to representing and serving local communities and creating opportunities for every American to participate in and appreciate all forms of the arts.

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"Understanding and acknowledging the incredible economic impact of the nonprofit arts and culture, we must always remember their fundamental value. They foster beauty, creativity, originality, and vitality. The arts inspire us, sooth us, provoke us, involve us, and connect us. But they also create jobs and contribute to the economy."

— Robert L. Lynch
President and CEO
Americans for the Arts

The Arts Mean Business

By Robert L. Lynch, President and CEO, Americans for the Arts

In my travels, I meet business and government leaders who speak passionately about the value the arts bring to their communities—fueling creativity, beautifying downtowns, and providing joy. Many also share with me the challenge of balancing arts funding with the demands to support jobs and grow their economy. To these community leaders, **Arts & Economic Prosperity 5** offers a clear and welcome message: the arts are an investment that delivers both community well-being and economic vitality.

Arts & Economic Prosperity 5 (AEP5) is Americans for the Arts' fifth economic impact study of the nation's nonprofit arts and cultural organizations and their audiences. By every measure, the results are impressive. Nationally, the nonprofit arts industry generated \$166.3 billion of economic activity in 2015—\$63.8 billion in spending by arts and cultural organizations and an additional \$102.5 billion in event-related expenditures by their audiences. This activity supported 4.6 million jobs and generated \$27.5 billion in revenue to local, state, and federal governments (a yield well beyond their collective \$5 billion in arts allocations). AEP5 is the most comprehensive study of its kind ever conducted. It provides detailed economic impact findings on 341 study regions representing all 50 states and the District of Columbia. Data was gathered from 14,439 organizations and 212,691 arts event attendees, and our project economists customized input-output models for each and every study region to ensure reliable and actionable localized results.

When Americans for the Arts published its first economic impact study in 1994, it worked with 33 local communities. As evidence of the value of these studies, AEP5 has grown this local participation ten-fold. We also have witnessed a corresponding growth in the understanding of the economic value of the arts. The U.S. Bureau of Economic Analysis, for example, now publishes an annual *Arts & Cultural Production Satellite Account*, which extends beyond the nonprofit sector to include the full breadth of commercial and for-profit arts, education, and individual artists, and lists the sector as a \$730 billion industry (4.2 percent of the nation's GDP—a larger share of the economy than

transportation, tourism, agriculture, and construction). As another example, many state and local governments have established agencies to track and grow their creative economy.

What continues to set AEP5 apart from other studies is exactly why it is so useful: it uses localized research that not only focuses on arts organizations—but also incorporates the event-related spending by their audiences. When patrons attend an arts event, they may pay for parking, eat dinner at a restaurant, enjoy dessert after the show, and return home to pay the babysitter. The study found that the typical attendee spends \$31.47 per person, per event beyond the cost of admission. AEP5 also shows that one-third of attendees (34 percent) traveled from outside the county in which the arts event took place. Their event-related spending was more than twice that of their local counterparts (\$47.57 vs. \$23.44). What brought those visitors to town? Two-thirds (69 percent) indicated that the primary purpose for their visit was to attend that arts event. The message is clear: a vibrant arts community not only keeps residents and their discretionary spending close to home, it also attracts visitors who spend money and help local businesses thrive.

AEP5 demonstrates that the arts provide both cultural and economic benefits. No longer do community leaders need to feel that a choice must be made between arts funding and economic development. **Arts & Economic Prosperity 5** proves that they can choose both. Nationally as well as locally, the arts mean business.

“Even in a strong economy, some may perceive the arts as an unaffordable luxury. Fortunately, this rigorous report offers evidence that the nonprofit arts industry provides not just cultural benefits to our communities, but also makes significant positive economic contributions to the nation’s financial well-being regardless of the overall state of the economy. The arts as a driver of employment, vibrancy, tourism, and building a creative workforce is certainly something to applaud.”

— Jonathan Spector
President & CEO
The Conference Board

The Economic Impact of the Nonprofit Arts and Culture Industry in the State of North Carolina

Arts & Economic Prosperity 5 provides evidence that the nonprofit arts and culture sector is a significant industry in the State of North Carolina—one that generates \$2.12 billion in total economic activity. This spending—\$937.5 million by nonprofit arts and cultural organizations and an additional \$1.18 billion in event-related spending by their audiences—supports 71,977 full-time equivalent jobs, generates \$1.5 billion in household income to local residents, and delivers \$201.5 million in local and state government revenue. This economic impact study sends a strong signal that when we support the arts, we not only enhance our quality of life, but we also invest in the State of North Carolina’s economic well-being.

This Arts & Economic Prosperity 5 study documents the economic impact of the nonprofit arts and culture sector in 341 study regions—113 cities, 115 counties, 81 multicounty or multicounty regions, 20 states, and 12 arts districts—representing all 50 U.S. states and the District of Columbia. The diverse study regions range in population (1,500 to four million) and type (rural to large urban). Economists customized input-output models to calculate specific and reliable findings for each study region. This study focuses solely on the economic impact of nonprofit arts and cultural organizations and event-related spending by their audiences. Spending by individual artists and the for-profit arts and culture sector (e.g., Broadway or the motion picture industry) are excluded from this study.

The geographic area analyzed in this unique report is defined as **the State of North Carolina**.

Defining Economic Impact

This proprietary study methodology uses four economic measures to define economic impact: full-time equivalent jobs, resident household income, and local and state government revenues.

Full-Time Equivalent (FTE) Jobs describes the total amount of labor employed. An FTE job can be one full-time employee, two half-time employees, etc. Economists measure FTE jobs, not the total number of employees, because it is a more accurate measure that accounts for part-time employment.

Resident Household Income (often called Personal Income) includes salaries, wages, and entrepreneurial income paid to residents. It is the money residents earn and use to pay for food, shelter, utilities, and other living expenses.

Revenue to Local and State Government includes revenue from local and state taxes (e.g., income, sales, lodging, real estate, personal property, and other local option taxes) as well as funds from license fees, utility fees, filing fees, and other similar sources. Local government revenue includes funds to governmental units such as city, county, township, and school districts, and other special districts.

Economic Impact of Spending by the Nonprofit Arts and Culture Industry (Combined Spending by Both Organizations and Their Audiences) in the State of North Carolina

In communities coast-to-coast, from our smallest towns to our largest cities, America's 100,000 nonprofit arts and cultural organizations make their communities more desirable places to live and work every day of the year.

The arts and culture provide inspiration and joy to residents, beautify public spaces, and strengthen the social fabric of our communities. Nonprofit arts and cultural organizations are also businesses. They employ people locally, purchase goods and services from other local businesses, and attract tourists. Event-related spending by arts audiences generates valuable revenue for local merchants such as restaurants, retail stores, parking garages, and hotels.

During fiscal year 2015, spending by both the State of North Carolina's nonprofit arts and cultural organizations and their audiences totaled **\$2.12 billion**. The table below demonstrates the total economic impact of these expenditures.

TABLE 1:
Total Economic Impact of the Nonprofit Arts and Culture Industry in the State of North Carolina
(Combined Spending by Nonprofit Arts and Cultural Organizations and Their Audiences)

	State of North Carolina	Median of Participating Statewide Study Regions
Total Industry Expenditures	\$2,116,540,138	\$835,040,012
Full-Time Equivalent Jobs	71,977	25,972
Resident Household Income	\$1,497,662,000	\$571,859,500
Local Government Revenue	\$94,544,000	\$32,230,500
State Government Revenue	\$106,909,000	\$44,062,000

The Arts Improve the Economy ... and the Quality of our Personal Lives

- ✓ **82 percent** of Americans believe the arts & culture are important to local businesses and the economy
- ✓ **87 percent** of Americans believe the arts & culture are important to quality of life

Source: Americans for the Arts' 2016 survey of 3,020 adults by Ipsos Public Affairs

“The success of my family’s business depends on finding and cultivating a creative and innovative workforce. I have witnessed firsthand the power of the arts in building these business skills. When we participate personally in the arts, we strengthen our ‘creativity muscles,’ which makes us not just a better ceramicist or chorus member, but a more creative worker—better able to identify challenges and innovative business solutions.”

— Christopher Forbes, Vice Chairman, Forbes, Inc.

Economic Impact: Total, Direct, Indirect, and Induced

How can a dollar be *respent*? Consider the example of a theater company that purchases a five-gallon bucket of paint from its local hardware store for \$100—a very simple transaction at the outset, but one that initiates a complex sequence of income and spending by both individuals and other businesses.

Following the paint purchase, the hardware store may use a portion of the \$100 to pay the sales clerk who sold the bucket of paint. The sales clerk then respends some of the money for groceries; the grocery store uses some of the money to pay its cashier; the cashier then spends some of the money for rent; and so on.

The hardware store also uses some of the \$100 to purchase goods and services from other businesses, such as the local utility company, and then to buy a new bucket of paint from the paint factory to restock its shelf. Those businesses, in turn, respend the money they earned from the hardware store to buy goods and services from still other local businesses, and so on.

Eventually, the last of the \$100 is spent outside of the community and no longer has a local economic impact. It is considered to have leaked out of the community.

The **total** economic impact describes this full economic effect, starting with the theater’s initial paint purchase and ending when the last of the \$100 leaks out of the community. It is composed of the **direct** economic impact (the effect of the initial expenditure by the theater), as well as the **indirect** and **induced** economic impacts, which are the effects of the subsequent rounds of spending by businesses and individuals, respectively.

Interestingly, a dollar ripples very differently through each community, which is why an input-output model was customized for the unique economy of the State of North Carolina.

Economic Impact of Spending by Nonprofit Arts and Cultural ORGANIZATIONS in the State of North Carolina

Nonprofit arts and culture organizations are active contributors to their business community. They are employers, producers, and consumers. They are members of the Chamber of Commerce as well as key partners in the marketing and promotion of their cities, regions, and states. **Spending by nonprofit arts and cultural organizations totaled \$937.5 million in the State of North Carolina during fiscal year 2015.** This spending is far-reaching: organizations pay employees, purchase supplies, contract for services, and acquire assets within their community. These actions, in turn, support jobs, generate household income, and generate revenue to local and state governments.

The State of North Carolina's nonprofit arts and cultural organizations provide rewarding employment for more than just administrators, artists, curators, choreographers, and musicians. They also employ financial staff, facility managers, and salespeople. In addition, the spending by these organizations directly supports a wide array of other occupations spanning many industries that provide their goods and services (e.g., accounting, construction, event planning, legal, logistics, printing, and technology).

Data were collected from 1,233 eligible nonprofit arts and cultural organizations that are located in the State of North Carolina. Each provided detailed budget information for fiscal year 2015 (e.g., labor, payments to local and nonlocal artists, operations, administration, programming, facilities, and capital expenditures/asset acquisition). The following table demonstrates the total economic impact of their aggregate spending.

TABLE 2: Total Economic Impact of Spending by Nonprofit Arts and Cultural ORGANIZATIONS in the State of North Carolina		
	State of North Carolina	Median of Participating Statewide Study Regions
Total Organizational Expenditures	\$937,497,172	\$423,849,454
Full-Time Equivalent Jobs	37,194	16,214
Resident Household Income	\$812,422,000	\$360,046,000
Local Government Revenue	\$29,829,000	\$14,323,500
State Government Revenue	\$44,804,000	\$20,720,500

Economic Impact Beyond Dollars: Volunteerism

While arts volunteers may not have an economic impact as defined in this study, they clearly have an enormous impact by helping nonprofit arts and cultural organizations function as a viable industry. Arts & Economic Prosperity 5 reveals a significant contribution to nonprofit arts and cultural organizations as a result of volunteerism. **During 2015, a total of 109,525 volunteers donated a total of 4,616,810 hours to the State of North Carolina's participating nonprofit arts and cultural organizations. This represents a donation of time with an estimated aggregate value of \$108,772,044** (Independent Sector estimates the dollar value of the average 2015 volunteer hour to be \$23.56). Volunteers can include unpaid professional staff (e.g., executive and program staff, board/commission members), artistic volunteers (e.g., artists, choreographers, designers), clerical volunteers, and service volunteers (e.g., ticket takers, docents, ushers, gift shop volunteers).

The 1,233 participating organizations reported an average of 88.8 volunteers who volunteered an average of 42.2 hours during 2015, for a total of 3,744.4 hours per organization.

The Value of In-Kind Contributions to Arts Organizations

The organizations were asked about the sources and value of their in-kind support. In-kind contributions are non-cash donations such as materials (e.g., office supplies from a local retailer), facilities (e.g., office or performance space), and services (e.g., printing from a local printer). **The 1,233 participating nonprofit arts and cultural organizations in the State of North Carolina reported that they received in-kind contributions with an aggregate value of \$21,084,218 during fiscal year 2015.** These contributions can be received from a variety of sources including corporations, individuals, local and state arts agencies, and government agencies.

"Investments in arts and culture enhance the quality of life, the third-highest measurement businesses use when gauging development trends—behind skilled labor and highway accessibility but ahead of other factors such as corporate tax rates and incentives. These investments are breathing new life into our downtown areas, creating educational opportunities, and attracting businesses and highly skilled workers to Iowa. Today, nearly 6,000 arts organizations employ 23,000 people in Iowa, and that number jumps to 73,000 when all creative fields are counted. In all, that's about four percent of our workforce."

— Governor Kim Reynolds, Iowa

Economic Impact of Spending by Nonprofit Arts and Cultural AUDIENCES in the State of North Carolina

The nonprofit arts and culture industry, unlike most industries, leverages a significant amount of event-related spending by its audiences. For example, when patrons attend a cultural event, they may pay to park their car, purchase dinner at a restaurant, shop in nearby stores, eat dessert after the show, and pay a babysitter upon their return home. Attendees from out of town often spend the night in a hotel. This spending generates related commerce for local businesses such as restaurants, parking garages, retail stores, and hotels. Local businesses that cater to arts and culture audiences reap the rewards of this economic activity.

To measure the impact of spending by cultural audiences in the State of North Carolina, data were collected from 18,151 event attendees during 2016. Researchers used an audience-intercept methodology, a standard technique in which patrons are asked to complete a short survey about their event-related spending (while they are attending the event). **Event-related spending by these attendees totaled \$1.18 billion in the State of North Carolina during fiscal year 2015**, excluding the cost of event admission. The following table demonstrates the total economic impact of this spending.

TABLE 3: Total Economic Impact of Spending by Nonprofit Arts and Cultural AUDIENCES in the State of North Carolina (excluding the cost of event admission¹)		
	State of North Carolina	Median of Participating Statewide Study Regions
Total Audience Expenditures ²	\$1,179,042,966	\$379,531,275
Full-Time Equivalent Jobs	34,783	9,381
Resident Household Income	\$685,240,000	\$232,723,500
Local Government Revenue	\$64,715,000	\$15,332,000
State Government Revenue	\$62,105,000	\$21,331,000

¹ Why exclude the cost of admission? The admissions paid by attendees are excluded from the audience analysis because those dollars are captured in the operating budgets of the participating nonprofit arts and cultural organizations and, in turn, are spent by the organizations. This methodology avoids “double-counting” those dollars in the study analysis.

² To calculate the total estimated audience expenditures in the State of North Carolina, first the audience expenditure findings for any individual participating study regions that are located within the State of North Carolina were summed. Next, the residency percentages and the average per person arts-related expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within the State of North Carolina but outside of the individual participating study region(s). Finally, the results were added to the aggregate of the individual participating region(s). Therefore, the total audience expenditures for the State of North Carolina do not equal the average per person event-related expenditure for residents multiplied by the total estimated attendance by residents plus the average per person event-related expenditure for nonresidents multiplied by the total estimated attendance by nonresidents.

Cultural Tourists Spend More

The 18,151 audience survey respondents were asked to provide the ZIP code of their primary residence, enabling researchers to determine which attendees were local residents (live within the State of North Carolina) and which were nonresidents (live outside the State of North Carolina). In the State of North Carolina, researchers estimate that 92.0 percent of the 39 million nonprofit arts attendees were residents; 8.0 percent were nonresidents.

Nonresident attendees spent an average of 121 percent more per person than local attendees (\$61.86 vs. \$27.95) as a result of their attendance to cultural events. As would be expected from a traveler, higher spending was typically found in the categories of lodging, meals, and transportation. When a community attracts cultural tourists, it harnesses significant economic rewards.

TABLE 4: Event-Related Spending by Arts and Culture Event Attendees Totaled \$1.18 billion in the State of North Carolina (excluding the cost of event admission)

	Residents	Nonresidents	All State of North Carolina Event Attendees
Total Attendance	35,907,827	3,122,420	39,030,247
Percent of Attendees	92.0%	8.0%	100%
Average Dollars Spent Per Attendee	\$27.95	\$61.86	\$30.66
Total Event-Related Expenditures	\$605,032,236	\$574,010,730	\$1,179,042,966

TABLE 5: Nonprofit Arts and Culture Event Attendees Spend an Average of \$30.66 Per Person in the State of North Carolina (excluding the cost of event admission)

	Residents	Nonresidents	All State of North Carolina Event Attendees
Refreshments/Snacks During Event	\$3.67	\$5.70	\$3.83
Meals Before/After Event	\$10.78	\$16.22	\$11.21
Souvenirs and Gifts	\$6.79	\$12.73	\$7.26
Clothing and Accessories	\$1.83	\$2.26	\$1.86
Ground Transportation	\$2.52	\$7.02	\$2.88
Event-Related Child Care	\$0.41	\$0.52	\$0.42
Overnight Lodging (<i>one night only</i>)	\$1.78	\$16.78	\$2.98
Other	\$0.17	\$0.63	\$0.20
Total Per Person Spending	\$27.95	\$61.86	\$30.66

The Arts Drive Tourism

Each of the nonresident survey respondents (i.e., those who live outside the State of North Carolina) were asked about the purpose of their trip: **64.6 percent indicated that the primary purpose of their visit to the State of North Carolina was “specifically to attend this arts/cultural event.”** This finding demonstrates the power of the arts to attract visitors to the community.

The audience-intercept survey also asked nonresident attendees if they would have traveled somewhere else (instead of to the State of North Carolina) if the event where they were surveyed had not occurred: **48.8 percent of nonresident attendees would have “traveled to a different community to attend a similar cultural event.”**

Of the 8.0 percent of arts attendees who are nonresidents, 22.4 percent reported an overnight lodging expense. Not surprisingly, nonresident attendees with overnight expenses spent considerably more money per person during their visit to the State of North Carolina than did nonresident attendees without overnight lodging expenses (\$150.61 and \$36.19, respectively). For this analysis, only one night of lodging expenses is counted toward the audience expenditure, regardless of how many nights these cultural tourists actually stayed in the community. This conservative approach ensures that the audience-spending figures are not inflated by non-arts-related spending.

The Arts Retain Local Dollars

The survey also asked local resident attendees about what they would have done if the arts event that they were attending was not taking place: **51.4 percent of resident attendees said they would have “traveled to a different community to attend a similar cultural event.”**

The cultural tourism findings on this page demonstrate the economic impact of the nonprofit arts and culture industry in its truest sense. If a community fails to provide a variety of artistic and cultural experiences, not only will it fail to attract new dollars from cultural tourists, it will also lose the discretionary spending of its own residents who will travel elsewhere for a similar experience.

"As a banker, I have visited businesses in almost every city and town in my state. There is a visible difference in places with a vibrant arts community. I see people looking for places to park, stores staying open late, and restaurants packed with diners. The business day is extended and the cash registers are ringing!"

— Ken Fergeson, Chairman, NBC Oklahoma
Past President, American Bankers Association

Travel Party and Demographic Characteristics of Arts Attendees

The tables below list the audience-intercept survey findings related to travel party size as well as the age, educational attainment, and household income reported by the survey respondents.

TABLE 6: Travel Party and Demographic Characteristics of Arts Audiences in the State of North Carolina

	Residents	Nonresidents
Travel Party Size		
Average number of adults (18 years or older)	2.2	2.4
Average number of children (younger than 18)	0.3	0.3
Average travel party size	2.5	2.7
Trip Characteristics		
Average number of nights spent away from home as a result of arts event	0.1	1.2
Percentage with any nights spent away from home as a result of arts event	7.0%	45.6%
Percentage attending the arts event or facility (where they were surveyed) for the first time	27.1%	51.4%
Age of Cultural Attendees		
18-34	14.6%	16.4%
35-44	14.3%	10.8%
45-54	17.3%	15.4%
55-64	23.3%	25.6%
65 or Older	30.5%	31.8%
Educational Attainment of Cultural Attendees		
Less than high school	0.2%	0.3%
High school	10.2%	10.5%
2-year college/technical/associates degree	16.8%	17.1%
4-year college/bachelors degree	38.0%	36.6%
Masters degree	25.7%	25.9%
Doctoral degree	9.0%	9.5%
Annual Household Income of Cultural Attendees		
Less than \$40,000	16.3%	15.9%
\$40,000 to \$59,999	17.4%	16.8%
\$60,000 to \$79,999	18.4%	16.9%
\$80,000 to \$99,999	15.1%	14.2%
\$100,000 to \$119,999	12.1%	13.2%
\$120,000 or More	20.6%	23.0%
Civic Engagement of Cultural Attendees		
Percentage that voted in 2016 U.S. presidential election	92.3%	87.6%

“Mayors understand the connection between the arts industry and city revenues. Arts activity creates thousands of direct and indirect jobs and generates billions in government and business revenues. The arts also make our cities destinations for tourists, help attract and retain businesses, and play an important role in the economic revitalization of cities and the vibrancy of our neighborhoods.”

— Oklahoma City Mayor Mick Cornett
President, The United States Conference of Mayors

Conclusion

The nonprofit arts and culture sector is a \$2.12 billion industry in the State of North Carolina—one that supports 71,977 full-time equivalent jobs and generates \$201.5 million in local and state government revenue.

Nonprofit arts and cultural organizations are businesses in their own right. They spent \$937.5 million during fiscal year 2015 to employ people locally, purchase goods and services from local establishments, and attract tourists. They also leveraged a remarkable \$1.18 billion in additional spending by cultural audiences—spending that pumps vital revenue into restaurants, hotels, retail stores, parking garages, and other local businesses.

This study puts to rest a misconception that communities support arts and culture at the expense of local economic development. In fact, communities that support the arts and culture are investing in an industry that supports jobs, generates government revenue, and is the cornerstone of tourism. This Arts & Economic Prosperity 5 study shows conclusively that **the arts mean business in the State of North Carolina!**

“A vital component to generating economic growth in our communities can be attributed to supporting and funding the arts. It is apparent that decreased support of the arts has negatively impacted some areas of our country. To compete and thrive in today’s workforce environment it is apparent that supporting the arts helps foster a more creative and innovative workforce that strengthens our economy.”

— Nevada Assemblywoman Maggie Carlton
Co-Chair, National Conference of State Legislatures
Labor & Economic Development Committee

The Arts & Economic Prosperity 5 Calculator

To make it easier to compare the economic impacts of different organizations within the State of North Carolina (or to calculate updated estimates in the immediate years ahead), the project researchers calculated the economic impact per \$100,000 of direct spending by nonprofit arts and cultural organizations and their audiences.

Economic Impact Per \$100,000 of Direct Spending by ORGANIZATIONS

For every \$100,000 in direct spending by a nonprofit arts and cultural organization in the State of North Carolina, there was the following total economic impact.

TABLE 7: Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Cultural Organizations in the State of North Carolina		
	State of North Carolina	Median of Participating Statewide Study Regions
Full-Time Equivalent Jobs	3.97	3.43
Resident Household Income	\$86,659	\$79,001
Local Government Revenue	\$3,182	\$3,253
State Government Revenue	\$4,779	\$5,182

An Example of How to Use the Organizational Spending Calculator Table (above):

An administrator from a nonprofit arts and cultural organization that has total expenditures of \$250,000 wants to determine the organization's total economic impact on full-time equivalent (FTE) employment in the State of North Carolina. The administrator would:

1. Determine the amount spent by the nonprofit arts and cultural organization;
2. Divide the total expenditure by 100,000; and
3. Multiply that figure by the FTE employment ratio per \$100,000 for the State of North Carolina.

Thus, \$250,000 divided by 100,000 equals 2.5; 2.5 times 3.97 (from the top row of data on Table 1 above) equals a total of 9.9 full-time equivalent jobs supported (both directly and indirectly) within the State of North Carolina by that nonprofit arts and cultural organization. Using the same procedure, the estimate can be calculated for resident household income as well as for local and state government revenue.

Economic Impact Per \$100,000 of Direct Spending by AUDIENCES

The economic impact of event-related spending by arts audiences can also be derived for an individual organization or groups of organizations in the State of North Carolina.

The first step is to determine the total estimated event-related spending by attendees who are residents of the State of North Carolina. To derive this figure, first multiply the total attendance by the percentage of attendees that are residents. Then, multiply the result by the average per person event-related expenditure by resident attendees. The result is the total estimated event-related spending by resident attendees.

The second step is to do the same for nonresidents of the State of North Carolina. To derive this figure, first multiply the total attendance by the percentage of attendees that are nonresidents. Then, multiply the result by the average per person event-related expenditure by nonresident attendees. The result is the total estimated event-related spending by nonresident attendees.

Then, add the results from the first two steps together to calculate the total estimated event-related audience spending. Finally, the ratios of economic impact per \$100,000 in direct spending can then be used to determine the total economic impact of the total estimated audience spending.

TABLE 8: Audience Spending Ratios for the Arts & Economic Prosperity 5 Calculator in the State of North Carolina (excluding the cost of event admission)

	Residents	Nonresidents
Percent of Attendees	92.0%	8.0%
Average Per Person Event-Related Expenditures	\$27.95	\$61.86

TABLE 9: Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Culture Audiences in the State of North Carolina

	State of North Carolina	Median of Participating Statewide Study Regions
Full-Time Equivalent Jobs	2.95	2.56
Resident Household Income	\$58,118	\$57,944
Local Government Revenue	\$5,489	\$4,387
State Government Revenue	\$5,267	\$5,982

An Example of How to Use the Audience Spending Calculator Tables (on the preceding page):

An administrator wants to determine the total economic impact of the 25,000 total attendees to his/her organization's nonprofit arts and cultural events on full-time equivalent (FTE) employment in the State of North Carolina. The administrator would:

1. Multiply the total attendance by the percentage of attendees that are residents;
2. Multiply the result of step 1 by the average per person event-related expenditure for residents;
3. Multiply the total attendance by the percentage of attendees that are nonresidents;
4. Multiply the result of step 3 by the average per person event-related expenditure for nonresidents;
5. Sum the results of steps 2 and 4 to calculate the total estimated event-related audience spending;
6. Divide the resulting total estimated audience spending by 100,000; and
7. Multiply that figure by the FTE employment ratio per \$100,000 for the State of North Carolina.

Thus, 25,000 times 92.0% (from Table 8 on the preceding page) equals 23,000; 23,000 times \$27.95 (from Table 8) equals \$642,850; 25,000 times 8.0% (from Table 8) equals 2,000; 2,000 times \$61.86 equals \$123,720; \$642,850 plus \$123,720 equals \$766,570, \$766,570 divided by 100,000 equals 7.67; 7.67 times 2.95 (from the top row of data on Table 9 on the preceding page) equals a total of 22.6 full-time equivalent jobs supported (both directly and indirectly) within the State of North Carolina by that nonprofit arts and cultural organization. Using the same procedure, the estimate can be calculated for resident household income as well as for local and state government revenue.

Making Comparisons with Similar Study Regions

For the purpose of this analysis and unique report, **the geographic region being studied is defined as the State of North Carolina**. According to the most recent data available from the U.S. Census Bureau, the population of the State of North Carolina was estimated to be 9,943,964 during 2015. For comparison purposes, 458 pages of detailed data tables containing the study results for all 341 participating study regions are located in Appendix B of the National Statistical Report. The data tables are stratified by population, making it easy to compare the findings for the State of North Carolina to the findings for similarly populated study regions (as well as any other participating study regions that are considered valid comparison cohorts).

The National Summary Report and National Brochure are available both by download (free) and hardcopy (for purchase). The National Statistical Report (more than 500 pages in length) is available by download only. All documents and resources can be found at www.AmericansForTheArts.org/EconomicImpact.

“In Rhode Island, we know cultural excellence is crucial to economic development and the success of businesses large and small. Arts-related industries create jobs, attract investments, and enhance tourism—the economic impact of arts organizations is significant. The arts also play a role in promoting the health and welfare of our military members which makes our communities and our state stronger.”

— Rhode Island Lieutenant Governor Dan McKee
Chair, National Lt. Governors Association

About This Study

This Arts & Economic Prosperity 5 study was conducted by Americans for the Arts to document the economic impact of the nonprofit arts and culture industry in 341 communities and regions (113 cities, 115 counties, 81 multi-city or multi-county regions, 20 states, and 12 individual arts districts)—representing all 50 U.S. states and the District of Columbia.

The diverse local communities range in population (1,500 to four million) and type (rural to urban). The study focuses solely on nonprofit arts and cultural organizations and their audiences. The study excludes spending by individual artists and the for-profit arts and entertainment sector (e.g., Broadway or the motion picture industry). Detailed expenditure data were collected from 14,439 arts and culture organizations and 212,691 of their attendees. The project economists, from the Georgia Institute of Technology, customized input-output economic models for each participating study region to provide specific and reliable economic impact data about their nonprofit arts and culture industry: full-time equivalent jobs, household income, and local and state government revenue.

The 250 Local, Regional, and Statewide Study Partners

Americans for the Arts published a Call for Participants in 2015 seeking communities interested in participating in the Arts & Economic Prosperity 5 study. Of the more than 300 potential partners that expressed interest, 250 local, regional, and statewide organizations agreed to participate and complete four participation criteria: identify and code the universe of nonprofit arts and cultural organizations in their study region; assist researchers with the collection of detailed financial and attendance data from those organizations; conduct audience-intercept surveys at cultural events; and pay a modest cost-sharing fee (no community was refused participation for an

inability to pay). Thirty of the 250 partners included multiple study regions as part of their AEP5 participation (e.g., a county as well as a specific city located within the county). As a result, the 250 local, regional, and statewide organizations represent a total of 341 participating study regions.

The North Carolina Arts Council responded to the 2015 Call for Participants, and agreed to complete the required participation criteria.

Surveys of Nonprofit Arts and Cultural ORGANIZATIONS

Each of the 250 study partners identified the universe of nonprofit arts and cultural organizations that are located in their region(s) using the Urban Institute's National Taxonomy of Exempt Entity (NTEE) coding system as a guideline. The NTEE system—developed by the National Center for Charitable Statistics at the Urban Institute—is a definitive classification system for nonprofit organizations recognized as tax exempt by the Internal Revenue Code. This system divides the entire universe of nonprofit organizations into 10 Major categories, including “Arts, Culture, and Humanities.” The Urban Institute reports that approximately 100,000 nonprofit arts and cultural organizations were registered with the IRS in 2015.

The following NTEE “Arts, Culture, and Humanities” subcategories were included in this study:

- A01 – Alliances and Advocacy
- A02 – Management and Technical Assistance
- A03 – Professional Societies and Associations
- A05 – Research Institutes and Public Policy Analysis
- A11 – Single Organization Support
- A12 – Fund Raising and Fund Distribution
- A19 – Support (not elsewhere classified)
- A20 – Arts and Culture (general)
- A23 – Cultural and Ethnic Awareness
- A24 – Folk Arts
- A25 – Arts Education
- A26 – Arts and Humanities Councils and Agencies
- A27 – Community Celebrations
- A30 – Media and Communications (general)
- A31 – Film and Video
- A32 – Television
- A33 – Printing and Publishing
- A34 – Radio
- A40 – Visual Arts (general)
- A50 – Museums (general)
- A51 – Art Museums
- A52 – Children’s Museums
- A53 – Folk Arts Museums
- A54 – History Museums
- A56 – Natural History and Natural Science Museums
- A57 – Science and Technology Museums
- A60 – Performing Arts (general)
- A61 – Performing Arts Centers
- A62 – Dance
- A63 – Ballet
- A65 – Theatre
- A68 – Music
- A69 – Symphony Orchestras
- A6A – Opera
- A6B – Singing and Choral Groups
- A6C – Bands and Ensembles
- A6E – Performing Arts Schools
- A70 – Humanities (general)
- A80 – Historical Organizations (general)
- A82 – Historical Societies and Historic Preservation
- A84 – Commemorative Events
- A90 – Arts Services (general)
- A99 – Arts, Culture, and Humanities (miscellaneous)

In addition to the organization types listed above, the study partners were encouraged to include other types of eligible organizations if they play a

substantial role in the cultural life of the community or if their primary purpose is to promote participation in, appreciation for, and understanding of the visual, performing, folk, literary arts, and/or media arts. These include government-owned and government-operated cultural facilities and institutions, municipal arts agencies and councils, private community arts organizations, unincorporated arts groups, living collections (such as zoos, aquariums, and botanical gardens), university presenters and cultural facilities, and arts programs that are embedded under the umbrella of a nonarts organization or facility (such as a community center or church). In short, if it displays the characteristics of a nonprofit arts and cultural organization, it is included. With rare exception, *for-profit businesses and individual artists are excluded from this study.*

To collect the required financial and attendance information from eligible organizations, researchers implemented a multipronged data collection process. Americans for the Arts partnered with DataArts to collect detailed budget and attendance information about each organization’s fiscal year that ended in 2015. DataArts’ Cultural Data Profile (CDP) is a unique system that enables arts and cultural organizations to enter financial, programmatic, and operational data into a standardized online form. To reduce the survey response burden on participating organizations, and because the CDP collects the detailed information required for this economic impact analysis, researchers used confidential CDP data as the primary organizational data collection mechanism for the Arts & Economic Prosperity 5 study. This primary data collection effort was supplemented with an abbreviated one-page paper version of the survey that was administered to organizations that did not respond to the CDP survey.

Nationally, information was collected from 14,439 eligible organizations about their fiscal year 2015 expenditures, event attendance, in-kind contributions, and volunteerism. Responding organizations had

budgets ranging from \$0 to \$785 million (Smithsonian Institution). Response rates for the 341 communities ranged from 9.5 percent to 100 percent and averaged 54.0 percent. It is important to note that each study region's results are based solely on the actual survey data collected. No estimates have been made to account for nonparticipating eligible organizations. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.

In the State of North Carolina, 1,233 of the 2,414 eligible nonprofit arts and cultural organizations identified by the North Carolina Arts Council participated in this study—a participation rate of 51.1 percent

Surveys of Nonprofit Arts and Cultural AUDIENCES

Audience-intercept surveying, a common and accepted research method, was conducted in all 341 of the study regions to measure event-related spending by nonprofit arts and culture audiences. Patrons were asked to complete a short survey while attending an event. Nationally, a total of 212,691 attendees completed a valid survey. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, retail shopping (e.g., gifts and souvenirs), local transportation, and lodging. Data were collected throughout 2016 (to account for seasonality) as well as at a broad range of both paid and free events (a night at the opera will typically yield more audience spending than a weekend children's theater production or a free community music festival, for example). The survey respondents provided information about the entire party with whom they were attending the event. With an overall average travel party size of 2.56 people, these data actually represent the spending patterns of more than 544,489 cultural attendees.

In the State of North Carolina, a total of 18,151 valid audience-intercept surveys were collected from attendees to arts and cultural performances, events, and exhibits during 2016.

Economic Analysis

A common theory of community growth is that an area must export goods and services if it is to prosper economically. This theory is called economic-base theory, and it depends on dividing the economy into two sectors: the export sector and the local sector. Exporters, such as automobile manufacturers, hotels, and department stores, obtain income from customers outside of the community. This "export income" then enters the local economy in the form of salaries, purchases of materials, dividends, and so forth, and becomes income to residents. Much of it is respent locally; some, however, is spent for goods imported from outside of the community. The dollars respent locally have an economic impact as they continue to circulate through the local economy. This theory applies to arts organizations as well as to other producers.

Studying Economic Impact Using Input-Output Analysis

To derive the most reliable economic impact data, input-output analysis is used to measure the impact of expenditures by nonprofit arts and cultural organizations and their audiences. This is a highly-regarded type of economic analysis that has been the basis for two Nobel Prizes. The models are systems of mathematical equations that combine statistical methods and economic theory in an area of study called econometrics. They trace how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for this study because it can be customized specifically to each study region.

To complete the analysis for the State of North Carolina, project economists customized an input-

output model based on the local dollar flow among 533 finely detailed industries within the unique economy of All North Carolina counties.

This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and cultural organizations and their audiences.

The Input-Output Process

The input-output model is based on a table of 533 finely detailed industries showing local sales and purchases. The local and state economy of each community is researched so the table can be customized for each community. The basic purchase patterns for local industries are derived from a similar table for the U.S. economy for 2012 (the latest detailed data available from the U.S. Department of Commerce). The table is first reduced to reflect the unique size and industry mix of the local economy, based on data from County Business Patterns and the Regional Economic Information System of the U.S. Department of Commerce. It is then adjusted so that only transactions with local businesses are recorded in the inter-industry part of the table. This technique compares supply and demand and estimates the additional imports or exports required to make total supply equal total demand. The resulting table shows the detailed sales and purchase patterns of the local industries. The 533-industry table is then aggregated to reflect the general activities of 32 industries plus local households, creating a total of 33 industries. To trace changes in the economy, each column is converted to show the direct requirements per dollar of gross output for each sector. This direct-requirements table represents the “recipe” for producing the output of each industry.

The economic impact figures for Arts & Economic Prosperity 5 were computed using what is called an “iterative” procedure. This process uses the sum of a power series to approximate the solution to the economic model. This is what the process looks like in matrix algebra:

$$T = IX + AX + A^2X + A^3X + \dots + A^nX.$$

T is the solution, a column vector of changes in each industry’s outputs caused by the changes represented in the column vector X. A is the 33 by 33 direct-requirements matrix. This equation is used to trace the direct expenditures attributable to nonprofit arts organizations and their audiences. A multiplier effect table is produced that displays the results of this equation. The total column is T. The initial expenditure to be traced is IX (I is the identity matrix, which is operationally equivalent to the number 1 in ordinary algebra). Round 1 is AX, the result of multiplying the matrix A by the vector X (the outputs required of each supplier to produce the goods and services purchased in the initial change under study). Round 2 is A²X, which is the result of multiplying the matrix A by Round 1 (it answers the same question applied to Round 1: “What are the outputs required of each supplier to produce the goods and services purchased in Round 1 of this chain of events?”). Each of columns 1 through 12 in the multiplier effects table represents one of the elements in the continuing but diminishing chain of expenditures on the right side of the equation. Their sum, T, represents the total production required in the local economy in response to arts activities.

Calculation of the total impact of the nonprofit arts on the outputs of other industries (T) can now be converted to impacts on the final incomes to residents by multiplying the outputs produced by the ratios of household income to output and employment to output. Thus, the employment impact of changes in outputs due to arts expenditures is calculated by multiplying elements in the column of total outputs

by the ratio of employment to output for the 32 industries in the region. Changes in household incomes, local government revenues, and state government revenues due to nonprofit arts expenditures are similarly transformed. The same process is also used to show the direct impact on incomes and revenues associated with the column of direct local expenditures.

A comprehensive description of the methodology used to complete the national study is available at www.AmericansForTheArts.org/EconomicImpact.

"Americans for the Arts' Arts and Economic Prosperity 5 study is an invaluable tool for Guilford County and counties across the nation. The data it has collected and analyzed provide an unparalleled understanding of the influence of the arts on the economy, locally and nationally. It is vital that we continue to measure the impact of the arts on our economy to show our constituents and the nation its value. We are grateful for the work Americans for the Arts does to help us show what an important asset the arts are in the areas of education and health, both physical and mental, and as an economic driver."

— Kay Cashion, Commissioner, Guilford County, N.C.
Chair, National Association of Counties Arts & Culture Commission

Frequently Used Terms

Cultural Tourism

Travel directed toward experiencing the arts, heritage, and special character of a place.

Direct Economic Impact

A measure of the economic effect of the initial expenditure within a community. For example, when the symphony pays its players, each musician's salary, the associated government taxes, and full-time equivalent employment status represent the direct economic impact.

Direct Expenditures

The first round of expenditures in the economic cycle. A paycheck from the symphony to the violin player and a ballet company's purchase of dance shoes are examples of direct expenditures.

Econometrics

The process of using statistical methods and economic theory to develop a system of mathematical equations that measures the flow of dollars between local industries. The input-output model developed for this study is an example of an econometric model.

Econometrician

An economist who designs, builds, and maintains econometric models.

Full-Time Equivalent (FTE) Jobs

A term that describes the total amount of labor employed. Economists measure FTE jobs—not the total number of employees—because it is a more accurate measure of total employment. It is a manager's discretion to hire one full-time employee, two half-time employees, four quarter-time employees, etc. Almost always, more people are affected than are reflected in the number of FTE jobs reported due to the abundance of part-time employment, especially in the nonprofit arts and culture industry.

Indirect and Induced Economic Impact

This study measures the economic impact of the arts using a methodology that enables economists to track how many times a dollar is respent within the local economy, and thus to measure the economic impact generated by each round of spending. When a theater company purchases paint from the local hardware store, there is a measurable economic effect of that initial expenditure within a community. However, the economic benefits typically do not end there, because the hardware store uses some of its income to pay the clerk that sold the paint, as well as to pay its electric bill and to re-stock the shelves. The indirect and induced economic impacts are the effects of the subsequent rounds of spending by businesses and individuals, respectively. (See the example on Page 5 of this report.)

Input-Output Analysis

A system of mathematical equations that combines statistical methods and economic theory in an area of economic study called econometrics. Economists use this model (occasionally called an inter-industry model) to measure how many times a dollar is respent in, or “ripples” through, a community before it “leaks out” of the local economy by being spent non-locally (see Leakage below). The model is based on a matrix that tracks the dollar flow among 533 finely detailed industries in each community. It allows researchers to determine the economic impact of local spending by nonprofit arts and cultural organizations on jobs, household income, and government revenue.

Leakage

The money that community members spend outside of the local economy. This non-local spending has no economic impact within the community. A ballet company purchasing shoes from a non-local manufacturer is an example of leakage. If the shoe company were local, the expenditure would remain within the community and create another round of spending by the shoe company.

Multiplier (often called Economic Activity Multiplier)

An estimate of the number of times that a dollar changes hands within the community before it leaks out of the community (for example, the theater pays the actor, the actor spends money at the grocery store, the grocery store pays its cashier, and so on). This estimate is quantified as one number by which all expenditures are multiplied. For example, if the arts are a \$10 million industry and a multiplier of three is used, then it is estimated that these arts organizations have a total economic impact of \$30 million. The convenience of a multiplier is that it is one simple number; its shortcoming, however, is its reliability. Users rarely note that the multiplier is developed by making gross estimates of the industries within the local economy with no allowance for differences in the characteristics of those industries, usually resulting in an overestimation of the economic impact. In contrast, the input-output model employed in Arts & Economic Prosperity 5 is a type of economic analysis tailored specifically to each community and, as such, provides more reliable and specific economic impact results.

Resident Household Income (often called Personal Income)

The salaries, wages, and entrepreneurial income residents earn and use to pay for food, mortgages, and other living expenses. It is important to note that resident household income is not just salary. When a business receives money, for example, the owner usually takes a percentage of the profit, resulting in income for the owner.

Revenue to Local and State Government

Local and state government revenue is not derived exclusively from income, property, sales, and other taxes. It also includes license fees, utility fees, user fees, and filing fees. Local government revenue includes funds to city and county government, schools, and special districts.

Frequently Asked Questions

How were the 341 participating communities and regions selected?

In 2015, Americans for the Arts published a Call for Participants for communities interested in participating in the Arts & Economic Prosperity 5 study. Of the more than 300 participants that expressed interest, 250 agreed to participate and complete four participation criteria: (1) identify and code the universe of nonprofit arts and cultural organizations in their study region; (2) assist researchers with the collection of detailed financial and attendance data from those organizations; (3) conduct audience-intercept surveys at cultural events; and (4) pay a modest cost-sharing fee (no community was refused participation for an inability to pay). Thirty of the 250 partners included multiple regions as part of their participation (e.g., a county as well as a city located within the county); as a result, the 250 local, regional, and statewide partners represent a total of 341 participating study regions.

How were the eligible nonprofit arts organizations in each community selected?

Local partners attempted to identify their universe of nonprofit arts and cultural organizations using the Urban Institute's National Taxonomy of Exempt Entity (NTEE) codes as a guideline. Eligible organizations included those whose primary purpose is to promote appreciation for and understanding of the visual, performing, folk, and media arts. Government-owned and government-operated cultural facilities and institutions, municipal arts agencies and councils, private community arts organizations, unincorporated arts groups, living collections (such as zoos, aquariums, and botanical gardens), university presenters and cultural facilities, and arts programs that are embedded under the umbrella of a non-arts organization or facility (such as a hospital or church) also were included if they play a substantial role in the cultural life of the community. For-profit businesses and individual artists are excluded from this study.

What type of economic analysis was done to determine the study results?

An input-output economic analysis was customized for each of the participating study regions to determine the economic impact its nonprofit arts and cultural organizations and arts audiences. Americans for the Arts, which conducted the research, worked with highly regarded economists to design the input-output models.

What other information was collected in addition to the arts surveys?

In addition to detailed expenditure data provided by the surveyed organizations and cultural attendees, researchers and economists collected extensive wage, labor, tax, and commerce data provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), as well as local and state tax data for use in the input-output analyses.

Why doesn't this study use a multiplier?

When many people hear about an economic impact study, they expect the result to be quantified in what is often called a multiplier or an economic activity multiplier. The economic activity multiplier is an estimate of the number of times a dollar changes hands within the community (e.g., a theater pays its actor, the actor spends money at the grocery store, the grocery store pays the cashier, and so on). It is quantified as one number by which expenditures are multiplied. The convenience of the multiplier is that it is one simple number. Users rarely note, however, that the multiplier is developed by making gross estimates of the industries within the local economy

and does not allow for differences in the characteristics of those industries. Using an economic activity multiplier usually results in an overestimation of the economic impact and therefore lacks reliability.

Why are the admissions expenses excluded from the analysis of audience spending?

Researchers assume that any admissions dollars paid by event attendees are typically collected as revenue for the organization that is presenting the event. The organization then spends those dollars. The admissions paid by audiences are excluded because those dollars are captured in the operating budgets of the participating nonprofit arts and cultural organizations. This methodology avoids “double-counting” those dollars in the analysis.

How is the economic impact of arts and culture organizations different from other industries?

Any time money changes hands there is a measurable economic impact. Social service organizations, libraries, and all entities that spend money have an economic impact. What makes the economic impact of arts and culture organizations unique is that, unlike most other industries, they induce large amounts of related spending by their audiences. For example, when patrons attend a performing arts event, they may purchase dinner at a restaurant, eat dessert after the show, and return home and pay the baby-sitter. These expenditures have a positive and measurable impact on the economy.

Will my local legislators believe these results?

Yes, this study makes a strong argument to legislators, but you may need to provide them with some extra help. It will be up to the user of this report to educate the public about economic impact studies in general and the results of this study in particular. The user may need to explain (1) the study methodology used; (2) that economists created an input-output model for each community and region in the study; and (3) the difference between input-output analysis and a multiplier. The good news is that as the number of economic impact studies completed by arts organizations and other special interest areas increases, so does the sophistication of community leaders whose influence these studies are meant to affect. Today, most decision makers want to know what methodology is being used and how and where the data were gathered.

You can be confident that the input-output analysis used in this study is a highly-regarded model in the field of economics (the basis of two Nobel Prizes in economics). However, as in any professional field, there is disagreement about procedures, jargon, and the best way to determine results. Ask 12 artists to define art and you may get 12 answers; expect the same of economists. You may meet an economist who believes that these studies should be done differently (for example, a cost-benefit analysis of the arts).

How can a community not participating in the Arts and Economic Prosperity 5 study apply these results?

Because of the variety of communities studied and the rigor with which the Arts & Economic Prosperity 5 study was conducted, nonprofit arts and cultural organizations located in communities that were not part of the study can estimate their local economic impact. Estimates can be derived by using the Arts & Economic Prosperity 5 Calculator (found at www.AmericansForTheArts.org/EconomicImpact). Additionally, users will find sample PowerPoint presentations, press releases, Op-Ed, and other strategies for proper application of their estimated economic impact data.

Acknowledgments

Americans for the Arts expresses its gratitude to the many people and organizations who made *Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of North Carolina* possible and assisted in its development, coordination, and production. A study of this size cannot be completed without the collaboration of many partnering organizations.

Generous funding for this project was provided by the North Carolina Arts Council, which also served as the local project partner and as such was responsible for the local implementation and data collection requirements of this customized analysis for the State of North Carolina.

Special thanks to the John D. and Catherine T. MacArthur Foundation, the Barr Foundation, and The Ruth Lilly Fund of Americans for the Arts for their financial support of the national implementation of Arts & Economic Prosperity 5.

Finally, each of our 250 local, regional, and statewide research partners contributed time and/or financial support toward the completion of this national study. We thank each and every one of them for committing the time and resources necessary to achieve success. A study of this magnitude is a total organizational effort; appreciation is extended to the entire board and staff of Americans for the Arts. The research department responsible for producing this study includes Randy Cohen, Ben Davidson, Isaac Fitzsimons, and Graciela Kahn.

The State of North Carolina's Participating Nonprofit Arts and Cultural Organizations

This study could not have been completed without the cooperation of the 1,233 nonprofit arts and cultural organizations in the State of North Carolina, listed below, that provided detailed financial and event attendance information about their organization.

100 Men in Black; 100 Words Film Festival; 82nd Airborne Division Museum; 82nd Airborne Division Museum Association; A Drummer World Drumline; A Sign of the Times of the Carolinas; A/Perture Cinema; Aberdeen Parks & Recreation Dept.; Ackland Art Museum at UNC-Chapel Hill; Action Greensboro; Activate Drama; Actors Theatre of Charlotte; African American Atelier; African American Cultural Festival of Raleigh And Wake County; African American Dance Ensemble; African American Heritage Committee; African American Heritage Music Project; Airborne & Special Operations Museum Foundation; Alamance Artisans Guild; Alamance Battleground; Alamance Children's Theatre (A.C.T); Alamance Chorale; Alamance County Arts Council; Alamance County Historical Museum; Alamance Jazz Band; Alamance Makers Guild; Alamance Photography Club; Alamance-Burlington Closing The Achievement Gap; Alban Elved Dance Company; Albemarle Potato Festival / EC Downtown Inc; Alleghany Arts & Craft; Alleghany Community Television; Alleghany Community Theatre; Alleghany County Schools; Alleghany Quilter's Guild; Alliance for Historic Hillsborough; American Chamber Music Festival; American Dance Festival; American Renaissance School; American School of Asian Culture; American-Turkish Association of North Carolina; AmiciMusic; Anam Cara Theatre Company; Anson County Arts Council; Anson County Historical Society; Anson County Writers' Club; Appalachian State University - An Appalachian Summer Festival; Appalachian State University Schaefer Center For The Performing Arts; Appalachian Theatre of the High Country; Archipelago Theatre; Arrowhead Artists and Artisans League; Art Alliance of Greensboro; Art Guild Of Person County; Art League of Highlands-

Cashiers; Art of Cool Project; Artistic Productions (Dance For Christ); Artists League Of The Sandhills; Arts & Health At Duke; Arts & Science Council Of Charlotte/Mecklenburg; Arts Academy at Grace; Arts Access; Arts Center; Arts Council of Carteret County; Arts Council Of Fayetteville/Cumberland County; Arts Council of Henderson County; Arts Council of Lincoln County; Arts Council Of Macon County; Arts Council Of Moore County; Arts Council Of Wayne County; Arts Council of Wilmington/New Hanover County; Arts Council Of Wilson; Arts Council Of Winston-Salem And Forsyth County; Arts for Arts Sake Group; Arts For Life; Arts Guild of Alleghany; Arts North Carolina; Arts of the Albemarle (includes Center Players, Gallery, and School of the Arts); Arts Of The Pamlico (Formerly Beau. Co. Arts Cncl.); Arts Richmond / Richmond County Arts Council; Arts Together; Arts United For Davidson County; Arts2People; Artsgreensboro; Artspace (Raleigh); Artsposure - The Raleigh Arts Festival; Ashe County Arts Council; Ashe County Little Theatre; Asheville Area Arts Council; Asheville Art Museum; Asheville Chamber Music; Asheville Choral Society; Asheville Community Theatre; Asheville Contemporary Dance Theatre; Asheville Creative Arts; Asheville Darkroom; Asheville Downtown Association; Asheville Lyric Opera; Asheville Museum of Science; Asheville Music School Sound Education; Asheville Quilt Guild; Asheville Rhythm; Asheville Symphony Society; Asian Focus Corporation; Associated Artists of Southport; Associated Artists of Winston-Salem; Aurora Fossil Museum; Authoring Action; Ava Gardner Museum; Averasboro Battlefield Museum; Avery County Historical Society; Aycock Birthplace; Ayr Mount; Azule; Band Together; Bartlett Theater; Barton College Art Galleries; Bascom Corporation; BBQ Festival On The Neuse; BeanStalk Community Theatre; Beaufort Historical Association; Beaufort Historical Foundation; Beaufort Music Festival; Bechtler Museum Of Modern Art; Bel Canto Company; Bennett Place State Historic Site; Benson Little Theatre; Benson Museum of Local History; Bentonville Battleground; Bertie County Arts Council; Big Dawg Productions; Black Arts Alliance; Black History Celebration In Moore County; Black Mountain College Museum & Arts Center; Black Mountain Swannanoa Art Center (Dba Black Mountain Center For The Arts); Blount-Bridgers House; Hobson Pittman Memorial Gallery Foundation; Blowing Rock Art And History Museum; Blowing Rock Historical Society; Blue Ridge Art Clan; Blue Ridge National Heritage Area; Blue Ridge Orchestra; Bookmarks; Boylan Heights Artwalk; Brasstown Concert Association; Brevard Community Band; Brevard Little Theatre; Brevard Music Festival; Brevard Philharmonic; Brunswick Community College / Odell Williamson Auditorium; Brunswick Community College Foundation (Brunswick County Intercultural Festival); Brunswick Concert Band Inc; Brunswick County Arts Council; Brunswick County Parks and Recreation; Brunswick Little Theatre; Brunswick Town Historic Site; Buffalo Creek Gallery; Bump: The Triangle; Burke Arts Council; Burlington Artists League; Burlington Artists' League Gallery; Burlington Boys Choir; Burlington Writers' Club; C. Grier Beam Truck Museum; C.S. Brown Cultural Arts Center; C.S.S. Neuse Interpretive Center and Governor Richard Caswell Memorial and Museum; Cabarrus Art Guild; Cabarrus Arts Council; Caldwell Arts Council; Caldwell Heritage Museum; Cam Raleigh; Camel City Jazz Orchestra; Campbell Children's Choir; Cape Fear Ballroom Dancers; Cape Fear Botanical Garden; Cape Fear Chorale; Cape Fear Independent Film Network; Cape Fear Museum Associates; Cape Fear Regional Theatre; Cape Fear Studios; Cape Fear Valley Medical Health Foundation; Capital Area Preservation; Cardinal Singers; Carolina Artist Studio Gallery; Carolina Ballet; Carolina Broadway Theatre Company; Carolina Chamber Music Festival; Carolina Chamber Symphony Players; Carolina Civic Center; Carolina Community Choir; Carolina Concert Choir; Carolina Designer Craftsmen; Carolina Meadows; Carolina Mountain Woodturners; Carolina Mountains Literary Festival; Carolina Music Ways; Carolina Performing Arts; Carolina Performing Arts Center; Carolina Philharmonic; Carolina Pottery Festival; Carolina Pro Musica; Carolina Quarterly; Carolina Raptor Center; Carolina Theatre; Carolina Theatre Of Greensboro; Carolina Voices; Carolina Wren Press; Carolina Youth Ballet; Carolinas Asian-American Chamber; Carolinas Aviation Museum; Carolinas Latin Dance Company; Caroline Calouche & Co.; Carrack Modern Art; Carrboro Elementary School PTA; Carrboro

Tourism Development Authority; Carteret Arts Forum; Carteret Community Theatre; Carteret County Historical Society; Cary Art Loop; Cary Arts Center; Cary Ballet Company; Cary Gallery of Artists; Cary Parks, Recreation And Cultural Resources Dept.; Cary Photographic Artists; Cary Players; Cary Playwrights Forum; Cary Theater; Cary Town Band; Cary Visual Art; Cary Youth Voices; Cary/Apex Piano Teachers Association; Cashiers Historical Society; Castalia July 4th Celebration; Caswell Council for the Arts; Caswell County Historical Association; Catawba County Library; Catawba County Senior Nutrition Art Programs; Catawba Science Center; Catawba Valley Camera Club; Catch The Spirit Of Appalachia; Cathedral Brass; Cedar Ridge High School Cultural Explosion; Center For Craft, Creativity, And Design; Center for Creative Economy; Center For Documentary Studies At Duke University; Center for Faith & the Arts; Center For Visual Artists; Greensboro; Center Stage Theatre (Wayne County, NC); Central Park NC (dba STARworks); CFCC's Wilson Center; Chamber Music Raleigh; Chamber Music Wilmington; Chamber Orchestra of the Triangle; Chapel Hill Carrboro Children's Museum (dba Kidzu Children's Museum); Chapel Hill Cultural Arts Division Of Parks & Recreation/Public Arts Commission; Chapel Hill Downtown Partnership (2nd Friday ArtWalk); Chapel Hill H.S. Arts Academy; Chapel Hill H.S. Band Boosters Club; Chapel Hill H.S. Philharmonic Foundation; Chapel Hill Historical Society; Chapel Hill Library Foundation; Chapel Hill Philharmonia; Chapel Hill Public Library; Chapel Hill Woodturners; Chapel Hill/Orange County Visitors Bureau; Chapel Hill-Carrboro Public School Foundation; Chapel Of Rest Preservation Society; Charity League of Lexington; Charlotte Ballet; Charlotte Chorale; Charlotte Cinema Arts; Charlotte Civic Orchestra; Charlotte Concerts; Charlotte Dragon Boat Association; Charlotte Film Society; Charlotte Folk Society; Charlotte Jewish Film Festival; Charlotte Museum of History; Charlotte Pride Band; Charlotte Symphony; Charlotte Viewpoint; Charlotte Youth Ballet; Chatham Artists Guild; Chatham County Arts Council; Chatham Creative Arts Incubator; CHB Museum; Cherokee County Arts Council (NC); Cherokee Historical Association; Cherry Hill Historical Foundation; Chicamacomico Historical Association; Children at Play Museum; Children's Home Society Of North Carolina; Children's Museum of Alamance County; Children's Museum of Winston-Salem; Children's Theater Festival; Children's Theater Workshop; Children's Theatre Of Charlotte; Chinese School at Chapel Hill; Choir School at St. Peter's; Choral Society Of Durham; Chowan Arts Council; Chowan County Tourism Development Authority; Christmas in July Festival; Church Musician's Guild; Circle De Luz; City Arts/Parks & Recreation; City Of Burlington Recreation And Parks Department; City Of Durham Parks And Recreation; Bimbe, Kwanza, Latino Festival, Rock The Park; City Of Graham Recreation And Parks Department; City Of Greenville Jaycee Park Center For Arts & Crafts; City of Kannapolis Parks & Recreation (arts programs); City of Lenoir; City Of Lexington Parks & Recreation Department; City of Raleigh Museum; Class Acts-Sampson CenterStage for Students; Classical Voice Of North Carolina (Cvnc); Clay County Historical and Arts Council; Claymakers Arts Community; Clayton Center; Clayton Visual Arts; Clayton Youth Theater; Clayworks; Clean Air Carolina; Cleveland County Arts Council; Cleveland County Choral Society; Coats Heritage Museum; Coharie People; Columbus County Arts Council; Columbus County DREAM Center; Communities in Schools (Yanoff Music Program); Communities in Schools of Orange Co. Inc; Communities in Schools of Thomasville; Community Choir Of Person County; Community Concerts; Community Council for the Arts; Community Foundation Of Greater Greensboro; Community Music Club; Community Music School (Raleigh); Community School of the Arts (Charlotte); Community Suzuki Music School; Community Theatre Of Greensboro; Concert Choir; Concert Singers Of Cary; Concord Downtown Development Corporation; Cooleemee Historical Association; Core Sound Decoy Carvers Guild; Core Sound Waterfowl Museum; Cornelius Youth Orchestra; Council for the Arts Jacksonville/Onslow; Coventry Carolers; Craven Arts Council & Gallery; Craven Community Chorus; Craven Concerts; Creative Aging Network-Nc; Cricket Craftsmen; Crossnore Fine Arts Gallery; Crown Coliseum Complex; Crystal Coast Choral Society; Crystal Coast Countdown; Cucalorus Film Foundation; Cultural Arts Council of

Wilkes; Culture Mill; Cumberland County Association for Indian People; Cumberland County Public Library & Information Center; Cumberland County Schools; Cumberland Oratorio Singers; Dance Cooperative; Dance Project; Daniel Stowe Botanical Garden; Dare County Arts Council; Davidson Community Players; Davidson County Public Library System; Davidson County Senior Services; Davie County Arts Council; Davner Theatricals (dba Burning Coal Theatre); DBA Wing Haven Garden & Bird Sanctuary; Delta House Life Development Of Asheville; Diamante; Diana Wortham Theatre; Digi-Bridge; Discovery Place; Dogwood Crafters Inc; Don and Catharine Bryan Cultural Series; Don Gibson Theatre; Doodad Farm; Door To Door (Unc Healthcare); Down East Folkarts Society; Downtown Arts District Association; Downtown Live! Summer Music Series; Downtown Winston-Salem Partnership; Dr. Sharyn Edwards 38th Annual Piano Festival & Competition; Dram Tree Shakespeare; DREAMS of Wilmington; Duke Energy Center For The Performing Arts; Duke Homestead; Duke Performances; Duke University Press; Duke University String School; Duplin County Schools Arts Programs; Durham Art Guild; Durham Arts Council; Durham Central Park; Durham Children's Choir; Durham Chorale; Durham Community Concert Band; Durham County Parks and Recreation (arts activities); Durham Library Foundation; Durham Medical Orchestra Foundation; Durham Music Teachers' Association; Durham Regional Theatre; Durham Savoyards, Limited, of Durham, North Carolina; Durham Symphony Orchestra; Earl Scruggs Center: Music & Stories from the American South; East Carolina University Family Fare Series; East Carolina University Joyner Library (Faulkner Gallery); East Carolina University School of Art & Design; East Carolina University School of Music; East Carolina University Youth Arts Festival; Eastern Cabarrus Historical Society Museum; Eastern Music Festival; Eastern North Carolina Dance Foundation; Echo Foundation; Edenton Historical Commission; Edgecombe County Cultural Arts Council; Edgecombe County Veterans Military Museum; Edward C Smith Civic Center; Efland Cheeks Elementary School PTA; El Centro Hispano (Carrboro); El Centro Hispano (Durham County); El Pueblo; Elizabeth City Area Convention & Visitors Bureau; Elizabeth City Historic Neighborhood Association; Elizabethan Gardens; Ellington-White Cdc; Elon University Office Of Cultural Programs; Elsewhere; Encore Theater Company; Eno Publishers; Eno River Association; Enrichment Center; Ensemble Stage; Ephesus Road Elementary School PTA; Evergreen of Greenville (DBA Uptown Greenville); Expedition School PTSA; Exploring Joara Foundation; Extraordinary Ventures Arts Program; Farmville Community Arts Council; Fascinate-U Children's Museum; Fayetteville Area Transportation and Local History Museum; Fayetteville Chinese Association; Fayetteville Convention and Visitors Bureau; Fayetteville Dogwood Festival; Fayetteville State University (Foundation); Fayetteville State University (Performing And Fine Arts Department); Fayetteville Symphony Orchestra; Fayetteville-Cumberland Parks and Recreation (NC Veterans Park); Federation of North Carolina Historical Societies; Festival In The Park (Charlotte); Fiddle and Bow Country Dancers; Filipino-American Performing Artists of North Carolina; Fine Arts Festival; Fine Arts League Of Cary; Fines Creek Bluegrass Jam; First Flight Foundation; Florence Thomas Art School; Folk Arts Society Of Greenville; Footcandle Film Society; Foothills Arts Council; Forest Theater; Forge Greensboro; Forsyth County Public Library; Fort Branch Battleground Commission; Fort Dobbs State Historic Site; Fort Fisher State Historic Park; Fort Raleigh; Forward Motion Dance; Franklin Area Community Theater; Franklin County Arts Council; Franklin Street Arts Collective (Frank Gallery); Friends of Carl Sandburg at Connemara; Friends of Carrboro Branch Library Arts Program; Friends of Elizabeth II; Friends of John Coltrane; Friends of Moorefields; Friends Of Music At Methodist; Friends of Public Radio; Friends of Queen Anne's Revenge; Friends of the Battleship North Carolina; Friends of the Chapel Hill Public Library; Friends of the City of Raleigh Museum; Friends Of The Cumberland County Public Library; Friends of the John A. Wilkinson Center; Friends of the Museum of Natural Sciences; Friends of the North Carolina Maritime Museum at Southport; Friends Of The Page-Walker Hotel; Friends of the Wilson County Public Library; Gallery Players (Alamance County); Gallery Theatre; Gardner-Webb University Art

Gallery; Garner Parks, Recreation And Cultural Resources Dept.; Gaspard and Dancers; Gaston Arts Council; Gaston College Rauch Gallery; Gaston Community Concert Band (dba Gaston Symphonic Band); Gaston Concert Association; Gaston County Museum of Art and History; Gaston Dance; Gaston School of the Arts; Gay Men's Chorus of Charlotte; George Black House & Brickyard; Gilbert Theater; Girls Rock; Given Library/Tufts Archives; Givens Performing Arts Center at UNC Pembroke; Glen Alpine School; Goldsboro Civic Ballet; Goldsboro Writer's Group; Good Times Drama Club; Graceful Expressions Dance Company; Grandfather Mountain Highland Games; Granville County Historical Society; Granville Theatre; Grassroots Productions Limited; Graveyard of the Atlantic Museum; Greater Shelby Community Theatre; Green Room Community Theatre; Greene County Arts and Historical Society dba Greene County Museum; Greenhill (Legal Name Green Hill Center For Nc Art); Greensboro Ballet; Greensboro Beautiful; Greensboro Children's Museum; Greensboro Chinese Association; Greensboro Coliseum Complex; Greensboro Historical Museum; Greensboro Opera; Greensboro Oratorio Singers; Greensboro Public Library Foundation; Greensboro Symphony Orchestra; Greensboro Tarheel Chorus; Greenville Choral Society; Greenville Museum of Art; Gregg Museum Of Art & Design; Grey Seal Puppets; GroundSwell Pictures; Guilford College Art Gallery; Guilford College Bryan Series; Guilford Courthouse National Military Park; Guilford Native American Association; Halifax County Arts Council; Haliwa-Saponi Indian Tribe; Halle Cultural Center; Harmony Hall Historic Plantation; Harnett Regional Theatre; Harrisburg Elementary School (arts programs); Hart Square Foundation; Harvey B. Gantt Center for African American Arts and Culture; Haw River Historical Museum; Hawkeye Indian Cultural Center; Haywood Arts Regional Theatre; Haywood Community Band; Haywood County Arts Council; Haywood Hall; Healing Force; Heart of Brevard; Heart Of Carolina Jazz Society; Hearts And Hands Eca Quilters Guild; Helen Simoneau Danse; Henderson County Gem And Mineral Society; Henderson County Heritage Museum; Hendersonville Friends of Chamber Music; Hendersonville Little Theatre; Hendersonville Symphony Orchestra; Heritage Dance Foundation; Heritage Square Historical Society of North Carolina; Hickory Ballet Academy; Hickory Choral Society; Hickory Community Theatre; Hickory Downtown Art Crawls; Hickory Landmarks Society; Hickory Museum Of Art; Hickory Music Factory; Hickory Public Library; Hiddenite Center; High Country Writers; High Point Arts Council; High Point Ballet; High Point Community Chorus; High Point Community Concert Association; High Point Community Theatre; High Point Museum; High Point Theatre; Highlands Cashiers Chamber Music Festival; Highlands Community Theatre; Hillsborough Arts Council; Hillsborough Community Media; Hillsborough Presbyterian Church Arts Program; Hispanic Arts Initiative; Hispanic League; Historic Bath State Historic Site; Historic Bethabara Park; Historic Cabarrus; Historic Carson House; Historic Edenton State Historic Site; Historic Grainger Stadium; Historic Halifax; Historic Hillsborough Commission; Historic Hope Foundation; Historic Morgantown Festival; Historic Preservation Foundation of North Carolina dba: Preservation NC; Historic Preservation Society of Durham; Historic Robeson; Historic Rosedale Foundation Inc; Historic Stagville State Historic Site; Historic Wilmington Foundation; Historical Assn. Of Catawba County; Historical Foundation of Hillsborough & Orange County; Historical Preservation Group; History Museum of Burke County; Holly Arts & Crafts Festival; Holly Springs Arts Council; Holly Springs Community Band; Hooper House Preservation Foundation; Horne Creek Living Historical Farm; Hospice & Palliative Care of Cabarrus (arts programs); House in the Horseshoe State Historic Site; Humsub Inc; Hyde Co. Historical & Genealogical Society; Iii Century Singers; Imagination Station Science Museum; Immediate Theatre Project; Imperial Centre for the Arts and Sciences; Maria V Howard Art Center; India Association of Charlotte; Indian Classical Music And Dance Society; Indian Talent Discovery Foundation; Infinity Ballet Theatre; Inis Cairde School of Irish Dance (parent association); Inspire the Fire; International Ballet Academy; International Civil Right Center and Museum; International Focus; International Lineman's Museum; Iredell Arts Council; Iredell Concert Association; Iredell Museums; J Smith Young YMCA; J.A.M. Of Swain County at

Mountain Discovery Charter School; Jackson County Arts Council; Jackson County Green Energy Park; James C. Harper School of Performing Arts; Japanese Association in Charlotte; Jazz Arts Initiative; Jazz Foundation of North Carolina; Jazz Preservation Society of New Bern; Jewish Heritage Foundation; Joel Lane Museum House; John C. Campbell Folk School; John F Kennedy Special Warfare Museum Association; Johnston County Arts Council; Johnston County Chorale; Jones County Arts Council; Jr. League of Fayetteville (Holly Day Fair); Judson Theatre Company; Judy Hogan's Writing Workshops; Jumbo Arts International; Junior Appalachian Musicians Alleghany County Schools; Justice Theater Project; Kamm Teapot Foundation; Kearns Dance Project; Kernersville Little Theatre; Kidsenses; Kidznotes; Kings Mountain Historical Museum; Kings Mountain Little Theatre; Knightdale Parks, Recreation and Cultural Programs Dept.; Koka Booth Amphitheatre At Regency Park; Korean American Association; Korner's Folly Foundation; Lake Waccamaw Depot Museum; Lakeland Cultural Arts Center; Las Amigas (Whiteville Chapter); Latin American Coalition; Latino Advocacy Coalition; Latta Place; Leaf Community Arts; Lee County Arts Council; Lee County Community Orchestra Assn; Lee Street Theatre; Legacy Repertory Company; LeGrand Center; Leland Cultural Arts Center; Lenoir Community College; Lenoir County Fair; Lenoir County Historical Association; Lenoir-Rhyne University Art Department; Lenoir-Rhyne Visiting Writers Series; Levine Museum of the New South; Lewisville Area Arts Council; Lexington Choral Society; Lexington Youth Theatre; Liberty Arts; Light Factory; Lincoln Community Concert Association; Lincoln County Historical Association; Lincoln Cultural Center; Linda Goodman, Author/Storyteller/Playwright; Liston B. Ramsey Center For Regional Studies, Mars Hill University; Little Green Pig Theatrical Concert; Little Theater of Gastonia; Little Theatre of Charlotte dba Theatre Charlotte; Livermush Festival; Local Cloth; Logan Community Day Care Association (arts programs); Longleaf Ensemble; Louisburg College; Louise Gilbert Gallery Mitchell Community College; Louise Wells Cameron Art Museum; Lower Cape Fear Historical Society; MacDowell Music Club; Macon County Art Association; Madison County Arts Council; Madison County Heritage Festival; Magnetic Theater; Magnolia Arts Center; Mallarme Chamber Players; Manbites Dog Theater Company; Mano Al Hermano; Marbles Kids Museum; Market House; Martha Connerton/Kenetic Works; Martin Community Players; Martin County Arts Council; Martin County Historical Society; Mary Scroggs Elementary School PTA; Matthews Concert Band; Matthews Historical Foundation; Matthews Playhouse of the Performing Arts; Mauney Memorial Library; May 20th Society; Mccoll Center For Art + Innovation; McDougle Elementary PTA; McDowell Arts Council; Mebane Arts And Community Center; Mebane Community Choir; Mentality Enterprises; Meredith Ensemble Theatre; MerleFest; Methodist University (Art Department); Methodist University (David McCune International Art Gallery); Mims And Civic Galleries At Nc Wesleyan College's Dunn Center; Minglewood Farm and Nature Preserve; Mint Hill Arts; Mint Hill Historical Society; Mint Museum Of Art; Montford Arts And Music Festival; Montford Park Players; Moore County All-County Orchestra Clinic; Moore County Choral Society; Moore County Concert Band; Moore County Historical Association; Moore Philharmonic Orchestra; Mooresville Arts; Moravian Music Foundation; Morehead Planetarium And Science Center; Mount Airy Museum of Regional History; Mount Airy Photo Club; Mount Pleasant Middle School (arts programs); Mountain Gateway Museum; Mountain Heritage Center (WCU); Mountain Home Music; Mozart Club Of Winston-Salem; Mt. Zion Baptist Church/Art Programs; Multi-Cultural Community Student Union (arts programs); Mumfest; Murfreesboro Historical Association; Museum And Archives Of Rockingham County; Museum of Ashe County History; Museum of Coastal Carolina; Museum of Durham History; Museum of NC Handicrafts; Museum Of Southeast American Indian; Museum of the Albemarle; Museum Of The Cape Fear; Museum Of The Cape Fear Foundation; Museum of the Cherokee Indian; Museum of the Marine; Music Academy of Eastern Carolina; Music Academy Of North Carolina; Music At St. Alban's; Music Fest 'n Sugar Grove; Music For A Great Space; Music Maker Relief Foundation; Musical Empowerment; Musicalminds Nc; Mustang Outreach Program; Nascar Hall Of Fame; Nash County Arts Council;

Nasher Museum Of Art At Duke University; Nashville Blooming Festival; National Folk Festival; National Humanities Center; Natural Science Center Of Greensboro; NC Folklore Society; NC Latin American Film Festival; NC Museum of Life and Science; NC Music Hall of Fame; NC State LIVE; New Bern Civic Theatre; New Bern Historical Society; New Bern Preservation Foundation; New Horizons Band in the Pines; New Music @ECU Festival; New Winston Museum; Newton-Conover Auditorium; Next Festival; Nikwasi Dulcimer Players; North Carolina Aquarium Society; North Carolina Arboretum Society; North Carolina Arts Council; North Carolina Arts Council Foundation; North Carolina Arts in Action; North Carolina Auto Racing Hall of Fame; North Carolina Aviation Museum; North Carolina Azalea Festival; North Carolina Basketmakers Association; North Carolina Black Repertory Company; North Carolina Blumenthal Performing Arts Center; North Carolina Botanical Garden; North Carolina Brass Band; North Carolina Central University Jazz Festival; North Carolina Civil War History Center Foundation; North Carolina Collection Gallery; North Carolina Dance Alliance; North Carolina Folklife Institute; North Carolina Genealogical Society; North Carolina Humanities Council; North Carolina International Folk Festival Inc; North Carolina Jazz Festival; North Carolina Literary and Historical Association; North Carolina Literary Review; North Carolina Maritime Museum at Beaufort; North Carolina Maritime Museum at Southport; North Carolina Master Chorale; North Carolina Museum Of Art; North Carolina Museum Of Art Foundation; North Carolina Museum Of History; North Carolina Museum of History Associates; North Carolina Museum of History Foundation; North Carolina Museum of Natural Sciences; North Carolina Music Educators Association; North Carolina Opera; North Carolina Pottery Museum; North Carolina Presenters Consortium; North Carolina Stage Company; North Carolina State Ballet Company; North Carolina State Capitol; North Carolina State University Theatre; North Carolina Symphony Board; North Carolina Symphony Society; North Carolina Theatre; North Carolina Theatre Conference; North Carolina Transportation Museum; North Carolina Writers' Network; North Carolina Youth Tap Ensemble; North Carolina Zoo; North Caroliniana Society UNC Wilson Library; North Mecklenburg Community Chorus; North Moore High School Theatre Arts; North Raleigh Arts And Creative Theatre; North Randolph Historical Society; Northampton County Cultural Arts Committee; Northside Elementary PTA; Northwood High School Arts Education Foundation; Nuv Yug Cultural Organization; Oak Hill Heritage House Museum and Research Library; Oak Island Art Guild; Occaneechi Band of the Saponi Nation; Ocracoke Preservation Society; Octagon House Restoration; Odyssey Clayworks; Office Of Raleigh Arts; Old Courthouse Theatre; Old Depot Association; Old Salem; Old Time Square Dance; Old Waynesborough Commission/Waynesborough Historical Village; Olio; Oliver Nestus Freeman Round House; On Q Performing Arts; One Song Productions; One Voice Inc; Open Hearts Art Center; Open Space Café Theatre; Opera Carolina; Opera House Theatre Company; Opera Wilmington; Orange County Artists Guild; Orange County Arts Commission (Orange County Gov.); Orange County Dept. on Aging; Outer Banks Forum for the Lively Arts; Outer Banks History Center; Outer Banks Preservation Association; Outer Banks Visitors Bureau; Ovens Auditorium; PACE Group; Page-Walker Arts And History Center; Pamlico County Arts Council; Pamlico Musical Society; Pan Harmonia; Paperhand Puppet Intervention, LLC; Paramount Theater Of Burlington; Paramount Theatre (Wayne County); Parkway Playhouse; Partnership for Art at the Core of Education; Partnership for the Sounds; Pathways Elementary All-County Chorus; Paul Green Foundation; Paul J Ciener Botanical Garden; Penland School Of Crafts; People's Channel; Performance Center in Asheville; Performance Edge; Performing Arts & Conference Center (Isothermal Community College); Performing Arts Center; Perquimans Arts League; Perquimans County Restoration Association - Newbold-White House; Person County Arts Council; Person County Museum of History; Philharmonic Association; Phillips Middle School PTSA; Phuzz Phest; Piedmont Artists; Piedmont Blues Preservation Society; Piedmont Chamber Singers; Piedmont Choral Society; Piedmont Craftsmen; Piedmont Folk Legacies; Piedmont Opera; Piedmont Percussion Program; Piedmont Prime Time Community Band; Piedmont Triad Jazz

Orchestra; Piedmont Wind Symphony; Pinecone, The Piedmont Council Of Traditional Music; Pinecrest H.S. Band; Pinecrest Players; Pinehurst Forum; Pinehurst Parks & Recreation Dept.; Pisgah Astronomical Research Institute; Pitt County Arts Council At Emerge; Pitt County Schools Arts Education; Playing for Others; Playmakers Repertory Company; Pocosin Arts; Polk Memorial Support Fund; Poplar Grove Foundation; Port City Music Festival; Port Discover; Port O'Plymouth Roanoke River Museum; Possibility Project; Power Plant Gallery; Preservation Chapel Hill; Preservation Greensboro; Preservation of Wilson; Preservation Society of Asheville-Buncombe County; Preserve Historic Forsyth; President James K. Polk State Historic Site; Pride of Kinston Downtown Events; Professional Art Quilters Alliance - South; Pullen Park Arts Center; Purple Door Productions; Raeford Hoke Museum; Rags to Riches Theatre for Young Audiences; Raleigh Boy Choir; Raleigh Civic Symphony Association; Raleigh Concert Band; Raleigh Dance Theatre; Raleigh Fine Arts Society; Raleigh Hall of Fame; Raleigh Little Theatre; Raleigh St. Patrick's Day Parade; Raleigh Symphony Orchestra; Randolph Arts Guild; Rankin Museum of American Heritage; Reed Gold Mine; Revolution Mill; Reynolda House; River Arts District Artists; Riverrun International Film Festival; Rivertowne Repertory Players; Roanoke Canal Museum And Trail; Roanoke Island Festival Park; Roanoke Island Historical Association/Lost Colony; Robbins Village Theater Foundation; Robeson County Arts Council; Robeson County History Museum; Robeson County Partnership for Children; Rockingham County Arts Council; Rosewood School; Rowan Arts Council; Rowan Blues and Jazz Society; Rowan Museum; Royal Expressions Contemporary Ballet; RSVP Community Theatre; RTP General Assembly Chorus; Rutherford Chamber Consort; Rutherford County Arts Council; Rutherford County Recreation Heritage and Culture Commission; Rutherford County Visual Artists Guild; S. Rudolph Alexander Performing Arts Series and Family Fare ; Sacrificial Poets; Salem College (Art Gallery); Salisbury-Rowan Symphony Society; Salt Block Foundation; Sampson Arts Council; Sampson Community Theatre; Sampson County History Museum; Sampson County Schools Arts Camp; Sandhills Community College Music Dept.; Sandhills Family Heritage Association; Sandhills Quilters Guild; Sandy Creek Weavers; Sanford Brush & Palette Club; Sarah P. Duke Gardens; Sawtooth School For Visual Art; Schiele Museum of Natural History; Sciworks Science Center and Environmental Park; Scottish Tartans Museum; Scrap Exchange; Sea Notes Choral Society; Seagrove Potters Of Historic Busbee Rd.; Seaside Arts Council; Seawell Elementary School PTA; Seby B. Jones Performing Arts Center; Secac; Secrest Artist Series; SEEDS; Sertoma Arts Center; Shakori Hills Community Arts Center; Silent Images; Siler City Mural Society; Sister Cities Association Of Cary; Sisters' Voices; Small Museum Of Folk Art; SmART Kinston City Project Foundation; Smiles And Frowns Playhouse; Smith Island Museum/Old Baldy Lighthouse; Smith-McDowell House Museum; Sneads Ferry Community Theatre; Snow Camp Historical Drama Society; Somerset Place State Historic Site; Sonorous Roa; Sons Of Norway-North Carolina Vikings Lodge 3-675; Southeast Center for Arts Integration; Southeastern Center for Contemporary Art; Southeastern North Carolina Radio Reading Service; Southeastern Theatre Conference; Southern Appalachian Historical Association; Southern Appalachian Repertory Theatre; Southern Documentary Fund; Southern Highland Craft Guild; Southern Middle School Orchestra; Southern Piedmont Woodturners; Southern Pines Public Library; Southern Pines Recreation and Parks Department; Spanish Dance Arts Company; Spring Lake Parks & Recreation; Springfest; Spruce Pine Main Street; St. Joseph Historic Foundation / Hayti Heritage Center; Stagestruck: The Young People's Own Theatre; Stanly Arts Guild; Stanly County Arts Council; Starlight Dance Band; Steap; Stecoah Valley Arts, Crafts & Educational Center; Stokes County Arts Council; Storefront Theatre Company; Storytelling Arts Center of the Southeast; Studio 1; Sun Publishing; Sunday In The Park; Sunrise Theater; Surry Arts Council; Swain County Center for the Arts; Swannanoa Valley Art League; Swannanoa Valley Museum; Swansboro Festival; Sweetgum Puppets Llc; Symphony of Rutherford County; Tar River Choral and Orchestral Society; Tar River Community Band; Tar River Players; Teen To Teen Theatre; Temple Theatre Company; Textile Heritage Museum; Thalian Association Community Theatre; Thalian

Hall Center for the Performing Arts; Theatre Guild Of Rockingham County; Theatre in the Park (Raleigh); Theatre Raleigh; Thegifted Arts; Thomas Day House-Union Tavern Restoration; Thomas Wolfe Memorial SHS; Tobacco Farm Life Museum; Toe Riverarts Council; Tosco Music Party; Touring Theatre Of North Carolina; Town Creek Indian Mound; Town of Carrboro; Town of Duck Jazz Festival; Town of Elon Recreation & Parks; Town of Fuquay-Varina PRCRD; Town Of Granite Falls; Town of Harrisburg - Concert Series; Town Of Hillsborough Planning Department; Town Of Hillsborough Tourism Board; Town of Hudson; Town Of Wingate; Towne Players Of Garner; Transylvania Community Arts Council; Transylvania County Historical Society; Triad Acoustic Stage; Triad Cultural Arts; Triad Pride Men's Chorus; Triad Stage; Triangle ArtWorks; Triangle Brass Band; Triangle Country Dancers; Triangle Lebanese-American Association; Triangle Radio Reading Service; Triangle Weavers; Triangle Wind Ensemble; Triangle Youth Ballet; Tryon Arts & Crafts; Tryon Concert Association; Tryon Fine Arts Center; Tryon Little Theatre; Tryon Palace; Turchin Center For The Visual Arts At Appalachian State University; Twin City Stage; Twin Rivers Quilt Guild; Umoja Group; UNC Coastal Studies Institute Foundation; UNCW Office Of The Arts; Unexposed Micro Cinema; Union County Community Arts Council; Union County Youth Ballet; Union Pines Marching Vikings; Union Symphony Society; United Arts Council Of Catawba County; United Arts Council Of Raleigh And Wake County; United Tribes of North Carolina; University of North Carolina Art Department; University of North Carolina Arts & Sciences Foundation; University of North Carolina Carolina Women's Center; University of North Carolina Clef Hangers; University of North Carolina Press; University of North Carolina School of the Arts; University Of North Carolina-Greensboro (Campus Activities & Programs); University Of North Carolina-Greensboro (Community Arts Collaborative); University Of North Carolina-Greensboro (Jazz Ensembles); University Of North Carolina-Greensboro (Opera Theatre); University Of North Carolina-Greensboro (Theatre Program); Unnatural Resources Institute; UpStage At Union Pines High School; UpstairsArtspace; Uptown Lexington; Uptown Shelby Association; Uwharrie Players; Vagabond School Of The Drama/Flat Rock Playhouse; Valleytown Cultural Arts and Historical Society; Van Every/Smith Galleries At Davidson College; Vance County Arts Council; Veterans Memorial Park Inc for Mt Airy Fiddlers Convention; Visual Art Exchange; Voce; Vollis Simpson Whirligig Park; Wake County Parks, Recreation & Open Space; Wake County Public Libraries; Wake Forest College Birthplace Society; Wake Forest Renaissance Centre For The Arts; Wake Forest University (Museum of Anthropology); Wake Forest University (START Gallery); Waldorf Educational Association of North Carolina; Walltown Children's Theatre; Warehouse Pac; Warren Arts Council; Washington County Historical Society (North Carolina); Watauga Arts Council; Waterworks Visual Arts Center; Wayne County Historical Association; WCU Bardo Fine and Performing Arts Center; WDAV; Weatherspoon Art Museum; Weaverville Art Safari; Western Carolina Civic Orchestra; Western Carolina University Spring Literary Festival; Western North Carolina Dulcimer Collective; Western North Carolina Pottery Festival; Western North Carolina Quilters Guild; Western Piedmont Symphony; Weymouth Center for the Arts & Humanities; WFDD-FM 88 Radio; Whalehead Preservation Trust; Whiteville Downtown Development Commission; Wilkes Art Gallery; Wilkes Heritage Museum; Wilkes Playmakers; William R. Kenan, Jr. Charitable Trust Fund for the Arts; Wilmington Ballet Company; Wilmington Children's Museum; Wilmington Choral Society; Wilmington Jewish Film Festival; Wilmington Symphony Orchestra; Wilson Botanical Garden; Winston-Salem Delta Fine Arts; Winston-Salem Festival Ballet; Winston-Salem State University (Diggs Gallery); Winston-Salem Symphony Association; Winston-Salem Theatre Alliance; Winston-Salem Youth Chorus; WNCU 90.7 FM; Womansong of Asheville; Women's Voices Chorus; Working Films; Wright Brothers National Memorial; Writers' Forum at St. Andrews University; WTVI; WUNC TV; XOXO; Yadkin Arts Council; Yancey History Association; YMI Cultural Center; Young Musicians Of Alamance; Young People's Performing Company; and Zebulon B. Vance Birthplace.

The State of North Carolina's Participating Cultural Event Attendees

Additionally, this study could not have been completed without the cooperation of the 18,151 arts and cultural audience members who generously took the time to complete the audience-intercept survey while attending a performance, event, or exhibit within the State of North Carolina during calendar year 2016.



AMERICANS FOR THE ARTS IS THE NATION'S LEADING NONPROFIT ORGANIZATION FOR ADVANCING THE ARTS IN AMERICA. ESTABLISHED IN 1960, WE ARE DEDICATED TO REPRESENTING AND SERVING LOCAL COMMUNITIES AND CREATING OPPORTUNITIES FOR EVERY AMERICAN TO PARTICIPATE IN AND APPRECIATE ALL FORMS OF THE ARTS.



The following national organizations partner with Americans for the Arts to help public- and private-sector leaders understand the economic and social benefits that the arts bring to their communities, states, and the nation.

Cover: Andrew Shurtleff Photography

(Clockwise from Top) Concert for Miami, Knight Concert Hall, Miami-Dade, FL.; Photos from the Broward 100 'InsideOut' campaign "Creatives Making a Difference in Hollywood". Presented by the Community Redevelopment Agency of Hollywood and supported by the Downtown Hollywood Mural Project and the Art and Cultural Center of Hollywood, FL. Photo by Jill Weisberg.; The Pool, El Paso Museums & Cultural Affairs Department, TX. Photo by Jen Lewin.; Dancer at outdoor performance. Fulton County Arts Council, GA. Photo by CGC Studios.

