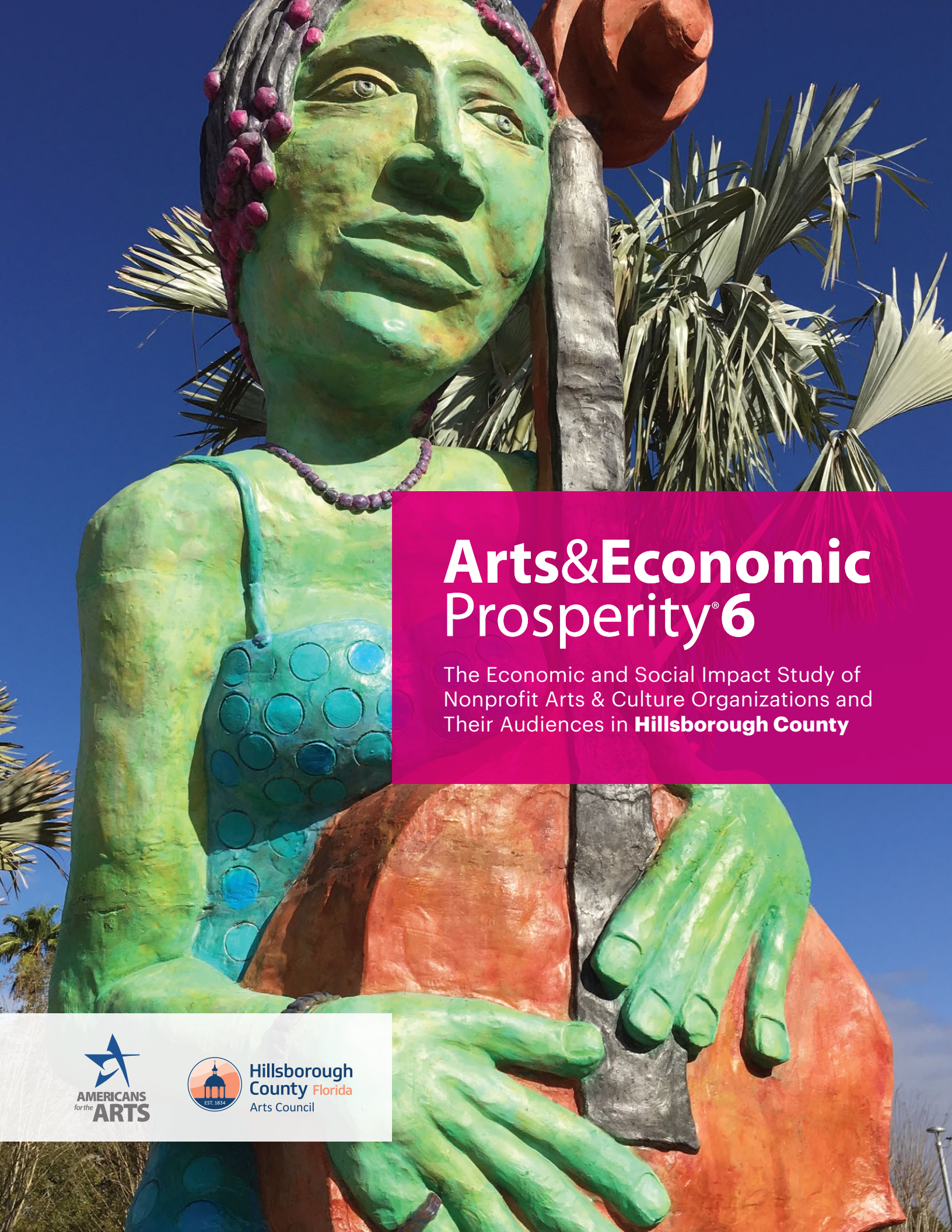




Arts&Economic Prosperity® 6

The Economic and Social Impact Study of
Nonprofit Arts & Culture Organizations and
Their Audiences in **Hillsborough County**



**Hillsborough
County Florida**
Arts Council

"I'm so grateful for the precious work and impact that the AEP report details for our region! Those of us that call Tampa home understand the significance of art and culture. Our economic engine — anchored by a strong arts scene — pays dividends for its' residents.

The arts here bring us together, despite an unprecedented time of division, to let us know what it is to truly be alive! Our common bonds from love of music, dance, great foods and festivals are on full display showing the nation that we are a city full of diversity; a city where all can thrive and embrace their heritage!"

— **Theron Butler**
Past Arts Council Board Chair

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Vice President of Research
Americans for the Arts

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THANK YOU

to Our Residents, Arts Community, and Americans for the Arts!

With the support of our residents who participated in audience surveys and our local nonprofit arts and culture organizations, we are proud to unveil the results of the **Arts & Economic Prosperity 6** study.

The economic impact of arts and culture in Hillsborough County remains highly valuable, in spite of the devastating effects of the Covid-19 pandemic in our area. We all watched as the arts spaces in our community were among the very first to close and the last to reopen, but despite this our arts spaces continue to provide high levels of economic impact by providing jobs, business-to-business spending, and through audience spending.

The Arts Council of Hillsborough County supports, promotes, and advances arts and culture in Hillsborough County. As the designated local arts agency by the State of Florida, the Council provides a unified voice for all cultural organizations and activities in the Tampa and Hillsborough County region. We partnered with Americans for the Arts to bring this study to Hillsborough County and thoroughly evaluate the economic impact of our nonprofit arts and culture industry.

Additionally, thanks to the Tampa Arts Alliance, who purchased a report specific to the City of Tampa which can be viewed on their website or by reaching out to them directly. The report also incorporates the research and data from this overall study.

We want to thank everyone for their support and involvement in evaluating the local arts economy. One thing is very clear: the arts mean business in Tampa and Hillsborough County.



TOP AEP6 TAKEAWAYS

in Hillsborough County

1 **Arts & Economic Prosperity 6 (AEP6) is an economic and social impact study of the nonprofit arts and culture industry**

In Hillsborough County, the sector generated \$387.5 million in economic activity during 2022—\$153.1 million in spending by arts and culture organizations and an additional \$234.4 million in event-related expenditures by their audiences. That economic activity supported 6,764 jobs, provided \$260.1 million in personal income to residents, and generated \$76.1 million in tax revenue to local, state, and federal governments.

2 **Nonprofit arts and culture organizations are businesses**

They employ people locally, purchase supplies and services from nearby businesses, and engage in the marketing and promotion of their cities and regions. Their very act of doing business—creating, presenting, exhibiting, engaging—has a positive economic impact and improves community well-being. In Hillsborough County, nonprofit arts and culture organizations spent an estimated \$153.1 million which supported 2,365 jobs and generated \$38.4 million in local, state, and federal government revenue.

3 **Arts and culture drives commerce to local businesses**

When people attend a cultural event, they often make an outing of it—dining at a restaurant, paying for parking or public transportation, enjoying dessert after the show, and returning home to pay for child or pet care. Overall, in Hillsborough County, attendees spend \$53.68 per person per event, beyond the cost of admission. These dollars represent vital income for local merchants and a value-add with which few industries can compete.

4 **Arts and culture strengthens the visitor economy**

In Hillsborough County, 28.6% of attendees are nonlocal visitors who traveled from outside Hillsborough County; they spend an average of \$75.04. Additionally, 75.4% of nonlocal attendees reported that the primary purpose of their visit was specifically to attend the performance, event, exhibit, venue, or facility where they were surveyed.

5 **A vibrant arts and culture community keeps local residents—and their discretionary dollars—in the community**

When attendees were asked what they would have done if the event where they were surveyed had not been available, 52.7% of attendees who live in Hillsborough County said they would have “traveled to a different community to attend a similar arts or cultural activity.”

6 **Arts and culture organizations contribute to community pride in Hillsborough County.**

90.2%

of arts and culture attendees agree that the activity or venue where they were surveyed “is inspiring a sense of pride in this neighborhood or community.”

88.8%

agree that “I would feel a great sense of loss if this activity or venue were no longer available.”

84.5%

agree that the venue or facility where they were surveyed is “an important pillar for me within my community.”

ARTS AND CULTURE BUILDS

BY Randy Cohen, Vice President of Research,
Americans For The Arts

Every day, more than 100,000 nonprofit arts and culture organizations in the U.S. are making their communities better places to live and work by beautifying cities, fueling creativity, celebrating diversity, and bringing joy to residents.

Like all nonprofits, these organizations have a public purpose: to make their cultural product broadly accessible so everyone can share in these benefits. And, like all nonprofits, they count on financial support from government and the private sector to deliver on that promise. We are in a time, however, when many leaders feel challenged to fund the arts. Shrinking budgets, mandates to prioritize jobs and economic growth, and pressing community development issues make for difficult decision making. To those leaders, Arts & Economic Prosperity 6 brings a welcome message: when you invest in the arts and culture, you are investing in an industry that strengthens your economy and builds more livable communities.

Arts & Economic Prosperity 6 (AEP6) is an economic and social impact study of the nation's nonprofit arts and culture industry. By every measure, the results are impressive. Nationally, the sector generated \$151.7 billion

of economic activity in 2022—\$73.3 billion in spending by arts and culture organizations and an additional \$78.4 billion in event-related expenditures by their audiences. What was the impact of this economic activity? It supported 2.6 million jobs, provided \$101 billion in personal income to residents, and generated \$29.1 billion in tax revenue to local, state, and federal governments.

Investment in the nonprofit arts and culture industry builds the communities where people want to live and work. It is where entrepreneurs and creative economy businesses are launched and where nighttime economies flourish. When we prioritize diverse cultural expressions and traditions, it nurtures social connections, promotes community pride and identity, and boosts tourism by providing the authentic experiences that draw visitors to the community. If visitors have a positive experience, it may become a place to work—and ultimately one in which to live. Creating livable communities is economic development.

“Investing in arts and cultural resources is not only about fostering creativity and enriching a community’s cultural fabric but also about making sound economic decisions. These investments create jobs, boost local commerce, and ensure the long-term stability and growth of neighborhoods, all of which contribute to the overall well-being of local and state economies.”

— **Zora Carrier**
Tampa Bay Businesses for Culture and the Arts

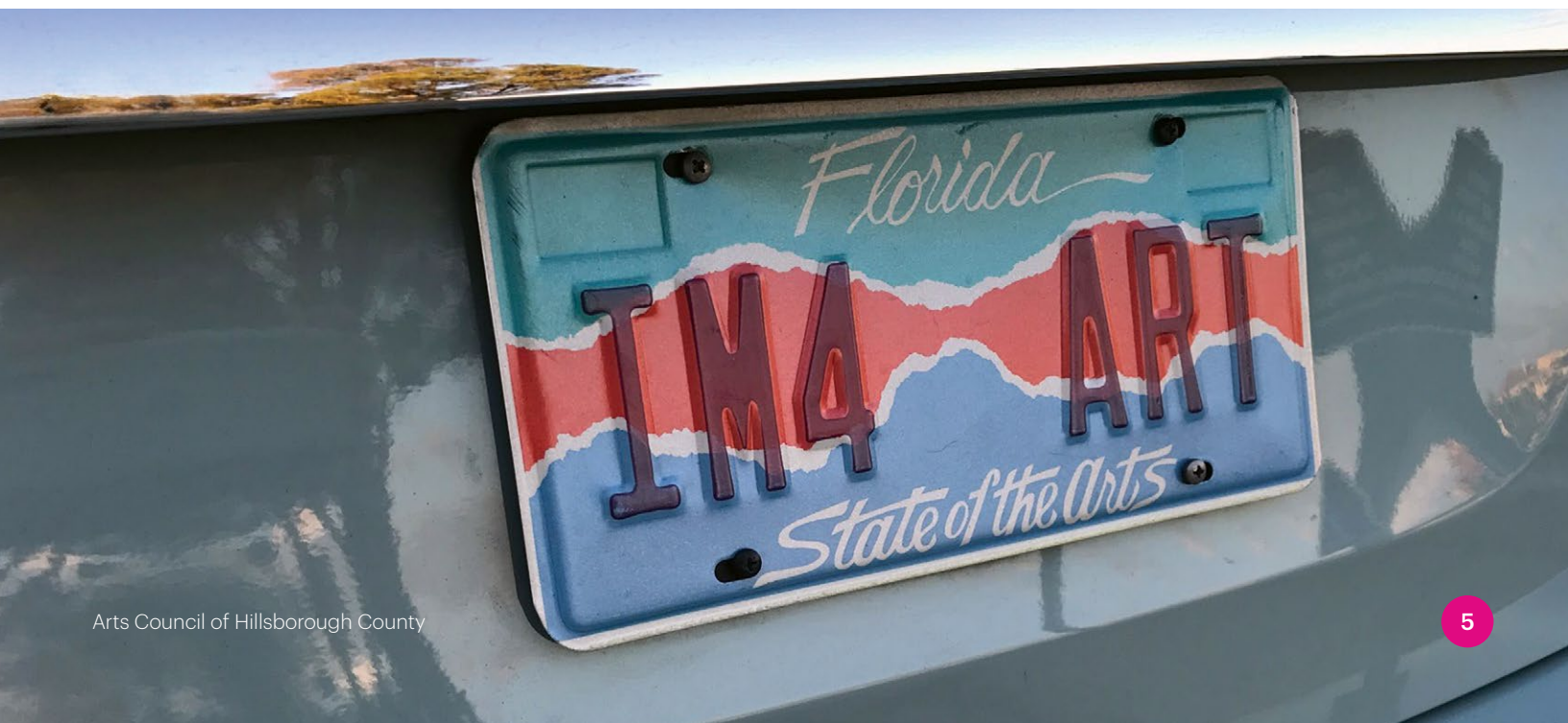
The AEP6 study expands beyond the economic and financial data of its five previous versions to include social impact measurements of arts and culture's effect on the well-being of communities and residents. For example, nationally, 89% of attendees to arts and culture events agreed that "the event they are attending inspires a sense of pride in the neighborhood or community," and 86% responded that they "would feel a great sense of loss if this activity or venue were no longer available." Taken together, economic and social impact provide better insight into how arts and culture strengthen communities.

30 YEARS OF ECONOMIC IMPACT STUDIES

AEP6 represents a total reset, establishing a new benchmark in the AEP study series.

- **We changed our approach.** We expanded the study inclusion criteria from "arts" to "arts and culture," implemented a new data collection methodology, asked our partners to utilize new community engagement tools, added social impact questions to the survey instruments, and moved our economic impact modeling to the IMPLAN platform.
- **The world around us changed.** The COVID-19 pandemic occurred, a recession followed, audiences decreased, attendance habits changed, the arts and hospitality industries suffered profound job losses, and billions of dollars were distributed to the arts and culture sector from federal pandemic relief funding such as the CARES Act.

What has not changed is the community-based focus of our work. When Americans for the Arts published its first economic impact study in 1994, we partnered with local arts agencies representing 33 communities. AEP6 has grown tenfold since then. It provides detailed findings on 373 regions from across all 50 states and Puerto Rico—ranging in population from 4,000 to 4 million—and representing rural, suburban, and large urban communities. Local and statewide research partners collected surveys from 16,399 nonprofit arts and culture organizations and 224,677 of their attendees and customized economic input-output models were built for every region to ensure reliable data and actionable results.



SPENDING BY ARTS AND CULTURE AUDIENCES

What continues to set AEP6 apart from other national studies is its analysis of the event-related spending by arts and culture audiences. When people attend a cultural event, they often make an outing of it—dining at a restaurant, paying for parking or public transportation, enjoying dessert after the show, and returning home to pay for child or pet care. AEP6 shows that the typical attendee spends \$38.46 per person per event, in addition to the cost of event admission. A ZIP code analysis of each of the 224,677 survey respondents shows that a third of attendees (30.1%) traveled from outside the county in which the event took place. Their event-related spending was more than twice that of their local counterparts (\$60.57 vs. \$29.77).

What brought those visitors to town? For 77% of respondents, the primary purpose of their visit was to attend that cultural event. When we asked their local counterparts what they would have done if the event where they were surveyed had not been available, 51% said they would have “traveled to a different community to attend a similar arts or cultural activity”—and 64% of nonlocal visitors would have traveled to another community as well. Vibrant arts communities attract visitors who spend money and help local businesses thrive. They also keep resident spending money local—a value-add that few industries can compete with.

ADDING VALUE THROUGH EQUITY AND INCLUSION

Past AEP studies have focused primarily on the nonprofit arts and culture industry’s financial, economic, and tourism contributions. This resulted in more effort being placed on collecting data from large-budget organizations with existing relationships to the funding community, and less on smaller organizations. With the goal of making AEP6 more inclusive and reducing systemic bias, Americans for the Arts transformed its approach. We hired a director of AEP6 community engagement and equity, added an equity consultant to the research team, established an AEP6 Equity Task Force composed of leaders from all segments of the industry, and completed a full review and restructuring of the methodology. We ensured publishing accessibility guidelines were met and provided inclusive language offerings (for example, we made the audience survey available in 25 languages). We also created a series of community engagement tools to

help our research partners identify, approach, and establish new or strengthen existing relationships with organizations representing BIPOC — (Black, Indigenous, People of Color) and ALAANA — (African, Latine, Asian, Arab, Native American) identifying communities.

AEP6 included an expectation—for the first time—that our research partners would collect a portion of audience surveys at events that were presented, produced, or hosted by BIPOC and ALAANA organizations. We found that spending by attendees at BIPOC and ALAANA organizations was nearly identical to the overall national average (\$38.29 and \$38.46 per person, respectively). Similar findings were noted in the social impact questions. For example, 81.2% of attendees at BIPOC and ALAANA organizations agreed, “This venue or facility is an important pillar for me within my community.” The figure for all attendees was 81.4%.



With the research showing proportional economic and community impacts, these findings should initiate new, or escalate existing, funding conversations about BIPOC and ALAANA organizations receiving fair and proportional financial support.

A 2019 report by Americans for the Arts, for example, found that among local arts agency grant making organizations, the largest 16% of grant recipients (by budget) received 73% of the dollars awarded. Ensuring equitable funding for arts and culture organizations is a vital step in creating an inclusive, balanced, and vibrant cultural landscape.

BUILDING MORE LIVABLE COMMUNITIES

The arts were among the economic sectors most devastated by the COVID-19 pandemic and remain among the slowest to recover. Yet, they still helped us heal socially and recover economically. The arts infused our lives with joy when it was hard to find, staved off isolation and loneliness when it was most persistent, and increased life satisfaction when it lagged the most. The arts were also kindling for the economy, getting people out of their homes and spending money in the community. **AEP6 makes clear that when we fund the arts, we are investing in an industry that stimulates the economy, supports local jobs, and contributes to building healthy and vibrant communities.**

“The AEP6 report findings confirm again the economic value of arts and culture. Arts and culture continue to put millions of people to work in big cities and small towns across the United States, including many members of DPE’s affiliate unions.

The AEP6 report also finds that arts and cultural productions are economic drivers for local economies by spurring consumer spending at restaurants, hotels, and other local businesses. Simply put, investment in arts and culture continues to deliver a positive economic return for American communities.”

— **Jennifer Dorning**

President, Department for Professional Employees
AFL CIO

THE ECONOMIC & SOCIAL IMPACT OF THE NONPROFIT ARTS AND CULTURE INDUSTRY

in Hillsborough County

From coast to coast—and in Hillsborough County—America’s nonprofit arts and culture organizations are providing inspiration and joy to residents, beautifying public spaces, and strengthening community pride and identity. Arts and culture organizations are also businesses.

They employ people locally, purchase goods and services from nearby businesses, and produce the authentic cultural experiences that are magnets for visitors, tourists, and new residents. Event-related spending by their audiences generates valuable revenue for local merchants—dining in a nearby restaurant, paying to park or for a rideshare, shopping at local retail stores, and enjoying dessert after a show—a value-add few industries can compete with. These actions, in turn, support jobs, generate household income, and generate tax revenues to the government that more than offset the public’s arts and culture sector investment. The economic activity by arts and culture organizations and their audiences is both measurable and a story that must be told.

Arts and Economic Prosperity 6 (AEP6) provides compelling evidence that the nonprofit arts and culture sector is a significant industry in Hillsborough County—one that generated \$387.5 million in total economic activity during 2022. This spending—\$153.1 million by nonprofit arts and culture organizations and an additional \$234.4 million in event-related spending by their audiences—supports 6,764 jobs, generates \$260.1 million in household income for local residents, and delivers \$76.1 million in tax revenues to local, state, and federal governments. This study sends a strong signal that, even in the aftermath of the COVID-19 pandemic and the resulting recession, the nonprofit arts and culture is a formidable industry. AEP6 demonstrates that when we support the arts, we are investing in Hillsborough County’s economic and community well-being.

AEP6 is the largest and most inclusive study of its kind. It documents the economic and social contributions of arts and culture in 373 diverse communities and regions representing all 50 states and Puerto Rico. The study areas range in population from 4,000 to 4 million and represent rural, suburban, and urban communities (130 cities and 126 counties, 78 multi-city or multi-county regions, 18 individual arts districts, and 21 entire states/territories). To measure industry spending, local and statewide research partners representing the 373 study regions collected expenditure and attendance data from 16,399 arts and culture organizations and the event-related spending information from 224,667 of their attendees. Using the IMPLAN economic modeling platform, input-output analysis models were customized for each study region to provide specific and reliable economic impact data for each.

This unique report has been prepared for Hillsborough County in collaboration with our community research partner, the Arts Council of Hillsborough County.

ECONOMIC IMPACT OF ARTS AND CULTURE

During fiscal year 2022, spending by both Hillsborough County's nonprofit arts and culture organizations and their audiences totaled \$387.5 million.

The table below demonstrates the total economic impact of this economic activity.

TABLE 1

Total Economic Impacts of the Entire Nonprofit Arts and Culture Industry in Hillsborough County During Fiscal Year 2022

	Organizations	Audiences	Industry Totals
Direct Expenditures	\$153,072,316	\$234,390,974	\$387,463,290
Jobs Supported	2,365	4,399	6,764
Household Income Paid	\$143,023,091	\$117,119,459	\$260,142,550
Local Government Revenue	\$4,405,523	\$6,837,080	\$11,242,603
State Government Revenue	\$4,609,927	\$7,142,349	\$11,752,276
Federal Tax Revenue	\$29,374,668	\$23,714,273	\$53,088,941
Total Tax Revenue	\$38,390,118	\$37,693,702	\$76,083,820

DEFINING ECONOMIC IMPACT

To complete this national study, researchers—together with local and statewide research partners—collected expenditure and attendance data from a total of 16,399 arts and culture organizations and 224,677 of their attendees to measure total industry spending. Using the IMPLAN economic modeling platform, input-output analysis models were customized for each study region, including Hillsborough County. These quantitative models measure the economic relationships between hundreds of different industries in each geographic area. This, in turn, enables localizable economic impact results to be derived. Why this level of rigor? Quite simply, \$50 spent in two different cities, even if in the same state, may have two very different sets of economic impact outcomes. It takes more than one million calculations to derive the economic impact data for each community. IMPLAN's method of economic analysis ensures reliable and actionable localized results.

- 1 Jobs** is a figure of total people employed (full-time, part-time, and seasonal employment).
- 2 Resident Household Income** includes salaries, wages, and entrepreneurial income paid to residents. It is the money individuals earn personally and then use to pay for food, mortgages, and other living expenses.
- 3 Revenue to Local, State, and Federal Governments** includes revenue from taxes (e.g., income, sales, property) as well as funds from licenses, fees, and other similar sources.

HOW CAN A DOLLAR BE RESPENT?

AEP6 measures the economic impact of the arts using a methodology that enables economists to track how many times a dollar is respent within the local economy, and then to measure the economic impact generated by each round of spending (i.e., the direct, indirect, and induced economic impacts). Think of this as tracking a supply chain.

Consider this example:

A theater company purchases a five-gallon bucket of paint from its local hardware store for \$100—a very simple transaction at the outset but one that initiates a complex sequence of income and spending by both individuals and other businesses.

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

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

Some of these expenditures are local and some are outside the region. The local ones continue the local economic impact cycle. Eventually, the last of the \$100 is spent outside of the community at which point it no longer has a local economic impact. It is considered to have “leaked” out of the community.

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

Interestingly, a dollar ripples very differently through each community, which is why an input-output model was constructed specifically for Hillsborough County. The IMPLAN platform accounts for the unique economic and industrial characteristics of local economies.

THE PANDEMIC'S DEVASTATING IMPACT ON ARTS AND CULTURE

... A Recovery That Continues

AEP6 was conducted in 2022-23 as the nation continued its emergence from the COVID-19 pandemic. By every measure, the arts and culture industry was among the most devastated economic sectors.

- The U.S. Bureau of Economic Analysis provided one particularly [sobering report](#) of the pandemic's impact on the arts in 2022: "In year one of the COVID-19 pandemic, few areas of the U.S. economy were harder hit than the performing arts: Performing arts presenters and companies joined oil drilling/exploration and air transportation as the steepest-declining areas of the U.S. economy in 2020. After adjusting for inflation, the value added by performing arts presenters (including festivals) fell by nearly 73% between 2019 and 2020."
- Many communities implemented restrictions on public gatherings and travel, which limited attendance and even the ability of performers to work together on the stage. 99% of producing and presenting organizations canceled events during the pandemic with many shuttering for entire seasons—a loss of an estimated 557 million ticketed admissions ([Americans for the Arts, 2022](#)).
- Johns Hopkins University reported in 2021 that the percentage of job losses at nonprofit arts organizations was nearly 5 times worse than the average of all nonprofits (-34.7% vs. -7.4%).
- In 2020, 63% of artists experienced unemployment and 95% lost creative income. 37% were unable to access or afford food at some point during the pandemic and 58% did not visit a medical professional due to an inability to pay. ([Americans for the Arts, 2022](#))
- The pandemic's impact was not felt equally. Organizations serving and representing BIPOC communities were more likely to report that they lacked the financial resources needed to return to in-person programming than non-BIPOC organizations (55% vs. 38%). BIPOC artists had higher rates of unemployment than white artists in 2020 (69% vs. 60%) and lost a larger percentage of their creative income (61% vs 56%). ([Americans for the Arts, 2022](#))

- Arts and culture organizations showed resilience by moving to virtual and online experiences, outdoor performances, drive-in events, and other innovative ways to maintain audience and subscriber engagement.
- Audiences are returning slowly in many communities with informal estimates of a $\frac{2}{3}$ to $\frac{3}{4}$ return rate as of 2023.
- 40% of responding AEP6 organizations reported that, during the height of the pandemic, they expanded services beyond arts and culture in order to address urgent community needs such as collecting and donating supplies, donating facility space as a testing/vaccination site, or helping other organizations and individuals apply for pandemic relief and unemployment benefits.

The pandemic occurred in the time between the AEP5 and AEP6 fiscal years of analysis (2015 and 2022, respectively). While analyses of the pandemic's impact on the arts will continue for years to come, the challenges it brought had an undeniable effect on the industry. Thus, study-to-study comparisons of AEP findings are not recommended.

SOCIAL IMPACT OF THE ARTS AND CULTURE

Past AEP studies have focused primarily on the financial, economic, and tourism contributions of the nonprofit arts and culture industry. AEP6 expands beyond that to also include measures of social impact.

Surveys completed by both arts organizations and individual attendees demonstrate a deep appreciation for how the arts and culture impacts the development and well-being of communities and their residents. Nationally, high levels of appreciation are demonstrated across all socioeconomic groupings. In Hillsborough County:

- 90.2% of attendees said that the activity or venue they were attending was a source of neighborhood pride for the community. 90.4% of the participating organizations agreed based on feedback received from community members.
- 88.8% of attendees said they would feel a sense of loss if that activity or venue was no longer available. 90.4% of the participating organizations agreed.
- 90.7% of attendees said it is important that future generations also be able to have that cultural experience. 84.6% of the participating organizations agreed.

"In Tampa Bay's economic fabric, cultural contributions go beyond mere creativity. Whether through art galleries, museums or live performances, these cultural elements not only uplift our spirits but also contribute to the economic vitality of the Tampa Bay community. Visit Tampa Bay has worked hand-in-hand with many groups to encourage the arts, from a video series to mural calendars and even fashion shows, because culture is the beating heart of our community."

— **Santiago Corrada**
Visit Tampa Bay

Percentage of Nonprofit Arts and Culture ATTENDEES that Agree with Statements about the Social Impact of the Arts in Hillsborough County

84.5%

"This venue or facility is an important pillar for me within my community."

90.2%

"This activity or venue is inspiring a sense of pride in this neighborhood or community."

88.8%

"I would feel a great sense of loss if this activity or venue were no longer available."

90.7%

"My attendance is my way of ensuring that this activity or venue is preserved for future generations."

Percentage of Nonprofit Arts and Culture ORGANIZATIONS that Agree with Statements about the Social Impact of the Arts in Hillsborough County

96.2%

"Members of the community consider my organization to be an important pillar within the community."

90.4%

"Members of the community feel that my organization inspires a sense of pride in this neighborhood or community."

90.4%

"Members of the community would feel a great sense of loss if my organization were no longer available."

84.6%

"Members of the community rely on my organization to ensure that the arts and culture we celebrate is preserved for future generations."

The social impact findings from the AEP6 study are specific to the nonprofit arts and culture attendees and organizations that participated in the study. It could be argued that these respondents may already have a positive disposition about their cultural experience by virtue of their attendance at an event.

“Americans Speak Out About the Arts in 2023”—a national public opinion study of 3,062 American adults conducted by Ipsos Public Affairs for Americans for the Arts—expands the survey universe to the general public to include both those that do, and do not, participate personally. This separate study also finds a rich appreciation for both the social and economic benefits that arts and culture provide for their community.

Findings from “Americans Speak Out About the Arts in 2023” A National Public Opinion Poll of 3,062 American Adults About the Arts and Culture

70%

Arts and culture “improves the image and identity of their community”

79%

Arts and culture is “important to their community’s businesses, economy, and local jobs”

63%

Arts and culture “inspires a sense of pride in their community”

72%

Arts and culture “provides shared experiences with people of different races, ethnicities, and beliefs”

86%

Arts and culture “is important to their community’s quality of life and livability”

63%

Arts and culture “helps them better understand other cultures in their community”

NONPROFIT ARTS AND CULTURE ORGANIZATIONS

Most people appreciate nonprofit arts and culture organizations as wonderful amenities that improve community livability. They are also businesses.

They employ people locally, purchase supplies and services from nearby businesses, and engage in the marketing and promotion of their cities and regions. Their very act of doing business—creating, presenting, exhibiting, engaging—has a positive economic impact on the community.

To measure the impact of spending by nonprofit arts and culture organizations in Hillsborough County, the Arts Council of Hillsborough County first identified the universe of eligible organizations that is located in the community. Those organizations were then asked to complete a survey about their fiscal year 2022 expenses and attendance. A total of 81 organizations participated in the survey. The findings in this report are based on the data provided only by those 81 organizations; no estimates or extrapolations have been made to account for non-participating organizations.

During 2022, the 81 participating nonprofit arts and culture organizations in Hillsborough County reported aggregate expenditures of \$153.1 million. These direct expenditures generated total economic impacts (i.e., direct, indirect, and induced) of 2,365 jobs, \$143.0 million in resident household income, and \$38.4 million in total tax revenue. This is the impact of just organizations—festivals, performing and visual arts organizations, history and heritage centers, public art programs, museums, community programs, living collections, and more. It does not take into consideration the spending by their audiences. The following table demonstrates the total economic impact findings of the direct spending by these organizations.

Total Economic Impacts of Spending by Nonprofit Arts and Culture Organizations in Hillsborough County During Fiscal Year 2022

	Hillsborough County	Median of Population Cohort (Population = 1,000,000 or More)
Direct Expenditures	\$153,072,316	\$183,207,530
Jobs Supported	2,365	3,685
Household Income Paid	\$143,023,091	\$157,476,429
Local Government Revenue	\$4,405,523	\$4,531,638
State Government Revenue	\$4,609,927	\$5,978,552
Federal Tax Revenue	\$29,374,668	\$32,806,972

JOBS SUPPORTED ACROSS THE COMMUNITY

Nonprofit arts and culture organizations provide rewarding employment for more than just arts administrators, artists, and curators. They also employ box office staff, ushers, tour guides, custodians, graphic designers, accountants, printers, maintenance staff, builders, plumbers, and an array of occupations spanning many industries. Arts and culture jobs are highly local and are not typically the type to be offshored. Dollars spent on human resources typically stay within a community longer, thereby having a greater local economic impact. In Hillsborough County, 1,647 of the 2,365 total jobs supported by the spending of nonprofit arts and culture organizations are a direct result of the organizations' initial expenditures (i.e., direct impacts that exclude indirect and induced impacts).

ECONOMIC IMPACT BEYOND DOLLARS: VOLUNTEERISM

While arts volunteers do not have an economic impact as defined in this study (because there are no direct expenditures), they do have an enormous impact on their community because their time and expertise help arts and culture organizations function as a viable industry. During 2022, a total of 20,239 volunteers donated a total of 230,346 to Hillsborough County's 81 participating organizations. This represents a donation of time with an estimated aggregate dollar value of \$6.8 million ([Independent Sector](#) places the value of the average volunteer hour in FL at \$29.41). Volunteers can include individuals such as unpaid professional staff (executive and program staff, board/commission members), artistic volunteers (artists, choreographers, designers), clerical volunteers, and service volunteers (ticket takers, docents, ushers, gift shop volunteers).

The 81 participating organizations in Hillsborough County reported an average of 249.9 volunteers who contributed an average of 11.4 hours each, for a total of 2,844 hours per organization during 2022.

VALUE OF IN-KIND CONTRIBUTIONS

The participating arts and culture organizations provided data about their in-kind support. In-kind contributions are non-cash donations such as donated assets, office space, airfare, and advertising space. These contributions can be received from a variety of sources including corporations, individuals, local and state arts agencies, and the government. Like volunteerism, in-kind contributions are not factored into the economic impact measures as defined in this study, but they provide an enormous assist to the organizations and their ability to make their cultural product accessible to the community.

In Hillsborough County, the 81 participating organizations reported that they received in-kind contributions with an aggregate estimated value of \$1,544,916 during fiscal year 2022 (an average of \$19,073 per organization).

Arts and culture organizations provide rewarding employment for more than just arts administrators, artists, and curators. They also employ box office staff, ushers, tour guides, custodians, graphic designers, accountants, printers, maintenance staff, builders, plumbers, and an array of occupations spanning many industries.

COMMUNITY ASSISTANCE DURING THE PANDEMIC

The participating organizations were asked if they expanded their services beyond arts and culture in order to address urgent community needs during the height of the COVID-19 pandemic. Examples could include collecting and donating food, masks, and cleaning materials to community members; donating facility space as a testing and/or vaccination site; and helping organizations and individuals apply for pandemic relief funds and unemployment benefits. **In Hillsborough County, 26.8% of the responding organizations responded “Yes.”**

PAY EQUITY

The participating organizations were asked if, since the beginning of the COVID-19 pandemic, they had addressed pay equity through deliberate changes to its policies or practices that were made for the benefit of paid staff, artists, and/or contractors. **In Hillsborough County, 75.8% of the responding organizations responded “Yes.”**

DESIGNATED CULTURAL DISTRICT

The participating organizations were asked if they are physically located or headquartered in—or if the majority of their arts and culture programming takes place within—a designated Cultural District (or Arts District, or Arts & Entertainment District). Cultural districts are defined as well-recognized, labeled areas of a city in which a high concentration of cultural facilities and programs serve as the main anchor of attraction. **In Hillsborough County, 34.9% of the responding organizations responded “Yes.”**

EMPOWERMENT ZONE OR RENEWAL COMMUNITY

The participating organizations were asked if they are physically located or headquartered in—or if the majority of their arts and culture programming takes place within—an Empowerment Zone or Renewal Community (or other designated revitalization zone as determined by the local municipality). Empowerment Zones (EZs) and Renewal Communities (RCs) are economically distressed communities where qualifying businesses are eligible to receive tax incentives and grants. **In Hillsborough County, 26.3% of the responding organizations responded “Yes.”**

“Music and the arts are the foundation of vibrant communities and help us connect, understand, and inspire one another while driving economic growth, creating rewarding jobs and careers, and powering our culture forward. Americans for the Arts’ latest Arts and Economic Prosperity report does a vital service documenting the facts on the ground of the U.S. creative and nonprofit economy and offers valuable lessons and opportunities for communities seeking to boost their own arts footprint and activities.”

— **Mitch Glazier**
Chairman and CEO,
Recording Industry Association of America

NONPROFIT ORGANIZATIONS GENERATE TAX REVENUE

The nonprofit arts and culture industry generates significant revenues to local, state, and federal governments. Nonprofit organizations themselves are exempt from many federal and state taxes, so how can they generate tax revenue? Like all employers, they pay payroll taxes (e.g., Social Security, Medicare) and their employees pay income taxes on their personal earnings. In addition, other local businesses are likely to pay taxes on goods they sell and services they provide to nonprofits. In Hillsborough County, **spending by nonprofit arts and culture**

organizations generated a total of \$38.4 million in tax revenues. In addition, event-related spending by arts audiences (e.g., food and drink, retail, lodging) is taxed in most communities, providing another stream of government revenue. In Hillsborough County, **spending by nonprofit arts and culture audiences generated a total of \$37.7 million in tax revenues.** Given the substantial financial activity that occurs within the nonprofit arts and culture sector, a considerable amount of tax revenue is often generated.

“NONPROFIT” ARTS AND CULTURE ORGANIZATIONS

The AEP6 study used an inclusive approach when defining the list of eligible nonprofit arts and culture organizations to be surveyed as part of the study—a definition that accounts for different localities and cultures. For example, in some communities, the city museum may be a nonprofit organization while in others it is a government-owned and operated entity. Both are included in AEP6. Also included are organizations such as public and private local arts agencies, historical societies and historic/heritage sites, living collections (zoos, aquariums, and botanical gardens), cultural and racial/ethnic awareness organizations and programs, university presenters, and arts programs under the umbrella of a non-arts organization or facility (such as a library, social service organization, or church). In

addition to the organization types listed above, the study partners were encouraged to include other types of organizations if they play a substantial role in the cultural life of the community or if their primary purpose is to promote participation in, appreciation for, and understanding of arts and culture. In short, if it displays the characteristics of a nonprofit arts and culture organization and has an identifiable budget, attendance, and leadership, it was included in AEP6. ***This study does, however, exclude individual artists and the for-profit arts and entertainment sector (e.g., Broadway, popular music concert tours, or the motion picture industry)—all vital and valued components of the nation’s arts landscape but beyond the scope of this study.***

“The economic and cultural impact of live performance on our nation and in communities across the country has been taken for granted for far too long. Independent venues and the entire live entertainment ecosystem are working at the federal, state, and local levels to elevate the critical role we play in community innovation, inclusion, and development. AEP6 will provide unparalleled data and compelling perspectives that will help our sector better tell our story and ensure that arts and culture organizations have a seat at the table to determine the future of their communities.”

— **Stephen Parker**
Executive Director,
National Independent Venue Association

ARTS AND CULTURE AUDIENCES

Every day, millions of people attend and participate in arts and culture activities. Unlike most industries, arts and culture leverages significant amounts of “event-related spending” by their audiences.

For example, part of the cultural experience often includes dining out at a restaurant, paying for parking, shopping in nearby stores, and returning home to pay for child or pet care. Sometimes it includes travel and paying for overnight lodging. Local businesses that cater to arts and culture audiences reap the rewards of this economic activity.

To measure the impact of spending by arts and culture audiences in Hillsborough County, data were collected from attendees between May 2022 and June 2023. Researchers used an audience-intercept methodology, a standard technique in which attendees to in-person performances, events, and activities are asked to complete a short survey about their spending related to that event, opinions about the social impact of the arts, ZIP code of their primary address, and basic socioeconomic information. Surveys took place only while attendees were attending the event.

In Hillsborough County, the 81 participating nonprofit arts and culture organizations reported that the aggregate attendance to their in-person events totaled 3.9 million during 2022. **Event-related spending by these arts audiences totaled \$234.4 million in Hillsborough County during fiscal year 2022**, excluding both the cost of admission as well as the cost of food and drink that was purchased on-site during the event. Why exclude the cost of admission and on-site food and drink purchases? Those costs are paid directly to the arts and culture organizations themselves and are captured as expenses on the separate survey completed by those organizations. This methodology avoids “double counting” those dollars in the analysis.

The table below demonstrates the total economic impacts of these audience expenditures.

Total Economic Impacts of Spending by Nonprofit Arts and Culture Audiences in Hillsborough County During Fiscal Year 2022

	Hillsborough County	Median of Population Cohort (Population = 1,000,000 or More)
Direct Expenditures	\$234,390,974	\$235,934,800
Jobs Supported	4,399	3,601
Household Income Paid	\$117,119,459	\$117,119,459
Local Government Revenue	\$6,837,080	\$6,771,884
State Government Revenue	\$7,142,349	\$7,266,914
Federal Tax Revenue	\$23,714,273	\$21,582,049

AVERAGE SPENDING BY ARTS AND CULTURE ATTENDEES

The typical attendee to a nonprofit arts or culture event in Hillsborough County spent \$53.68 per person per event as a direct result of their attendance (not including the cost of admission, or food and beverage purchased on-site during the event).

The audience survey respondents in Hillsborough County were asked to provide the ZIP code of their primary residence, enabling research to determine which attendees were local residents (i.e., live within Hillsborough County), and which were nonlocals (i.e., live outside that area). In Hillsborough County, 71.4% of the 3.9 million nonprofit arts and culture attendees were residents, and 28.6% were nonresidents.

Nonlocal attendees spent an average of 66% more than local attendees (\$75.04 vs. \$45.12, respectively) as a result of their attendance to nonprofit arts and culture events in Hillsborough County. As would be expected from a traveler, nonlocal attendees typically spend more in categories like lodging, meals, and transportation. When a community attracts cultural tourists, local merchants reap the rewards.

Event-Related Spending by Nonprofit Arts and Culture Audiences Totaled \$234.4 million in Hillsborough County During Fiscal Year 2022

	Local Attendees	Nonlocal Attendees	All Attendees
Total Attendance	2,794,802	1,119,486	3,914,288
Percent of Attendees	71.4%	28.6%	100%
Average Dollars Per Attendee	\$45.12	\$75.04	\$53.68
Total Event-Related Spending ¹	\$136,381,310	\$98,009,664	\$234,390,974

“Whenever we share data with policymakers about how the live arts generate economic activity, eyes are opened. As we wrestle with historic underfunding of the arts in the United States, this study shows how tremendously powerful the live arts are in generating economic activity by activating other community businesses. This study is a must read for policymakers and economic development staff from coast to coast.”

— **Al Vincent, Jr.**
Executive Director,
Executive Director, Actors’ Equity Association

¹ To calculate the total audience expenditures in Hillsborough County, first the audience expenditures were calculated for any participating sub-regions that are located within Hillsborough County. Next, the residency percentage and the average per person expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within Hillsborough County but outside the sub-regions. Finally, the results were summed with the findings from the sub-regions. As a result, the aggregate audience expenditures for Hillsborough County do not equal the overall average per person expenditure for locals multiplied by the total attendance by locals plus the average per person expenditure for nonlocals multiplied by the total attendance by nonlocals.

Nonprofit Arts and Culture Attendees Spent an Average of \$53.68 Per Person, Per Event as a Result of Attending an Event in Hillsborough County During Fiscal Year 2022

	Local Attendees	Nonlocal Attendees	All Attendees
Food and Drink (off-site only)	\$17.32	\$23.32	\$19.04
Retail Shopping	\$6.97	\$5.71	\$6.61
Overnight Lodging	\$1.05	\$19.63	\$6.36
Local Transportation	\$4.79	\$7.91	\$5.68
Clothing and Accessories	\$8.97	\$8.67	\$8.89
Supplies and Groceries	\$4.17	\$3.61	\$4.01
Childcare	\$0.63	\$4.10	\$1.62
Other/Miscellaneous	\$1.22	\$2.09	\$1.47
Overall Per Person Average	\$45.12	\$75.04	\$53.68

THE ARTS DRIVE TOURISM

Each of the nonlocal survey respondents (i.e., those that live outside Hillsborough County) were asked about the primary reason for their trip: **75.4% of nonlocal attendees reported that the primary purpose of their visit to Hillsborough County was “specifically to attend the performance, event, exhibit, venue, or facility”** where they were surveyed.

The audience-intercept survey also asked nonlocal attendees if they would have traveled somewhere else (i.e., somewhere other than Hillsborough County) if the event where they were surveyed had not been available: **52.2% of nonlocal attendees responded “I would have traveled to a different community to attend a similar arts or cultural activity.”**

Additionally, 52.6% of the nonlocal attendees in Hillsborough County indicated that it was the first time they had ever attended the specific activity or visited the specific venue where they were surveyed.

Of the 28.6% of Hillsborough County’s arts and culture attendees who are nonlocal, 14.0% reported an overnight lodging expense as a result of attending the event where they were surveyed. Not surprisingly, these attendees with a lodging expense spent considerably more money during their visit—an average of \$211.70 per person (as compared to \$75.04 per person for the average nonlocal attendee in Hillsborough County). For this analysis, only one night of lodging expense is counted in the audience expenditure analysis, regardless of how many nights these cultural tourists actually spent in the community. This approach ensures that the results from the AEP6 study are not inflated by non-arts-related lodging expenses.

Can you still get a hotel room for only \$19.63? This figure is an average of all survey responses collected from nonlocal attendees to nonprofit arts and culture events in Hillsborough County—14.0% of those nonlocals reported an overnight lodging expense (the rest of the nonlocal responses reported \$0 for lodging).

Overall, nonlocal attendees to nonprofit arts and culture organizations reported that they spent an average of 1.0 nights in Hillsborough County specifically as a result of their attendance at the activity or venue where they were surveyed. (It is important to note that this figure is not limited to paid lodging—it can include nonlocal attendees who stayed at the home of family members or friends, and may include attendees who have a secondary residence that is located in Hillsborough County.

A VIBRANT ARTS SCENE KEEPS RESIDENTS' DOLLARS LOCAL

Finally, the audience-intercept survey asked **local** attendees if they would have traveled somewhere else (i.e., if they would have left Hillsborough County) if the event where they were surveyed had not been available: **52.7% of local attendees responded “I would have traveled to a different community to attend a similar arts or cultural activity.”**

Additionally, 43.3% of the local attendees in Hillsborough County indicated that it was the first time they had ever attended the specific activity or visited the specific venue where they were surveyed.

When taken all together, these cultural tourism findings demonstrate the economic impact of the nonprofit arts and culture industry in its truest sense. If a community fails to provide a variety of opportunities to experience the arts and culture, it risks not attracting cultural tourists and their valuable dollars as well as losing the discretionary spending of its own residents who will travel elsewhere in search of the diverse artistic expressions and authentic cultural experiences they seek.

“AEP6 reminds us that vibrant arts and cultural assets exist in every corner of the country. The data paints a vivid picture of how the arts enhance our community prosperity and our residents’ quality of life. By supporting and investing in the arts, counties play an important role in strengthening our communities today and for generations to come. We appreciate our partnership with Americans for the Arts, especially as we continue to demonstrate the value of our artistic and cultural endeavors.”

— **Hon. Mary Jo McGuire**

President, National Association of Counties Commissioner,
Ramsey County, MN

TRAVEL PARTY AND DEMOGRAPHIC CHARACTERISTICS

Travel Party and Demographic Characteristics of Arts Audiences in Hillsborough County	Local Attendees	Nonlocal Attendees
Travel Party Size		
Average number of adults (18 years of age or older)	2.4	2.4
Average number of children (younger than 18)	0.5	0.4
Average travel party size	2.9	2.8
Age Range		
18 to 25 years of age (i.e., Generation Z)	7.4%	8.8%
26 to 41 years of age (i.e., Millennials, Generation Y)	27.5%	32.7%
42 to 57 years of age (i.e., Generation X)	31.2%	25.7%
58 to 76 years of age (i.e., Baby Boomers)	30.5%	28.3%
77 years of age or older (i.e., Greatest Generation, Silent Generation)	3.3%	4.4%



Travel Party and Demographic Characteristics of Arts Audiences in Hillsborough County (cont.)

	Local Attendees	Nonlocal Attendees
Educational Attainment		
Less than high school	0.4%	0.0%
High school degree	6.3%	9.8%
Technical or associates degree	9.7%	13.4%
Bachelor's degree	41.6%	42.9%
Master's degree	29.0%	23.2%
Doctoral degree	13.0%	10.7%
Annual Household Income		
Less than \$30,000	4.6%	7.5%
\$30,000 to \$59,999	13.8%	11.2%
\$60,000 to \$99,999	24.5%	24.3%
\$100,000 to \$149,999	19.9%	24.3%
\$150,000 to \$199,999	9.6%	15.9%
\$200,000 or more	27.6%	16.8%
Identify with a Disability		
Yes	7.8%	4.5%
	All Attendees	
Race/Ethnicity*		
American Indian or Alaska Native or Indigenous or First Nations	1.9%	
Arab or Middle Eastern or Northern African	0.8%	
Asian or Asian American	6.2%	
Black or African American	6.2%	
Hispanic or Latino/Latina/Latinx or Spanish origin	13.4%	
Native Hawaiian or Pacific Islander	0.8%	
White or Caucasian or European American	76.7%	
I prefer to self-identify	2.4%	
Any BIPOC or ALAANA	27.1%	
White Only	72.9%	

* The audience-intercept survey instrument allowed respondents to choose multiple racial/ethnic categories. Therefore, the sum of the results for the individual categories may exceed 100%.

“City planners know the tremendous power of art and creativity in the built environment. For the planning profession, artists and culture bearers are key allies in our work: they help us shape resilient, livable, and equitable places. This is why the Arts & Planning Division of the American Planning Association advances a network across the fields of planning and the arts. And this is why we value the AEP6 and its data-driven, place-based approach. We know it will have a strong impact for our members and our shared work.”

— **Annis Sengupta**
Chair, The Arts & Planning Division
of the American Planning Association

“As the world’s largest and most reliable resource for destination organizations, arts and culture organizations make up the beautiful tapestry of what makes destinations come alive. Advocacy, especially at the local level, and data from the AEP6 research partners empower destinations to not just showcase their beauty but to measure the impact of creativity, fostering a vibrant, sustainable future for all to explore and cherish.”

— **Sophia Hyder Hock**
Chief Diversity Officer,
Destinations International

CONCLUSION

Arts and culture is more than food for the soul. It also puts food on the table for millions of people across the United States—including in Hillsborough County.

In 2022, nonprofit arts and culture organizations and their audiences generated \$387.5 million in economic activity in Hillsborough County—\$153.1 million in spending by the organizations, which leveraged an additional \$234.4 million in event-related spending by their audiences. This economic activity supported 6,764 jobs and generated \$76.1 million in tax revenue.

AEP6 changes the conversation about nonprofit arts and culture organizations from that of a charity—worthy of funding in prosperous economic times but hard to justify in challenging times—to that of an industry with an economic and social impact. Arts and culture organizations are businesses. They employ people locally, purchase supplies and services from nearby businesses, and produce the authentic cultural experiences that are magnets for visitors, tourists, and new residents. Their very act of creating, presenting, exhibiting, and engaging has a positive economic impact on the community.

When people attend a cultural event, they often make an outing of it—dining at a restaurant, paying for parking or public transportation, enjoying dessert after the show, and returning home to pay for child or pet care. Attendees at Hillsborough County’s nonprofit arts and culture events spend \$53.68 per person per event, beyond the cost of admission—vital income for local merchants and a value-add that few industries can compete with. Arts and culture organizations also strengthen the visitor economy: 28.6% of Hillsborough County’s arts attendees travel from outside Hillsborough County; these cultural tourists spend an

average of \$75.04 per person. When asked, 75.4% of those nonlocal attendees reported that the primary purpose of their visit was “specifically to attend the performance, event, exhibit, venue, or facility” where they were surveyed.

Arts and culture is a fundamental component of livable communities—beautifying cities and towns, bringing joy to residents, and celebrating diverse cultural expressions and traditions. It powers the creative communities where people want to live and work, where entrepreneurs and innovation thrive, and where businesses and nighttime economies flourish. Shared cultural experiences strengthen sense of belonging and community pride.

Arts & Economic Prosperity 6 delivers a clear and welcome message: when communities invest in arts and culture, they are not investing in community development at the expense of economic development. Rather, they are investing in an industry that stimulates the economy, supports local jobs, and contributes to building healthy, vibrant, and more livable communities. **When we support the arts, we are investing in both Hillsborough County’s economic and community well-being.**

AEP6 CALCULATOR

To make it easier to compare the economic impacts of different organizations located in Hillsborough County (or to calculate updated impact estimates in the five years ahead), the project researchers calculated the economic impact per \$100,000 of direct spending by nonprofit arts and culture organizations and their audiences.

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

For every \$100,000 in direct spending by a nonprofit arts and culture organization in Hillsborough County, there was the following estimated economic impact during fiscal year 2022.

Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Culture Organizations in Hillsborough County During Fiscal Year 2022

	Hillsborough County
Employment (Jobs)	1.55
Resident Household Income	\$93,435
Local Government Revenue	\$2,878
State Government Revenue	\$3,012
Federal Tax Revenue	\$19,190

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

An administrator from a nonprofit arts and cultural organization that has total expenditures of \$250,000 wants to determine the organization's total economic impact on employment in Hillsborough County. The administrator would:

1. Determine the amount spent by the nonprofit arts and cultural organization (in this example, \$250,000)
2. Divide the total expenditure by 100,000 (in this example, \$250,000 divided by 100,000 equals 2.5)
3. Multiply that figure by the employment ratio per \$100,000 for Hillsborough County

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

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

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

The second step is to do the same for nonlocal attendees. To derive this figure, first multiply the total attendance by the percentage of attendees that are

nonresidents. Then, multiply the result by the average per person event-related expenditure by nonlocal attendees. The result is the total estimated event-related spending by nonlocals.

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

Audience Spending Ratios for the AEP6 Calculator in Hillsborough County

	Local Attendees	Nonlocal Attendees
Percentage of Total Attendees	71.4%	28.6%
Average Per Person Event-Related Expenditure	\$45.12	\$75.04

Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Culture Audiences in Hillsborough County During Fiscal Year 2022

	Hillsborough County
Employment (Jobs)	1.88
Resident Household Income	\$49,968
Local Government Revenue	\$2,917
State Government Revenue	\$3,047
Federal Tax Revenue	\$10,117

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

An administrator wants to determine the total economic impact of the 25,000 total attendees to his/her organization's nonprofit arts and cultural events on employment in Hillsborough County. The administrator would:

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

MAKING COMPARISONS WITH SIMILAR STUDY REGIONS

For the purpose of this analysis and unique report, the geographic region being studied is defined as Hillsborough County in Florida. According to the most recent data available from the U.S. Census Bureau, the population of Hillsborough County was estimated to be 1,471,968. For comparison purposes, an appendix of detailed data tables containing the study results for all 373 participating study regions can be found

on at AEP6.AmericansForTheArts.org. The data tables are stratified by population, making it easy to compare the findings for Hillsborough County to the findings for similarly populated study regions (as well as any other participating study regions that are considered valid comparison cohorts).

Additional AEP6 tools and resources can be found at AEP6.AmericansForTheArts.org.

“As statewide policy makers, NOBEL Women fully appreciates the connection between the arts, community development, and social improvement. The AEP6 report shows us that this collective effort across the country fosters diverse and inclusive collaborations that can influence sustainable policy change and more arts funding. Generating \$151.7 billion of economic activity in 2022, is proof positive of the impact that the arts has on America’s economy.”

— **Representative Juandalynn Givan (AL)**
National President, National Organization
of Black Elected Legislative Women

ABOUT THIS STUDY

Americans for the Arts conducted AEP6 to document the economic and social benefits of the nation's nonprofit arts and culture industry. The study was conducted in 373 diverse communities and regions across the country, representing all 50 states and Puerto Rico.

A local or statewide research partner implemented the data collection for each community—a total of 297 research partners represented the 373 participating communities (41 research partners represented multiple communities such as both a city and a county). The participating communities range in population from 4,000 to 4 million and represent rural, suburban, and urban areas (130 cities, 126 counties, 78 multi-city or multi-county regions, 18 arts districts, and 21 states/territories).

Researchers, in collaboration with their local and statewide partners, collected surveys from 16,399 organizations and 224,677 attendees to provide a measure of total industry spending. Using the IMPLAN economic modeling platform, input-output analysis models were customized for all 373 study regions. These quantitative models measure the economic relationships

between hundreds of different industries in each geographic area. Reports were prepared for each of the 373 study regions, and national estimates were made for the nation as a whole.

For this study, economic impact is defined as the following measures:

- Jobs is a total figure of people employed (full-time, part-time, and seasonal employment jobs).
- Resident household income includes salaries, wages, and entrepreneurial income paid to residents. It is the money individuals earn personally and then use to pay for food, mortgages, and other living expenses.
- Tax revenue to local, state, and federal governments includes revenue from taxes (e.g., income, property, or sales), as well as funds from licenses, filing fees, and other similar sources.

TO PARTICIPATE IN AEP6, THE 297 LOCAL AND STATEWIDE RESEARCH PARTNERS AGREED TO FOUR PARTICIPATION CRITERIA.

- 1 Identify and code the comprehensive universe of eligible arts and culture organizations located in their study region.
- 2 Assist with the collection of detailed financial and attendance information from those organizations and review the information for accuracy.
- 3 Collect audience-intercept surveys from attendees at a broad, representative sample of cultural events that take place in their study region.
- 4 Pay a modest cost-sharing fee. (No community was refused participation for an inability to pay.)

To secure Hillsborough County's status as one of the 373 participating communities, the Arts Council of Hillsborough County responded to the Call for Participants and agreed to complete the required criteria.

HOW LOCAL AND STATEWIDE RESEARCH PARTNERS IDENTIFIED ELIGIBLE ARTS AND CULTURE ORGANIZATIONS FOR STUDY INCLUSION.

Each of the 297 research partners identified the universe of nonprofit arts and culture organizations located in their region using the National Taxonomy of Exempt Entity (NTEE) coding system as a guideline. The NTEE system—developed by the National Center for Charitable Statistics at the Urban Institute—is a definitive classification system for nonprofit organizations recognized as tax exempt by the Internal Revenue Code. This system divides the entire universe of nonprofit organizations into 10 major categories, including “Arts, Culture, and Humanities.” The IRS Business Master File lists approximately 116,000 nonprofit arts and culture organizations registered with the IRS in 2022.

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

A01 – Alliances and Advocacy	A56 – Natural History and Natural Science Museums
A02 – Management and Technical Assistance	A57 – Science and Technology Museums
A03 – Professional Societies and Associations	A60 – Performing Arts (general)
A05 – Research Institutes and Public Policy Analysis	A61 – Performing Arts Centers
A11 – Single Organization Support	A62 – Dance
A12 – Fund Raising and Fund Distribution	A63 – Ballet
A19 – Support (not elsewhere classified)	A65 – Theatre
A20 – Arts and Culture (general)	A68 – Music
A23 – Cultural and Ethnic Awareness	A69 – Symphony Orchestras
A24 – Folk Arts	A6A – Opera
A25 – Arts Education	A6B – Singing and Choral Groups
A26 – Arts and Humanities Councils & Agencies	A6C – Bands and Ensembles
A27 – Community Celebrations	A6E – Performing Arts Schools
A30 – Media and Communications (general)	A70 – Humanities (general)
A31 – Film and Video	A80 – Historical Organizations (general)
A32 – Television	A82 – Historical Societies and Historic Preservation
A33 – Printing and Publishing	A84 – Commemorative Events
A34 – Radio	A90 – Arts Services (general)
A40 – Visual Arts (general)	A99 – Arts, Culture, and Humanities (miscellaneous)
A50 – Museums (general)	B70 – Libraries
A51 – Art Museums	C41 – Botanical Gardens and Arboreta
A52 – Children’s Museums	C42 – Garden Clubs
A53 – Folk Arts Museums	D50 – Zoos and Aquariums
A54 – History Museums	N52 – Fairs and Festivals
	Q21 – International Cultural Exchange

AEP6 takes an inclusive approach that accounts for different localities and cultures. For example, in some communities, the museum may be a nonprofit organization while in others it is a government-owned and operated entity. Both are included in AEP6. Also included are entities such as public and private local arts agencies, living collections (zoos, aquariums, and botanical gardens), university presenters, and arts programs under the umbrella of a non-arts organization or facility (such as a library, social service organization, or church). In addition to the organization types listed above, the study research partners were encouraged to include

other types of eligible organizations if they play a substantial role in the cultural life of the community or if their primary purpose is to promote participation in, appreciation for, and understanding of arts and culture. In short, if it displays the characteristics of a nonprofit arts and culture organization and has an identifiable budget, attendance, and leadership, it was included in AEP6. *This study does, however, exclude individual artists and the for-profit arts and entertainment sector (e.g., Broadway or the motion picture industry)—all vital and valued components of the nation’s arts landscape but beyond the scope of this study.*

SURVEYS OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS

Detailed information was collected from 16,399 eligible organizations about their fiscal year 2022 expenditures (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition), as well as their event attendance, in-kind contributions, and volunteerism. Surveys were collected from February through July 2023. Some organizations only provided total expenditures and attendance (they are included in the study). Responding organizations had budgets ranging from a

low of \$0 to a high of \$375 million. Response rates for the 373 communities averaged 43.9% and ranged from 5% to 100%. It is important to note that each study region’s results are based solely on the survey data collected. No estimates have been made to account for non-respondents. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.

In Hillsborough County, 81 of the 186 total eligible nonprofit arts and culture organizations identified by the Arts Council of Hillsborough County provided the financial and attendance information required for the study analysis—an overall participation rate of 43.5%.

SURVEYS OF NONPROFIT ARTS AND CULTURE AUDIENCES

Audience-intercept surveying, a common and accepted research method, was conducted in all 373 of the study regions to measure event-related spending by nonprofit arts and culture audiences. Attendees and participants were asked to complete a short survey while attending an event. Nationally, a total of 224,677 attendees completed the survey for an average of 602 surveys per study region. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as

meals, souvenirs, transportation, and lodging, as well as socioeconomic information, ZIP code of primary residence, and four social impact questions. Data was collected from May 2022 through June 2023 at a broad range of both paid and free events. The survey respondents provided information about the entire party with whom they were attending the event. With an overall average travel party size of 2.41 people, this data represents the spending patterns of 541,472 attendees.

In Hillsborough County, surveys were collected from attendees to nonprofit arts and culture performances, events, exhibits, and special events during the period from May 2022 through June 2023.

STUDYING ECONOMIC IMPACT USING INPUT-OUTPUT ANALYSIS

The nation's economy is shaped by complex interactions among businesses, workers, and communities. 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 multiple 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.

Americans for the Arts uses the IMPLAN platform to create the customized models for each of the 373 study regions. Input-output models calculate the interdependencies between various sectors or industries within a region. The model quantifies how changes

in one sector's output and demand for inputs affect other sectors in the economy. IMPLAN's models are based on detailed tables that represent the flow of goods and services between different industries.

IMPLAN relies on region-specific and industry-specific data to customize input-output models for different areas and sectors, allowing for more accurate analysis.

In short, this analysis traces how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for AEP studies because it can be customized specifically to each participating community, region, or state.

To complete this analysis for Hillsborough County, the researchers used the IMPLAN platform to build a customized input-output model based on the unique economic and industrial characteristics of Hillsborough County.

CALCULATION OF THE NATIONAL ECONOMIC IMPACT ESTIMATES

The national estimates were derived using the following steps:

- 1 The 130 cities and towns that participated in the study were stratified into six population cohorts, and average economic impact results were calculated for each cohort. Ten communities were excluded from the calculation of the averages due to their comparably high levels of economic activity relative to the other participating communities in their cohort. This was done to avoid inflating the national estimates.
- 2 The nation's largest 13,189 incorporated places were assigned to one of the six groups based on their population, as supplied by the U.S. Census Bureau, and assigned the economic impact average for its population group.
- 3 The average economic impact values of the cities and towns were added together to determine estimated national economic impact findings.

A comprehensive description of the methodology used to complete this national study is available at [AEP6.AmericansForTheArts.org](https://www.aep6.americansforthearts.org).

GLOSSARY

BIPOC and ALAANA

These acronyms are used to reference individuals or communities of color: BIPOC (Black, Indigenous, People of Color) and ALAANA (African, Latine, Asian, Arab, Native American). While these terms do not fully encompass or represent the complicated and multi-layered nature of indigeneity or ethnic and racial identities, they are the most commonly used terms in our work.

Cultural Tourism

Travel directed toward experiencing and engaging with the arts, culture, heritage, traditions, and special character of a place. It may involve visiting an arts and culture organization, attending festivals, and experiencing the cuisine.

Direct Economic Impact

A measure of the economic effect of the initial expenditure within a community. For example, when a symphony pays its players, each musician's salary and the associated payroll taxes paid by the nonprofit represent direct economic impact.

Direct Expenditures

The first round of expenditures in the economic cycle (the money buyers pay to sellers in exchange for goods or services). A ballet company's purchase of dance shoes is an example 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 customized for each AEP6 community is an example of an econometric model.

Household Income (or 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 receives a percentage of the profit, resulting in income for the owner. Household income also includes benefits and employer-paid payroll taxes (social security, unemployment, etc.).

IMPLAN

AEP6 study uses IMPLAN for its economic analysis. IMPLAN is short for "IMpact analysis for PLANning." It is a widely used economic modeling and impact analysis tool. Using the IMPLAN economic modeling platform, input-output analysis models were customized for all 373 study regions. These quantitative models measure the economic relationships between hundreds of different industries in each geographic area. IMPLAN is a well-regarded system that is used by more than 1,000 U.S. companies and governments.

Indirect and Induced Impact

AEP6 measures the economic impact of the arts using a methodology that enables economists to track how many times a dollar is respent within the local economy and thus, to measure the economic impact generated by each round of spending. For example, when a theater company purchases paint from the local hardware store, there is a measurable economic effect of that initial expenditure within a community. However, the economic benefits typically do not end there because the hardware store uses some of its income to pay the clerk that sold the paint (induced impact), as well as to pay other businesses such as the electric bill (indirect impact). The indirect and induced economic impacts are the effects of the subsequent rounds of spending by businesses and individuals, respectively.

Input-Output Analysis

A system of mathematical equations that combines statistical methods and economic theory in an area of economic study called econometrics. Economists use this model (occasionally called an inter-industry model) to measure how many times a dollar is respent in, or ripples through, a community before it leaks out (see Leakage). The model is based on a matrix that tracks the dollar flow between hundreds of 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.

Jobs (Employment)

Employment data in IMPLAN is an annual average headcount of full time, part time, and seasonal employment. Note that a person can hold more than one job, so the job count is not necessarily the same as the count of employed persons. While IMPLAN employment adjusts for seasonality, it does not indicate the number of hours worked per day. It is not, therefore, equal to full time equivalents. This is the same definition used by the U.S. Bureau of Economic Analysis Regional Economic Accounts and the U.S. Bureau of Labor Statistics Census of Employment and Wages.

Leakage

Leakage refers to the money that is spent outside of a community. This is measured because nonlocal spending has no economic impact within the community, whereas dollars spent within the community continue to have an economic local impact. A ballet company purchasing shoes from a nonlocal 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 (and local economic impact) by the shoe company.

Social Impact

In AEP6, social impact refers to the effect that the nonprofit arts and culture industry has on the well-being of individuals and their community, such as social connections, community pride and identity, physical and emotional health, and community livability.

Tax Revenue to Local, State, and Federal Governments

The IMPLAN economic modeling platform used in AEP6 provides a measure of government tax income based on the transactions of the tracked economic activities. It includes taxes paid by both businesses and individuals such as sales tax, income tax, corporate tax, and property tax.

FREQUENTLY ASKED QUESTIONS

This section answers some common questions about the AEP6 study, and the methodology used to complete it.

What is the significance of the AEP6 study?

Americans for the Arts provides the trusted knowledge and information tools that leaders need to advocate for increased funding for arts and culture, inclusive equitable policies and programs, and a thriving local arts agency field. Building on its 30-year legacy as the largest and most inclusive study of its kind, Arts & Economic Prosperity 6 (AEP6) is an economic and social impact study of the nation's nonprofit arts and culture industry. The study provides detailed findings on 373 regions from across all 50 states and Puerto Rico—ranging in population from 4,000 to 4 million—and represents rural, suburban, and large urban communities. AEP6 uses a rigorous methodology to document the economic contributions of the arts and culture industry, demonstrating locally as well as nationally that arts and culture is a critical economic driver of vibrant communities. Americans for the Arts partnered with 297 local, regional, and statewide organizations that represent the 373 study regions in AEP6. This study absolutely could not have been completed without them. This collective effort across the country fosters diverse and inclusive collaborations that can influence sustainable policy change and more arts funding. AEP6 is released with important national partners—organizations of public and private sector leaders that steer billions of dollars into arts and culture funding and create arts-friendly policies. These include:

- Actors' Equity Association
- African Diaspora Consortium
- Arts & Planning Division (American Planning Association)
- Black Legislative Leaders Network
- Department for Professional Employees, AFL- CIO (American Federation of Labor and Congress of Industrial Organizations)
- Destinations International
- International City/County Management Association
- Independent Sector
- National Association of Counties
- National Conference of State Legislatures
- National Alliance of Community Economic Development Associations
- National Independent Venue Association
- National Organization of Black Elected Legislative Women
- Race Forward
- Recording Industry Association of America
- The Conference Board
- U.S. Conference of Mayors

What are the key findings from AEP6?

AEP6 uses a highly regarded, conservative approach to analyze the economic impact of the nonprofit arts and culture industry, which generates a significant amount of economic activity by its organizations and event-related spending by its audiences.

The message is clear: a vibrant nonprofit arts and culture community not only keeps residents and their discretionary spending close to home, but it also attracts visitors who spend money and help local businesses thrive.

Local Impact

What continues to set AEP6 apart from other national studies is exactly why it is so useful. It is local. Every study region uses the same rigorous methodology, and each receives its own customized report. Surveys from 16,399 nonprofit arts and culture organizations and 224,677 of their attendees were collected by local and statewide research partners, and a customized input-output economic model was built for each region.

Arts and Culture Audience Impact

AEP6 is the only national study that incorporates the event-related spending by arts and culture audiences. When attendees go to an arts and culture event, they may also pay for parking, eat dinner at a restaurant, enjoy dessert after the show, and return home to pay child or pet care. The typical attendee spends \$38.46 per person, not including the cost of admission.

Visitor Impact

Vibrant arts and culture communities attract visitors who spend money and help local businesses thrive. The study found that one-third of attendees (30.1%) were from outside the county in which the arts event took place. They spent an average of \$60.57, twice that of their local counterparts (\$29.77)—all vital income for local merchants. For 77% of respondents, the primary purpose of their visit was to attend that cultural event. When we asked arts and culture event attendees what they would have done if the event where they were surveyed had not been available, 51% of local attendees said they would have “traveled to a different community to attend a similar arts or cultural activity,” and 64% of nonlocal visitors would have selected another community as well.

Social Impact

For the first time, AEP6 asked audiences social impact questions. Beyond its economic and financial impacts, arts and culture provides social contributions that benefit the wider community, such as neighborhood pride and cultural identity. Surveys completed by attendees demonstrate a deep appreciation for how arts and culture impacts the development and well-being of communities and their residents.

- 89% of respondents agreed the activity or venue they were attending was “a source of neighborhood pride for the community.”
- 86% said they would “feel a sense of loss if that activity or venue was no longer available.”
- 86% felt it important that future generations also be able to have that cultural experience. This high level of appreciation is found across all socioeconomic groupings.

Equity and Inclusion

AEP6 included an expectation—for the first time—that our research partners would collect a portion of audience surveys from attendees to events that were presented, produced, or hosted by BIPOC and ALAANA organizations. The study found:

- Spending by attendees at BIPOC and ALAANA organizations was nearly identical to the overall national average (\$38.29 and \$38.46 per person, respectively).
- Social impact survey results were also nearly identical. For example, 81.2% of attendees at BIPOC and ALAANA organizations agreed, “This venue or facility is an important pillar for me within my community.” The figure for all attendees was 81.4%.
- These findings should initiate critical funding conversations about BIPOC and ALAANA organizations receiving fair and proportional financial support.
- A 2019 report by Americans for the Arts, for example, found that among local arts agency grant making organizations, the largest 16% of grant recipients (by budget) received 73% of the dollars awarded.
- The 2022 survey found that the pandemic’s impact was not felt equally. Organizations serving and representing BIPOC communities were more likely to report lacking the financial resources needed to return to in-person programming than non-BIPOC organizations (55% vs. 38%).
- Ensuring equitable funding for arts and culture organizations is a vital step in creating an inclusive, balanced, and vibrant cultural landscape.

What are the problems or challenges that AEP6 helps to address?

Like all nonprofits, arts and culture organizations have a public purpose: to make their cultural product broadly accessible so everyone can share in its benefits. And, like all nonprofits, they depend on financial support from the government and the private sector to deliver on that promise. We are in a time, however, when many leaders feel challenged to fund the arts. Shrinking budgets, mandates to prioritize jobs and economic growth, and pressing community development issues make for difficult decision making. AEP6 brings a welcome message: when we invest in the arts, we are investing in an industry that strengthens the economy and builds more livable communities.

What impact did the COVID-19 pandemic have on AEP6?

AEP6 was postponed for 16 months due to the pandemic. Data collection for AEP6 was originally scheduled to be completed by December 2021 and based on budget and attendance information for the 2020 fiscal year. The study now focuses on fiscal year 2022. The pandemic had a devastating impact on the arts sector. According to national survey work by Americans for the Arts, 99% of producing and presenting arts and culture organizations canceled events during the pandemic—representing the loss of an estimated 557 million ticketed admissions. A secondary impact of the pandemic is the continued stress faced by the arts and culture industry. This includes continued reduced staffing levels needed to complete the organizational survey as well as fewer volunteers and staff to conduct the audience surveys.

What trends do you see between the last AEP5 study (2017) and this current AEP6 study (2023)?

The pandemic occurred in the time between the AEP5 and AEP6 fiscal years of analysis (2015 and 2022, respectively). While analyses of the pandemic's impact on the arts will continue for years to come, the challenges it brought had an undeniable effect on the industry. Thus, study-to-study comparisons of AEP findings are not recommended.

Because of the robust samples of audience surveys that were collected for each study (212,671 for AEP5 and 224,677 for AEP6), it is appropriate to make comparisons with some of the audience data. Nationally, the average per person event-related expenditure increased from \$31.47 in AEP5 to \$38.44 in AEP6 (+22%), a change that keeps pace with inflation. Conversely, the percentage of nonlocal attendees decreased from 34% in AEP5 to 30% in AEP6 (-11.5%).

Who conducted this research?

Americans for the Arts led the research in collaboration with its local and statewide research partners. There are a total of 297 research partners representing the 373 participating communities (41 research partners represented multiple communities such as both a city and a county).

The participating communities range in population from 4,000 to 4 million and represent rural, suburban, and urban areas (130 cities, 126 counties, 78 multi-city or multi-county regions, 18 arts districts, and 21 states/ territories).

Who is the sample group for the research?

In 2021, Americans for the Arts published a call for communities interested in participating in the AEP6 study. Study partners agreed to complete the study's four participation criteria. Some partners requested that multiple study regions be included in their study (e.g., a county as well as a specific city within the county). As a result, 297 study partners represent a total of 373 participating study regions.

How were the eligible arts organizations in each community selected?

Each of the 297 study partners identified the universe of nonprofit arts and culture organizations located in their region(s). Eligibility was determined using the Urban Institute's National Taxonomy of Exempt Entities (NTEE) coding system as a guideline. Communities were encouraged to include other types of eligible organizations if they play a substantial role in the cultural life of the community or if their primary purpose is to promote participation in, appreciation for, and understanding of the visual, performing, folk, literary, and media arts. These include government-owned or operated cultural facilities and institutions, municipal arts agencies or councils, living collections (such as zoos and botanical gardens), university museums and presenters, and arts programs that are embedded under the umbrella of a non-arts organization or facility. For-profit businesses and individual artists were excluded from this study. In short, if it displays the characteristics of a nonprofit arts and culture organization, it was included.

To assist the 297 study partners, Americans for the Arts provided a sample list of the eligible organizations that are located in each of the 373 participating communities using secondary source data. For communities in the six New England states (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont), a list of eligible organizations was provided by our research partner the New England Foundation for the Arts via its CreativeGround database, a dynamic regional directory that celebrates and reflects the vital work of New England's artists, creatives, culture bearers, and creative organizations and businesses. For communities in all other states, a list of eligible organizations was licensed from Candid's GuideStar database of 1.8 million IRS- recognized tax-exempt organizations. Each study partner reviewed, cleaned, and supplemented the list for their community using their own data sources, then returned a final list of eligible organizations to Americans for the Arts.

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

AEP6 uses a highly regarded, conservative approach to analyze the economic impact of the arts and culture industry, which generates a significant amount of event- related spending and tax revenue.

Researchers—together with local and statewide AEP6 study partners—collected expenditure and attendance data from 16,399 arts and culture organizations and 224,677 of their attendees to measure total industry spending. Using the IMPLAN economic modeling platform, input-output analysis models were customized for each study region. These quantitative models measure the economic relationships between hundreds of different industries in each geographic area. This, in turn, enables localizable economic impact results to be derived.

Why this level of rigor? Quite simply, \$50 spent in two different cities, even if in the same state, may have two very different sets of economic impact outcomes. It takes more than one million calculations to derive the economic impact data for each community. IMPLAN's methodology utilizes a highly regarded method of economic analysis that ensures reliable and actionable localized results.

Will elected officials, economists, and other community decision-makers trust the validity and rigor of the AEP6 study?

Yes, the AEP6 study makes a strong argument to legislators, but you may need to provide them with some extra help. It will be up to the user of this report to educate the public about economic impact studies in general and the results of this study.

- The user may need to explain the study methodology used and the IMPLAN system that provides a customized input- output model for each of the 373 study regions. You can be confident that the input-output analysis used in this study is a highly regarded model in the field of economics.
- It is also valuable to mention the conservative approach used by AEP6. For example, organizational expenditures are based only on the data collected. No estimates are made for nonresponding organizations. The audience surveys are conducted at a broad range of cultural events to ensure a representative sample, and not just at the highest priced venues, which would inflate the audience spending averages.

- The AEP6 national partners are organizations of public and private sector leaders that steer billions of dollars into arts funding and create arts-friendly policies. They are partners because (1) they too believe the arts are a fundamental component of a healthy community, and (2) they view the methodology and study findings worthy of their members' attention. Partners are listed on the back cover of every AEP6 report.
- The AEP6 methodology was developed and vetted by economists. As in any professional field, however, there are differing opinions about procedures, jargon, and the best way to determine results. Ask ten artists to define art, and you can expect ten different answers. Ask ten economists the best way to measure the economic impact of arts and culture, and you can expect a similar range of responses. Some economists, for example, prefer to exclude spending by residents in the economic analysis and only track the impact of spending by visitors (often considered the purest form of economic development). Others, however, include resident spending because it plays a significant role in understanding the industry's overall economic contributions to local businesses and the community. In AEP6, both local and nonlocal impacts are counted in the analysis.

The data tables in the report appendix provide details about both local and nonlocal economic impacts. This provides full transparency of the work and offers the opportunity for others to find additional insights from the study.

Who funds this research?

AEP6 was funded by the 297 local and statewide study partners and the Americans for the Arts Ruth Lilly Endowment Fund.

ACKNOWLEDGEMENTS AND APPRECIATION

Americans for the Arts expresses its gratitude to the many people across the country who made Arts & Economic Prosperity 6 possible and assisted with its development, coordination, and production. A study of this scale cannot be completed without the collaboration of many partnering organizations and individuals.

The Arts Council of Hillsborough County

This study would not have been possible without the Arts Council of Hillsborough County, our research partner in Hillsborough County, which was responsible for the local implementation and data collection requirements. Thank you!!

Research Partners

Special thanks to each of our 297 local, regional, and statewide research partners who contributed time, heart, and financial support toward the completion of this national study. We thank each one of them. AEP6 would not have been possible without them. Thanks also to the New England Foundation for the Arts and SMU DataArts for their collaboration and contributions to the data collection effort.

AEP6 Equity Task Force

The AEP6 Equity Task Force provided invaluable advisory support and guidance throughout the study. Their insights and expertise are reflected in everything from the methodology to the survey design to community engagement tools used by local research partners to language usage and narrative messaging of the report, thereby helping to ensure the inclusion of BIPOC and ALAANA arts and culture organizations and communities in the study. The Task Force has enabled Americans for the Arts to begin to address its history of underrepresenting BIPOC and ALAANA arts and culture organizations as part of the AEP studies. We are most grateful.

- Sandra Aponte, Program Officer, John D. and Catherine T. MacArthur Foundation
- Mark Cardwell, Founder and Principal Consultant, Cardwell Communications LLC
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- Elisheba Johnson, Curator, Wa Na Wari
- Jeremy Johnson, President and CEO, Assembly for the Arts
- Monica Montgomery, Social Justice Curator, Museum Consultant, Community Engager
- David Pankratz, Arts Policy and Research Advisor

Miles Partnership

- Melissa Cherry, Chief Diversity & Inclusion Officer and Senior Vice President
- Najauna White, Vice President, Diversity, Equity & Inclusion
- Juan F. Vargas, Diversity, Equity & Inclusion Account Director

Americans for the Arts Staff

A study of this magnitude is a total organizational effort. Appreciation is extended to the entire staff and board of Americans for the Arts. The Research Department was responsible for the production of this study—Benjamin Davidson, Dr. Genna Styles-Lyas, and Randy Cohen.

The Participating Arts and Culture Attendees

Additionally, this study could not have been completed without the cooperation of the people who graciously took the time to complete the AEP6 audience-intercept survey while attending a performance, event, or exhibit—or otherwise visiting a cultural event or facility—in Hillsborough County during the period from May 2022 through June 2023.

The Participating Nonprofit Arts and Culture Organizations

This study could not have been completed without the cooperation and participation of the 81 nonprofit arts and culture organizations in Hillsborough County, listed below, that provided the financial and attendance information necessary for the analysis.

Arts Council Division of Hillsborough County	Plant City Main Street
Arts Council of Plant City	Powerstories Theatre of Tampa Bay
Bits 'N Pieces Puppet Theatre	Rudram Dance Company
Brandon Ballet	Sinister Wisdom
Carrollwood Cultural Center	Spanish Lyric Theatre
Carrollwood Players	Stageworks; Tampa Arts Alliance
Center Place Fine Arts and Civic Association	Tampa Bay Arts & Education Network
Choral Masterworks Festiva	Tampa Bay Black Heritage Festival
City of Tampa Creative Arts Theatre Company	Tampa Bay Businesses for Culture and the Arts
City of Tampa Parks and Recreation Department	Tampa Bay Community Network
Art Studios	Tampa Bay Heralds of Harmony Chorus
Coco Hunday	Tampa Bay History Center
Community Stepping Stones	Tampa Chapter of SPEBSQSA
Creative Junk Therapy	Tampa City Ballet
David A. Straz Jr. Center for the Performing Arts	Tampa Educational Cable Consortium
East Hillsborough Historical Society	Tampa Film Institute (Gasparilla International Film Festival)
Firehouse Cultural Center	Tampa Heights Junior Civic Association
Florida Institute For Community Studies (FICS)	Tampa International Fringe Festival
Florida Museum of Photographic Arts	Tampa Jccs & Federation
Florimazzo (dba Tampa Metropolitan Youth Orchestra)	Tampa Museum of Art
Fluid Expressions (dba Outcast Theatre Collective)	Tampa Pride
Friends of the Festival	Tampa Realistic Artists
Gasparilla Concours D Elegance	Tampa Theatre
Gasparilla Festival of the Arts	Tampa-Hillsborough County Public Library
Gasparilla Music Foundation	Temple Terrace Arts Council
Glazer Children's Museum of Tampa	Tempus Projects
Heard Em Say Youth Arts Collective	The Florida Aquarium
Henry B. Plant Museum	The Florida Wind Band
International Independent Showmens	The Gay Men's Chorus of Tampa Bay
Museum Corporation	The Nathan B Stubblefield Foundation
Ivory Club of Tampa	The Tampa Foundation
Jobsite Theate	The Victory Ship; Theatre Tampa Bay
Lab Theater Project	Thinktank Theatre
Life Enrichment Center	Toast of Tampa Show Chorus
Moving Current Dance Collective	University Area Community Development Corp.
(Fl. Dance Association)	University of South Florida (Arts And Cultural Programming)
Museum Of Science & Industry (MOSI)	University of Tampa (Arts And Cultural Programming)
New Tampa Players	Winthrop Arts
Parachute Gallery	Ybor City Museum Society
Pelican Players	Zootampa at Lowry Park
Philippine Cultural Foundation	
Plant City Community Chorale	

ABOUT AMERICANS FOR THE ARTS

Americans for the Arts is a national arts service organization based in Washington, D.C., with an office in New York City. Founded in 1960, it serves, advances, and provides leadership to the network of organizations and individuals who cultivate, promote, sustain, and support the arts and arts education in America.

NATIONAL PARTNERS IN THE AEP6 STUDY

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

- Actors' Equity Association
- African Diaspora Consortium
- Arts & Planning Division (American Planning Association)
- Black Legislative Leaders Network
- Department for Professional Employees, AFL-CIO (American Federation of Labor and Congress of Industrial Organizations)
- Destinations International
- International City/County Management Association
- Independent Sector
- National Association of Counties
- National Conference of State Legislatures
- National Alliance of Community Economic Development Associations
- National Independent Venue Association
- National Organization of Black Elected Legislative Women
- Race Forward
- Recording Industry Association of America
- The Conference Board
- U.S. Conference of Mayors



"As longtime patrons of the arts, we place immense value in art's ability to convene, intrigue and delight. Art is a universal good, transcendent of countless divisions. As we work toward a more vibrant Tampa Bay, the arts must be a central priority."

—Jeff and Penny Vinik



Arts Council of Hillsborough County

601 E. Kennedy Blvd. 20th Floor · Tampa, FL 33602 · 813.571.6991 · HillsboroughArts.org



**Hillsborough
County Florida**
Arts Council