



Creative North Carolina Measures

National research documents how much North Carolina’s rich cultural heritage contributes — to both our quality of life and economic stability. When communities have a strong arts presence, people want to live in, work in and visit those places. The number of jobs in the creative workforce and their contribution to the economy provide benchmarks for communities seeking to build on their unique assets.

The North Carolina Arts Council is charged by statute with *“promoting the maximum opportunity for people to experience and enjoy the arts, providing assistance to local organizations and the community.”* Organizations and artists supported by the North Carolina Arts Council create vibrant communities. Our research demonstrates the “creative class” theory that people are drawn to these *SmART* communities:

- Counties with higher proportions of workers in creative occupations are more likely to retain current residents and attract new ones.
- The presence of creative workers is strongly associated with rising household incomes.
- Visitors spend more in counties with higher numbers of creative professionals.
- Rich cultural traditions in craft and music are sustainable place-based economic development opportunities that cannot be outsourced.
- Creative design provides a competitive edge to manufacturing.
- Cultural programs draw new talent and keep skilled workers.
- Jobs in creative industries and creative occupations have remained stable despite recessions.

Creative North Carolina includes:

- Nonprofit arts, humanities and cultural organizations
- Audiences and cultural travelers
- Businesses producing innovative goods
- Artists, creative workers and entrepreneurs



Creative workers are drawn to communities that support the arts. Both nonprofit and for profit businesses thrive because they are needed to bring original creative content into the economy. Spending by creative industry businesses and consumers pumps revenue into local restaurants, hotels, retail stores and transportation. Galleries, bookstores, performing arts events, museums, historic sites, photography stores and music stores are examples of creative industries that bring unique North Carolina experiences to residents and visitors.

The North Carolina Arts Council partners with national research organizations to measure the strength of our creative economy.

Measuring the Creative Economy

Creative Workers & Creative Industries



Data from EMSI, Economic Modeling Specialists Intl. through the WESTAF, Western States Arts Federation for the North Carolina Arts Council

Quick Facts About North Carolina's Creative Economy

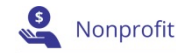
336,000+ Jobs

 73 Industry Sectors	 \$119 Million in government tax revenue	 \$23 per person spent by arts audiences
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Arts and Economic Prosperity is a national nonprofit organization and audience study conducted by Americans for the Arts (AFTA) every five years. Data collection for the next study will begin in 2016 and be available in 2017. Data obtained from surveys is analyzed to calculate the national, statewide, regional and local economic impact of the nonprofit cultural sector.

In 2010 the study found that:

- Nonprofit arts and culture are a \$1.24 billion industry.
- Nonprofit arts and culture support 43,605 full-time equivalent jobs.
- Nonprofit arts and culture generate \$119 million in local and state government revenue.
- Nonprofit arts and culture organizations spend \$659.3 million annually.
- Nonprofit arts and culture audiences spend \$582.6 million annually.



Direct Economic Activity	Arts and Culture Organizations	+	Arts and Culture Audiences	=	Total Industry Expenditures
Total Industry Expenditures	\$659,296,614		\$582,577,874		\$1,241,874,488

Total Economic Impact of Expenditures (Direct & Indirect Impacts Combined)	Economic Impact of Organizations	+	Economic Impact of Audiences	=	Total Economic Impact
Full-Time Equivalent (FTE) Jobs Supported	25,824		17,781		43,605
Household Income Paid to Residents	\$561,257,000		\$385,450,000		\$946,707,000
Revenue Generated to <u>Local</u> Government	\$20,730,000		\$35,902,000		\$56,632,000
Revenue Generated to <u>State</u> Government	\$28,891,000		\$33,482,000		\$62,373,000

Attendance to Arts and Culture Events	Resident* Attendees	+	Non-Resident* Attendees	=	All Cultural Audiences
Total Attendance to Arts and Culture Events	23,215,362		2,550,856		25,766,218
Percentage of Total Attendance	90.1%		9.9%		100%
Average Event-Related Spending Per Person	\$18.91		\$63.79		\$23.37
Total Event-Related Expenditures	\$302,764,334		\$279,813,540		\$582,577,874

Category of Event-Related Expenditure	NC Resident Attendees	Non-Resident Attendees	All Cultural Audiences
Meals and Refreshments	\$9.91	\$20.77	\$10.99
Souvenirs and Gifts	\$2.54	\$7.84	\$3.07
Ground Transportation	\$2.21	\$8.71	\$2.86
Overnight Lodging (one night only)	\$2.17	\$21.00	\$4.04
Other/Miscellaneous	\$2.08	\$5.47	\$2.41
Average Event-Related Spending Per Person	\$18.91	\$63.79	\$23.37

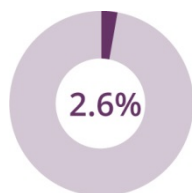
The **Creative Vitality Suite** provides annual national, statewide, regional and local creative economy comparisons from national data obtained through the Western States Arts Federation (WESTAF) from Economic Modeling Specialists International (EMSI). Creative industries, creative occupations and consumer spending are measured using national datasets. The most recent available data is 2013.

Creative Occupations

Creative occupations included utilize creative thinking, originality and fine arts knowledge. National data provides counts of the actual number of North Carolina workers who have jobs in creative occupations in *any type of industry*.

The number of direct jobs in creative occupations increased by 13.6 percent from 2006-2013, from 126,494 to 143,730 total creative jobs, 2.6 percent of the state's workforce.

5,466,216
Total North
Carolina Workforce



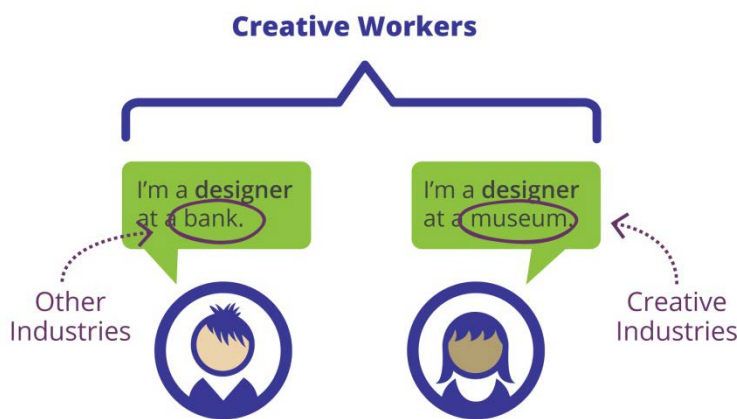
143,730
Creative workers
in all industries



There are a wide range of creative occupations that are included when measuring North Carolina's (NC) creative workers.

A few of the occupations:

22,205	Photographers
12,771	Musicians and Singers
11,228	Graphic Designers
10,741	Writers and Authors
6,068	Public Relations Specialists
4,650	Librarians
4,602	Editors
4,318	Multimedia Artists & Animators
4,183	Architects <i>except landscape & naval</i>
3,935	Art Directors



Creative Industries

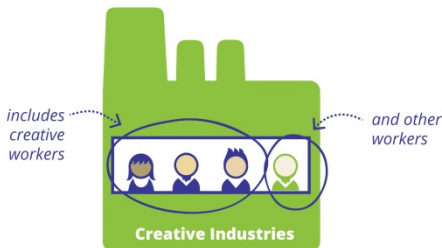
Industries included create, produce, distribute, supply or support original creative artistic or cultural intellectual property. National data provides counts of the actual number of North Carolina workers who have *any type of job* in a creative industry. The 2013 data documents that:

- Creative Industries are directly and indirectly responsible for more than 336,000 full time, part time and sole proprietor jobs, over 6 percent of North Carolina’s overall workforce.
- These creative industry jobs generate over \$14 billion in wages, salaries and benefits.
- Creative Industries in North Carolina generate \$22.7 billion in revenues and \$9 billion in exports.

Workers



North Carolina has 174,787 total workers within the creative industries, which is more than 3% of the state’s workforce.



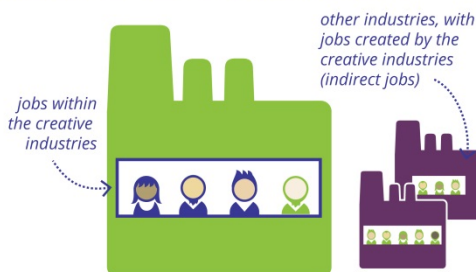
There are different types of creative industries.

Publishing & Printing	<i>newspapers, books, software, lithographers</i>	35,477
Entertainment & Information	<i>film, television, radio, advertising</i>	34,568
Artists*	<i>theaters, dance, music, writers</i>	33,342
Design Services	<i>architects, designers, photographers</i>	27,885
Retail	<i>jewelers, book stores, art dealers, florists</i>	20,656
Community Services	<i>libraries, museums, fine arts schools, arts councils</i>	12,437
Design Manufacturing	<i>pottery, jewelry, musical instruments, woodwork</i>	10,422

Industry



North Carolina’s creative industries create jobs in other industries, referred to as indirect jobs. Indirect jobs and jobs within the creative industries are responsible for 336,284 jobs. This figure represents over 6% of the state’s workforce.



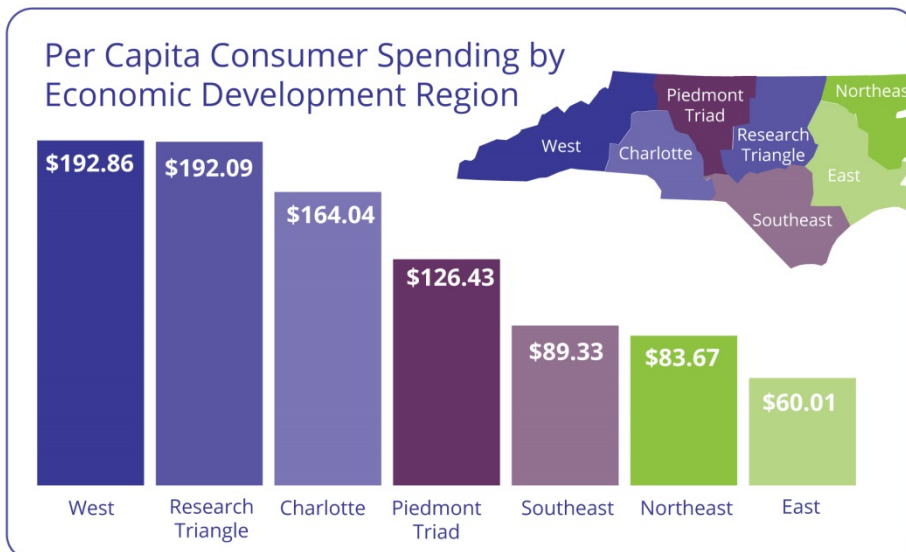
Consumer Spending

A strong arts presence generates spending which in turn pumps revenue into the local economy.

A strong arts infrastructure in all 100 counties keeps North Carolina competitive. Artists, local arts councils and nonprofit arts groups attract and retain the creative workforce. Creative people want to live and work in the vibrant communities strengthened by local arts programs.



A select group of consumer oriented industries* generates average sales of more than \$144 per person. More than half of this spending is at art galleries and purchases from individual artists.



** The selected industries include sales in photography, music, book and record stores as well as art gallery and individual artist sales and performing arts participation.*

Creative Economy Codes Used

Occupations

SOC Code	Description [15 supplemental occupations unique to NC highlighted]
13-1011	Agents and Business Managers of Artists, Performers, and Athletes
17-1011	Architects, Except Landscape and Naval
17-1012	Landscape Architects
19-3091	Anthropologists and archeologists
19-3093	Historians
21-2021	Directors, Religious Activities
25-4011	Archivists
25-4012	Curators
25-4013	Museum Technicians and Conservators
25-4021	Librarians
25-4031	Library technicians
27-1011	Art Directors
27-1012	Craft artists
27-1013	Fine Artists including Painters, Sculptors, and Illustrators
27-1014	Multi-Media Artists and Animators
27-1019	Artists and related workers, all other
27-1021	Commercial and Industrial Designers
27-1022	Fashion Designers
27-1023	Floral Designers
27-1024	Graphic Designers
27-1025	Interior Designers
27-1026	Merchandise displayers and window trimmers
27-1027	Set and Exhibit Designers
27-1029	Designers, all other
27-2011	Actors

27-2012	Producers and Directors
27-2031	Dancers
27-2032	Choreographers
27-2041	Music Directors and Composers
27-2042	Musicians and Singers
27-3011	Radio and Television Announcers
27-3031	Public Relations Specialists
27-3041	Editors
27-3042	Technical Writers
27-3043	Writers and Authors
27-3099	Media and Communication Workers, All Other
27-4011	Audio and Video Equipment Technicians
27-4012	Broadcast Technicians
27-4014	Sound Engineering Technicians
27-4021	Photographers
27-4031	Camera Operators, Television, Video, and Motion Picture
27-4032	Film and Video Editors
27-4099	Media and Communication Equipment Workers, All Other
39-3031	Ushers, lobby attendants, and ticket takers
39-3092	Costume attendants
39-3099	Entertainment attendants and related workers, all other
40-848	Advertising and Promotions Managers
43-4121	Library assistants, clerical
48-153	Public Relations Managers
49-9063	Musical Instrument Repairers and Tuners
51-9071	Jewelers and precious stone and metal workers

Industry

NAICS	Sector Description
312120	Breweries
312130	Wineries
323111	Commercial Printing
323113	Commercial Screen Printing
323117	Books Printing
323120	Support Activities for Printing
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
327110	Pottery, Ceramics, and Plumbing Fixture Manufacturing
327212	Other Pressed and Blown Glass and Glassware Manufacturing
332323	Ornamental and Architectural Metal Work Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
339910	Jewelry (except Costume) Manufacturing
339992	Musical Instrument Manufacturing
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
448310	Jewelry Stores
451130	Sewing, Needlework, and Piece Goods Stores
451140	Musical Instrument and Supplies Stores
451211	Book Stores
453110	Florists
453920	Art Dealers
511110	Newspaper Publishers
511120	Periodical Publishers
511130	Book Publishers
511191	Greeting Card Publishers
511199	All Other Publishers
511210	Software Publishers
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
519110	News Syndicates
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
541810	Advertising Agencies
541850	Display Advertising
541860	Direct Mail Advertising
541890	Other Services Related to Advertising
541921	Photography Studios, Portrait
541922	Commercial Photography
611610	Fine Arts Schools (Private)
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711190	Other Performing Arts Companies
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
711510	Independent Artists, Writers, and Performers
712110	Museums
712120	Historical Sites
811420	Reupholstery and Furniture Repair
812921	Photofinishing Laboratories (except One-Hour)
812922	One-Hour Photofinishing
813211	Grantmaking Foundations
813219	Other Grantmaking and Giving Services