The Role of the Cultural Sector in the Local Economy: 2005 UPDATE

City of Austin, Texas

TXP, Inc.
1310 South 1st Street; Suite 105
Austin, Texas 78704
(512) 328-8300 phone
(512) 462-1240 fax
www.txp.com

Summary

There is a growing understanding of the connection between the arts and the economy, although there have been relatively few attempts to fully capture the connection between culture, creativity, and economic activity. TXP has addressed portions of this phenomenon in previous work, as we measured the economic impact of music in 2001, not-for-profit arts groups in 2003, and film in 2004. This paper attempts to more fully "paint the picture" in Austin of the influence of the cultural sector (defined to include music, film/digital media, not-for-profit performing arts, visual arts, and tourism related to the arts) on the local economy by updating the findings contained in the previous three studies, as well as further extending the analysis to better capture the local connection between the arts and tourism.

2004 Cultural Sector-Related Total Economic Activity in Austin *

	Sales/ Shipments/ Receipts	Labor Compensation	Employment	City Tax Revenue
Music	$419,208,316	$159,203,078	5,639	$4,731,171
Film & Visual Media	$281,021,016	$79,927,770	2,689	$1,072,500
Not-For-Profit Performing Arts	$330,220,253	$184,821,416	8,916	$3,758,605
Visual Arts	$201,595,212	$87,571,770	3,874	$2,294,580
Arts-Related Tourism	$1,032,600,716	$324,244,133	22,994	$36,372,276
-Influenced by Music	$580,242,172	$182,200,261	12,921	$20,438,421
-Other	$452,358,544	$142,043,872	10,073	$15,933,855
TOTAL	**$2,251,745,804**	**$827,761,366**	**43,744**	**$48,075,521**

As the findings above indicate, the cultural sector in Austin constitutes one of the major industrial sectors of the local economy, accounting for well over $2.2 billion in annual economic activity and almost 44,000 permanent jobs. That having been said, the non-measurable impacts may be even greater, especially as related to the connection between quality of life and economic development. Much energy and effort has gone into analyzing the reasons that the "creative class" finds Austin so appealing, with the widespread availability of cultural offerings clearly a major piece of the puzzle. Austin is a place that appreciates creativity in a variety of forms, and the incredible diversity of the local arts scene undoubtedly serves to both attract and retain talented people. This in turn has a significant impact on business recruitment, retention, and expansion, as well as local entrepreneurship. As such, the overall role of the cultural sector in the economy is disproportionately large to its narrowly defined impact. Communities with vision see the arts and related sectors with this "wide-angle" lens; those that take a narrower view may do so at their peril.

** Note: Any effort to measure the role of the cultural sector in a local economy will by definition involve classification decisions by the analyst, since "cultural sector" does not map directly to standard industrial classification patterns. In this case, TXP has defined five broad categories of activity as comprising the "cultural" sector: Music (which includes performers, recording services, music video, production, tour, industry, and commercial music), Film and Visual media (including film, television, and commercial production), Not-For-Profit Performing Arts, Visual Arts (including not-for-profit museums, as well as galleries, photographers, and other commercial visual artists), and Culture-Related Tourism (broken down into tourism influenced by music and other culture-influenced tourism). These categorizations are by no means definitive, but represent TXP's best effort to capture the range and scope of Austin's cultural economic activity in a manner that is both reasonably comprehensive and consistent with our previous local work in this area.*

Introduction

There is a growing understanding of the connection between the arts and the economy, although there have been relatively few attempts to fully capture the connection between culture, creativity, and economic activity. TXP has addressed portions of this phenomenon in previous work, as we measured the economic impact of music in 2001, not-for-profit arts groups in 2003, and film in 2004. This paper attempts to more fully “paint the picture” in Austin of the influence of the cultural sector on the local economy by updating the findings contained in the previous three studies, as well as further extending the analysis to include the visual arts and to better capture the local connection between the arts and tourism. The first section discusses the relationship between cultural vitality and economic development, and findings from an area survey concerning the value of the arts to the community at large are reviewed. The second section is largely quantitative, in that it provides a comparison of Austin’s cultural sector to a selection of peer communities elsewhere in the U.S and then measures the total local economic impact of the cultural sector (defined to include music, film/digital media, not-for-profit arts, visual media, and tourism related to the arts). The report concludes with a brief discussion of the overall findings on the role of the cultural sector in the Austin economy.

The Connection Between Culture and the Economy

Overview

The “knowledge economy” has been under scrutiny for some time. In his 1993 book, *Post-Capitalist Society*, Peter Drucker states that “the basic economic resources – ‘the means of production,’ to use the economist’s term, is no longer capital, nor natural resources…nor labor. It is and will be knowledge.” Other writers have expanded the concept further by including knowledge and information as the building blocks of creativity. Richard Florida’s groundbreaking book, *The Rise of the Creative Class*, details the growing role of creativity in the economy. According to Florida, our economy is shifting from a corporate-centered system to a more people-driven one. Of course, large corporations will continue to exist and be an important part of the American economy, but the simple fact is that people change jobs more frequently than in the past. Corporations are less committed to their employees, and the employment contract has become more contingent.

> Access to talented and creative people is to modern business what access to coal and iron ore was to steelmaking. It determines where companies will choose to locate and grow, and this in turn changes the ways cities must compete (Florida, 2002, p. 6).

What sets a city apart when it comes to attracting new businesses and talented workers? According to Florida, the answer lies fundamentally in the interaction between the individual and the character of the community. In the past, people defined themselves by a fairly narrow range of social categories: occupation, employer, and family status. Now more and more people are building a lifestyle around their creative experiences, unencumbered by strict demarcations that no longer suit their self-image. A person may now identify himself as an amateur musician, programmer, dad, gourmet cook, theater buff, and bicyclist. As creativity plays a larger role in our day to day lives, creative experiences become more valued. Communities that offer a wide variety of cultural amenities are more likely to attract quality workers. At the same time, creative people have always clustered in certain types of communities – think Greenwich Village in New York or the Left Bank in Paris. Successful communities are those that are multidimensional and diverse; in addition to offering employment, they offer a wide range of lifestyle amenities and a climate that encourages and cultivates creative expression. The arts are a significant part of this equation, as noted by Florida:

> Cultural offerings such as music, theater, and visual arts are a strong draw for creative workers . . . a flourishing arts scene seems to suggest a region values and supports creativity in all its forms – technological and economic as well as artistic and cultural (Florida, April 2002, p. 6).

The Arts and Economic Competitiveness

The notion that the ability to maintain creativity and innovation in the workplace requires ready access to a vibrant, renewing cultural environment is moving beyond academia. Even traditional manufacturing firms have long recognized that most new value is created through a process that needs creativity as a crucial raw material. John D. Ong, Chairman Emeritus of the B.F. Goodrich Company, speaking to a group of business students in 1995 as part of the Business Committee for the Arts Lecture Series, observed that:

> People who create in our companies – whether they be scientists, marketing experts or business strategists – benefit from exposure to the arts. People cannot create when they work and live in a

> culturally sterile environment… The economic benefits of the arts greatly transcend and outlive any of the normal cycles… That is why business invests in the arts – even when times are tough, and when there is increased pressure to manage money carefully (NGA Center, 2001).

The growth of the technology industry in the 1990s radically altered business location requirements. No longer are physical site characteristics and cheap labor the driving forces of the site location process. A *Conway Data* survey of corporate real estate executives in the early 1990s reveals that proximity to customers, access to skilled labor, and a variety of quality of life factors are now the most important issues. Much of this shift can be attributed to tastes and preferences of young, tech savvy workers. They tend to rank "quality of place" considerations as highly as any other factor, even job market conditions, in making career decisions, and the reasons for this transcend mere residential preference.

Enlightened business and government leaders recognize that investment in the arts is something more than simply a sign of personal or corporate virtue. Rather, there are real economic returns associated with this investment. These returns extend beyond the ability to attract and retain high quality employees. Businesses that support the arts count on their enhanced image as a corporate citizen and the attending name recognition to make consumers more receptive to their products. More than a third of all businesses that supported the arts in 1997 believed that the general public was more likely to purchase products and services from companies they knew provided such support (CEO Challenge, 1999). And, as the regional economy is often the core of a company's client base, these businesses also tend to fortify the regional economy by drawing dollars in from the outside and increasing local disposable income.

The Situation in Austin

The recovery continues in Austin, as most measures of the local economy have been on the upswing for some time. This trend is expected to continue, especially with better-than-anticipated national economic news and recent local announcements. As a general rule, external events drive the fortunes of the local economy in the near term. However, the community can have a greater influence on the nature and direction of its economic development over the longer run. Most agree that Austin's future will continue to be closely tied to the factors that historically have driven growth – a highly capable workforce, innovation and entrepreneurship, clusters in knowledge industries, the presence of a world-class research university and several other institutions of higher learning, and strong community assets.

In many ways, Austin's development of this core capacity is merely the outward manifestation of more fundamental underlying factors. Austin is blessed with an unusual interrelationship between creativity, innovation, and quality of life. The role of creativity and innovation has been explored elsewhere, as it is clear that much of the incremental growth of the local economy has been in sectors of the economy that rely on knowledge and creativity to generate value. At the same time, quality of life, an umbrella term that loosely covers variables such as recreational and cultural amenities, overall cost of living, diversity of local residents, and a sense of place that is at least partially informed by land, water, and the physical environment, is an increasingly important factor in economic development. This is especially the case in Austin, where there is a strong sense that the above factors combine in a unique and special way.

Given the above, companies have become more sensitive to the needs and wishes of their employees in worksite location decisions. This is particularly true in high technology sectors that are so dependent on the new breed of "knowledge workers." Earlier work by Florida examined these issues in depth (Florida, 2001). Among the key findings of this research were:

- Amenities and the environment – particularly natural, recreational, and lifestyle amenities – are absolutely vital in attracting knowledge workers and in supporting leading-edge high technology firms and industries.
- Knowledge workers prefer places with a diverse range of outdoor recreational activities … and associated lifestyle amenities… [These activities and amenities] should be easy to get to and readily available (Florida, 2001).

Under these circumstances, it is hardly surprising that most of the leading high technology regions today, including Austin, are regions that offer high levels of lifestyle amenities, including the arts. *The New York Times* recently summed it up nicely: "It is generally agreed that world-class cities are defined by a vibrant and diverse cultural life that offers both a large symphony and small theater companies, couture dress designers and tiny hat makers, art museums filled with impressionist paintings and hole-in-the-wall galleries where local glass makers show their stuff (Steinhauer, 2005)."

Austin-Area Residents View of the Arts

Based on recent findings, the importance of the arts and cultural vitality to the local economy is evident to the Austin-area residents. Montgomery and Associates conducted a Central Texas Directions survey from October 15-23, 2003 and tested 619 residents of Travis, Williamson, Bastrop, Hays and Caldwell Counties in Central Texas. The margin of error is plus or minus 3.7%.

The purpose of the questions was to expand on earlier survey research concerning art and culture in Austin. Key findings are as follows (detailed findings are reported in Appendix 1).

- 92.5% agree or strongly agree that "The cultural arts in Austin contribute to the local economy by helping to attract tourists and fostering a lively, creative environment."
- 89.3% agree or strongly agree that "The cultural arts in Austin enhance the quality of life for both audience members and the community at large."
- 73.6% agree or strongly agree that "The cultural arts in Austin bring a value to me over and above my attendance at actual performances."
- 96.5% rate locally-produced cultural events such as dance, theater, opera, concerts, museums, lectures, etc. as either "important" or "very important" to Central Texas.

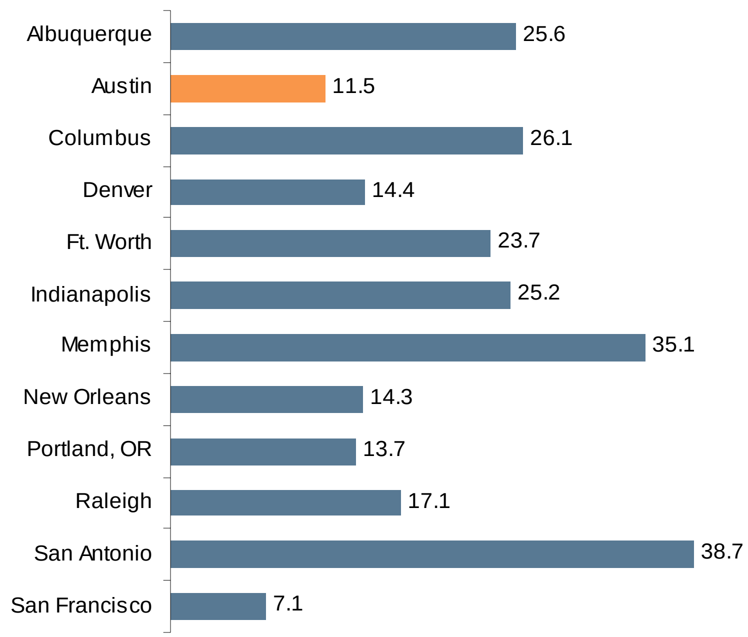
As revealed in the survey findings, Austin-area residents who have never set foot in a theater or attended a performance still derive tangible benefits from the existence of these venues and events. Among other things, they attract tourism and outside spending, which in turn enriches local firms, helps fund City services, and correspondingly reduces the local tax burden. Perhaps more importantly, they also embellish the image of Austin as a good place to work and live. This makes it easier for local companies to attract and retain workers – an issue discussed more thoroughly above. These are examples of positive externalities, where Austin residents at large derive indirect benefits from the decisions of other local residents and out-of-town visitors to support the cultural arts here.

The Central Texas Directions survey found that 73.6% of respondents felt that the arts in Austin "bring a value to me over and above my attendance at actual performances." When asked to put an annual dollar amount on that value, half of the respondents were unable to do so, which is perhaps not surprising since people are unused to putting a dollar value on intangible benefits. Among those that did respond, the average annual value was $539.11. Apparently, the value of the arts to the local economy and community at large is well understood.

Comparison to Other Communities

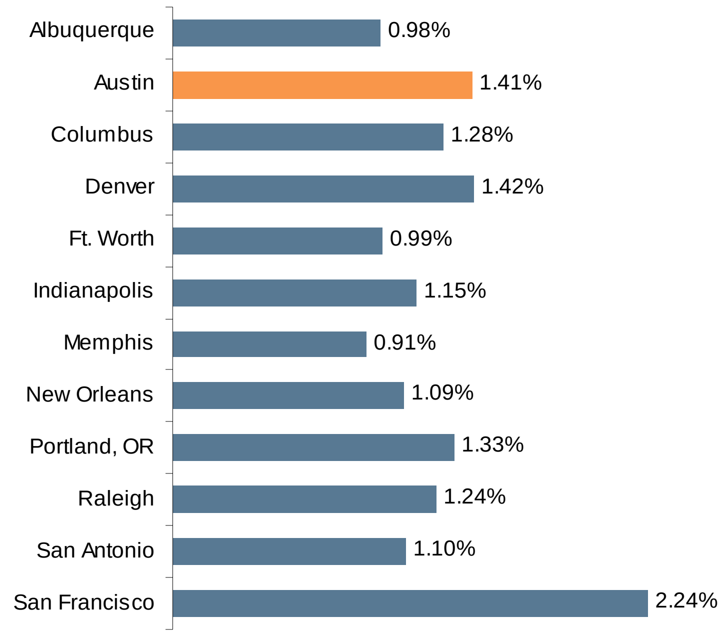
Evaluating the role of the cultural sector in Austin's economy versus other communities is somewhat challenging, as the available data is either incomplete or too highly aggregated to provide a thorough basis of comparison. This data also likely understates the relative impact, due to the sense that many of the cultural offerings in Austin are not fully captured in official statistics, which must be used to in order to do an "apples-to-apples" comparison to other areas. Nevertheless, the following charts suggest that the arts in Austin are relatively more important to the local economy than in many peer communities across the country. See Appendix 2 for more detailed information.

Number of Residents per Performing Arts Company (00s)
(a smaller number equals greater arts intensity)



Source: 2002 Economic Census, TXP

Arts/Design/Entertainment Occupations as a Percentage of Total Employment
(a larger number equals greater arts intensity)



Source: 2004 American Community Survey, TXP

Assumptions Regarding Inputs to the Modeling Process

Since much of this analysis is an update of previous work by TXP, data on the direct impact of film, music, and the not-for-profits performing arts community was either obtained from the original sources or projected forward from the recently available baseline information. Information on the direct role of the visual arts comes from Dun & Bradstreet data recently made available by the Americans for the Arts Collaborative. Meanwhile, new information was developed to estimate the role of the arts in Austin's tourism industry through a study commissioned by The Austin Convention & Visitors Bureau in December 2003. The study examined, among other things, the relative appeal of attractions that brought visitors to Austin. Each attraction was ranked on a 1-10 point scale, with ten being the highest score. Once the scores were normalized, questions concerning the variety of attractions in general, the range of art and cultural offerings available, and music and nightlife were used (in combination with data from D.K. Shiflett maintained by the Governor's Office of Economic Development on tourism in the Austin area) to calculate the role of music and the arts in bringing tourists to Austin. This approach is reinforced by information from AmericanStyle Magazine, which recently ranked Austin among the top ten arts destinations in the United States for 2005 (Bling, Brawn & Beauty, 2005).

Economic Impact Methodology

In an input-output analysis of new economic activity, it is useful to distinguish three types of expenditure effects: direct, indirect, and induced. Direct effects are production changes associated with the immediate effects or final demand changes. The payment made by an out-of-town visitor to a hotel operator is an example of a direct effect, as would be the taxi fare that visitor paid to be transported into town from the airport.

Indirect effects are production changes in backward-linked industries caused by the changing input needs of directly affected industries – typically, additional purchases to produce additional output. Satisfying the demand for an overnight stay will require the hotel operator to purchase additional cleaning supplies and services, for example, and the taxi driver will have to replace the gasoline consumed during the trip from the airport. These downstream purchases affect the economic status of other local merchants and workers. Induced effects are the changes in regional household spending patterns caused by changes in household income generated from the direct and indirect effects. Both the hotel operator and taxi driver experience increased income from the visitor's stay, for example, as do the cleaning supplies outlet and the gas station proprietor. Induced effects capture the way in which this increased income is in turn spent by them in the local economy.

Summary Findings

The role of the cultural sector in Austin's economy is significant, with just over $2.25 billion in economic activity, $827.7 million in labor compensation, over $48 million in City tax revenues, and almost 44,000 permanent jobs that can be ascribed to its collective influence during 2004. Not surprisingly, the economic impact of the cultural sector is most evident in tourism; as the Live Music Capital of the World, there are a number of high profile events each year that draw thousands, as well as several major film festivals. On any given weekend, those in Austin (residents and visitors) can take part in a wide variety of cultural activities that extend well beyond these high-profile events to theatre productions, gallery openings, food festivals, rodeos, and other offerings that fall under the broad heading of "cultural events." As a result, "retail arts," i.e., those offerings designed to be experienced first-hand, are a dominant influence on Austin's cultural scene. See Appendix 3 for more detail.

2004 Cultural Sector-Related Total Economic Activity in Austin *

	Sales/ Shipments/ Receipts	Labor Compensation	Employment	City Tax Revenue
Music	$419,208,316	$159,203,078	5,639	$4,731,171
Film & Visual Media	$281,021,016	$79,927,770	2,689	$1,072,500
Not-For-Profit Performing Arts	$330,220,253	$184,821,416	8,916	$3,758,605
Visual Arts	$201,595,212	$87,571,770	3,874	$2,294,580
Arts-Related Tourism	$1,032,600,716	$324,244,133	22,994	$36,372,276
-Influenced by Music	$580,242,172	$182,200,261	12,921	$20,438,421
-Other	$452,358,544	$142,043,872	10,073	$15,933,855
TOTAL	**$2,251,745,804**	**$827,761,366**	**43,744**	**$48,075,521**

** Note: Any effort to measure the role of the cultural sector in a local economy will by definition involve classification decisions by the analyst, since "cultural sector" does not map directly to standard industrial classification patterns. In this case, TXP has defined five broad categories of activity as comprising the "cultural" sector: Music (which includes performers, recording services, music video, production, tour, industry, and commercial music), Film and Visual Media (including film, television, and commercial production), Not-For-Profit Performing Arts, Visual Arts (including not-for-profit museums, as well as galleries, photographers, and other commercial visual artists), and Culture-Related Tourism (broken down into tourism influenced by music and other culture-influenced tourism). These categorizations are by no means definitive, but represent TXP's best effort to capture the range and scope of Austin's cultural economic activity in a manner that is both reasonably comprehensive and consistent with our previous local work in this area.*

Conclusion

As the findings of this report indicate, the cultural sector in Austin constitutes one of the major industrial sectors of the local economy, accounting for well over $2.2 billion in annual economic activity and almost 44,000 permanent jobs. That having been said, the non-measurable impacts may be even greater, especially as it relates to the connection between quality of life and economic development. Much energy and effort has gone into analyzing the reasons that the "creative class" finds Austin so appealing, with the widespread availability of cultural offerings clearly a major piece of the puzzle. Austin is a place that appreciates creativity in a variety of forms, and the incredible diversity of the local arts scene undoubtedly serves to both attract and retain talented people. This in turn has a significant impact on business recruitment, retention, and expansion, as well as local entrepreneurship.

In assessing the economic health of a community, the yardstick used to be fairly standard, easily-available numbers - what is the unemployment rate, are new jobs being created, how many building permits have we issued, are retail sales growing, etc. As the global economic environment has grown both more competitive and complex in recent years, however, it has become crucial to reach beyond these surface figures to understand the underlying factors that predict which communities will thrive going forward. In that context, “cultural vitality and quality of life”– umbrella terms that loosely cover variables such as recreational and cultural amenities, overall cost of living, diversity of local residents, and a sense of place – are not only an increasingly important community asset, but essential features of communities on the rise.

The traditional stereotype of the arts as a luxury – worth supporting in prosperous times, but disconnected from the performance of the economy – appears to have been disproven, as a vibrant cultural environment is a key element of long-term economic success. As such, the overall role of the arts in the economy is disproportionately large to their narrowly defined impact. Communities with vision see the arts with this “wide-angle” lens; those that take a narrower view do so at their peril.

Selected References

Bling, Brawn & Beauty (2005). Retrieved on December 15, 2005 from http://www.americanstyle.com/Magazine/AS43/Arts_Travel/Top25/Top25ArtCities.cfm

The CEO Challenge: A Conference Board/Hendricks & Struggles Survey of 656 CEOs (May 1999). Retrieved June, 2001 from http://www.bca.org (now www.bcainc.org).

Drucker, Peter (1993). *Post-Capitalist Society*. New York: HarperCollins.

Florida, Richard (2002). *The Rise of the Creative Class*. New York: Basic Books.

Florida, Richard (April 26, 2002). *Rebuilding Lower Manhattan for the Creative Age: Implications for the Greater New York Region*. Retrieved on December 14, 2005 from http://www.creativeclass.org/acrobat/NYRPA.pdf.

Florida, Richard (January 2001). *Competing in the Age of Talent: Environment, Amenities and the New Economy*. Retrieved January 2004 from www.heinz.cmu.edu.

NGA Center for Best Practices (June 25, 2001). *The Role of the Arts in Economic Development*. Retrieved on December 14, 2005 from http://preview.nga.org/Files/pdf/062501ARTSDEV.pdf.

Steinhauer, Jennifer (December 18, 2005). *New York, Once a Lure, Is Slowly Losing the Creative Set*. New York Times newspaper.

Appendix 1: Cultural Arts Poll – Central Texas Directions

This Central Texas Directions survey was conducted by Montogomery & Associates from October 15-23, 2003 and tested 619 residents of Travis, Williamson, Bastrop, Hays and Caldwell Counties in Central Texas. The margin of error is plus or minus 3.7%. The purpose of these questions (which were part of a larger survey) was to test attitudes and opinions about art and culture in Austin. The following analysis of the findings was provided by Montogomery & Associates.

Qualitative Value of Cultural Arts in Austin

Our survey found that Central Texans place a high value on Austin's cultural scene, both for their contribution to the economy and to the local quality of life.

33% strongly agree that **"The cultural arts in Austin contribute to the local economy by helping to attract tourists and fostering a lively, creative environment."** Another 59.5% agree with the statement, for a remarkable 92.5% who agree or strongly agree with the statement. Only 5.3% disagree (4.8%) or strongly disagree (0.5%). 2.3% did not know.

This agreement level stayed consistently high in all our demographic groups, without variation for age, income, ethnicity, region, or political beliefs.

We did see some variation in the level of strong agreement (rather than overall agreement), which might be thought of as the enthusiasm index. Groups that were somewhat more likely to strongly agree include:

More likely to strongly agree that arts contribute to local economy

- Women (39.7%) when compared to men (25.5%)
- Those with more education (41.4% college graduate, 35.4% graduate degree) when compared to those with less (20.7% high school, 26.4% some college)
- Political liberals (45.8%) compared to conservatives (23.2%)
- Those who live inside (39.2%) the city limits compared to those outside (26.9%)
- Those who live outside the city limits and consider themselves Austinites (29.9%) compared to those who do not consider themselves Austinites (18.7%)

It is important to emphasize however, that in all these groups the level of overall agreement stayed the same. For example, even among those who live outside the city limits and do not consider themselves Austinites, 89.4% agreed that the cultural arts in Austin contribute to the local economy.

Agreement was just as strong with the statement **"The cultural arts in Austin enhance the quality of life for both audience members and the community at large."** 32.8% strongly agree with this statement, and 56.5% agreed, for an overall agreement of 89.3%. Only 8.2% disagree (7.4%) or strongly disagree (0.8%). 2.4% did not know.

Once again, overall agreement remained very strong across the board, with only slight variations by education (overall agreement rose steadily from 81.8% for those with a high school education or less to 94.7% for those with a graduate degree) and political beliefs (overall agreement was 81.7% among conservatives, 91.6% among middle-of the road voters, and 97.2% among liberals). But even in these groups where agreement fell off, it remains very high.

We saw some variations in the enthusiasm index similar to the previous question:
More likely to strongly agree that the arts enhance the quality of life:

- Those aged 18-24 (44.1%) when compared to those aged 55 and older (25.2%)
- Women (36.9%) when compared to men (28.2%)
- Single people (40.3%) as opposed to married (29.4%)
- Those who live outside the city limits and consider themselves Austinites (29.2%) compared to those who do not consider themselves Austinites (16.3%)

Again, however, overall levels of agreement were equally high in all these groups.

On our third statement, agreement was high, but not as overwhelming as in the first two statements. 20% of our respondents strongly agreed that **"The cultural arts in Austin bring a value to me over and above my attendance at actual performances."**

53.6% agreed, for an overall agreement level of 73.6%. 20% either disagreed (18.9%) or strongly disagreed (1.1%). 6.3% did not know.

Women (79.1% overall agreement) were more positive here than men (67.7% overall agreement). Agreement also shifted with political orientation, from 62.8% for conservatives to 72.5% for middle-of-the-road voters to 88.2% for liberals. Also, those who live outside the city limits and consider themselves Austinites had a higher rate of agreement (74%) compared to those who do not consider themselves Austinites (61%).

We also specifically tested the value of **locally-produced cultural events**, asking, “How important would you say locally produced cultural events such as dance, theater, opera, concerts, museums, lectures, etc. are to Central Texas?”

These ranked remarkably high: 67.4% said they were very important, and 29.1% said they were somewhat important, for a total positive rating of 96.5%. 1.5% said they were somewhat unimportant, and 0.5% said they were very unimportant—a negative rating of only 2%. 0.6% said they were neither important nor unimportant, and 1% did not know.

This finding shows extremely high support and high enthusiasm for locally-produced cultural events. The overall positive support remains in the 90s in nearly every group. Enthusiasm (the “very important” number) does drop in certain groups:

- 58.5% of those over age 55 say locally-produced events are “very important,” compared to 76.3% of those aged 18-24
- Men at 58.8% show lower enthusiasm than women at 75.1%
- 54.1% of political conservatives say such events are very important, compared to 85.9% of liberals
- Those who visit Central Austin only a couple of times a year (52.4%) show lower enthusiasm than those who visit several times a week (78.1%)

Other groups who show somewhat less enthusiasm for locally produced events include those with a high school education or less (53.7%), those who live outside the city and visit Austin twice a month or less (51.3%), and those who live outside the city and do not consider themselves Austinites (48.8%).

Still, it must be emphasized that even in these groups, half or more said that locally-produced cultural events were very important to Central Texas, and over 90% said they were important.

71.9% agreed with the statement that **"The arts add a great deal to my life; I would really miss it if I had to live without them."** 26.2% disagreed, and 1.9% didn't know. That level of agreement is actually slightly higher (just outside our margin of error) than when the same question was asked two years ago. At that time, 66% agreed and 33.2% disagreed.

There were interesting crosstab differences here, with some groups showing as much as a 25-point differential along one crosstab axis:

Arts add a great deal to my life:

Higher agreement	Lower agreement
Live inside city limits (77.6%)	Live outside city (67%)
Age 18-24 (83.1%)	Age 55+ (67.5%)
Women (78.2%)	Men (65%)
College grad (77.2%)	High school degree or less (59.8%)
Single (83.9%)	Married (66%)
No children in household (76%)	Children in household (64%)
Liberal (86.4%)	Conservative (59.4%)
Visit Central Austin sev. times/week (80.6%)	Couple of times a year (56.1%)
Consider self an Austinite (76%)	Do not consider self an Austinite (51.2%)

As you can see from the last statistic, whether or not those living outside of Austin consider themselves an Austinite correlates strongly with how much they value art in their lives.

We also asked respondents to agree or disagree with this statement**: "If it were easier to get into town and park, I would probably go out to more arts and entertainment events."**

72.2% agreed; 25.8% disagreed, 1.9% did not know.

Parking was even more of an issue for Hispanics (79.7%, compared to Anglos at 66.5%), those 18-24 (84.7%, compared to 61% for those 55 and over), and non-Austin residents who consider themselves Austinites (80.5%, compared to 69.9% for those who don't). These are groups who showed a higher propensity for valuing the arts anyway, so it may be that other groups would not attend cultural events even if parking were not an issue.

Dollar Value of Cultural Arts in Austin

We asked only those who agreed or strongly agreed that the cultural arts in Austin bring them a value over and above attendance at actual performances whether they could put a dollar figure on that value on an annual basis.

Nearly half were unable to do so, which is perhaps not surprising since people are unused to putting a dollar value on intangible benefits. The rest spread out all over the map:

Less than $200	1.8%
$200-$499	14.3%
$500-$999	7.7%
$1000-$1999	10.1%
$2000 or more	9.4%
Don't know	46.7%

There were no significant crosstab variations.

Although some respondents were challenged to put a dollar value on arts events beyond their attendance, they had no trouble with a more specific question on the same topic. We told all respondents, "The City of Austin provides **support to the cultural arts through the 'bed tax,'** which is paid by visitors who stay at Austin hotels and motels," and asked, "In your opinion, should the City continue this support of the cultural arts?"

An overwhelming 87.6% said the City should continue to fund the arts through the bed tax. Only 8.4% disagreed, 1.9% said it would depend, and 2.1% didn't know.

There was very little variation in the crosstabs for this question—support for the bed tax remained strong across the board. The lowest support was among political conservatives, at 77.8% (compared to 90.7% for middle-of-the-road voters and 95.5% for liberals). 77.8% is still quite high. There was also a slight drop from those who live outside Austin but visit once a week or more (89.4%) to those who visit less often (80.8%). Clearly, Central Texans approve of supporting arts through the bed tax.

Conclusion

The survey suggests that Central Texans put a remarkably high value on art and cultural activities—particularly on locally-produced art and culture. They believe that Austin's cultural arts scene contributes to the local economy (both directly and by fostering a creative environment), and that it contributes to the quality of life even of those who do not attend arts events. Three-fourths agree that the cultural arts in Austin "bring a value to me over and above my attendance at actual performances."

Enthusiasm for the arts scene is especially high among certain groups, particularly young people, women, highly-educated people, liberals, city residents, and those who identify themselves as Austinites even though they are not city residents. However, support for the arts remained remarkably strong throughout nearly all the demographic groups we measured—even in areas outside of Austin.

Appendix 2: Detailed Occupational Data

Note: The data in this appendix is drawn from official federal figures produced by the Bureau of Labor Statistics (www.bls.gov), and is included for purposes of further relative comparison between peer communities. A value of N/A in a given cell indicates that particular information was either withheld for reasons of confidentiality, could not be measured (as part of the BLS process) at a statistically-valid level, or was simply not available.

2004 Austin Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**9,590**	**$41,600**
Art Directors	180	$56,400
Multi-Media Artists and Animators	120	$48,090
Commercial and Industrial Designers	N/A	$65,070
Floral Designers	220	$20,710
Graphic Designers	1,150	$40,140
Interior Designers	580	$46,660
Merchandise Displayers and Window Trimmers	290	$30,670
Set and Exhibit Designers	40	$37,150
Actors	N/A	N/A
Producers and Directors	250	$51,620
Coaches and Scouts	920	$31,400
Choreographers	N/A	$39,730
Musicians and Singers	N/A	N/A
Radio and Television Announcers	280	$35,410
Public Address System and Other Announcers	50	$28,270
Broadcast News Analysts	N/A	$37,560
Reporters and Correspondents	150	$39,910
Public Relations Specialists	1,280	$50,850
Editors	N/A	$40,270
Technical Writers	460	$49,980
Writers and Authors	360	$43,310
Interpreters and Translators	540	$48,540
Broadcast Technicians	150	$25,730
Photographers	310	$32,510
Camera Operators, Television, Video, and Motion Picture	50	$25,010

2004 Albuquerque Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**3,490**	**$37,700**
Art Directors	50	$47,760
Commercial and Industrial Designers	60	$53,450
Floral Designers	100	$20,520
Graphic Designers	390	$37,480
Interior Designers	100	$25,340
Merchandise Displayers and Window Trimmers	270	$29,130
Producers and Directors	130	$44,840
Coaches and Scouts	180	$38,800
Umpires, Referees, and Other Sports Officials	N/A	$20,210
Public Relations Specialists	270	$45,330
Editors	250	$43,630
Technical Writers	180	$50,910
Writers and Authors	120	$39,160
Interpreters and Translators	80	$36,920
Audio and Video Equipment Technicians	120	$34,570
Broadcast Technicians	100	$34,140
Photographers	140	$24,930
Film and Video Editors	N/A	$54,670

2004 Columbus Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**10,970**	**$42,090**
Art Directors	210	$56,310
Fine Artists, Including Painters, Sculptors, and Illustrators	N/A	$35,920
Multi-Media Artists and Animators	140	$49,060
Commercial and Industrial Designers	350	$49,700
Fashion Designers	N/A	$64,290
Floral Designers	300	$24,400
Graphic Designers	970	$41,700
Interior Designers	420	$41,980
Merchandise Displayers and Window Trimmers	630	$28,250
Set and Exhibit Designers	40	$39,220
Designers, All Other	130	$45,180
Actors	N/A	N/A
Producers and Directors	270	$51,560
Coaches and Scouts	1,000	$31,770
Dancers	N/A	N/A
Radio and Television Announcers	210	$28,530
Public Address System and Other Announcers	70	$52,060
Reporters and Correspondents	330	$40,320
Public Relations Specialists	1,310	N/A
Editors	850	$51,740
Technical Writers	250	$52,690
Writers and Authors	170	$44,150
Interpreters and Translators	110	$33,590
Media and Communication Workers, All Other	N/A	$56,160
Audio and Video Equipment Technicians	120	$36,250
Broadcast Technicians	210	$34,900
Photographers	350	$32,680
Camera Operators, Television, Video, and Motion Picture	180	$36,440
Film and Video Editors	40	$46,350
Media and Communication Equipment Workers, All Other	90	$52,750

2004 Denver Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**16,100**	**$46,950**
Art Directors	180	$84,560
Fine Artists, Including Painters, Sculptors, and Illustrators	120	$27,670
Multi-Media Artists and Animators	190	$53,140
Commercial and Industrial Designers	430	$46,250
Floral Designers	N/A	$24,360
Graphic Designers	1,720	$41,170
Interior Designers	720	$49,550
Merchandise Displayers and Window Trimmers	N/A	$22,530
Set and Exhibit Designers	70	$41,690
Designers, All Other	70	$50,080
Actors	230	N/A
Producers and Directors	610	$63,480
Athletes and Sports Competitors	310	$183,030
Coaches and Scouts	1,030	$39,220
Umpires, Referees, and Other Sports Officials	N/A	$18,760
Dancers	460	N/A
Radio and Television Announcers	370	$44,400
Public Address System and Other Announcers	230	$24,080
Broadcast News Analysts	60	$53,010
Reporters and Correspondents	300	$66,280
Public Relations Specialists	2,010	$53,020
Editors	810	$50,140
Technical Writers	850	$60,840
Writers and Authors	330	$50,650
Interpreters and Translators	450	$52,690
Media and Communication Workers, All Other	230	$54,100
Audio and Video Equipment Technicians	360	$36,440
Broadcast Technicians	360	$35,410
Sound Engineering Technicians	110	$42,530
Photographers	420	$38,770
Camera Operators, Television, Video, and Motion Picture	260	$37,120
Film and Video Editors	90	$67,850
Media and Communication Equipment Workers, All Other	360	$37,960

2004 Ft. Worth Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**7,620**	**$38,520**
Art Directors	140	$47,240
Multi-Media Artists and Animators	130	$36,750
Commercial and Industrial Designers	N/A	$53,700
Floral Designers	340	$25,530
Graphic Designers	870	$38,480
Interior Designers	200	$47,230
Merchandise Displayers and Window Trimmers	230	$25,340
Set and Exhibit Designers	N/A	$34,000
Designers, All Other	60	$39,360
Producers and Directors	130	$59,050
Coaches and Scouts	540	$22,590
Umpires, Referees, and Other Sports Officials	80	$26,020
Dancers	140	N/A
Choreographers	120	N/A
Music Directors and Composers	30	$29,650
Musicians and Singers	250	N/A
Radio and Television Announcers	220	$25,380
Public Address System and Other Announcers	80	$23,230
Public Relations Specialists	730	$45,140
Editors	570	$51,150
Technical Writers	320	$74,640
Writers and Authors	190	$52,600
Interpreters and Translators	130	$31,610
Media and Communication Workers, All Other	N/A	$55,350
Audio and Video Equipment Technicians	50	$27,720
Broadcast Technicians	260	N/A
Sound Engineering Technicians	50	$44,640
Photographers	470	$21,520
Camera Operators, Television, Video, and Motion Picture	N/A	$27,140
Film and Video Editors	70	$40,230

2004 Indianapolis Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**10,050**	**$37,810**
Art Directors	180	$52,720
Fine Artists, Including Painters, Sculptors, and Illustrators	100	$40,070
Multi-Media Artists and Animators	140	$46,460
Commercial and Industrial Designers	220	$52,290
Floral Designers	510	$18,510
Graphic Designers	1,070	$40,690
Interior Designers	470	$40,920
Merchandise Displayers and Window Trimmers	170	$25,370
Designers, All Other	70	$30,610
Actors	40	N/A
Producers and Directors	280	$46,330
Coaches and Scouts	970	$23,720
Dancers	520	N/A
Choreographers	130	$23,690
Radio and Television Announcers	350	$28,830
Reporters and Correspondents	250	$23,140
Public Relations Specialists	1,220	$46,210
Editors	740	$44,840
Technical Writers	460	$52,420
Writers and Authors	160	$55,880
Media and Communication Workers, All Other	40	$39,510
Audio and Video Equipment Technicians	480	$37,470
Broadcast Technicians	120	$24,280
Sound Engineering Technicians	60	$35,420
Photographers	430	$24,850
Camera Operators, Television, Video, and Motion Picture	120	$35,250
Media and Communication Equipment Workers, All Other	60	$38,730

2004 Memphis Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**5,180**	**$36,680**
Art Directors	140	$55,380
Multi-Media Artists and Animators	50	$58,870
Commercial and Industrial Designers	N/A	$48,220
Fashion Designers	N/A	$58,780
Floral Designers	570	$23,110
Graphic Designers	620	$39,140
Interior Designers	200	$57,910
Merchandise Displayers and Window Trimmers	250	$21,860
Actors	N/A	N/A
Producers and Directors	190	$43,620
Coaches and Scouts	270	$33,510
Dancers	90	N/A
Musicians and Singers	180	N/A
Radio and Television Announcers	N/A	$40,130
Reporters and Correspondents	210	$36,530
Public Relations Specialists	460	$43,990
Editors	200	$49,800
Technical Writers	110	$50,570
Writers and Authors	130	$60,270
Interpreters and Translators	N/A	$22,860
Audio and Video Equipment Technicians	150	$32,440
Broadcast Technicians	130	$28,440
Photographers	240	$23,000
Camera Operators, Television, Video, and Motion Picture	90	$26,990
Film and Video Editors	N/A	$30,780
Media and Communication Equipment Workers, All Other	N/A	$27,110

2004 New Orleans Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**6,660**	**$30,790**
Art Directors	80	$45,480
Fine Artists, Including Painters, Sculptors, and Illustrators	40	$29,200
Multi-Media Artists and Animators	N/A	$37,980
Floral Designers	240	$19,900
Graphic Designers	430	$32,570
Interior Designers	180	$39,690
Merchandise Displayers and Window Trimmers	540	$23,420
Producers and Directors	140	$43,610
Athletes and Sports Competitors	200	$31,110
Coaches and Scouts	280	$35,750
Dancers	70	N/A
Musicians and Singers	350	N/A
Entertainers and Performers, Sports and Related Workers, All Other	N/A	N/A
Radio and Television Announcers	N/A	$23,940
Public Address System and Other Announcers	40	$24,570
Reporters and Correspondents	180	$42,640
Public Relations Specialists	400	$39,270
Editors	290	$48,200
Technical Writers	60	$43,530
Writers and Authors	100	$42,300
Media and Communication Workers, All Other	N/A	$35,640
Audio and Video Equipment Technicians	N/A	$27,480
Broadcast Technicians	90	$20,600
Sound Engineering Technicians	110	$33,290
Photographers	440	$16,610
Camera Operators, Television, Video, and Motion Picture	40	$30,860
Media and Communication Equipment Workers, All Other	50	$58,260

2004 Portland (OR) Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**12,410**	**$43,230**
Art Directors	270	$66,760
Fine Artists, (Painters, Sculptors, & Illustrators)	140	$37,970
Multi-Media Artists and Animators	170	$52,910
Artists and Related Workers, All Other	30	$35,920
Commercial and Industrial Designers	210	$54,380
Floral Designers	440	$22,770
Graphic Designers	1,310	$40,940
Interior Designers	480	$41,790
Merchandise Displayers and Window Trimmers	770	$25,270
Set and Exhibit Designers	120	$37,570
Designers, All Other	210	$52,490
Actors	110	N/A
Coaches and Scouts	750	$30,600
Umpires, Referees, and Other Sports Officials	210	$22,540
Dancers	N/A	N/A
Choreographers	70	$34,520
Music Directors and Composers	420	$47,590
Musicians and Singers	400	N/A
Entertainers and Performers, Sports and Related Workers, All Other	80	N/A
Radio and Television Announcers	170	$46,290
Public Address System and Other Announcers	40	$37,400
Reporters and Correspondents	300	$52,920
Public Relations Specialists	1,420	$49,100
Editors	520	$47,880
Technical Writers	540	$57,440
Writers and Authors	310	$50,210
Interpreters and Translators	250	$33,550
Media and Communication Workers, All Other	350	$37,750
Audio and Video Equipment Technicians	290	$38,330
Broadcast Technicians	230	$40,260
Sound Engineering Technicians	40	$47,740
Camera Operators, Television, Video, and Motion Picture	170	$48,890
Film and Video Editors	50	$46,210
Media and Communication Equipment Workers, All Other	180	$40,500

2004 Raleigh/Durham Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**8,450**	**$43,830**
Art Directors	120	$56,400
Fine Artists, Including Painters, Sculptors, and Illustrators	110	$40,400
Multi-Media Artists and Animators	80	$50,170
Commercial and Industrial Designers	N/A	$58,250
Graphic Designers	940	$40,160
Interior Designers	230	$42,530
Merchandise Displayers and Window Trimmers	230	$23,370
Producers and Directors	290	$51,360
Coaches and Scouts	730	$39,750
Choreographers	N/A	$29,380
Musicians and Singers	N/A	N/A
Entertainers and Performers, Sports and Related Workers, All Other	60	N/A
Public Address System and Other Announcers	90	N/A
Broadcast News Analysts	80	$79,640
Reporters and Correspondents	370	$38,530
Public Relations Specialists	1,230	$47,190
Editors	490	$44,550
Technical Writers	480	$55,840
Writers and Authors	230	$51,520
Interpreters and Translators	80	$32,860
Audio and Video Equipment Technicians	240	$31,060
Broadcast Technicians	180	$41,460
Photographers	440	$66,260
Camera Operators, Television, Video, and Motion Picture	70	$29,570
Film and Video Editors	60	$42,280
Media and Communication Equipment Workers, All Other	40	$41,680

2004 San Antonio Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**7,970**	**$36,030**
Art Directors	130	$80,450
Fine Artists, Including Painters, Sculptors, and Illustrators	50	$48,650
Multi-Media Artists and Animators	60	$36,870
Commercial and Industrial Designers	150	$30,690
Floral Designers	170	$19,630
Graphic Designers	740	$41,900
Interior Designers	370	$38,210
Merchandise Displayers and Window Trimmers	220	$23,150
Set and Exhibit Designers	N/A	$25,370
Designers, All Other	50	$48,020
Actors	N/A	N/A
Producers and Directors	240	$49,550
Coaches and Scouts	400	$35,490
Dancers	110	N/A
Choreographers	40	$20,080
Musicians and Singers	140	N/A
Radio and Television Announcers	290	$33,120
Public Address System and Other Announcers	120	$22,300
Broadcast News Analysts	70	$62,590
Public Relations Specialists	740	$41,520
Editors	420	$42,150
Technical Writers	310	$46,950
Writers and Authors	80	$48,090
Interpreters and Translators	840	$28,070
Media and Communication Workers, All Other	90	$49,610
Audio and Video Equipment Technicians	200	$30,880
Broadcast Technicians	240	$29,240
Sound Engineering Technicians	N/A	$24,310
Photographers	410	$30,720
Camera Operators, Television, Video, and Motion Picture	50	$38,700
Film and Video Editors	40	$43,940
Media and Communication Equipment Workers, All Other	80	$51,730

2004 San Francisco Arts-Related Occupational Patterns

	Number Employed	Mean Annual Income
Total Arts, Design, Entertainment, Sports, and Media Occupations	**21,320**	**$60,430**
Art Directors	610	$104,430
Fine Artists, Including Painters, Sculptors, and Illustrators	70	$56,110
Multi-Media Artists and Animators	1,320	$71,370
Commercial and Industrial Designers	260	$65,520
Fashion Designers	160	$61,970
Floral Designers	340	$31,560
Graphic Designers	2,200	$56,210
Interior Designers	490	$64,820
Merchandise Displayers and Window Trimmers	810	$27,360
Set and Exhibit Designers	150	$53,390
Actors	340	N/A
Producers and Directors	980	$88,250
Coaches and Scouts	1,530	$34,690
Dancers	540	N/A
Choreographers	130	$42,730
Music Directors and Composers	220	$46,280
Musicians and Singers	1,020	N/A
Radio and Television Announcers	280	N/A
Reporters and Correspondents	500	$53,710
Public Relations Specialists	2,760	$68,150
Editors	1,970	$60,390
Technical Writers	850	$74,930
Writers and Authors	630	$67,820
Interpreters and Translators	150	$43,420
Media and Communication Workers, All Other	350	$57,150
Audio and Video Equipment Technicians	350	$38,030
Broadcast Technicians	280	$52,680
Sound Engineering Technicians	90	$53,170
Photographers	510	$51,890
Camera Operators, Television, Video, and Motion Picture	300	$55,750
Film and Video Editors	190	$44,090
Media and Communication Equipment Workers, All Other	210	$47,130

Appendix 3: Detailed Economic Impact Data

2004 Economic Impact of Film & Visual Media (Not Including Tourism)

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$96,915	$355,973	$452,891
Construction	$0	$753,819	$380,638	$1,134,457
Manufacturing	$0	$2,904,573	$2,277,436	$5,182,014
Trans & Utilities	$0	$10,292,447	$2,791,020	$13,083,466
Wholesale Trade	$0	$1,825,206	$3,313,380	$5,138,587
Retail Trade	$0	$637,976	$6,456,543	$7,094,520
FIRE	$0	$5,666,502	$7,574,541	$13,241,045
Services	$168,900,000	$46,967,258	$18,313,167	$234,180,435
Government	$0	$872,837	$1,236,343	$2,109,180
Total	$168,900,000	$70,017,534	$42,699,042	$281,616,596
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$11,370	$31,768	$43,138
Construction	$0	$278,415	$137,115	$415,530
Manufacturing	$0	$821,753	$459,264	$1,281,016
Trans & Utilities	$0	$2,908,027	$702,129	$3,610,157
Wholesale Trade	$0	$658,688	$1,195,747	$1,854,435
Retail Trade	$0	$270,459	$2,648,897	$2,919,356
FIRE	$0	$871,900	$1,546,176	$2,418,077
Services	$45,393,967	$14,065,607	$7,012,405	$66,471,980
Government	$0	$183,285	$277,171	$460,456
Total	$45,393,967	$20,069,505	$14,010,673	$79,474,145
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	0	5	5
Construction	0	9	4	13
Manufacturing	0	20	10	29
Trans & Utilities	0	65	19	84
Wholesale Trade	0	7	13	19
Retail Trade	0	12	120	132
FIRE	0	39	52	90
Services	1,509	495	300	2,304
Government	0	3	5	9
Total	1,509	649	527	2,685

2004 Economic Impact of Not-For-Profit Arts Groups (Not Including Tourism)

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$108,997	$400,351	$509,348
Construction	$0	$847,795	$428,091	$1,275,887
Manufacturing	$0	$3,266,678	$2,561,358	$5,828,037
Trans & Utilities	$0	$11,575,580	$3,138,969	$14,714,548
Wholesale Trade	$0	$2,052,749	$3,726,451	$5,779,200
Retail Trade	$0	$717,511	$7,261,464	$7,978,975
FIRE	$0	$6,372,930	$8,518,839	$14,891,770
Services	$189,956,321	$52,822,543	$20,596,222	$263,375,085
Government	$0	$981,652	$1,390,475	$2,372,127
Total	$189,956,321	$78,746,436	$48,022,220	$316,725,000
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$61,005	$224,073	$285,078
Construction	$0	$474,504	$239,599	$714,103
Manufacturing	$0	$1,828,332	$1,433,570	$3,261,902
Trans & Utilities	$0	$6,478,752	$1,756,854	$8,235,605
Wholesale Trade	$0	$1,148,906	$2,085,662	$3,234,568
Retail Trade	$0	$401,585	$4,064,178	$4,465,763
FIRE	$0	$3,566,874	$4,767,921	$8,334,795
Services	$106,316,908	$29,564,320	$11,527,527	$147,408,754
Government	$0	$549,422	$778,237	$1,327,659
Total	$106,316,908	$44,073,698	$26,877,621	$177,268,240
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	3	11	14
Construction	0	23	12	34
Manufacturing	0	88	69	157
Trans & Utilities	0	313	85	397
Wholesale Trade	0	55	101	156
Retail Trade	0	19	196	215
FIRE	0	172	230	402
Services	5,129	1,426	556	7,112
Government	0	27	38	64
Total	5,129	2,126	1,297	8,552

2004 Economic Impact of Music (Not Including Tourism)

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$333,294	$307,804	$641,095
Construction	$0	$1,085,412	$844,954	$1,930,366
Manufacturing	$50,415,261	$7,744,800	$2,284,872	$60,444,939
Trans & Utilities	$0	$7,149,813	$3,535,710	$10,685,523
Wholesale Trade	$0	$6,428,182	$3,949,260	$10,377,440
Retail Trade	$157,106,404	$878,957	$11,873,135	$169,858,495
FIRE	$0	$12,417,174	$15,430,756	$27,847,933
Services	$76,386,266	$39,018,905	$16,374,939	$131,780,112
Government	$0	$3,112,237	$2,530,176	$5,642,412
Total	$283,907,931	$78,168,774	$57,131,607	$419,208,316
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$130,927	$123,175	$254,101
Construction	$0	$372,891	$246,604	$619,495
Manufacturing	$9,243,482	$2,071,128	$512,046	$11,826,658
Trans & Utilities	$0	$2,407,457	$1,211,183	$3,618,640
Wholesale Trade	$0	$2,617,590	$1,608,160	$4,225,750
Retail Trade	$80,253,437	$333,159	$5,533,488	$86,120,090
FIRE	$0	$5,331,434	$6,691,810	$12,023,242
Services	$19,360,177	$13,276,771	$6,182,697	$38,819,643
Government	$0	$984,047	$711,413	$1,695,460
Total	$108,857,095	$27,525,404	$22,820,577	$159,203,078
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	6	4	11
Construction	0	14	10	24
Manufacturing	212	45	10	266
Trans & Utilities	0	34	19	54
Wholesale Trade	0	27	16	43
Retail Trade	3,007	19	242	3,268
FIRE	0	74	61	134
Services	1,064	477	256	1,797
Government	0	18	25	42
Total	4,282	714	642	5,639

2004 Economic Impact of Visual Arts (Not Including Tourism)

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$69,377	$254,823	$324,200
Construction	$0	$539,621	$272,480	$812,101
Manufacturing	$0	$2,079,238	$1,630,302	$3,709,541
Trans & Utilities	$0	$7,367,847	$1,997,951	$9,365,798
Wholesale Trade	$0	$1,306,573	$2,371,883	$3,678,456
Retail Trade	$0	$456,695	$4,621,916	$5,078,611
FIRE	$0	$4,056,365	$5,422,235	$9,478,600
Services	$120,907,048	$33,621,507	$13,109,479	$167,638,033
Government	$0	$624,821	$885,036	$1,509,857
Total	$120,907,048	$50,122,044	$30,566,105	$201,595,212
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$30,137	$110,694	$140,830
Construction	$0	$234,408	$118,364	$352,772
Manufacturing	$0	$903,209	$708,194	$1,611,403
Trans & Utilities	$0	$3,200,549	$867,898	$4,068,448
Wholesale Trade	$0	$567,568	$1,030,332	$1,597,900
Retail Trade	$0	$198,386	$2,007,733	$2,206,119
FIRE	$0	$1,762,061	$2,355,387	$4,117,448
Services	$52,521,308	$14,604,984	$5,694,680	$72,820,972
Government	$0	$271,418	$384,455	$655,873
Total	$52,521,308	$21,772,720	$13,277,736	$87,571,770
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	1	5	6
Construction	0	10	5	16
Manufacturing	0	40	31	71
Trans & Utilities	0	142	38	180
Wholesale Trade	0	25	46	71
Retail Trade	0	9	89	98
FIRE	0	78	104	182
Services	2,323	646	252	3,221
Government	0	12	17	29
Total	2,323	963	587	3,874

2004 Economic Impact of Music-Related Tourism

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$667,602	$463,056	$1,130,662
Construction	$0	$2,021,750	$1,274,576	$3,296,328
Manufacturing	$0	$5,797,284	$3,433,302	$9,230,579
Trans & Utilities	$53,076,052	$12,107,060	$5,322,266	$70,505,374
Wholesale Trade	$0	$6,766,733	$5,939,882	$12,706,615
Retail Trade	$231,081,686	$1,751,826	$17,866,785	$250,700,298
FIRE	$0	$15,613,485	$23,272,162	$38,885,650
Services	$124,567,722	$35,671,920	$24,661,236	$184,900,886
Government	$0	$5,083,439	$3,802,339	$8,885,780
Total	$408,725,461	$85,481,099	$86,035,604	$580,242,172
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$201,791	$141,882	$343,676
Construction	$0	$549,048	$284,751	$833,798
Manufacturing	$0	$1,118,444	$589,216	$1,707,671
Trans & Utilities	$17,191,746	$3,238,925	$1,396,104	$21,826,776
Wholesale Trade	$0	$2,110,076	$1,852,238	$3,962,312
Retail Trade	$76,095,485	$497,796	$6,375,149	$82,968,435
FIRE	$0	$5,219,035	$7,729,161	$12,948,196
Services	$37,724,150	$10,837,021	$7,127,860	$55,689,033
Government	$0	$1,101,346	$819,018	$1,920,365
Total	$131,011,381	$24,873,481	$26,315,379	$182,200,261
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	13	9	22
Construction	0	33	17	50
Manufacturing	0	39	17	59
Trans & Utilities	489	76	35	600
Wholesale Trade	0	35	30	65
Retail Trade	6,995	48	450	7,493
FIRE	0	139	113	252
Services	3,192	637	476	4,308
Government	0	24	46	72
Total	10,677	1,044	1,198	12,921

2004 Economic Impact of Other Cultural-Related Tourism

Economic Activity	Direct	Indirect	Induced	Total
Agriculture/Mining	$0	$520,465	$361,000	$881,468
Construction	$0	$1,576,162	$993,663	$2,569,827
Manufacturing	$0	$4,519,580	$2,676,612	$7,196,187
Trans & Utilities	$41,378,250	$9,438,700	$4,149,254	$54,966,202
Wholesale Trade	$0	$5,275,366	$4,630,750	$9,906,115
Retail Trade	$180,151,979	$1,365,729	$13,929,000	$195,446,707
FIRE	$0	$12,172,320	$18,143,048	$30,315,370
Services	$97,113,371	$27,809,936	$19,225,974	$144,149,288
Government	$0	$3,963,064	$2,964,315	$6,927,381
Total	$318,643,600	$66,641,322	$67,073,616	$452,358,544
Labor Compensation	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	$0	$157,317	$110,612	$267,931
Construction	$0	$428,039	$221,992	$650,032
Manufacturing	$0	$871,942	$459,355	$1,331,305
Trans & Utilities	$13,402,737	$2,525,076	$1,088,407	$17,016,220
Wholesale Trade	$0	$1,645,021	$1,444,010	$3,089,031
Retail Trade	$59,324,269	$388,083	$4,970,085	$64,682,442
FIRE	$0	$4,068,775	$6,025,677	$10,094,452
Services	$29,409,861	$8,448,574	$5,556,901	$43,415,338
Government	$0	$858,612	$638,509	$1,497,122
Total	$102,136,867	$19,391,441	$20,515,549	$142,043,872
Employment	**Direct**	**Indirect**	**Induced**	**Total**
Agriculture/Mining	0	10	7	17
Construction	0	25	14	39
Manufacturing	0	31	14	46
Trans & Utilities	381	59	27	468
Wholesale Trade	0	27	24	51
Retail Trade	5,454	37	351	5,842
FIRE	0	108	88	197
Services	2,489	497	371	3,358
Government	0	19	36	56
Total	8,324	814	934	10,073