



Arts & Economic Prosperity^{III}

The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences
in THE STATE OF FLORIDA



From the iconic images of the Florida Highwaymen to the museums that preserve and collect our history, arts and culture define us. They improve quality of life for Floridians and visitors to our state. The arts and culture inspire creativity and lifelong learning, build strong communities, and build a strong network for leadership that encourages a stronger Florida. The findings of *The Arts and Economic Prosperity III* reveal that, in addition to these innumerable benefits, arts and culture bring economic vitality to our state.

This study reveals that the cultural industry is important to economic prosperity. In Florida, arts and culture mean business. With more than \$3 billion in total direct expenditures into the Florida economy in 2008, arts and culture are sound investments in Florida's future. In the pages to follow, you will read about the many ways that arts and culture are good news for those looking to strengthen Florida's economy.

Leaders in Florida are supportive of arts and culture because they have helped to bring new businesses and ventures to our state. In today's competitive global marketplace, arts and culture can play an important role in attracting high-wage jobs and a creative workforce. *The Arts and Economic Prosperity III* expands that notion. Not only can the cultural industry play its important part in attracting business critical to economic recovery, this industry contributes directly to economic activity, supports jobs, and returns revenue to local and state government.

The return on investment number speaks for itself. At 5:1 in Florida in 2008, it is clear that the arts and culture are a worthwhile investment in Florida's future. That year, over 30 million people, including 7 million school children, participated in grants-supported programs from the Division of Cultural Affairs. That's people in all of Florida's 67 counties attending more than 32,000 cultural events. Coupled with the over \$3 billion in total expenditures, arts and culture mean better quality of life and better business all across our state.

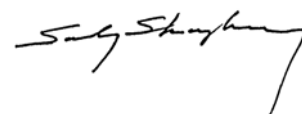
In addition to their inherent value, arts and culture have the power to build a better Florida. We are committed to arts and culture, and to the tremendous benefits they bring. We hope that after you read *The Arts and Economic Prosperity III* you'll agree that arts and culture are indeed good news.



Kurt S. Browning
Secretary of State



JuDee Pettijohn
Deputy Secretary
Office of Cultural, Historical,
& Information Programs



Sandy Shaughnessy
Director
Division of Cultural Affairs

Arts and Economic Prosperity III was conducted by Americans for the Arts, 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.

Generous support for this project was provided by Citizens for Florida Arts, Inc.

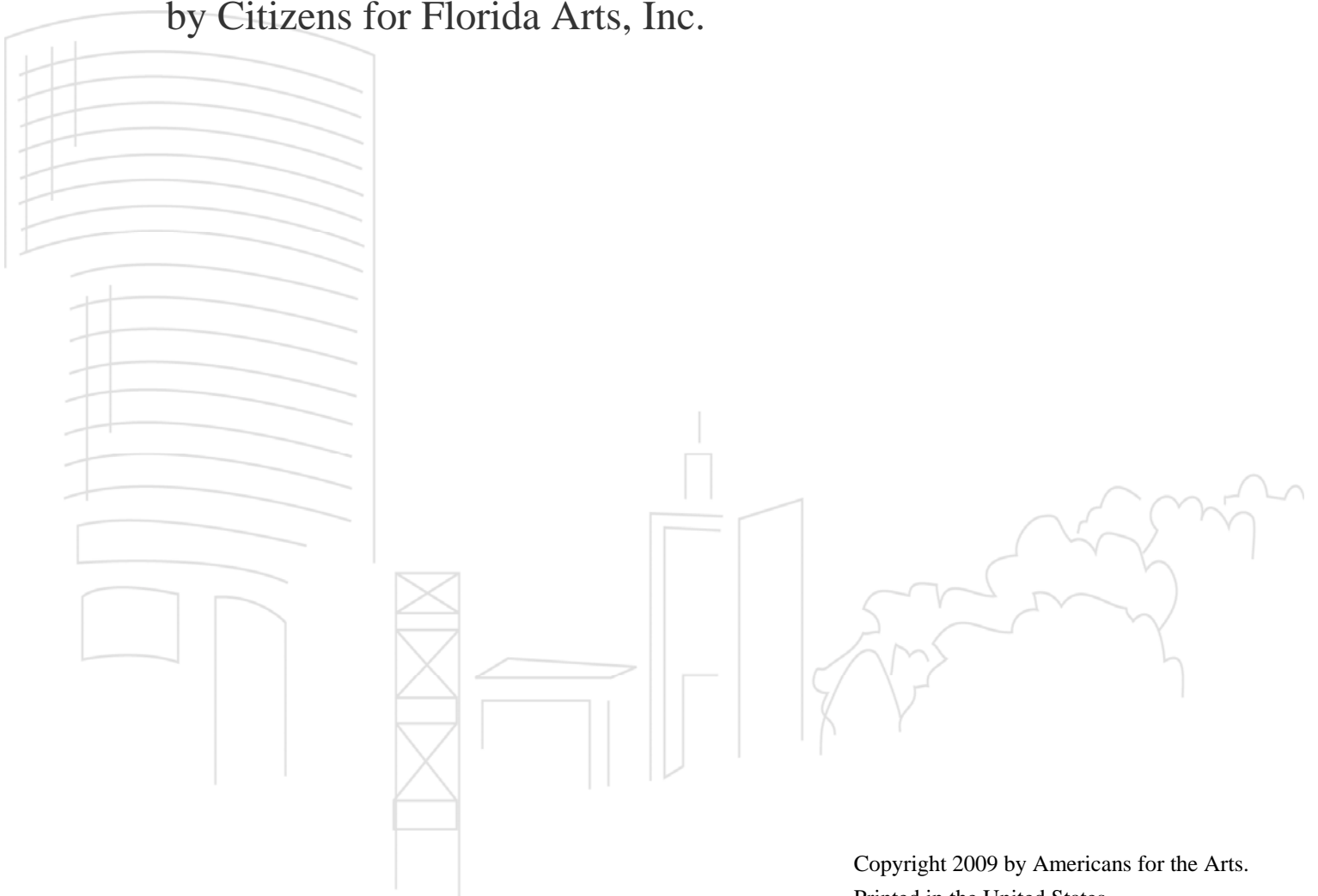
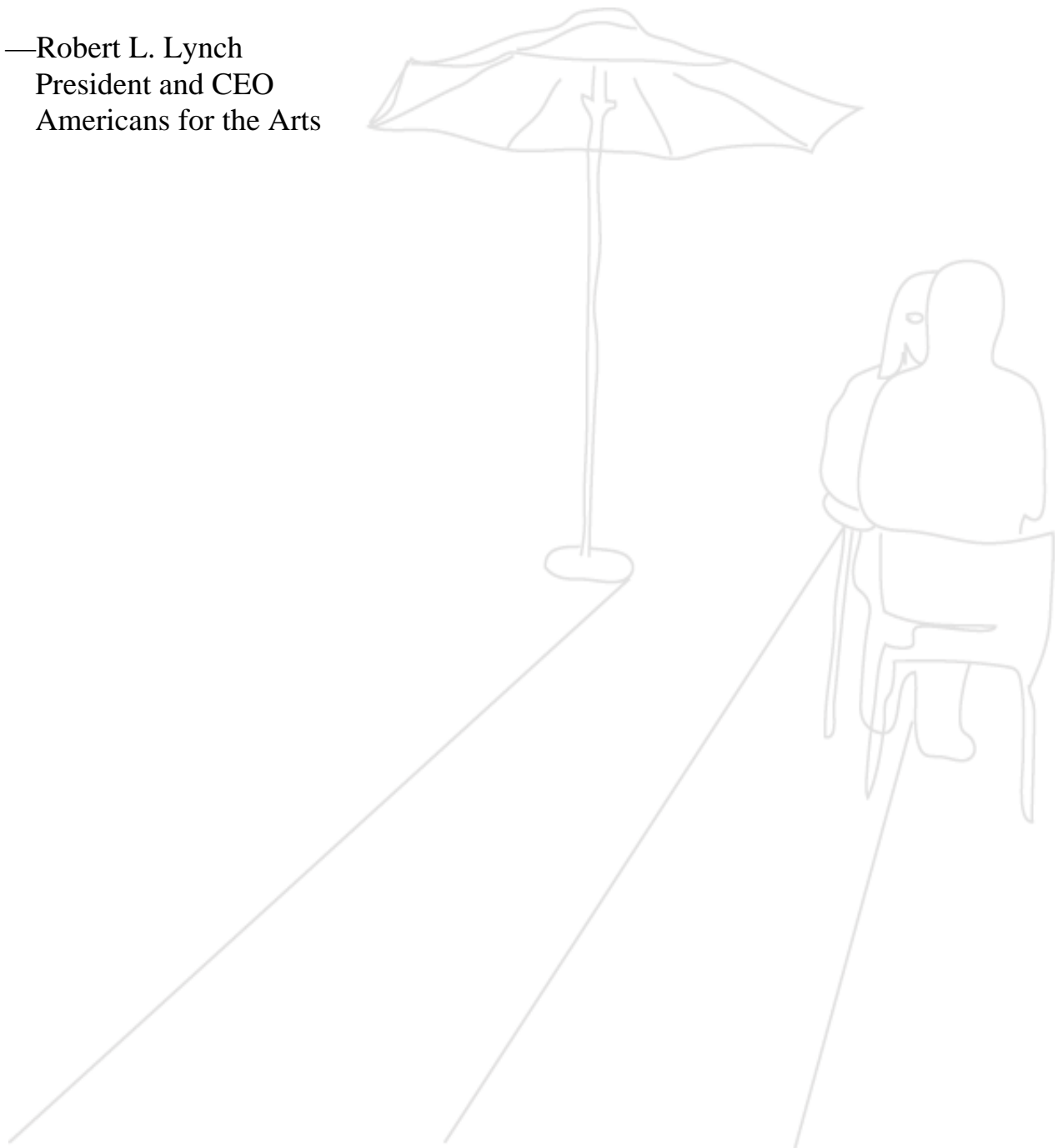


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"Understanding and acknowledging the incredible economic impact of the nonprofit arts and culture industry, we must always remember their fundamental value. They foster beauty, creativity, originality, and vitality. The arts inspire us, soothe us, 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

ROBERT L. LYNCH, PRESIDENT AND CEO, AMERICANS FOR THE ARTS

The key lesson from *Arts & Economic Prosperity III* is that communities that invest in the arts reap the additional benefit of jobs, economic growth, and a quality of life that positions those communities to compete in our 21st century creative economy. In my travels across the country, business and government leaders often talk to me about the challenges of funding the arts and other community needs amid shrinking resources. They worry about jobs and the economic performance of their community. How well are they competing in the high-stakes race to attract new businesses? Is their region a magnet for a skilled and creative workforce? I am continually impressed by their commitment to doing what is best for their constituents and to improving quality of life for all. The findings from *Arts & Economic Prosperity III* send a clear and welcome message: leaders who care about community and economic development can feel good about choosing to invest in the arts.

Most of us appreciate the intrinsic benefits of the arts—their beauty and vision; how they inspire, soothe, provoke, and connect us. When it comes time to make tough funding choices, however, elected officials and business leaders also need to have strong and credible data that demonstrate the economic benefits of a vibrant nonprofit arts and culture industry.

Arts & Economic Prosperity III is our third study of the nonprofit arts and culture industry's impact on the nation's economy. Because of their rigor and reliability, results from the 1994 and 2002 studies have become the most frequently used statistics to demonstrate the value of arts and culture locally, statewide, and nationally. This new study is our largest ever, featuring findings from 156 study regions (116 cities and counties, 35 multi-county regions, and five statewide studies). Data were collected from an impressive 6,080 nonprofit arts and culture organizations and 94,478 of their attendees across all 50 states and the District of Columbia.

By every measure, the results are impressive! Nationally, the nonprofit arts and culture industry generates \$166.2 billion in economic activity annually—a 24 percent increase in just the past five years. That amount is greater than the Gross Domestic Product of most countries. This spending supports 5.7 million full-time jobs right here in the U.S.—an increase of 850,000 jobs since our 2002 study. What's more, because arts and culture organizations are strongly rooted in their community, these are jobs that necessarily remain local and cannot be shipped overseas.

Our industry also generates nearly \$30 billion in revenue to local, state, and federal governments every year. By comparison, the three levels of government collectively spend less than \$4 billion annually to support arts and culture—a spectacular 7:1 return on investment that would even thrill Wall Street veterans.

Arts & Economic Prosperity III has more good news for business leaders. Arts and culture organizations—

businesses in their own right—leverage additional event-related spending by their audiences that pumps vital revenue into restaurants, hotels, retail stores, and other local businesses. When patrons attend a performing arts event, for example, they may park their car in a toll garage, purchase dinner at a restaurant, and eat dessert after the show. Valuable commerce is generated for local merchants. This study shows that the typical attendee spends \$27.79 per person, per event, in addition to the cost of admission. When a community attracts cultural tourists, it harnesses even greater economic rewards. Non-local audiences spend twice as much as their local counterparts (\$40.19 vs. \$19.53). Arts and culture is a magnet for tourists, and tourism research repeatedly shows that cultural travelers stay longer and spend more. Whether serving the local community or out-of-town

visitors, a vibrant arts and culture industry helps local businesses thrive.

Right now, cities around the world are competing to attract new businesses as well as our brightest young professionals. International studies show that the winners will be communities that offer an abundance of arts and culture opportunities. As the arts flourish, so will creativity and innovation—the fuel that drives our global economy.

Arts & Economic Prosperity III is great news for those whose daily task is to strengthen the economy and enrich quality of life. No longer do business and elected leaders need to choose between arts and economic prosperity. Nationally, as well as locally, the arts mean business!



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

Arts & Economic Prosperity III provides compelling new evidence that nonprofit arts and culture are a significant industry in the State of Florida—one that generates \$3.1 billion in local economic activity. This spending—\$1.4 billion by nonprofit arts and culture organizations and an additional \$1.7 billion in event-related spending by their audiences—supports 88,326 full-time equivalent jobs, generates \$2.1 billion in household income to local residents, and delivers \$446.5 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 Florida’s economic well-being.

In 2007, Americans for the Arts published *Arts & Economic Prosperity III*, the most comprehensive study of its kind ever conducted. It documents the economic impact of the nonprofit arts and culture industry in 116 cities and counties, 35 multi-county regions, and five states—[representing all 50 states and the District of Columbia]. The diverse study regions range in population (4,000 to 3 million) and type (rural to urban). Researchers collected detailed expenditure and attendance data from 6,080 nonprofit arts and culture organizations and 94,478 of their attendees to measure total industry spending. Project economists customized input/output analysis models to calculate specific and reliable findings for each study region. This study focuses solely on the economic impact of nonprofit arts and culture organizations and event-related spending by their audiences. Not included in this study are spending by individual artists and the for-profit arts and culture sector (e.g., Broadway or the motion picture industry).

This report presents the findings of a new study measuring the economic impact of the nonprofit arts and culture industry in the State of Florida. The methodology used is identical to the national study methodology, providing the ability to compare the results with those of the national study participants.

DEFINING ECONOMIC IMPACT

This study uses four measures to define economic impact:

Full-Time Equivalent (FTE) Jobs describes the total amount of labor employed. 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 local residents.

Revenue to Local and State Government includes revenue from taxes (i.e., income, property, or sales) as well as funds from license fees, utility fees, filing fees, and similar sources.

ECONOMIC IMPACT OF THE ENTIRE NONPROFIT ARTS AND CULTURE INDUSTRY IN THE STATE OF FLORIDA

Total spending by nonprofit arts and culture organizations and their audiences totaled \$3.1 billion in the State of Florida during 2008. The following table shows the direct economic impact of this spending—that is, the initial economic effect of these expenditures.

<u>DIRECT</u> Economic Impact of the Nonprofit Arts and Culture Industry in the State of Florida (Spending by Nonprofit Arts and Culture Organizations <u>and</u> Their Audiences)		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$3,135,393,850	\$418,055,786
Full-Time Equivalent Jobs	41,984	9,190
Resident Household Income	\$951,807,000	\$168,309,000
Local Government Revenue	\$80,576,000	\$6,276,000
State Government Revenue	\$129,520,000	\$17,538,000

These direct economic impacts create an additional indirect economic impact on the economy. The local expenditures continue to have an economic impact on the economy until the money eventually “leaks out” of the region (i.e., is spent outside the State of Florida). The total economic impact is the combination of the direct economic impact and the indirect economic impact. The table below shows the total economic impact of the \$3.1 billion spent by nonprofit arts and culture organizations and their audiences during 2008.

<u>TOTAL</u> Economic Impact of the Nonprofit Arts and Culture Industry in the State of Florida (Spending by Nonprofit Arts and Culture Organizations <u>and</u> Their Audiences)		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$3,135,393,850	\$418,055,786
Full-Time Equivalent Jobs	88,326	11,060
Resident Household Income	\$2,057,309,000	\$213,712,000
Local Government Revenue	\$196,778,000	\$18,556,000
State Government Revenue	\$249,740,000	\$25,682,000

DIRECT AND INDIRECT ECONOMIC IMPACT: HOW A DOLLAR IS RE-SPENT IN THE ECONOMY

Arts & Economic Prosperity III uses a sophisticated economic analysis called input/output analysis to measure economic impact. It is a system of mathematical equations that combines statistical methods and economic theory. Input/output analysis enables economists to track how many times a dollar is “re-spent” within the local economy, and the economic impact generated by each round of spending. How can a dollar be re-spent? Consider the following example:

A theater company purchases a gallon of paint from the local hardware store for \$20, generating the direct economic impact of the expenditure. The hardware store then uses a portion of the aforementioned \$20 to pay the sales clerk’s salary; the sales clerk respends some of the money for groceries; the grocery store uses some of the money to pay its cashier; the cashier then spends some for the utility bill; and so on. The subsequent rounds of spending are the indirect economic impacts.

Thus, the initial expenditure by the theater company was followed by four additional rounds of spending (by the hardware store, sales clerk, grocery store, and the cashier). The effect of the theater company’s initial expenditure is the direct economic impact. The effects of the subsequent rounds of spending are all of the indirect impacts. The total impact is the sum of the direct and indirect impacts.

A dollar “ripples” through communities very differently, which is why a customized input/output model was created for the State of Florida.

“Arts and culture are vital to the future of Florida. Count these as investments in community development, as investments in a quality workforce and an innovation economy. Businesses and communities prosper from the creativity and the creative workforce. Arts and culture is that ingredient that not only enriches experiences but attracts others, some as visitors but many to stay.”

—Tony Carvajal
Executive Vice President
Florida Chamber Foundation
Tallahassee, Florida

ECONOMIC IMPACT OF SPENDING BY NONPROFIT ARTS AND CULTURE ORGANIZATIONS IN THE STATE OF FLORIDA

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 culture organizations totaled \$1.4 billion in the State of Florida during 2008. 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, create household income, and generate revenue to the local and state governments.

Data were collected from 1,182 nonprofit arts and culture organizations in the State of Florida. Each provided detailed budget information about more than 40 expenditure categories for fiscal year 2008 (e.g., labor, payments to local and non-local artists, operations, materials, facilities, and asset acquisition) as well as their total attendance figures. The following tables demonstrate the direct and total impacts of this spending.

<u>DIRECT</u> Economic Impact of Spending by Nonprofit Arts and Culture Organizations in the State of Florida		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$1,433,182,107	\$247,127,217
Full-Time Equivalent Jobs	15,591	4,039
Resident Household Income	\$469,943,000	\$89,813,000
Local Government Revenue	\$16,771,000	\$1,888,000
State Government Revenue	\$14,429,000	\$4,166,000

<u>TOTAL</u> Economic Impact of Spending by Nonprofit Arts and Culture Organizations in the State of Florida		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$1,433,182,107	\$247,127,217
Full-Time Equivalent Jobs	49,701	5,163
Resident Household Income	\$1,136,692,000	\$119,603,000
Local Government Revenue	\$72,849,000	\$2,694,000
State Government Revenue	\$74,068,000	\$5,896,000

ECONOMIC IMPACT OF SPENDING BY NONPROFIT ARTS AND CULTURE AUDIENCES IN THE STATE OF FLORIDA

The nonprofit arts and culture, unlike most industries, leverage a significant amount of event-related spending by its audiences. For example, when patrons attend an arts event, they may pay to park their car in a garage, purchase dinner at a restaurant, eat dessert after the show, and pay a babysitter upon their return home. This spending generates related commerce for local businesses such as restaurants, parking garages, hotels, and retail stores.

To measure the impact of nonprofit arts and culture audiences in the State of Florida, data were collected from 13,989 event attendees during 2008-09. Researchers used an audience-intercept methodology, a standard technique in which patrons complete a written survey about their event-related spending while attending the event. The 1,182 nonprofit arts and culture organizations that responded to the detailed organizational survey reported that the aggregate attendance to their events was 57.8 million. These attendees spent a total of \$1.7 billion, excluding the cost of event admission. The following tables demonstrate the direct and total impacts of this spending.

DIRECT Economic Impact of Spending by Nonprofit Arts and Culture Audiences in the State of Florida (excluding the cost of event admission)		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$1,702,211,743	\$170,928,569
Full-Time Equivalent Jobs	26,393	5,151
Resident Household Income	\$481,864,000	\$78,496,000
Local Government Revenue	\$63,805,000	\$3,174,000
State Government Revenue	\$115,091,000	\$13,372,000

TOTAL Economic Impact of Spending by Nonprofit Arts and Culture Audiences in the State of Florida (excluding the cost of event admission)		
	State of Florida	Median of Statewide Study Regions
Total Expenditures ¹	\$1,702,211,743	\$170,928,569
Full-Time Equivalent Jobs	38,625	5,897
Resident Household Income	\$920,617,000	\$94,109,000
Local Government Revenue	\$123,929,000	\$9,074,000
State Government Revenue	\$175,672,000	\$19,786,000

VISITORS SPEND MORE

In addition to spending data, the 13,989 audience survey respondents were asked to provide the ZIP code of their primary residence, enabling researchers to determine which attendees were residents (i.e., live within State of Florida) and which were non-residents (live outside State of Florida). In the State of Florida, 84.4 percent of the 57.8 million nonprofit arts attendees were residents; 15.6 percent were non-residents.

Non-resident arts and culture event attendees spent an average of 137 percent more than resident attendees per person (\$57.49 vs. \$24.25). As would be expected from a traveler, higher spending was typically found in the categories of lodging, meals, and transportation. These data demonstrate that when a community attracts cultural tourists, it harnesses significant economic rewards.

Event-Related Spending by Arts and Culture Event Attendees Totaled \$1.7 billion in the State of Florida (excluding the cost of event admission)			
	Residents	Non-Residents	All State of Florida Event Attendees
Total Event Attendance	48,807,381	9,021,269	57,828,650
Percent of Attendees	84.4%	15.6%	100%
Average Dollars Spent Per Attendee	\$24.25	\$57.49	\$29.42
Total Event-Related Spending	\$1,183,578,988	\$518,632,755	\$1,702,211,743

Nonprofit Arts and Culture Event Attendees Spend an Average of \$29.42 Per Person in the State of Florida (excluding the cost of event admission)			
	Residents	Non-Residents	All State of Florida Event Attendees
Refreshments/Snacks During Event	\$3.23	\$5.01	\$3.50
Meals Before/After Event	\$9.25	\$13.33	\$9.89
Souvenirs and Gifts	\$3.74	\$6.54	\$4.17
Clothing and Accessories	\$1.87	\$2.19	\$1.92
Ground Transportation	\$2.29	\$6.11	\$2.88
Event-Related Child Care	\$0.33	\$0.17	\$0.31
Overnight Lodging (<i>one night only</i>)	\$2.61	\$22.21	\$5.66
Other	\$0.93	\$1.93	\$1.09
Total Per Person Spending	\$24.25	\$57.49	\$29.42

Voluntarism and In-Kind Contributions

AN ECONOMIC IMPACT BEYOND DOLLARS

Arts & Economic Prosperity III reveals a significant contribution to nonprofit arts and culture organizations as a result of voluntarism. In 2008, 199,259 arts volunteers donated 9,394,421 hours to the State of Florida's nonprofit arts and culture organizations. This represents a donation of time with an estimated value of \$190,237,025 (Independent Sector estimates the value of the average 2008 volunteer hour to be \$20.25).² While these arts volunteers may not have an economic impact as defined in this study, they clearly have an enormous impact by helping the State of Florida's nonprofit arts and culture organizations function as a viable industry.

In addition, the nonprofit arts and culture organizations surveyed for this study 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., rent), and services (e.g., printing costs from a local printer). The 1,182 responding nonprofit arts and culture organizations in the State of Florida reported that they received in-kind contributions with an aggregate value of \$74,304,054 during 2008. These contributions were received from a variety of sources including corporations, individuals, local and state arts agencies, and government.

"The arts benefit communities as well as individuals. Cities and towns with flourishing cultural activities attract businesses and tourists and provide tremendous incentives for families. There are wonderful models in Massachusetts and across the country of communities that have integrated cultural institutions into revitalizations efforts. They have strengthened their economies and greatly improved quality of life in their neighborhoods."

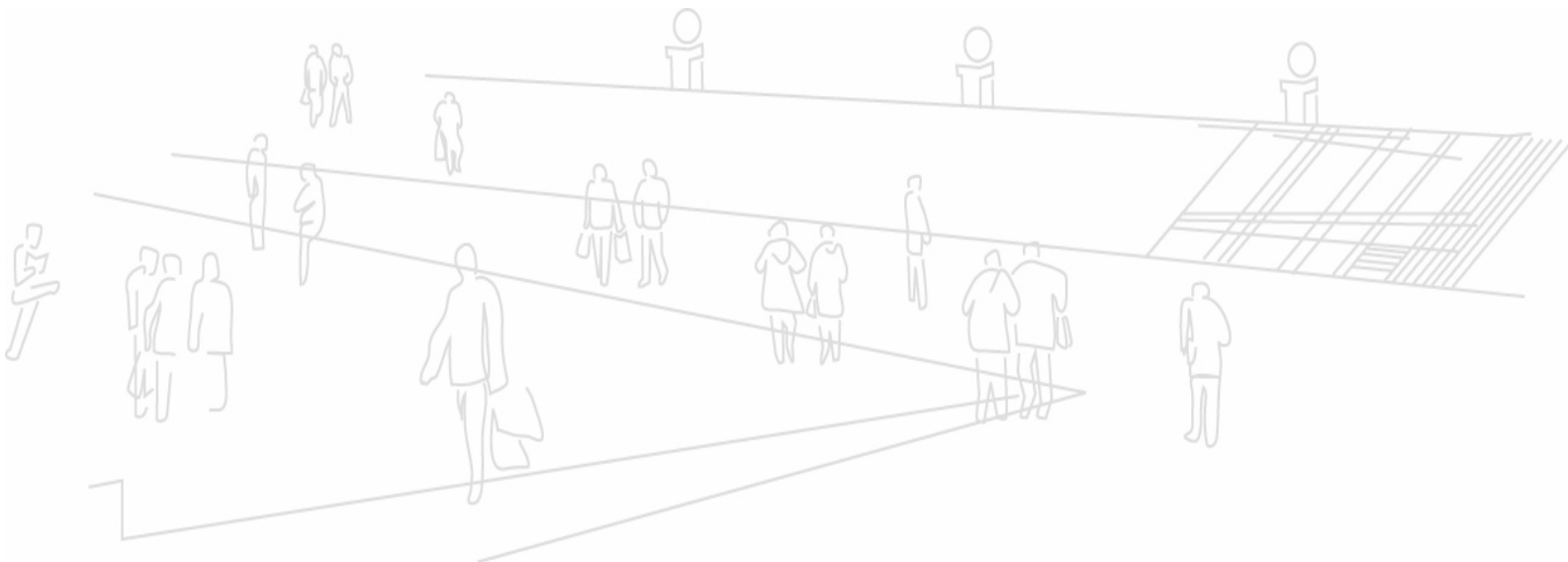
—Late Senator Edward Kennedy, Massachusetts
Former Co-Chairman, Senate Cultural Caucus

“The statistics don't lie. With nearly 75 percent of visitors to the Sunshine State participating in cultural activities and spending twice as much as local attendees while they visit, it is clear that if we want Florida to remain a premiere tourist destination, we must continue to invest in the arts.”

—U.S. Senator George LeMieux

“Communities rich in art and culture no doubt attract other economic investments and are fun places to live. But art and culture accomplish so much more – they are an expression of what it means to be fully human, they bind us together as fellow travelers, lift our spirits, and allow us to realize our creative potential.”

—Sherry Magill, Ph.D.
President
Jessie Ball du Pont Fund
Jacksonville, Florida



Conclusion

Nonprofit arts and culture are a \$3.1 billion industry in the State of Florida—one that supports 88,326 full-time equivalent jobs and generates \$446.5 million in local and state government revenue. Nonprofit arts and culture organizations, which spend \$1.4 billion annually, leverage a remarkable \$1.7 billion in additional spending by arts and culture audiences—spending that pumps vital revenue into local restaurants, hotels, retail stores, parking garages, and other businesses in the State of Florida. By demonstrating that investing in the arts and culture yields economic benefits, *Arts & Economic Prosperity III* lays to rest a common misconception: that communities support the arts and culture at the expense of local economic development. In fact, they are investing in an industry that supports jobs, generates government revenue, and is a cornerstone of tourism. This report shows conclusively that **the arts mean business in the State of Florida!**

“As workers choose where they want to live, museums, concert venues, and cultural fairs are part of their decision. The most creative and innovative workers are looking for diversity and excitement.”

—Mike Miedel
Director
Pinellas County Economic Development
Clearwater, Florida

“Arts and culture have helped cities boost property values, reduce crime and stabilize public budgets. In addition, given Florida's dependence on tourist revenues, a vibrant arts and culture sector is vital to attracting out-of-state visitors, encouraging them to stay longer and providing them with opportunities to make the best use out of their vacation dollars.”

—Dr. Ron Cheung
Department of Economics
Florida State University
Tallahassee, Florida



Arts & Economic Prosperity III Calculator

ESTIMATING ECONOMIC IMPACT IN THE STATE OF FLORIDA

To make it easier to compare the economic impacts of different organizations within the State of Florida, the project researchers calculated the economic impact per \$100,000 of spending by nonprofit arts and culture organizations and their audiences.

ECONOMIC IMPACT PER \$100,000 OF SPENDING BY NONPROFIT ARTS AND CULTURE ORGANIZATIONS

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

Ratios of Economic Impact Per \$100,000 of Spending by Nonprofit Arts and Culture <u>Organizations</u> in the State of Florida	
	State of Florida
Full-Time Equivalent Jobs	3.47
Resident Household Income	\$79,312
Local Government Revenue	\$5,083
State Government Revenue	\$5,168

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

An administrator from a nonprofit arts and culture 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 Florida. The administrator would:

1. Determine the amount spent by the nonprofit arts and culture 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 Florida.

Thus, \$250,000 divided by 100,000 equals 2.5; 2.5 times 3.47 (from the table above—*Ratios of Economic Impact Per \$100,000 of Spending by Nonprofit Arts and Culture Organizations in the State of Florida*) equals a total of 8.7 full-time equivalent jobs supported (both directly and indirectly) within the State of Florida by that nonprofit arts and culture organization. Using the same procedure, the estimate can be calculated for resident household income and local and state government revenue.

ECONOMIC IMPACT PER \$100,000 OF SPENDING BY NONPROFIT ARTS AND CULTURE AUDIENCES

The economic impact of event-related spending by arts audiences also can be derived for individual or groups of nonprofit arts and culture organizations and events in the State of Florida.

The first step is to determine the total estimated event-related spending by arts and culture event attendees (excluding the cost of admission). To derive this figure, multiply the average per person event-related expenditure in the State of Florida by the total event attendance. The ratios of economic impact per \$100,000 in spending then can be used to determine the total economic impact of the total estimated audience spending.

Average Per Person Event-Related Spending by All Arts and Culture Event Attendees in the State of Florida (excluding the cost of event admission)	
	State of Florida
Refreshments/Snacks During Event	\$3.50
Meals Before/After Event	\$9.89
Souvenirs and Gifts	\$4.17
Clothing and Accessories	\$1.92
Ground Transportation	\$2.88
Event-Related Child Care	\$0.31
Overnight Lodging (<i>one night only</i>)	\$5.66
Other	\$1.09
Total Per Person Spending	\$29.42

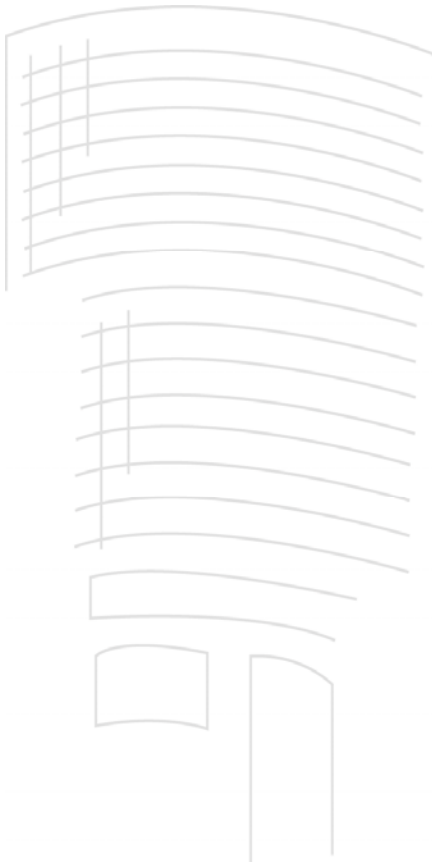
Ratios of Economic Impact Per \$100,000 of Spending by Nonprofit Arts and Culture <u>Audiences</u> in the State of Florida	
	State of Florida
Full-Time Equivalent Jobs	2.27
Resident Household Income	\$54,084
Local Government Revenue	\$7,280
State Government Revenue	\$10,320

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 culture events on full-time equivalent (FTE) employment in the State of Florida. The administrator would:

1. Determine the total estimated audience spending by multiplying the average per person expenditure for the State of Florida by the total attendance to nonprofit arts and culture events;
2. Divide the resulting total estimated audience spending by 100,000; and
3. Multiply that figure by the FTE employment ratio per \$100,000 for the State of Florida.

Thus, 25,000 times \$29.42 (from the top table on the preceding page—*Average Per Person Event-Related Spending by Arts and Culture Event Attendees in the State of Florida*) equals \$735,500; \$735,500 divided by 100,000 equals 7.36; 7.36 times 2.27 (from the bottom table on the preceding page—*Ratios of Economic Impact Per \$100,000 of Spending by Nonprofit Arts and Culture Audiences in the State of Florida*) equals a total of 16.7 full-time equivalent jobs supported (both directly and indirectly) within the State of Florida by that nonprofit arts and culture organization. Using the same procedure, the estimate can be calculated for resident household income and local and state government revenue.



"We in the public sector need to keep in mind what an important role the arts play in economic development. Part of a community's vibrancy is defined by its arts and culture quality and diversity. All the things we do at the county level to support the arts can make a difference and I encourage county officials to step up to make sure their communities understand the linkage between local economic development and the arts."

—Linda Langston
Linn County Supervisor, Iowa
Chair, Arts Commission, National Association of Counties

“A strong cultural presence fosters employee innovation, enhancing business and marketing opportunities, while creating a rich social fabric when interwoven with sports & community activities.”

—Sam Ellison
Chair
Greater Tampa Chamber of Commerce
Tampa, Florida



Comparisons with Similarly Populated Study Regions

According to the most recent data available from the U.S. Census Bureau, the population of the State of Florida was estimated to be 18,328,340 during 2008. The table below compares the economic impact results for the State of Florida with those of other statewide study participants.

For more comparisons, data tables containing the detailed survey results for all 156 communities that participated in *Arts & Economic Prosperity III* are located in Appendix A of the full National Report. **All three national study reports are available for download and purchase at www.AmericansForTheArts.org/EconomicImpact**, including the Highlights Brochure, the Summary Report, and the full National Report.

Economic Impact of the Nonprofit Arts Industry: The State of Florida Compared to Similarly Populated Study Regions with Populations of Statewide (Listed by Population in Ascending Order)						
Study Region	Population	Total Industry Expenditures (Organizations & Audiences)	Full-Time Equivalent Jobs	Resident Household Income	Local Government Revenue	State Government Revenue
State of North Dakota	636,677	\$101,764,435	1,870	\$41,033,000	\$3,094,000	\$4,408,000
State of Delaware	843,524	\$142,364,724	3,685	\$102,411,000	\$1,713,000	\$7,657,000
State of Kansas	2,802,134	\$153,522,598	4,612	\$95,060,000	\$6,018,000	\$9,616,000
State of Minnesota	5,132,799	\$838,527,669	22,095	\$631,149,000	\$21,053,000	\$73,094,000
State of Wisconsin	5,536,201	\$418,055,786	11,060	\$213,712,000	\$18,556,000	\$25,682,000
State of Maryland	5,633,597	\$380,660,626	10,303	\$222,613,000	\$13,825,000	\$21,875,000
State of Missouri	5,878,415	\$1,072,656,998	33,617	\$742,875,000	\$45,014,000	\$65,542,000
State of Pennsylvania	12,429,616	\$1,994,171,920	44,546	\$935,851,000	\$91,536,000	\$142,266,000
State of Florida	18,328,340	\$3,135,393,850	88,326	\$2,057,309,000	\$196,778,000	\$249,740,000

"True economic recovery comes from creating a healthy business climate to attract high-wage jobs and talent."

—Marshall Criser
President
AT&T Florida
Miami, Florida



About This Study

The *Arts & Economic Prosperity III* study was conducted by Americans for the Arts to document the economic impact of the nonprofit arts and culture industry in 156 communities and regions (116 cities and counties, 35 multi-county regions, and five states)—representing all 50 states and the District of Columbia.

The diverse communities range in population (4,000 to 3 million) and type (rural to urban). The study focuses solely on nonprofit arts and culture organizations and their audiences. Public arts councils and public presenting facilities/institutions are included as are select programs embedded within another organization (that have their own budget and play a substantial role in the cultural life of the community). 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 6,080 arts and culture organizations and 94,478 of their attendees. The project economists customized input/output analysis models for each study region to provide specific economic impact data about their nonprofit arts and culture industry.

THE 156 STUDY PARTNERS

Americans for the Arts published a Call for Participants in 2005 seeking communities interested in participating in the *Arts & Economic Prosperity III* study. Of the more than 200 partners that expressed interest, 156 agreed to participate and complete four participation criteria: (1) identify and code the universe of nonprofit arts and culture organizations in their study region; (2) disseminate, collect, and review for accuracy expenditure surveys from those organizations; (3) conduct audience-intercept surveys at a minimum of 16 diverse arts events; and (4) pay a modest cost-sharing fee (no community was refused participation for an inability to pay).

Citizens for Florida Arts, Inc.—in partnership with the Florida Division of Cultural Affairs—contracted with Americans for the Arts to conduct an economic impact study focusing on the nonprofit arts and culture industry in the State of Florida. The methodology used is identical to the national study methodology, providing the ability to compare the results for Florida with those of the national study’s other statewide participants.

SURVEYS OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS

Each of the 156 study regions attempted to identify its complete universe of nonprofit arts and culture organizations using the Urban Institute’s National Taxonomy of Exempt Entity (NTEE)³ codes as a guideline. Eligible nonprofit arts and culture organizations—those whose primary purpose is to promote appreciation for and understanding of the visual, performing, folk, and media arts—received a web-based survey. Sent via email, the survey collected detailed information about their 2005 fiscal year expenditures in more than 40 expenditure categories, including labor, local and non-local artists, operations, materials, facilities, and asset acquisition. Data were collected from 6,080 organizations for this study. Response rates for the 156 communities averaged 41.3 percent and ranged from 10.4 percent to 100 percent. Responding organizations had budgets ranging from a low of \$0 to a high of \$159.2 million. Each study region’s results are based solely on the actual survey data

collected, not on fiscal projections. The less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions. The following NTEE categories of nonprofit arts, culture, and humanities organizations were included in this study:

- A02, Management and Technical Assistance Organizations
- A03, Professional Societies and Associations
- A05, Research Institutes and Policy Analysis Organizations
- A11, Single Support Organizations
- A12, Fund Raising and Fund Distributing Organizations
- A23, Cultural and Ethnic Awareness Organizations
- A24, Folk Arts and Traditional Arts Organizations
- A25, Arts Education Organizations
- A26, Arts Councils and City Presenting Facilities
- A31, Film and Video Organizations
- A32, Public Access Television Studios
- A40, Visual Arts Organizations
- A45, Architectural Organizations
- A46, Drawing Organizations
- A47, Ceramic Arts Organizations
- A48, Art Conservation Organizations
- A51, Art Museums
- A52, Children’s Museums
- A53, Folk Arts and Ethnic Museums
- A54, History Museums
- A55, Marine and Maritime Museums
- A56, Natural History and Natural Science Museums
- A57, Science and Technology Museums
- A58, Sports and Hobby Museums
- A59, Specialized Museums
- A61, Performing Arts Centers
- A62, Dance Organizations
- A63, Ballet Organizations
- A64, Choreography Organizations
- A65, Theaters
- A66, Playwriting Organizations
- A67, Musical Theaters
- A68, Music Organizations
- A69, Symphony Orchestras
- A6A, Theaters
- A6B, Singing or Choral Organizations
- A6C, Music Groups, Bands, or Ensembles
- A6D, Music Composition Organizations

- A6E, Performing Arts Schools
- A71, Art History Organizations
- A76, Literary Service Organizations and Activities
- A82, Historical Societies
- A84, Fairs, Festivals, and other Commemorative Events
- A91, Artist Service Organizations

In the State of Florida, 1,182 of the 4,063³ total eligible nonprofit arts and culture organizations responded to the survey—a response rate of 29 percent. These 1,182 nonprofit arts and culture organizations reported aggregate operating budgets of \$1.21 billion (representing 84.4 percent of the estimated statewide total organizational expenditures of \$1.43 billion).

In addition, researchers used a combination of secondary source data and a conservative extrapolation methodology to calculate the \$223 million in total spending by the 2,881 non-participating organizations (representing 15.6 percent of the statewide total).

SURVEYS OF NONPROFIT ARTS AND CULTURE AUDIENCES

Audience-intercept surveying, a common and accepted research method, was completed in 152 of the 156 study regions to measure spending by audiences at nonprofit arts and culture events. Patrons were asked to complete a short survey while attending an event. A total of 94,478 attendees completed the survey for an average of 673 surveys per community. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging. Data were collected throughout 2006 (to guard against seasonal spikes or drop-offs in attendance) as well as at a broad range of events (a night at the opera will typically yield more spending than a Saturday children’s theater production, for example). Using total attendance data for 2005 (collected from the organization surveys),

standard statistical methods were then used to derive a reliable estimate of total expenditures by attendees in each community. The survey respondents provided information about the entire party with whom they were attending. With an average travel party size of three people, these data actually represent the spending patterns of more than 280,000 attendees.

In the State of Florida, a total of 13,989 audience intercept surveys were collected from attendees to nonprofit arts and culture events.

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 local residents. Much of it is re-spent locally; some, however, is spent for goods imported from outside of the community. The dollars re-spent locally have a positive economic impact as they continue to circulate through the local economy.

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 culture organizations and their audiences. This is a highly regarded type of economic analysis that has been the basis for two Nobel Prizes in economics. The models are systems of mathematical equations that combine statistical methods and economic theory in an area of study called econometrics. The analysis traces how many times a dollar is re-spent within the local

economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of analysis is well suited for this study because it can be customized to each community.

An input/output model was customized for the State of Florida based on the local dollar flow between 533 finely detailed industries within its economy. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (e.g., County Business Patterns, Regional Economic Information System, 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 culture 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 2002 (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 III* 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 A^2X , 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 local 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.

END NOTES

¹ Americans for the Arts’ proprietary economic impact methodology does not employ the use of an expenditure multiplier. The “Total Expenditures” figure listed on the data tables on Pages 4, 6, and 7 of this report are identical because we measure the economic impacts of only the actual expenditures reported. An explanation of the difference between “direct” and “total” economic impacts can be found on Page 5 of this report.

² Giving and Volunteering in the United States 2008, Independent Sector, 2009.

³ The National Taxonomy of Exempt Entities (NTEE)—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 in ten broad categories, including “Arts, Culture, and Humanities.” The Urban Institute estimates that there are approximately 100,000 nonprofit arts and culture organizations currently operating in the United States (including 4,063 that are located within the State of Florida).

Frequently Used Terms

This section provides a glossary of economic impact terminology, sorted alphabetically in ascending order.

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 IMPACT

Each time a dollar changes hands, there is a measurable economic impact. When people and businesses receive money, they re-spend much of that money locally. Indirect impact measures the effect of this re-spending on jobs, household income, and revenue to local and state government. It is often referred to as secondary spending or the dollars “rippling” through a community. When funds are eventually spent non-locally, they are considered to have “leaked out” of the community and therefore cease to have a local economic impact. Indirect impact is the sum of the impact of all rounds of spending.

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 re-spent in, or “ripples” through, a community before it leaks out (see Leakage). The model is based on a matrix that tracks the dollar flow between 533 finely detailed industries in each community. It allows researchers to determine the economic impact of local spending by nonprofit arts and culture organizations on jobs, household income, and government revenue.

LEAKAGE

The money that community members spend outside of a community. 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 III* 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

This section answers some common questions about this study and the methodology used to complete it.

HOW WERE THE 156 PARTICIPATING COMMUNITIES AND REGIONS SELECTED?

In 2005, Americans for the Arts published a Call for Participants for communities interested in participating in the *Arts & Economic Prosperity III* study. Of the more than 200 participants that expressed interest, 156 agreed to participate and complete four participation criteria: (1) identify and code the universe of nonprofit arts and culture organizations in their study region; (2) disseminate, collect, and review for accuracy expenditure surveys from those organizations; (3) conduct audience-intercept surveys at a minimum of 15 diverse arts events; and (4) pay a modest cost-sharing fee (no community was refused participation for an inability to pay).

HOW WERE THE ELIGIBLE NONPROFIT ARTS ORGANIZATIONS IN EACH COMMUNITY SELECTED?

Local partners attempted to identify their universe of nonprofit arts and culture 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. Public arts councils, public presenting facilities or institutions, and embedded organizations that have their own budget also were included if they play a substantial role in the cultural life of the community.

WHAT TYPE OF ECONOMIC ANALYSIS WAS DONE TO DETERMINE THE STUDY RESULTS?

An input-output analysis model was customized for each of the participating communities and regions to determine the local economic impact their nonprofit arts and culture organizations and arts audiences. Americans for the Arts, which conducted the research, worked with a highly regarded economist to design the input-output model used for this study.

WHAT OTHER INFORMATION WAS COLLECTED IN ADDITION TO THE ARTS SURVEYS?

In addition to detailed expenditure data provided by the surveyed organizations, extensive wage, labor, tax, and commerce data were collected from local, state, and federal governments for use in the input-output model.

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 make the assumption 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 eligible nonprofit arts and culture organizations on the Organizational Expenditure Survey. 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. All of 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. 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 will get 24 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).

In Appreciation

Americans for the Arts expresses its gratitude to the many people and organizations who made *Arts & Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the State of Florida* possible and assisted in its coordination and production. A study of this size and scope cannot be completed without the collaboration of many partnering organizations. Thankfully, Florida's strong network of arts and culture service organizations provided that collaboration.

Generous funding for this project was provided by Citizens for Florida Arts, Inc. The Florida Division of Cultural Affairs served as the statewide project partner and as such was responsible for coordinating the statewide implementation and data collection requirements of the study.

In addition, several local arts agencies which participated in previous Americans for the Arts economic impact studies—and that serve communities within Florida—provided the data from their previous studies in order to lessen the burden on their local arts communities. For these efforts, sincere appreciation is due to the following organizations:

Arts & Humanities Council of Charlotte County; Arts Council of Hillsborough County; Arts Council of Northwest Florida; Bay Arts Alliance; Brevard Cultural Alliance; Broward County Cultural Division; City of Fernandina Beach; City of Orlando; City of Winter Park; Council on Culture and Arts for Tallahassee and Leon County; Cultural Council of Greater Jacksonville; Florida Keys Council of the Arts; Gainesville Department of Cultural Affairs; Lake County Department of Tourism and Business Relations; Manatee County Chamber of Commerce; Miami-Dade County Department of Cultural Affairs; Orange County Arts & Cultural Affairs; Osceola Center for the Arts; Palm Beach County Cultural Council; Pinellas County Arts Council; Polk Arts Alliance; Sarasota County Arts Council; Seminole Cultural Arts Council; St. Johns County Cultural Council; The Arts Council (Martin County); United Arts of Central Florida; and Volusia County Leisure Services.

Finally, special thanks to the Paul G. Allen Family Foundation, the John D. and Catherine T. MacArthur Foundation, and The Ruth Lilly Fund of Americans for the Arts for their financial support of the national implementation of *Arts & Economic Prosperity III*.

THE STATE OF FLORIDA'S PARTICIPATING NONPROFIT ARTS AND CULTURE PATRONS

Additionally, this study could not have been completed without the cooperation of the 13,989 arts and culture patrons who generously took the time to complete the audience-intercept survey while attending an arts and culture event in the State of Florida.

THE STATE OF FLORIDA'S PARTICIPATING NONPROFIT ARTS AND CULTURE ORGANIZATIONS

This study could not have been completed without the cooperation of the 1,182 nonprofit arts and culture organizations in the State of Florida, listed below, that provided detailed financial and event attendance information about their organization.

ALACHUA COUNTY

Acrosstown Repertory Theatre; American Guild of Organists (Local Chapter); Arts Association of Alachua County; City of Gainesville Division of Cultural Affairs; Dance Alive!; Florida Museum of Natural History; Friends of Payne's Prairie; Gainesville Artisans Guild; Gainesville Association for the Creative Arts; Gainesville Ballet Theatre; Gainesville Community Band; Gainesville Community Playhouse; Gainesville Youth Chorus; Harn Museum of Art; Hippodrome State Theatre; Morningside Nature Center; North Central Florida Blues Society; and University of Florida Performing Arts.

BAY COUNTY

Bay Arts Alliance; Friends of St. Andrews State Park; Junior Museum of Bay County; Kaleidoscope Theater; Panama City Music Association; Swinging Squares; and Visual Arts Center of Northwest Florida.

BREVARD COUNTY

Brevard Cultural Alliance; Brevard Museum of Art and Science; Brevard Symphony Youth Orchestra Association; Brevard Zoo; Canaveral Barbershoppers; E.A.R.T.H. Awareness of Brevard; Florida Tech College Players; Maxwell C. King Center for the Performing Arts; Melbourne Art Festival; Melbourne Chamber Music Society; Melbourne Chamber Music Society; and Veterans Memorial Center.

BROWARD COUNTY

A.C.T.I.O.N. Foundation; All Florida Youth Orchestra; Ars Flores Symphony Orchestra; Arts Ballet Theatre of Florida; ArtServe; Association of Performing Arts of India; Bonnet House; Broward Art Guild; Broward County Film Society; City of Coconut Creek; City of Miramar Cultural Center/Arts Park; City of Pembroke Pines (Fletcher Art Center); City of Tarpon Springs Cultural Treasures; Concert Association of Florida; Coral Springs Chinese Cultural Association; Curtain Call Playhouse; Dr. Martin Luther King, Jr. Celebration; Fantasy Theatre Factory; Florida Atlantic University School for the Arts; Florida's Singing Sons; Fort Lauderdale Children's Theater; Fort Lauderdale Historical Society; Friends of the Broward County; Gold Coast Jazz Society; Gold Coast Opera; Hollywood Art and Culture Center; Inside Out Theatre Company; Master Chorale of South Florida; Maximum Dance Company (dba Ballet Gamonet); Miami City Ballet; Museum of Art; Museum of Discovery & Science; Old Davie School Historical Museum; Performing Arts Center Authority; Riverwalk Fort Lauderdale; School Board of Broward County; South Florida Choral Arts; South Florida Jazz; South Florida Lambda Chorale; Stranahan House; Symphony of the Americas; The Opera Guild of Fort Lauderdale; Theatre League of South Florida; Tranzendance Dance Productions; and Young At Art Children's Museum.

CITRUS COUNTY

Citrus Community Concert Choir

COLLIER COUNTY

Children's Museum of Naples; Gulfshore Playhouse; Ikebana International; Naples Botanical Garden; Paradise Coastmen Barbershop Chorus; Philharmonic Center for the Arts; and Southwest Florida Pastel Society; TheatreZone.

COLUMBIA COUNTY

Alligator Community Theatre; Community Concerts of Lake City; Lake City Community College Library; and Levy Performing Arts Center.

DUVAL COUNTY

Art with a Heart; Atlantic Beach Experimental Theatre; Beaches Area Historical Society; Beaches Fine Arts Series; Cathedral Arts Project; City Kids Art Factory; City of Jacksonville Public Art Program; Cultural Council of Greater Jacksonville; Cummer Museum of Art and Gardens; Don Thompson Chorale; Downtown Vision; First Coast Chorus; Florida Theatre Performing Arts Center; Friday Musicale; Jacksonville Ballet; Jacksonville Children's Chorus; Jacksonville Community Band; Jacksonville Film & TV Office; Jacksonville Film Events; Jacksonville International Airport Arts Commission; Jacksonville Symphony Orchestra; Jacksonville Zoological Society; Jax Historical; Jewish Community Alliance; Karpeles Manuscript Museum; Mandarin Museum and Historical Society; Mayo Clinic Center for Humanities in Medicine; MOCA Jacksonville; Murray Hill Theatre; Museum of Science and History; Players by the Sea; Ritz Chamber Music Society; Ritz Theatre & LaVilla Museum; Riverside Fine Arts Series; San Marco Preservation Society; St. Johns River City Band; Stage Aurora; The Art Center

Cooperative; The Florida Ballet; Theatre Jacksonville; Theatretworks; Tree Hill; and WJCT.

ESCAMBIA COUNTY

Artel Inc.; Ballet Pensacola; Bands on the Beach; Belmont Arts and Cultural Center; Blue Morning Gallery; Choral Society; Fiesta Barbershop Chorus; Fiesta of Five Flags; Frank Brown International Song Writers Festival; Great Gulf Coast Art Festival; Hurrey-Up Stage and FilmWorks; Jazz Society of Pensacola; National Naval Aviation Museum; Pensacola Children's Chorus; Pensacola Civic Band; Pensacola Civic Center; Pensacola Cultural Center; Pensacola Historical Society; Pensacola Museum of Art; Pensacola Opera; Pensacola Quilters' Guild; Pensacola Symphony Orchestra; Pensacola Winterfest; PJC Music and Theatre Department; Saenger Theatre; St. Michael's Cemetery Foundation of Pensacola; Sweet Prospect Band; Teaspoon Foundation; The Arts Council of Northwest Florida; UWF Center for Fine and Performing Arts; and West Florida Historic Preservation.

GADSDEN COUNTY

Gadsden Arts Center; Quincy Music Theatre

HAMILTON COUNTY

North Florida Center for Documentary Studies; and Stephen Foster Citizen Support Organization.

HERNANDO COUNTY

Spring Hill Garden Club

HIGHLANDS COUNTY

Caladium Arts and Crafts Co-op; Children's Museum of the Highlands; and Historical Society of Avon Park and Depot Museum.

HILLSBOROUGH COUNTY

Acanthus; American Guild of Organists; Arts Council of Hillsborough County; Bits 'N Pieces Puppet Theatre; Brandon League of Fine Art; Carrollwood Cultural Center; Center Place; Choral Masterworks Festival; City of Tampa Art Programs; Clip Film Festival (Tampa International Gay and Lesbian Film Festival); Florida Aquarium; Florida Museum of Photographic Arts; Florida Orchestra; Florida Suncoast Puppet Guild; Florida West Coast Public Broadcasting (WEDU-TV); Gasparilla Festival of the Arts; Glazer Children's Museum; Gulf Coast Youth Chorus; Hat Trick Theater Productions; Henry B. Plant Museum; Hillsborough Community College (Cultural Programs); Hillsborough County Government Television (HTV22); Hillsborough County Public Art Program; Hillsborough County Public Library Cooperative; Jobsite Theatre; Lowry Park Zoological Society of Tampa; M.A.D. Theatre of Tampa; MOSI (Museum of Science and Industry); Moving Current; Philippine Cultural Foundation; Spanish Lyric Theatre; Speak Up Tampa Bay Television; Stageworks; Sunshine Brass; Tampa Bay Business Committee for the Arts; Tampa Bay Children's Chorus; Tampa Bay Heralds of Harmony; Tampa Bay History Center; Tampa Bay Performing Arts Center; Tampa Educational Channel; Tampa Museum of Art; Tampa Oratorio Singers; Tampa Realistic Artists; Tampa Theatre; Tampa-Hillsborough County Storytelling Festival; The Tampa Film Institute (dba Gasparilla Film Festival); TICH/Hispanic American Inter-Cultural Workshop; University of Tampa (Scarfone/Hartley Gallery); USF Contemporary Art Museum; USF GraphicStudio; USF Public Broadcasting; VSA arts of Florida; WMNF; and Ybor City Museum Society.

INDIAN RIVER COUNTY

Emerson Center at UU Fellowship of VB; Indian River Symphonic Association; National League of American Pen Women; Sunbonnet Sue Quilters Guild; and Treasure Coast Chorale.

LAKE COUNTY

Central Florida Chapter of SPEBSQSA; City of Tavares Public Library; Eustis Historical Museum & Preservation Society; Lake Eustis Museum of Art; Lauren Graham Cunningham Galleries; Mount Dora Theatre Company at the IceHouse Theatre; and Mt. Dora Center for the Arts.

LEE COUNTY

Broadway Palm Dinner Theatre; Florida Repertory Company; North Fort Myers Academy STEEL; and Sidney & Berne Davis Arts Center.

LEON COUNTY

621 Gallery; African Caribbean Dance Theatre; Anhinga Press; Apalachee Press; Ars Magna (FSU); Artist Series of Tallahassee; Association Francaise de Tallahassee; Big Bend Filipino-American Association; Big Bend Poets Chapter of Florida State Poets Association; Boys Choir of Tallahassee; Celebrate America; Center for Fine Arts Education; Challenger Learning Center; Character & Heritage Institute; Council on Culture & Arts; Curious Echo Radio Theater; Dysfunction Junction; Excellence Dance Studio; FAMU Foster Tanner Fine Arts Gallery; Florida Association of Museums; Florida Channel; Florida Division of Cultural Affairs; Florida Historic Capitol & Legislative Research Center; Florida Trust for Historic Preservation; Friends of Maclay Gardens; Friends of the LeRoy Collins Leon County Public Library System; FSU International Center Art Gallery; FSU Master Craftsman Program; FSU Museum of Fine Arts; FSU Opera; FSU School of Theatre; FSU Student Life Cinema; Girls Choir of CHOICE; Goodwood Museum and Gardens; Governor's Office of Film and Entertainment; India Association of Tallahassee; John Gilmore Riley Center & Museum; Lafayette Park Arts Center; LeMoyné Art Foundation; LeRoy Collins Leon County Public Library System; Maggie Allesee National Center for Choreography; Mary Brogan Museum of Art and Science; Meek-Eaton Southeastern Regional Black Archives; Mickee Faust Alternative Performance Club; Mission San Luis; Museum of Florida History; Off Street Players; Seven Days of Opening Nights; Society of Nature Photographers of the Panhandle (SNAPP); Springtime Tallahassee; Swamp Buddha Sumi-e; Tallahassee Ballet; Tallahassee Civic Chorale; Tallahassee Community Chorus; Tallahassee Community Friends of Old Time Dance; Tallahassee Film Festival; Tallahassee Film Society; Tallahassee Highland Games and Celtic Festival; Tallahassee Irish Society; Tallahassee Krasnodar Sister Cities Program; Tallahassee Little Theater; Tallahassee Museum; Tallahassee Music Guild; Tallahassee Senior Center for the Arts; Tallahassee Symphony Orchestra; Tallahassee Trust for Historic Preservation; Tallahassee Writers' Association; Tallahassee-Leon County Civic Center Broadway Series; TCC Fine Art Gallery; The Florida Center for Performing Arts and Education; Theatre A La Carte; TheatreTCC!; Voces Angelorum; WCOT; WFSU Public Broadcasting; Winter Festival; Women's Belly Dance Center; WVFS Tallahassee Radio; and Young Actors Theatre of Tallahassee.

LEVY COUNTY

Cedar Key Arts Center; Cedar Key Chamber of Commerce; and Journey Daybook.

LIBERTY COUNTY

Liberty County Arts Council; and Veterans Memorial Railroad.

MADISON COUNTY

NFCC Artist Series / NFCC Children's Theater; and Sentinel Upstage Players (Community Theater).

MARION COUNTY

Marion Ballet Theatre; Marion County Center for Arts at West Port High School; Ocala Community Concert Association; and Ocala Symphony Orchestra.

MARTIN COUNTY

Academy of the Performing Arts; Art Associates of Martin County; Atlantic Classical Orchestra; Barn Theater; CBPH Productions; Children's Museum of the Treasure Coast; Duck In The Truck Puppets; Florida Arts & Dance; Historical Society of Martin County; Hobe Sound Fine Arts League; Jensen Beach Chamber of Commerce; Lyric Theater; Maritime & Yachting Museum; Martin County Audubon Society; Martin County Library System; MCTV (Martin County Television); MSJ Artist Series (c/o Immanuel Lutheran); Palm City Art Associates; Stuart Community Band; The Arts Council; Treasure Coast Community Singers; Treasure Coast Flute Choir; Treasure Coast Music Teachers Association; and Treasure Coast Wood Carvers.

MIAMI-DADE COUNTY

3B Productions; Academia de las Luminas de Las Bellas Artes; Academy of Performing Arts and Entertainment; Accent Miami; ACT Productions; Actors' Playhouse Productions; Advanstar Communications (dba Art Miami on Miami Beach); African American Performing Arts Community Theatre; African Caribbean American Performing Arts (ACAPAI); Algo Nuevo; Alhambra Heights Residential Force; Alhambra Music (dba Alhambra Orchestra); All Florida Youth Orchestra; Alliance for Musical Arts Productions; Alliance Francaise de Miami; Amaranthine; American Children Orchestras for Peace; American Czechoslovak Social Club; American Fraternity; Anchor Arts Management; Angels for Life Community Outreach Center; Arca Images; Ars Flores Symphony Orchestra; Art Circuits, Guide and Maps; Art for the Animals; Artemis Performance Network; Artists in Motion of Miami; Arts and Business Council of Miami; Arts at St. Johns; Arts Ballet Theatre of Florida; Arts Cultural Movement Foundation; Arts for Learning / Miami; Arts on the Way; Arts-N-The-Hood; ArtSouth; ArtSpring; Ballet Concerto Company of Miami; Ballet Etudes Company of South Florida; Ballet Flamenco La Rosa; Ballet Gamonet Maximum Dance; Ballet Rosario Suarez; Bank United Center; Barry University - Fine Arts; Bascomb Memorial Broadcasting Foundation; Bay of Pigs Museum & Library of the 2506 Brigade; Bayfront Park Management Trust; Beaux Arts of the Lowe Art Museum of the University of Miami; Behind the Curtains Entertainment; Bet Breira Art Gallery; BET Holdings II (BET Awards on Miami Beach); Biscayne Corridor Chamber of Commerce (F.A.B. FEST); Biscayne Foundation; Black Archives, History and Research Foundation of South Florida; Black Door Dance Ensemble; Black Economic Development Coalition (dba Tools for Change); Bowling Tournament of the Americas Association; Boys & Girls Clubs of Miami; Brazz Dance Theater; Camille & Sulette Merilus Foundation for Haiti Development; Caribbean Cultural Connections; Caribisles Sports Club; Carnaval Independencia Centro America & Mexico; Center for Artistic and Cultural Events in the Community; Center for Emerging Art; Center for Haitian Studies; Center for the Advancement of Jewish Education; Centro Campesino (Farmworker Center); Centro Cultural Brasil Usa da Florida; Centro Cultural de Puerto Rico en el Sur de la Florida; Centro Cultural Espanol de Cooperacion iberoamerica; Centro de Prevencion y Educacion Corazones Unidos; Ceramic League of Miami; CGCC Community Arts Program ; Chopin Foundation of the United States; Christ Crusaders; Ciboney Tribe; Circulo Lirico de la Opera; Citizens for a Better South Florida; City of Hialeah Cultural Arts Program; City of Homestead Parks and Recreation; City of Miami Department of Economic Development for The Real Miami Tours; City of Miami Mayor's Office of Film, Arts & Entertainment; City of Miami Beach Office of the City Manager (An American Celebration); City of Miami Beach Cultural Affairs; City of Miami Neighborhood Enhancement Team for Kagoshima; City of Miami Springs Department of Economic Development; City of Miami-Programs for Persons with Disabilities; City of North Miami Beach North Miami Beach Performing Arts Theater; City of South Miami Parks and Recreation Department; City of South Miami for Sundays on Sunset; City Style Events (Miami Fashion Week on Miami Beach); City Theatre; Civic Chorale of Greater Miami; Clarita Filgueiras - Flamenco Puro; Classic Concerts; Clio Awards On South Beach; Coconut Grove Arts & Historical Association, Inc.; Coconut Grove Chamber of Commerce, Inc.; Coconut Grove Playhouse State

Theatre of Florida Corporation; Colombian American Service Association, Inc. for Colombian Independence Day; Communities In Schools of Miami, Inc.; Community AIDS Resource, Inc. dba Care Resource for White Party Week; Community Arts & Culture, Inc.; Community Concert Association, Inc.; Community Performing Arts Associations Inc; Community Television Foundation of South Florida, Inc. (WPBT); Community Theatre of Miami Lakes; Concert Association of Florida, Inc.; Conference of Haitian Pastors United in Christ, Inc. for Christmas Festival; Coral Gables Chamber Symphony & Opera, Inc.; Coral Gables Cultural Affairs Council; Council of Latin American Fashion Designers, Inc. for Miami Fashion Week on Miami Beach; Creation II Ballet Company, Inc. DBA Creation Art Center; Creative Arts Enterprises, Inc.; Creative Camps/Miami Children's Theater; Creative Children Therapy; Cuban Cultural Heritage Corporation; Cuban Museum, Inc.; Cuban Theater Folklore Heritage, Inc.; Cultural Affairs Committee of Miami Lakes for Celebrate the Earth; Cultural Affairs Council of South Miami, Inc. for ArtSouthMiami Art Show; Cultural Development Group, Inc. for Art in the Tropics; Customerfirstval, Inc.; Dade Community Foundation, Inc. for Miami Fellows Initiative; Dade Cultural Alliance; Dade Heritage Trust; Dance Esaias Corporation; DanceArts Foundation, Inc.; Dave and Mary Alper Jewish Community Center; De Hostos Senior Center, Inc.; Deco Echo Artists' Delegation d/b/a Center for Folk & Community Art (CFCA); Department of Arts and Philosophy, Miami Dade College; DIASPORA ARTS COALITION, INC; Diaspora Vibe Cultural Arts Incubator, Inc.; Diaspora World Cinema, Inc.; DIEN-B, Inc. d/b/a Damien B. Contemporary Art Center; Discovering Opportunities for Outreach and Reflection, Inc.; Diva Arts & Entertainment; Dora Teitelboim Center for Yiddish Culture, Inc.; Downtown Miami Partnership, Inc. for Welcome Center; Dr. Martin Luther King, Jr. Parade & Festivities Committee, Inc.; Dr. Rafael A. Penalver Clinic, Inc. for FINCAM; Duende Ballet Espanol; Ecos, Inc.; EDGE Theatre; Edge Zones, Inc.; Egbe Omo Oduduwa, Inc. for Celebration of African Culture; Eglise Evangelique Baptiste Philadelphie, Inc.; EK Events, Inc.; Empower U, Inc. for Expression through the Arts; enFAMILIA, Inc.; Entertainment Industry Incubator, Inc.; Excellent Child Community Outreach, Inc. for Gospel Star Search Live; Exponica International, Inc; Fairchild Tropical Botanic Garden; Fanm Ayisyen Nan Miyami, Inc. for Cultural Unity Night; Fantasy Theatre Factory; Festival Miami-Frost School of Music at the University of Miami; Film Life, Inc. for American Black Film Festival on Miami Beach; FIU - African New World Studies Program; FIU - Cuban Research Institute; FIU - Department of English for Gulf Stream Magazine; FIU - School of Architecture for Bienal Miami Beach; FIU - Women's Basketball for Sun & Fun Classic 2004; Florene Litthcut's Inner City Children's Touring Dance Company; Florida Center for the Literary Arts at Miami Dade College; Florida Chamber Orchestra; Florida Dance Association; Florida Film Institute, Inc.; Florida Grand Opera, Inc.; Florida Historical Performance Company, Inc.; Florida International University - Dance Program; Florida International University - School of Hospitality Management for Sou; Florida International University - School of Music for FIU Music Festival; Florida International University - Wolfe University Ctr.; Florida International University for the Frost Art Museum at F.I.U.; Florida Memorial University - Lou Rawls Performing Arts Center; Food Culture Museum, Inc.; Foundation for Human Rights in Cuba, Inc. for Cultural Lectures; Fountain of Life International, Inc.; Fountain of Life Mission Center, Inc.; Fourth Dimension of South Beach; FREDDICK BRATCHER & COMPANY; Friends of Chamber Music of Miami, Inc.; Friends of Miami-Dade Public Library System, Inc.; Friends of the Bass Museum, Inc.; Ft. Lauderdale Children's Theatre; Fundacion Internacional Ruben Dario; Funding Arts Network (FAN); GableStage; GALATA, Inc.; God's Total Word Ministries, Inc. for Community Festival; Gold Coast Railroad Museum; Gold Coast Theatre Co.; Goodlet Theater - City of Hialeah Recreation and Community Services Dept.; Goulds Community Development Corporation for Founders Day; Greater Miami Billfish Tournament; Greater Miami Convention & Visitors Bureau; Greater Miami Festivals & Events Association; Greater Miami Youth Symphony; Greater So. Dade/So.Miami/Kendall Chamber of Commerce; Grupo Teatral El Duende, Inc.; Gusman Center for the Performing Arts; Hairstylists for Humanity, Inc. for Combing Through

Life's Tangles on Miami Beach; Haitian American Foundation, Inc. for Greater Miami Mardi Gras Festival; HAITIAN AMERICAN YOUTH TASK FORCE, INC. (HAYTFO); Haitian Corporation for Musical Development; Haitian Cultural Arts Alliance; Haitian Heritage Museum; Haitian Neighborhood Center Sant La, Inc.; Hands On Miami, Inc.; Hannah Kahn Poetry Foundation; Harambee, Inc.; Heroes Unite; Hispano Heritage Council, Inc; Hispanic Theater Guild Corp.; Hispanic-American Lyric Theatre, Inc.; Historical Association of Southern Florida; Holocaust Documentation and Education Center; Holocaust Memorial Committee, Inc.; Homestead Art Club, Inc.; Homestead Center for the Arts, Inc.; Homestead Community Concert Association, Inc.; Homestead Main Street, Inc.; Homestead Rodeo Association, Inc.; Ife-Ile, Inc.; Infinito Art & Cultural Foundation; Informed Families/The Florida Family Partnership; Institute for Public Management and Community Service-FIU; Instituto de Cultura Peruana; Inte LLC for Spanish Television Awards; Intercultural Dance & Music Institute, Latin American & Caribbean Ctr, FIU; International Foundation for the Living Arts, Inc.; Israfest Foundation, Inc. for Israel Film Festival in North Miami Beach; Italian Film Festival, Inc.; Jamaica Awareness, Inc.; Jay I. Kislak Foundation, Inc.; Jay's Learning Center I, Inc.; Jewish Museum of Florida; Jubilate, Inc.; Juggerknot Theatre Corporation ; Junior Orange Bowl Committee, Inc.; Karen Peterson and Dancers, Inc.; Kendall Church of God; Key Biscayne 4th of July Parade Committee, Inc.; KIDCO-Child Care, Inc.; Kidventures, Inc.; Kinad, Inc.; Kismet Dance Foundation; Latin Quarter Cultural Center of Miami, Inc.; Little Havana Grand Orchestra d/b/a Miami Pop Orchestra; Locust Projects; Louis Wolfson II Florida Moving Image Archive; M Ensemble Theater Company; M. Athalie Range Cultural Arts Foundation, Inc.; Mad Cat Theater Company; Made in Miami Film & Video Festival, Inc.; Mal-Jonal Productions, Inc.; Manuel Artime Performing Arts Center; Marjory Stoneman Douglas Biscayne Nature Center; Maroma Players, Inc.; Marti Artistic Repertory Theater, Inc; Master Chorale of South Florida; MCH Swiss Exhibition (Basel) Ltd.; Merrick Festival, Inc.; Miami Art Central; Miami Art Club, Inc.; Miami Art Museum of Dade County Association Inc.; Miami Beach Arts Trust; Miami Beach Chamber of Commerce - Visitors Center; Miami Beach Community Development Corporation; Miami Beach Cultural Arts Alliance, Inc.; Miami Beach Film Society; Miami Beach Jewish Community Center; Miami Beach Latin Chamber of Commerce; Miami Beach Visitor and Convention Authority; Miami Beach Watersports Center, Inc.; Miami Book Fair International, Inc.; Miami Carnival, Inc.; Miami Chamber Symphony; Miami Chapter of Society for Pres. & Encouragement of Barbershop Singing; Miami Chapter of the American Institute of Architects; Miami Children's Chorus; Miami Children's Museum; Miami City Ballet; Miami Civic Music Association; Miami Classical Guitar Society, Inc.; Miami Contemporary Dance Company; Miami Dade Art in Public Places; Miami Dade College - Prometeo Theatre; Miami Dade College - Wolfson Campus - Dance Department; Miami Dade College, Cultural Affairs; Miami Dade College, Cultural Affairs; Miami Dade College, InterAmerican Campus, Tower Theater; Miami Dade County Days, Inc.; Miami Dance Futures Inc.; Miami Dance Machine; Miami Design Preservation League; Miami Gay and Lesbian Film Festival, Inc.; Miami Gay Men's Chorus, Inc.; Miami Globo Theater; Miami Hispanic Ballet; Miami International Film Festival; Miami Latin Film Festival; Miami Light Project; MIAMI LYRIC OPERA, INC.; Miami Museum of Science & Planetarium; Miami Northwest Express Track Club, Inc.; Miami Oratorio Society, Inc.; Miami Overseas Chinese Association; Miami Symphony Orchestra, Inc.; Miami Watercolor Society, Inc.; Miami World Theater, Inc.; Miami/Bahamas Goombay Festival in Coconut Grove, Inc.; Miami-Dade County Asian-American Advisory Board for Cultural Series; Miami-Dade County Black Affairs Advisory Board; Miami-Dade County Department of Cultural Affairs; Miami-Dade County Park and Recreation - Division of Arts and Culture; Miami-Dade County Public Schools - Division of Life Skills; Miami-Dade County Public Schools - Hialeah High School Auditorium; Miami-Dade Mayor's Office of Film & Entertainment; Miami-Dade Parks-Division of Arts and Culture; Miami-Dade Public Library System; MIAMIntelligence Inc.; Michael-Ann Russell Jewish Community Center; Mid Eastern Dance Exchange; Momentum Dance Company, Inc.; Movimiento Mundial Dariano, Inc.; MTV Networks Latin America, Inc.

for 2004 MTV Video Awards Latin America; Museum of Contemporary Art (MOCA); Music Fest Miami, Inc.; Mz. Goose, Inc.; NANAY, Inc.; National Art Exhibitions by the Mentally Ill, Inc.; National Drug Free Youth Foundation, Inc. for Youth School Tour; National Foundation for Advancement in the Arts; National Gay and Lesbian Task Force Foundation for Winter Party Festival on Miami Beach; National Heritage Foundation, Inc.; National Park Foundation - South Florida National Parks Trust; New Theatre, Inc.; New Vision for South Dade, Inc.; New World Festival, Inc.; New World School of the Arts; New World School of the Arts; New World School of the Arts /Visual Arts Department; New World Symphony; No Jive Productions, Inc; North Beach Development Corporation of Miami Beach, Inc.; North Dade Regional Chamber of Commerce for Big Fish; North Miami Community Concert Band ; On Stage ; One Art, Inc.; Our Lady of the Holy Rosary Catholic Church for Carnevale; PAN, Performing Arts Network; Patrons of Exceptional Artists, Inc.; PAX Catholic Communications for Cuban Culture Radio; Pen Club Cuban Writers In Exile, Inc.; Performing Arts Center Trust; Performing Arts Institute, Inc.; Piag Museum Inc; PR Racing, Inc.; Praise-In-Motion Cultural Arts Center, Inc.; Proyecto Arte Actual, Inc. for The Moore Space; Recapturing the Vision International, Inc. for Arts of Influence; Revelation Christian Academy, Inc.; Richmond Heights Homeowners Association, Inc. for Tree Lighting; Rising Son Cadet Human Growth & Development Foundation, Inc.; Rotary Club of Key Biscayne Foundation, Inc. for Key Biscayne Art Festival; S.A.F.E. Foundation, Inc.; scope Art Fair, Inc. for scope Miami on Miami Beach; Second Baptist Church of Richmond Heights for Summer Arts Camp; Seminole Cultural Arts Theatre, Inc.; Seraphic Fire; Shake-A-Leg Miami, Inc.; Siempre Flamenco, Inc; Sociedad Cultural Santa Cecilia, Inc.; Sociedad Pro Arte Grateli; Societa Dante Alighieri, Italian Cultural Center; Sosyete Koukouy d'Miyami; South Beach Chamber Ensemble; South Florida Art Center, Inc. dba ArtCenter/South Florida; South Florida Boys Choir, Inc.; south florida composers alliance; South Florida Sailfish Kickoff; south florida youth symphony, inc; Southern Florida Tropical Growers, Inc. for Tropical Ag Fiesta; St. Patrick's Day Committee, Inc.; St. Stephen's Episcopal Parish for Arts & Craft Show; St. Thomas Episcopal Church, Inc. for Eisenhart Concert Series; Sunday Afternoons of Music; Sunrise Community Promotions, Inc.; Sunshine Jazz Organization; T & T Saga Boys Int., Inc for Miami Calypso Fiesta; Talent Artistic Juvenile, Inc.; Teatro Avante, Inc.; Teatro en Miami Corp.; Teatro Obstaculo, Inc.; Teatro y Titeres La Tarumba Miami, Corp.; Temple Israel of Greater Miami, Inc.; The Bakehouse Art Complex, Inc.; The Colony Theater - City of Miami Beach; The Cove/Rincon; The Cultural Council, Inc.; The Dance Now! Ensemble, Inc.; The Deering Estate at Cutler; The Earthman Project, inc.; The Foundation Group, Inc.; The Miami Bach Society; The Murray Dranoff Foundation, Inc. ; THE ORANGE BOWL COMMITTEE, INC.; The PlayGround Theatre for Young Audiences; The Rhythm Foundation, Inc.; The Roxy Theatre Group; THE SOUTH FLORIDA BLUEGRASS ASS'N..INC.; The Unconservatory; The Wolfsonian-FIU; Theater League of South Florida; Thomas Armour Youth Ballet; Tigertail Productions; Tropical Everglades Visitor Association; Unidad of Miami Beach, Inc; United Chinese Association of Florida; United Haitian American Artists, Inc.; United Jewish Generations for FACE; University of Miami Frost School of Music Young Musicians' Camp; University of Miami Jerry Herman Ring Theatre; University of Miami, Department of Art and Art History; University of Miami, Lowe Art Museum; Viernes Culturales / Cultural Fridays, Inc.; Village of Pinecrest for Pinecrest Gardens; Virginia Key Beach Park Trust; Vizcaya Museum & Gardens; Voices for Children Foundation; Walenstein Musical Organization, Inc.; West Miami Arts, Inc.; West Perrine CDC, Inc.; Women's History Coalition of Miami-Dade County, Inc.; WORLD LITERACY CRUSADE OF FL, INC.; World Salsa Federation, Inc.; Yellow Tulip Productions, Inc.; Y-not Art Productions, Inc.; Young Patronesses of the Opera, Inc.; Youth United of South Florida, Inc.; and Zoological Society of Florida.

MONROE COUNTY

1100 SoDu Gallery; Anderson Design; Bluewater Potters; Bougainvillea House Gallery; Community Foundation of the Florida Keys; Coul William

Colt; Crane Point Nature Center (Bahamian Heritage Festival); FKCC Library Gallery; Flamingo Isle Consulting; Florida Keys Art Guild Outdoor Art Festival; Florida Keys Birding and Wildlife Festival; Florida Keys Community Concert Band; Florida Keys Council of the Arts; Florida Keys History of Diving Museum; Florida Keys National Marine Sanctuary; Friends of Fort Taylor; Ghost Tours of Key West; Harry Truman's Little White House; Historic Tours of America; Historical Preservation of the Upper Keys; Indian Key State Historic Site; John David Hawver; Key Largo Art Gallery; Key Largo Library; Key Largo Steel Drums; Key West Aquarium; Key West Art & Historical Society (Museums); Key West Art Center; Key West Council on the Arts; Key West Film Society (Tropic Cinema); Key West Fine Art Photography and Printing; Key West Harry S. Truman Foundation and Symposium; Key West Heritage House Museum; Key West Innkeepers Holiday Historic Inn Tour; Key West Literary Seminar; Key West Plein Air Painters; Key West Pops Orchestra Concert Series; Key West Symphony Orchestra; Key West Tropical & Botanical Gardens; Keys Chorale Concert Series; Lignumvitae Key State Botanical Site; Lower Keys Artist Network; Lower Keys Music Festival; Lower Keys Underwater Music Festival; Lucky Street Gallery; Marathon Community Theatre; Marathon Garden Club (Seasonal Events); Mel Fisher Maritime Heritage Society (Museum); Middle Keys Concert Association; Monroe County Public Library; Nancy Forrester's Secret Garden; Nancy Perez Miller Architect; Old Island Restoration Foundation; Paradise Ballet Theatre; Performance at St. Paul's Concert Series; Pigeon Key Art Festival; Purple Isles Art Guild; Red Barn Actors Studio/Theatre; Renegade Clay; Robert Frost Poetry Festival; Sculpture Key West; Tennessee Williams Theatre (Performing Arts Series); The Gallery on Greene; The Key West Cultural Preservation Society (aka The Sunset Celebration); The Photographer's Eye Studio; The Studios of Key West; and The Waterfront Playhouse.

NASSAU COUNTY

Amelia Arts Academy; Amelia Community Theatre; Amelia Island Chamber Music Festival; Amelia Island Museum of History; Fernandina Little Theater; Island Chamber Singers; and Les DeMerle Amelia Island Jazz Festival.

OKALOOSA COUNTY

Arts and Design Society of Fort Walton Beach; ECCA; FWB HS Theatre Department; Highsteppers; Mattie Kelly Arts Foundation; Northwest Florida State College/OWC; Okaloosa Arts Alliance; Okaloosa Chamber Singers; and StageCrafters.

OKEECHOBEE COUNTY

Okeechobee Community Theatre

ORANGE COUNTY

Albin Polasek Museum and Sculpture Garden; Annie Russell Theatre; Artists League of Orange County ; Association to Preserve the Eatonville Community, Inc.; Bach Festival Society of Winter Park; Central Florida Ballet; Central Florida Chapter of USA Dance, Inc.; Central Florida Performing Arts Alliance; Central Florida Plein Air Artists; Charles Hosmer Morse Museum of American Art; City of Orlando; Cornell Fine Arts Museum/Rollins College; Crealde School of Art; Downtown Arts District; Enzian Theater; Festival of Orchestras; Global Peace Film Festival; Harry P. Leu Gardens; Holocaust Memorial Resource and Education Center of Central Florida; Holy Land Experience and Scriptorium; International House of Blues Foundation; Mad Cow Theatre Company; Maitland Historical Society, Inc.; Mennello Museum of American Art; Michele Puppets; Orange County Arts and Cultural Affairs; Orange County Regional History Center; Orlando Ballet; Orlando Gay Chorus; Orlando International Fringe Theatre Festival; Orlando Museum of Art; Orlando Opera Company, Incorporated; Orlando Philharmonic Orchestra; Orlando Repertory Theatre; Orlando Science Center; Orlando Theatre Project, Inc.; Orlando-UCF Shakespeare Festival; People's Theatre, Inc.; Performing Arts of Maitland, Inc.; Phoenix Productions; Pinocchio's Marionette Theater; SunTrust Broadway Across

America-Orlando; The Association to Preserve African American Society, History and Tradition; The Orlando Chorale, Inc.; Theatre Downtown; UCF Art Gallery; United Arts of Central Florida; U-Turn Dance, Inc.; Winer Park Sidewalk Arts Festival; Winter Garden Heritage Foundation; Winter Park Historical Association; Winter Park Playhouse; Winter Park Public Library; and Women Playwrights' Initiative.

PALM BEACH COUNTY

Art Deco Society of the Palm Beaches; Ballet Florida, Inc.; Boca Raton Historical Society; Boca Raton Museum of Art, Inc.; Boynton Cultural Centre; Caldwell Theatre Company; Center for Creative Education; Centre for the Arts at Mizner Park; Cultural Trust of the Palm Beaches; Expanding & Preserving Our Cultural Heritage (EPOCH); Florida Atlantic University School of the Arts; Florida Stage; Henry Morrison Flagler Museum; Inspirit, Inc.; Lake Worth Playhouse, Inc.; Milagro Center; New Gardens Band; Norton Museum of Art; Old School Square, Inc.; Palm Beach County Cultural Council; Palm Beach Dramaworks; Palm Beach Opera; Puerto Rican Cultural Society of Palm Beach County; Puppetry Arts Center of the Palm Beaches; Raymond F. Kravis Center for the Performing Arts; Suncoast High School Foundation; Sunfest of Palm Beach County; The Children's Coalition, Inc.; VSA Arts of Florida (Palm Beach County); WXEL TV & FM; and Zoological Society of the Palm Beaches.

PASCO COUNTY

Richey Suncoast Theatre; Suncoast Arts Fest; and West Pasco Art Guild.

PINELLAS COUNTY

American Stage Theater; Art Harvest Show and Sale, Junior League of Clearwater-Dunedin; Clearwater Cultural Affairs Division; Clearwater Jazz Holiday; Cool Art Show; Creative Clay; Dunedin Fine Art Center; Eight O'Clock Theatre; EMIT; First Night St. Petersburg; Florida Craftsmen, Inc.; Florida Holocaust Museum, Inc.; Florida International Museum; Florida Society of Goldsmiths; Florida Watercolor Society; Florida West Ballet; Great Explorations; Gulf Beach Art Center, Inc; Gulf Coast Museum of Art; Heritage Village; Largo Cultural Center; Leepa-Rattner Museum of Art; Master Chorale of Tampa Bay; Miniature Art Society of Florida; Museum of Fine Arts St. Petersburg FL; Oldsmar Parks, Recreation & Cultural Affairs; Pier Aquarium, Inc.; Pinellas Youth Symphony; Ruth Eckerd Hall (PACT,); Safety Harbor Museum of Regional History; Salvador Dali Museum, Inc.; Science Center of Pinellas County; St. Petersburg Cultural Affairs; St. Petersburg International Folk Fair Society; St. Petersburg Little Theatre; St. Petersburg Museum of History; St. Petersburg Preservation, ; Suncoast Chapter of the Embroiderers Guild of America; Sweet Adelines International / Gulf to Bay Chorus; Tampa Bay Herald's of Harmony Chorus; Tampa Bay Symphony; Tarpon Springs Cultural Treasures; The Arts Center; The Florida Orchestra; The Palladium Theater; The Studio @ 620, Inc.; Weedon Island Preserve Cultural & Natural History Center; and Youth Arts Corps at Family Resources.

POLK COUNTY

Explorations V Children's Museum, Inc.; Imperial Symphony Orchestra; Lois Cowles Harrison Center for the Visual and Performing Arts; Polk Arts Allilance, Inc.; Polk Museum of Art; Ridge Art Association; and Theatre Winter Haven.

PUTNAM COUNTY

Arts Council of Greater Palatka

SARASOTA COUNTY

Artist Series of Sarasota; Asolo Repertory Theatre; Circus Sarasota; Crowley Museum; Florida Studio Theatre; G. Wiz; Glenridge Performing Arts Center; Gulf Coast Heritage Association; Hermitage Artist Retreat; Jazz Club of Sarasota; John and Mable Ringling Museum of Art; Key Chorale; La Musica di Asolo (dba La Musica); Manasota Weavers Guild;

Marie Selby Botanical Gardens; North Port Area Art Center & Guild; Palm Avenue Merchants Association; Pops Extras; Sarasota Ballet of Florida; Sarasota Film Society; Sarasota Opera Association; Season of Sculpture; South Florida Museum; The Players; Van Wezel Performing Arts Hall; Venice Main Street; Venice Symphony; and Venice Theatre.

SEMINOLE COUNTY

AKB Productions, Inc.; Altamonte Jazz Ensemble; Central Florida Watercolor Society; St. Lukes Lutheran Church; and Women's Caucus (Florida Chapter).

ST. JOHNS COUNTY

A Classic Theatre; Children's Museum of St. Johns; Cultural Center at Ponte Vedra Beach; EPIC Community Services; Flagler College Tours; Flagler College Writers in Residence Program; Florida Heritage Book Festival; FOCUS CUMMER; Gamble Rogers Folk Festival; Ponte Vedra Public Education Foundation; Ponte Vedra Chamber of Commerce; St. Augustine Amphitheater; St. Augustine Art Association; St. Augustine Community Chorus; St. Augustine Community Orchestra; St. Augustine Cooks and Chefs Association; St. Augustine Historical Society; St. Augustine School of Performing Arts; St. Johns County Fair; St. Photios Foundation; Stetson Kennedy Foundation; Tale Tellers of St. Augustine; The Ashley Foundation; The Dance Company; and Veddy Theatre Group.

ST. LUCIE COUNTY

WQCS Public Radio

SUMTER COUNTY

Sumter Arts Guild; and Volunteers Performing Arts Alliance.

TAYLOR COUNTY

Florida State Bluegrass Music Festival & Music Competition

VOLUSIA COUNTY

Central Florida Cultural Endeavors, Inc.; Halifax Historical Museum; and Iranian-American Society.

WAKULLA COUNTY

Big Bend Maritime Center

WALTON COUNTY

Cultural Arts Association of Walton County; Emerald Coast Woodturning Guild; Seaside Repertory Theatre; and Walton County Art League.

AMERICANS FOR THE ARTS' 156 ARTS & ECONOMIC PROSPERITY III NATIONAL STUDY PARTNER REGIONS

The following are the 156 communities and regions (116 cities and counties, 35 multi-county regions, and five states) that participated in the national study, representing all 50 states and the District of Columbia.

Jefferson County, AL; Greater Birmingham Region, AL; Anchorage, AK; Homer, AK; Chandler, AZ; Eastern Maricopa County, AZ; Mesa, AZ, Phoenix, AZ; Pima County, AZ, Tempe, AZ; Northwest Arkansas Region, AR; Fullerton, CA; Glendale, CA; Humboldt County, CA; Laguna Beach, CA; Pasadena, CA; Riverside County, CA; San Francisco, CA; Santa Barbara County, CA; Santa Clara County, CA; Santa Cruz County, CA; Sonoma County, CA; Walnut Creek, CA; Boulder, CO; Colorado Springs, CO; Fort Collins, CO; Gunnison County, CO; Loveland, CO; Greater Hartford, CT; Dover, DE; Wilmington, DE; the State of Delaware; Washington, DC; Greater Washington DC Metropolitan Region; Alachua

County, FL; Bay County, FL; Broward County, FL; Central Florida Region; Miami, FL; Miami Beach, FL; Miami-Dade County, FL; Orange County, FL; Orlando, FL; Palm Beach County, FL; Pinellas County, FL; Winter Park, FL; Atlanta, GA; Savannah, GA; the Island of Maui, HI; Boise, ID; Wood River Valley Region, ID; Champaign County, IL; Chicago, IL; Indianapolis, IN; Saint Joseph County, IN; Iowa Cultural Corridor Region; Salina, KS; Sedgwick County, KS; Louisville-Jefferson County, KY; Northwest Louisiana Region; Portland, ME; Baltimore, MD; Montgomery County, MD; Prince George's County, MD; Pittsfield, MA; Kalamazoo County, MI; Brainerd Lakes Region, MN; Central Minnesota; East Central Minnesota; Minneapolis, MN; Minnesota Arrowhead Region; Minnesota Lake Region; Minnesota Twin Cities' Metropolitan Region; North Central Minnesota; Northwest Minnesota; Saint Cloud, MN; Saint Paul, MN; South Central Minnesota; Southeast Minnesota; Southwest Minnesota; Washington and Chicago Counties, MN; the State of Minnesota; Lauderdale County, MS; Metropolitan Kansas City Region, MO/KS; Saint Louis City and County, MO; Missoula, MT; Lincoln, NE; Portsmouth Seacoast Area, NH/ME; Newark, NJ; New Brunswick, NJ; Doña Ana County, NM; Buncombe County, NC; Forsyth County, NC; Guildford County, NC; Mecklenburg County, NC; Wake County, NC; Fargo-Moorhead Region, ND/MN; Greater Minot Region, ND; the State of North Dakota; Clark County, NV; Greater Buffalo Region, NY; Monroe County, NY; Orange County, NY; Suffolk County, NY; Ulster County, NY; Westchester County, NY; Greater Columbus, OH; Greater Cincinnati Region, OH/KY/IN; Mansfield, OH; Tulsa, OK; Greater Portland Region, OR; Josephine County, OR; Allegheny County, PA; Bradford County, PA; Erie County, PA; Greater Harrisburg Region, PA; Greater Philadelphia Region, PA; Lackawanna County, PA; Lancaster, PA; Luzerne County, PA; Lehigh Valley Region, PA; Philadelphia County, PA; Somerset County, PA; the State of Pennsylvania; Providence, RI; Greater Columbia; SC; Black Hills Region, SD; Nashville-Davidson County, TN; Abilene, TX; Austin, TX; Houston, TX; Iron County, UT; Greater Burlington, VT; Windham County, VT; Alexandria, VA; Arlington County, VA; Fairfax, VA; Fairfax County, VA; Bainbridge Island, WA; Seattle, WA; Tacoma, WA; Whatcom County, WA; Wheeling, WV; Dane County, WI; Greater Milwaukee Region, WI; La Crosse, WI; Marathon County, WI; Milwaukee County, WI; Northeast Wisconsin Region, WI; Oshkosh, WI; Pierce County, WI; Polk County, WI; St. Croix County, WI; St. Croix Valley Region, WI; the State of Wisconsin; and Teton County, WY.

"There is no better indicator of the spiritual health of our city, its neighborhoods, and the larger region than the state of the arts. The arts deepen our understanding of the human spirit, extend our capacity to comprehend the lives of others, allow us to imagine a more just and humane world. Through their diversity of feeling, their variety of form, their multiplicity of inspiration, the arts make our culture richer and more reflective."

—Jonathon Fanton
President
MacArthur Foundation

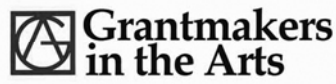


"Cultural and arts activities not only contribute tens of billions of dollars to our economy, but also inspire innovation. In neighborhoods and communities across the Nation, the arts and humanities lie at the center of revitalization, inspiring creativity, ideas, and new hope in areas that have gone too long without it."

—President Barack Obama



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