A Cultural Paradise:
Celebrating Creativity in Collier

Research Appendix

Prepared by The Cultural Planning Group
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About the Research Appendix

This research appendix includes studies and reports developed to inform A Cultural Paradise, the Collier County Arts and Culture Strategic Plan. The plan was developed between June 2019 and January 2020 and was adopted by the Collier County Board of County Commissioners on March 24, 2020. The research was conducted during that time period, with the exception of the Arts and Economic Prosperity 5 study, which was developed in 2017 by the United Arts Council of Collier County, in partnership with Americans for the Arts and the local nonprofit arts community.

For more information on the plan: https://www.uaccollier.com/programs/strategic-plan/

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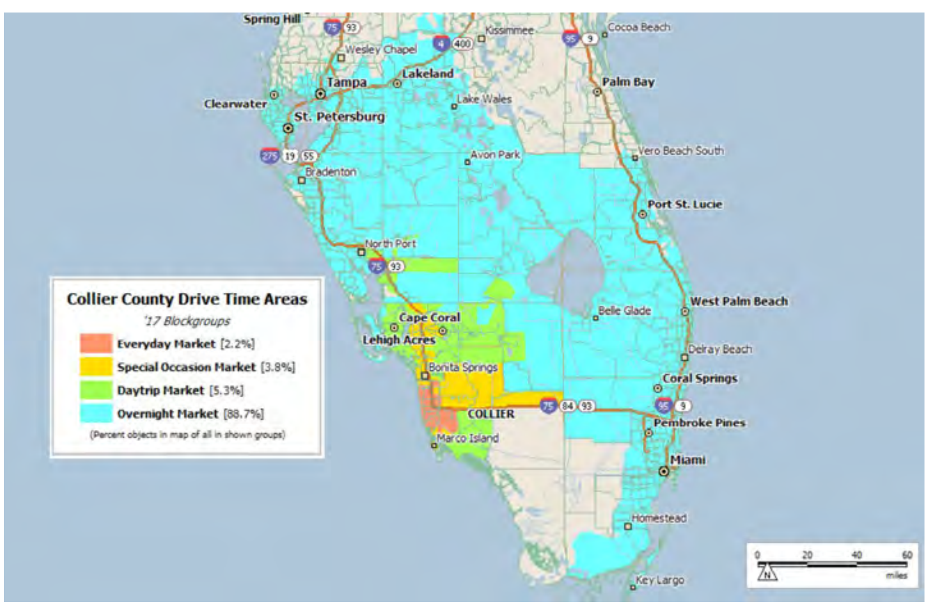
Market Demand Study

Market Demand Analysis & Mapping

This market demand analysis and mapping report provides context for the Arts and Culture Strategic Plan recommendations. The consultants conducted geodemographic analysis using Mosaic USA, ESRI market potential data, and 2019-2024 U.S. Census demographics to understand the consumer landscape for the local area and region relative to arts and culture participation. This data complements the findings from stakeholder and civic engagement and survey research.

To inform local and regional strategies for the plan, the consultants established geographic drive-time boundaries for four distinct areas from which data was compiled.

1. **Everyday Market**—Immediate area within a 30-minute drive time from downtown Naples. This area includes Naples and a few communities just over the Lee County line.
2. **Special Occasion Market**—Local area within a 30 to 60-minute drive time from downtown Naples. This area includes the outskirts of Naples, Marco Island and some parts of North and East Naples as well as areas of Lee County that hug the I-75 corridor including Fort Myers.
3. **Daytrip Market**—Close regional area within a 60 to 90-minute drive time from downtown Naples outside of Naples. This area includes Everglades City and Immokalee and other rural parts of Collier County as well as areas in Lee County such as Fort Myers Beach, Cape Coral, Lehigh Acres and North Port.
4. **Overnight Florida Market**—Extended regional area outside of Collier County within a 90 to 180-minute drive time area. This area includes population areas outside of the other three areas including multiple counties with parts of Miami-Dade to the south, Palm Beach, Martin, and St. Lucie counties to the east, Pinellas, Hillsborough and Polk to the north.



Mapping Demand

Using ESRI data the consultants mapped a variety of arts and cultural indexes to illustrate consumer demand for, a) visual arts (galleries/museums), b) arts performances (classical music/dance/theater), c) commercial concerts (country/rock), and d) hands-on creative activities (painting/drawing/playing music/cooking for fun/woodwork). The maps below illustrate the strength of this demand in the study area.[1]

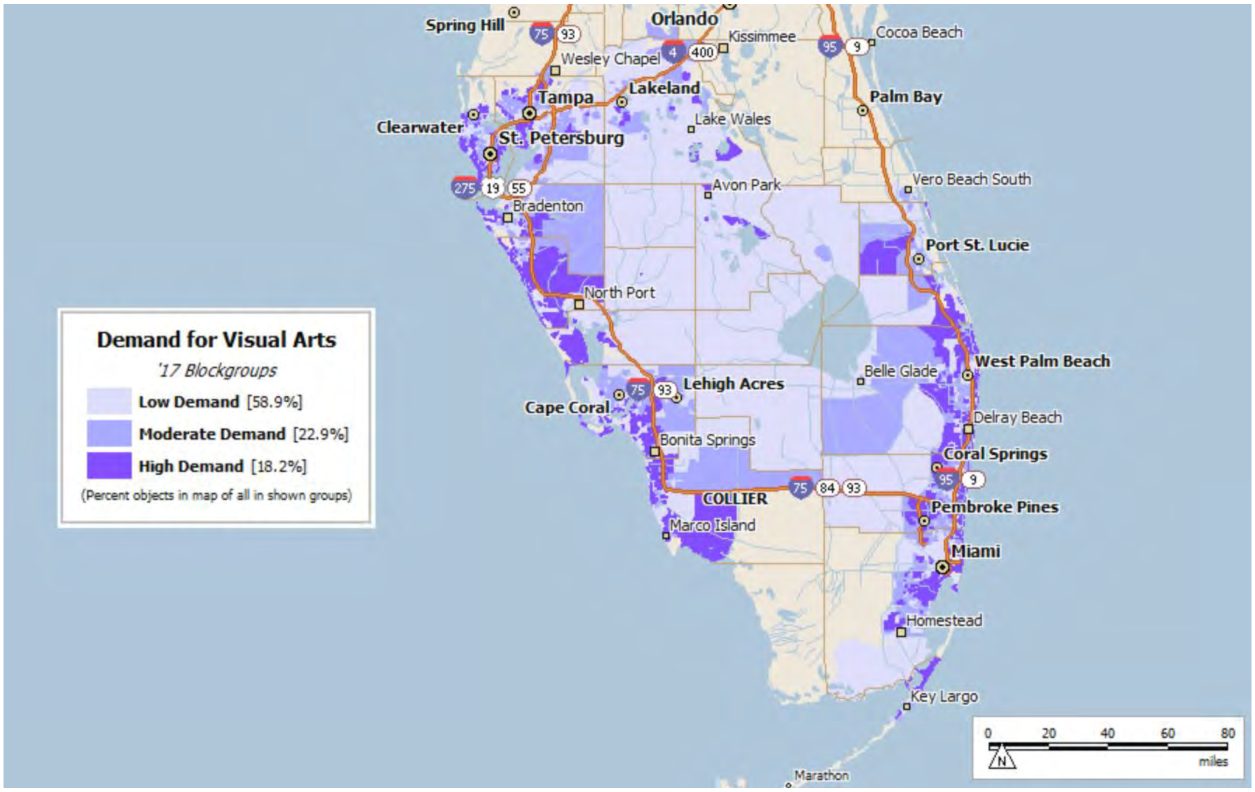
Index data measures the strength of demand for activities relative to a national average of 100. The consultants stratified the indexes into three groups, a) low demand (lower than 100), b) moderate demand (100-130), and c) high demand (higher than 130) reflecting extremes in the market area. If households in an area index at 125, for example they are 25 percent more likely than the average consumer to participate in an activity compared to the national average. Conversely, if they index at 75, they are 25 percent less likely to participate in an activity compared to the national average.[2]

For the purposes of illustration two maps are provided. The maps below illustrate demand for the entire three-hour drive time area followed by a view of Collier County. They are color coded for easier reference with visual arts in purples, arts performances in reds, commercial concerts in greens, and hands-on creative activities in blues. The geographic block groups are shaded from light (low demand) to dark (high demand). Block groups are census-based geography that reflects population density. Smaller shapes on the map are higher population density block group areas and larger shapes are low density areas, mostly rural.

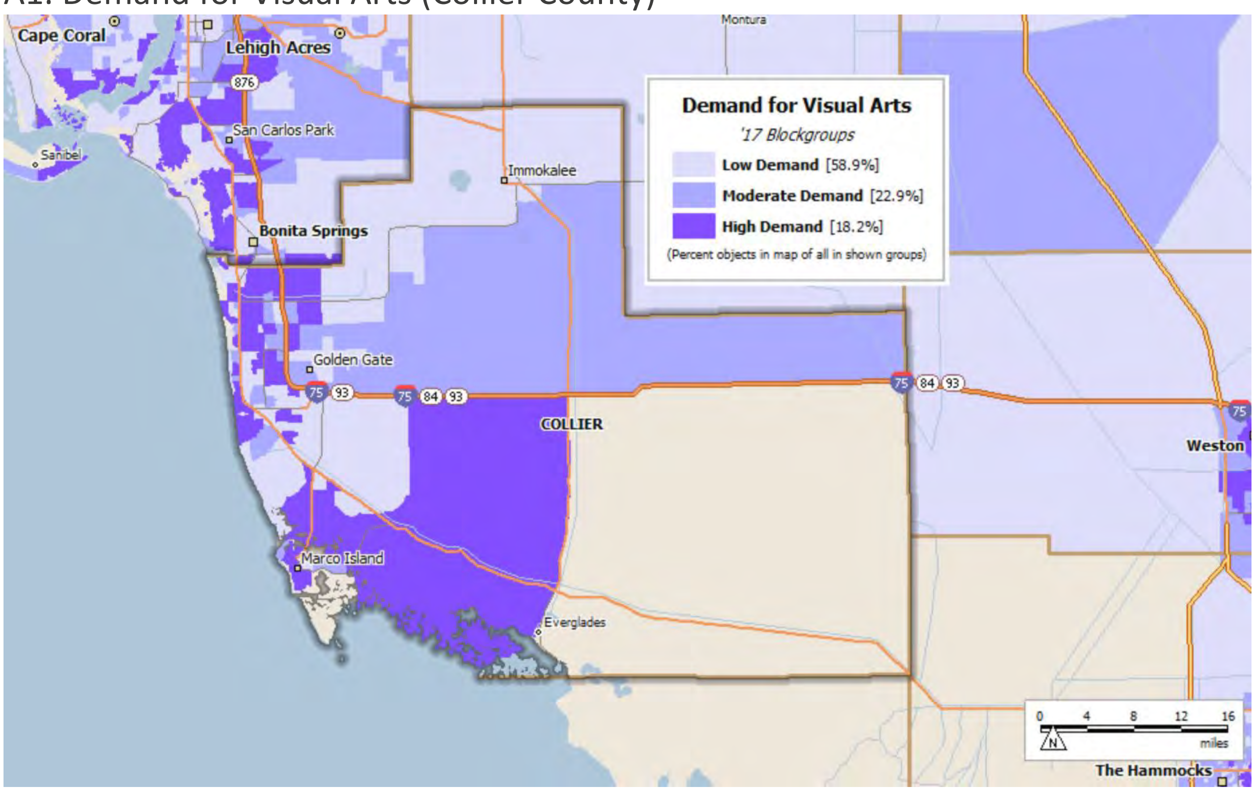
[1] ESRI data (2019) includes the following variables that have been grouped for this analysis. While these data do not encompass all of the broad and diverse arts and cultural activities in which people may participate, this is what is available. More specificity in personal interests can be found in the community survey results. Visual arts include visiting art galleries, art museums, and other museums. Arts performances include live theater, live dance performances, and concerts of classical music or opera. Commercial concerts include county music or rock-n-roll shows, and night clubs. Hands-on creative activities include playing a musical instrument, doing painting or drawing, woodworking, dancing, or cooking for fun.

[2] Index data is calculated on households at the block group level of geography which is the smallest and most stable unit of geography for which this data is available.

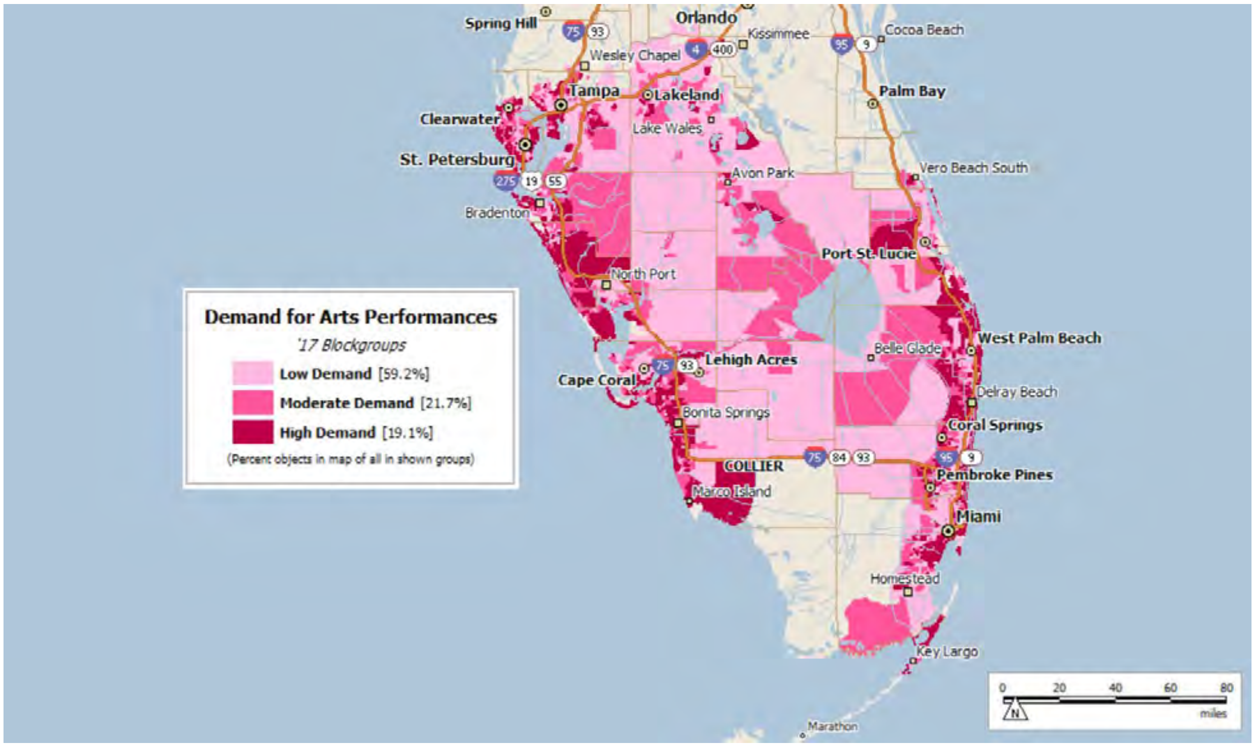
A. Demand for Visual Arts (all market areas within a three-hour drive)



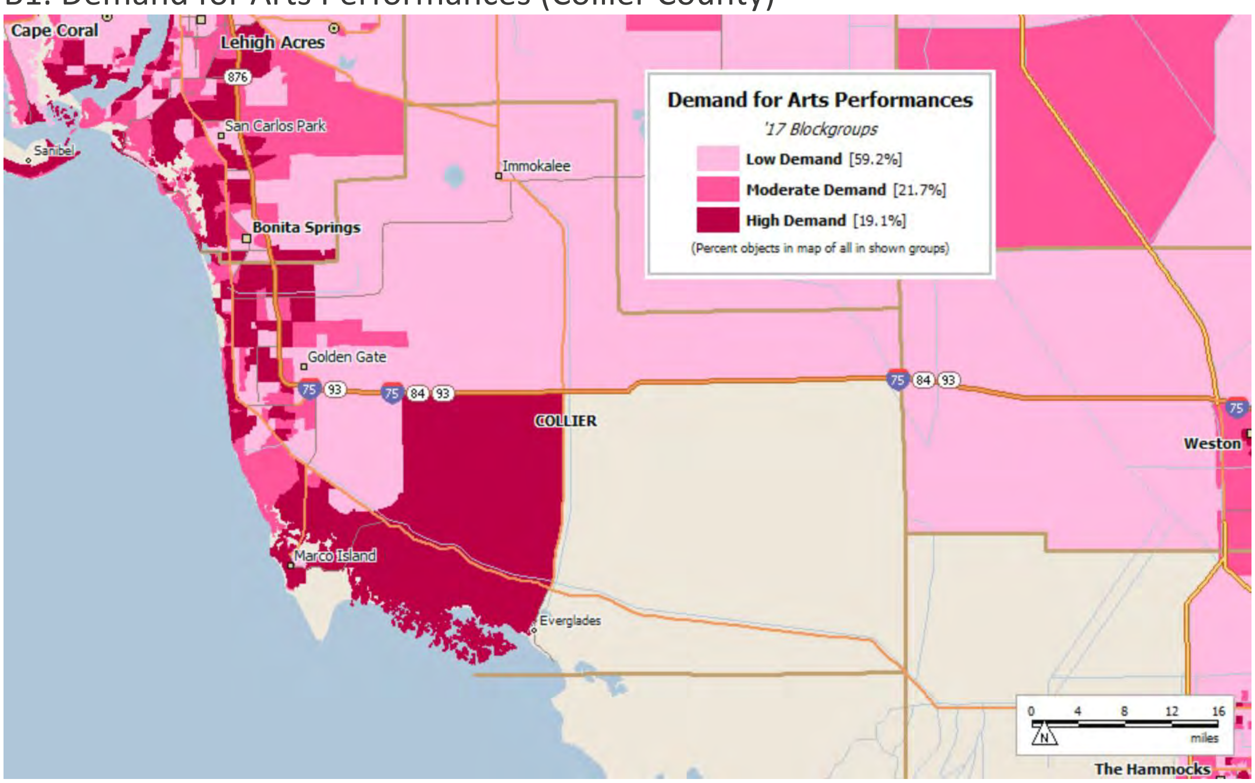
A1. Demand for Visual Arts (Collier County)



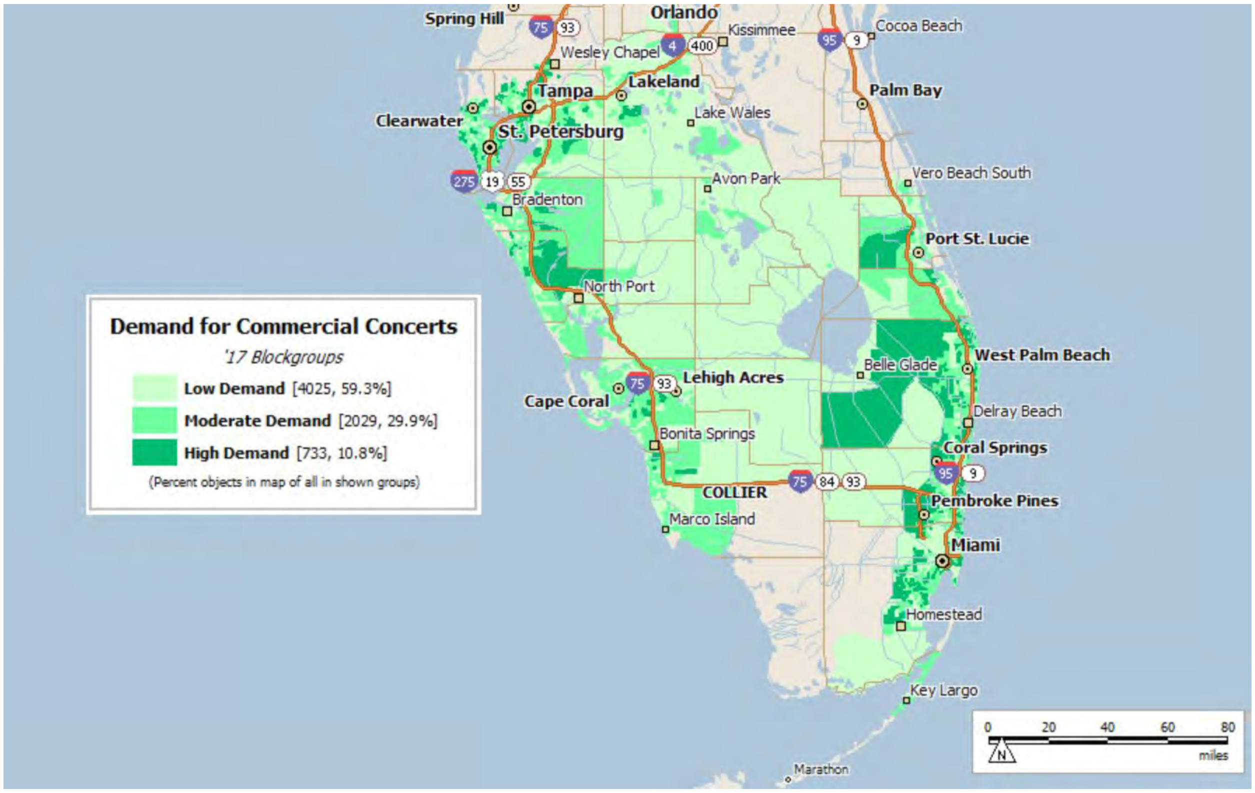
B. Demand for Arts Performances



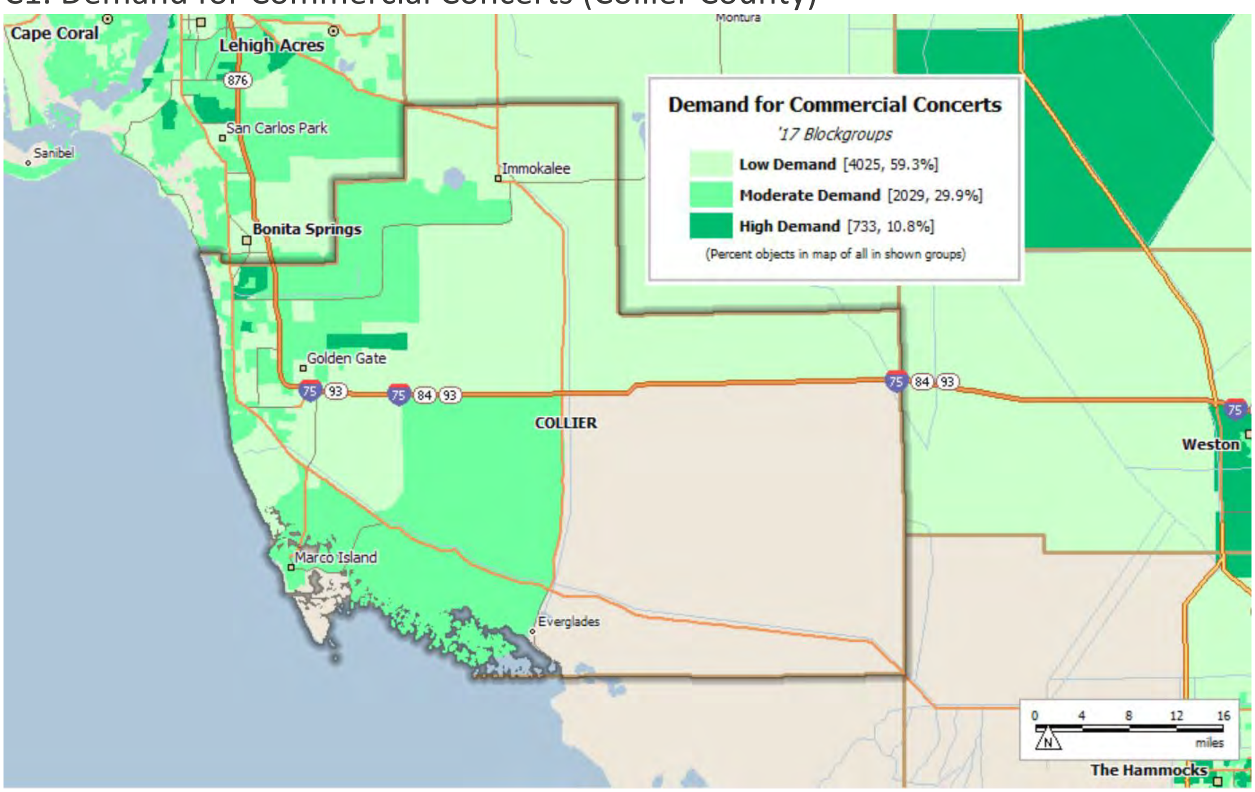
B1. Demand for Arts Performances (Collier County)



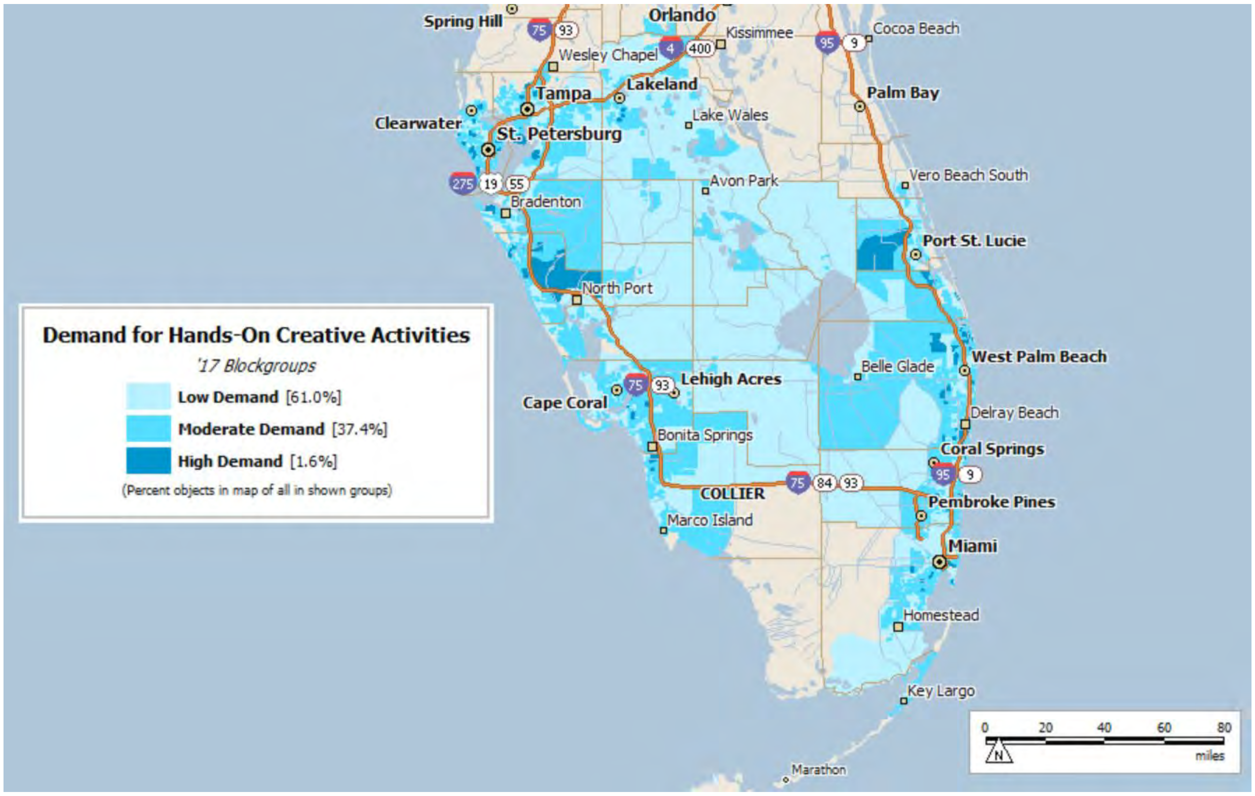
C. Demand for Commercial Concerts



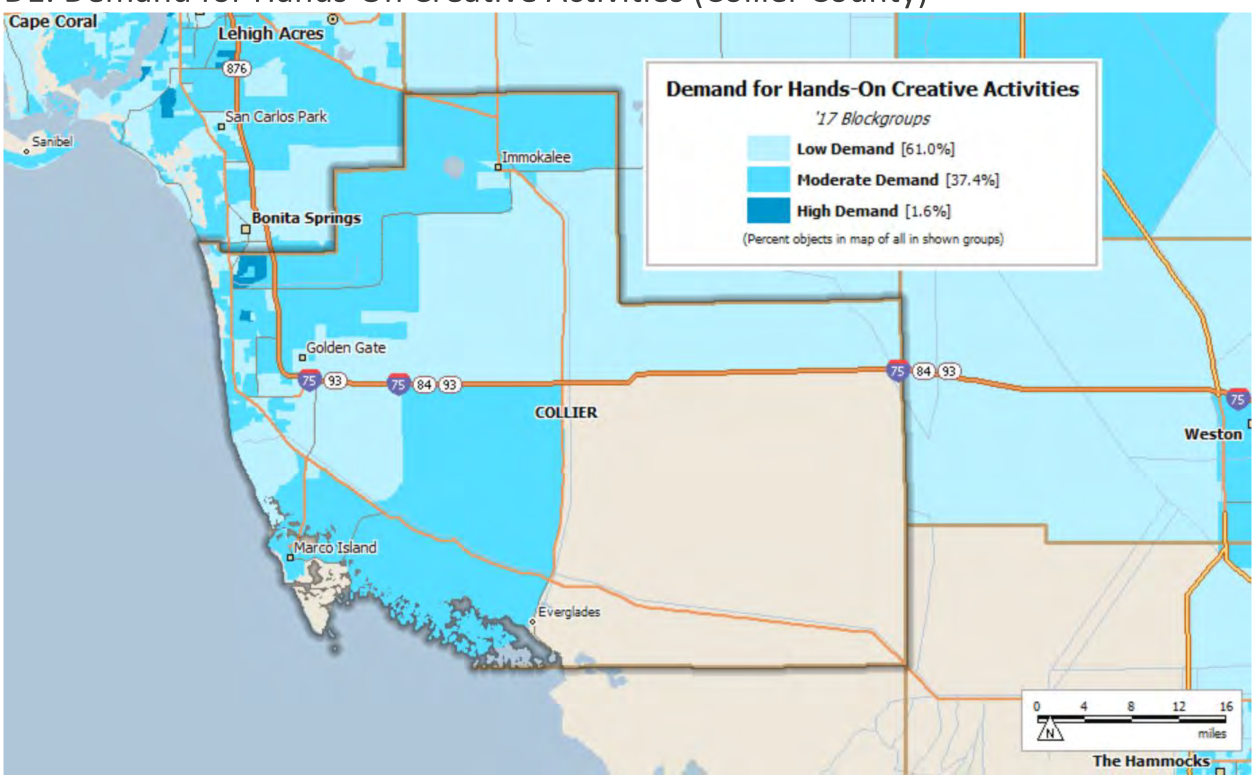
C1. Demand for Commercial Concerts (Collier County)



D. Demand for Hands-On Creative Activities



D1. Demand for Hands-On Creative Activities (Collier County)



Demographics

The chart below shows a comparison of key 2019[3] demographics for the population within the four market areas.

	2019 DEMOGRAPHICS							
	Everyday Market		Special Occasion Market		Daytrip Market		Overnight Market	
Population	266,108		449,825		583,968		10,612,055	
Households	122,662		186,398		238,955		4,133,625	
Households with persons < age 18	23,906		44,428		59,126		1,201,067	
Percentage of households with persons <age 18	19.5%		23.8%		24.7%		29.1%	
Median age	55.2		47.8		49.3		43.9	
Average household income	$ 96,846		$ 81,061		$ 66,597		$ 76,759	
White, Caucasian	222,794	83.7%	348,285	77.4%	481,199	82.4%	7,478,572	70.5%
Black, African American	18,718	7.0%	52,079	11.6%	43,767	7.5%	2,016,986	19.0%
Native American	833	0.3%	1,668	0.4%	1,948	0.3%	34,395	0.3%
Asian/Pacific Islander	5,337	2.0%	9,825	2.2%	11,374	1.9%	351,498	3.3%
Other, multi-racial	18,426	6.9%	37,968	8.4%	45,680	7.8%	730,604	6.9%
Hispanic origin	65,393	24.6%	106,645	23.7%	127,591	21.8%	3,620,199	34.1%
Percentage of population age 25+ with college degree or higher	75,952	36.7%	106,797	32.2%	104,608	23.8%	2,314,929	30.4%
2024 project population change	24,319	+9.14%	46,035	+10.23%	67,227	+11.51%	692,566	+6.53%

[3] Source: Scan/US updated U.S. Census demographics.

Market Area Household Characteristics (Mosaic USA) & Projected Potential

Household consumer characteristics are expressed in this research as Mosaic USA groups. Mosaic is a consumer lifestyle system by Experian licensed for consultant use. It groups and quantifies households by 19 types and provides an overview of the lifestyle characteristics, including how households index for leisure activities, media use, among other things compared to a national average (100). The chart below reports the percentage of households[4] represented by each Mosaic group in the four drive-time areas Following the chart is a snapshot description of the household types in the market and aspects that distinguish them, one from the other, with regard to arts and cultural participation.

Mosaic Household Types		Everyday Market	%	Special Occasion Market	%	Daytrip Market	%	Overnight Market	%
Household Counts		122,715		189,625		238,963		4,160,119	
Population in Households		*263,578*		*442,494*		*578,737*		*10,447,931*	
Population in Group Quarters		*53*		*3,227*		*9*		*31,528*	
A	Power Elite	10,068	8.2%	10,218	5.4%	3,765	1.6%	252,150	6.1%
B	Flourishing Families	1,495	1.2%	2,235	1.2%	4,151	1.7%	131,414	3.2%
C	Booming with Confidence	39,347	32.1%	46,666	24.6%	29,664	12.4%	390,528	9.4%
D	Suburban Style	933	0.8%	3,398	1.8%	3,872	1.6%	232,679	5.6%
E	Thriving Boomers	2,927	2.4%	6,315	3.3%	10,754	4.5%	152,966	3.7%
F	Promising Families	1,570	1.3%	10,853	5.7%	7,129	3.0%	109,833	2.6%
G	Young City Solos	464	0.4%	646	0.3%	89	0.0%	110,663	2.7%
H	Middle-class Melting Pot	2,401	2.0%	4,054	2.1%	8,613	3.6%	178,864	4.3%
I	Family Union	5,818	4.7%	8,757	4.6%	12,615	5.3%	392,321	9.4%
J	Autumn Years	1,125	0.9%	2,780	1.5%	13,989	5.9%	109,283	2.6%
K	Significant Singles	11,342	9.2%	12,326	6.5%	7,040	2.9%	242,230	5.8%
L	Blue Sky Boomers	13,255	10.8%	12,927	6.8%	30,994	13.0%	253,655	6.1%
M	Families in Motion	50	0.0%	410	0.2%	2,587	1.1%	23,348	0.6%
N	Pastoral Pride	167	0.1%	1,623	0.9%	2,614	1.1%	30,448	0.7%
O	Singles and Starters	9,364	7.6%	22,130	11.7%	23,926	10.0%	535,103	12.9%
P	Cultural Connections	3,492	2.8%	6,028	3.2%	9,835	4.1%	224,755	5.4%
Q	Golden Year Guardians	18,346	15.0%	27,677	14.6%	56,567	23.7%	545,371	13.1%
R	Aspirational Fusion	397	0.3%	5,543	2.9%	2,717	1.1%	114,479	2.8%
S	Economic Challenges	154	0.1%	5,039	2.7%	8,042	3.4%	130,029	3.1%
		122,715	100.0%	189,625	100.0%	238,963	100.0%	4,160,119	100.0%

[4] Household count includes group quarters for military barracks and college quarters which will differ somewhat from the U.S. Census household count.

Summary of Arts and Culture Demand by Mosaic Target Group

The chart below summarizes the demand for arts and cultural activities within the market area for the plan for each Mosaic Group.

Summary of Market Demand				
Mosaic Groups	Visual Arts	Arts Performances	Commercial Concerts	Hand-On Creative Activities
A. Power Elite	High	High	Moderate	Moderate
B. Flourishing Families	Moderate	Moderate	High	Moderate
C. Booming with Confidence	Moderate	High	Moderate	Moderate
D. Suburban Style	Low	Low	Low	Low
E. Thriving Boomers	Moderate	Moderate	Moderate	Moderate
F. Promising Families	Moderate	Moderate	Moderate	Moderate
G. Young City Solos	High	High	High	Moderate
H. Middle-class Melting Pot	Moderate	Low	Low	Low
I. Family Union	Low	Low	Low	Low
J. Autumn Years	Low	Low	Moderate	Low
K. Significant Singles	Moderate	Moderate	Low	Moderate
L. Blue Sky Boomers	Low	Low	Low	Low
M. Families in Motion	Low	Low	Low	Low
N. Pastoral Pride	Low	Low	Low	Low
O. Singles and Starters	Low	Low	Low	Moderate
P. Cultural Connections	Low	Low	Low	Low
Q. Golden Year Guardians	Low	Moderate	Low	Low
R. Aspirational Fusion	Low	Low	Low	Low
S. Economic Challenges	Low	Low	Low	Low

Mosaic Target Group Descriptions and Strategy

Using a combination of demand, location, specific indexing data, and crossover potential, each Mosaic Group was assigned to a market. Market assignments are highlighted in green. Because of proximity, all of the groups are assumed to be included in the Everyday Market although there are differences in the types of activities these households would be likely to attend, how often, and at what cost. Building on the everyday market is the extended local area named Special Occasion Market which holds the same demand, though is likely to draw visitors and attendees less often due to distance. Expanding further, the groups were then assigned to the daytrip or overnight market, or both based on their profile and characteristics.

	Household Types	Everyday Market	Special Occasion Market	Daytrip Market	Overnight Market
	Household Counts	122,715	**189,625**	**238,963**	**4,160,119**
		% of households in Area	*% of households in Area*	*% of households in Area*	*% of households in Area*
A	**Power Elite**	**8.2%**	**5.4%**	**1.6%**	**6.1%**
	Wealthy, highly educated, politically conservative, donors, active/fit, married with kids (mostly teen) at home				
	High demand for visual arts/museums, arts performances, moderate demand for commercial concerts, hands-on creative activities				
	Top interests in order: classical music, art galleries, museums, charitable giving, theater, dance, rock music, adult education, playing instruments, painting/drawing				
	Rationale: This group is off the charts for interest in all types of arts and should be included in efforts to engage full-time and seasonal residents in the everyday market as well as audiences from the special occasion, daytrip, and overnight markets. They have a variety of interest. Cost is not a barrier. This is a good crossover group for a variety of eco/nature-tourism activities, culinary arts, health/wellness, and a variety of recreational activities.				
B	**Flourishing Families**	**1.2%**	**1.2%**	**1.7%**	**3.2%**
	Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable active lifestyles				
	High demand for commercial concerts, moderate demand for visual arts/museums, arts performances, hands-on creative activities				
	Top interests in order: rock music, country music, charitable giving				
	Rationale: This group shows high and moderate demand for all arts variables, but is most interested in commercial concerts such as rock and country music. It should be included in everyday, special occasion, daytrip, and overnight market for popular, non-classical performance and family day trips and family and couple overnights for special events. They have a variety of interests, cost is not a barrier. This group is abundant with cross-over interests with attractions, culinary arts, health/wellness, and nearly every spor/recreational activity.				
C	**Booming with Confidence**	**32.1%**	**24.6%**	**12.4%**	**9.4%**
	Affluent, highly educated, belong to clubs, give to environment, married no kids at home				
	High demand for arts performances, moderate demand for commercial concerts, visual arts/museums, hands-on creative activities				
	Top interests in order: theater, charitable giving, art galleries, classical music				
	Rationale: This group shows high and moderate demand for all arts variables and tops interest for theater, classical music and visiting art galleries. It should be included in everyday, special occasion, daytrip, and overnight market for adults/couples overnights for special events. Cost is not a barrier.This is good crossover group for eco/nature-tourism, attractions, culinary arts, and several sports/recreational activities.				
D	**Suburban Style**	**0.8%**	**1.8%**	**1.6%**	**5.6%**
	Middle-aged, ethnically-mixed suburban families and couples earning upscale incomes				
	Demand is low, below national average for all.				
	Top interests (index 90+) in order: adult education, dancing, painting/drawing, cooking for fun				
	Rationale: This group shows low demand for all arts variables, but just below the national average for hands-on creative activities. It should be included in everyday, special occasion, and daytrip markets for relevant programs. It is excluded from the overnight market because of the low scores for events and cultural/art destination sites. Cost is not a major barrier, but this group is more likely to be attracted through its crossover interests that include attractions, culinary arts, and a good number of sports/recreational activities.				
E	**Thriving Boomers**	**2.4%**	**3.3%**	**4.5%**	**3.7%**
	Middle class, politically independent, nature enthusiasts, love 60s & 70s music, married no kids at home				
	Moderate demand for visual arts/museums, arts performances, commercial concerts, hands-on creative activities				
	Top interests in order: theater, painting/drawing, charitable giving, art galleries, classical music, museums				
	Rationale: This group shows moderate demand for all arts variables and a variety of interests. It should be included in everyday, special occasion, and daytrip markets for relevant programs. Cost is not a major barrier and this is a good crossover market for eco-tourism.				

Continued on following pages.

	Household Types	Everyday Market	Special Occasion Market	Daytrip Market	Overnight Market
	Household Counts	122,715	189,625	238,963	4,160,119
		% of households in Area	*% of households in Area*	*% of households in Area*	*% of households in Area*
F	Promising Families	1.3%	5.7%	3.0%	2.6%
	Young couples with children in starter homes living child-centered lifestyles				
	Demand is moderate for all.				
	Top interests (index 90+) in order: zoos, country music, adult education, rock music, charitable giving, woodworking, dance performances, cooking for fun, nightclubs, dancing, painting/drawing, playing instruments, museums, theater, art galleries, classical music				
	Rationale: This group shows moderate demand for all arts variables and a very wide variety of interests. It should be included in everyday, special occasion, daytrip and overnight markets for family-friend activities and packages. Cost may be barrier to some and this is a good crossover market for family-friend attractions.				
G	Young City Solos	0.4%	0.3%	0.0%	2.7%
	Mid and lower income singles, downtown commuters, active lifestyle, career driven, liberal, females, mix of young kids and no kids				
	High demand for visual arts/museums, arts performances, commercial concerts. Moderate demand for hands-on creative activities				
	Top interests in order: museums, art galleries, theater, charitable giving, classical music, nightclubs, painting/drawing, rock music, dancing				
	Rationale: This group shows high or moderate demand for all arts variables and a wide variety of interests. It should be included in everyday, special occasion, daytrip, and overnight markets for younger, socially active single adults.. Cost may be a barrier for some. This is good crossover market for sports and recreation marketing.				
H	Middle-class Melting Pot	2.0%	2.1%	3.6%	4.3%
	Middle-aged, established couples living in suburban and urban homes				
	Demand is moderate for visual arts/museums. Demand is low for arts performances, commercial concerts, hands-on creative activities				
	Top interests (index 90+) in order: adult education, zoos, dancing, attending dance, rock music, museums, cooking for fun, theater, painting/drawing, nightclubs, country music, art galleries, woodwork				
	Rationale: This group shows moderate demand for visual arts and museums, but low for other activites. However, the indexes are just below the national average.. It should be included in everyday and special occasion markets. Cost is not a major barrier. This is good crossover market for a variety of activities related to eco-tourism and recreation.				
I	Family Union	4.7%	4.6%	5.3%	9.5%
	Middle-aged, established couples living in suburban and urban homes				
	Demand is below average for all.				
	Top interests (index 90+) in order: adult education, dancing, zoos, attending dance performances				
	Rationale: This group shows low indexes for all arts/cultural activities. However, the indexes for zoos and dance performances are just below the national average.. It should be included in everyday and special occasion markets. Cost is not a major barrier, but this group is likely to be more attracted by crossover activities linked to family visits to attractions or special recreational events/competitions/tournaments (e.g. dance competitions). This is good crossover market for sports and recreation..				
J	Autumn Years	0.9%	1.5%	5.9%	2.6%
	Established and mature couples living gratified lifestyles in older homes				
	Demand is moderate for commercial concerts. Demand is low for visual arts/museums, hands-on creative activities				
	Top interests (index 90+) in order: charitable giving, woodworking, country music, zoos, cooking for fun, nightclubs, theater, rock music, classical music, adult education, painting/drawing, dance performances, playing instruments, museums				
	Rationale: This group shows moderate demand for commecial concerts, but low demand for most other arts/cultural activites. However, their indexes are just below the national average and their interests are extremely varied. It should be included in everyday, special occasion, daytrip, and overnight market for older adults/seniors, particulary for evening events when driving at night may be an issue. Cost is likely to be a barrier for some..This is good crossover group for eco/nature-tourism..				
K	Significant Singles	9.2%	6.5%	2.9%	5.8%
	Frugal, renters, socialites, eclectic interests, cultural interests, mix of kids and no kids at home				
	Demand is moderate for visual arts/museums, arts performances, hands-on creative activities. Demand is low for commercial concerts.				
	Top interests (index 90+) in order: painting/drawing, classical music, art galleries, playing instruments, nightclubs, theater, rock music, museums, dance performances, cooking for fun, adult education, zoos, dancing, woodwork				
	Rationale: This group shows moderate demand for most arts/cultural variables and a very wide variety of interests. It should be included in everyday, special occasion, daytrip markets for younger, socially active single adults.. Cost will be a barrier to some. This is good crossover market for sports and recreation marketing.				

	Household Types	Everyday Market	Special Occasion Market	Daytrip Market	Overnight Market
	Household Counts	122,715	189,625	238,963	4,160,119
		% of households in Area	*% of households in Area*	*% of households in Area*	*% of households in Area*
L	Blue Sky Boomers	10.8%	6.8%	13.0%	6.1%
	Lower and middle-class baby boomer-aged households living in small towns				
	Demand is low for all (although just below moderate)				
	Top interests (index 90+) in order: woodworking, charitable giving, painting/drawing, zoos, cooking for fun, theater, art galleries, country music, playing instruments, classical music, nightclubs, adult education				
	Rationale: This group shows low indexes for all arts/cultural activities. However, the indexes for zoos, theater, art galleries, country music, and classical music are just below the national average. It should be included in everyday and special occasion markets - every day for the hands-on activities and special occasion for events. Cost mayu be a barrier to some. This is good crossover market for eco/nature-tourism, culinary arts, and some leisure recreational activities.				
M	Families in Motion	0.0%	0.2%	1.1%	0.6%
	Younger, working-class families earning moderate incomes in smaller residential communities				
	Demand is low, well below national average for all.				
	Top interests (index 90+) in order: woodwork				
	Rationale: This group shows low indexes for all arts/cultural activities and as cost is also likey to be a barrier this groups should be included in the everyday market and special occasion market. This group is likely to be more attracted by crossover activities linked to family visits to attractions or recreational activities that involve the whole family. This is good crossover market for sports and recreation.				
N	Pastoral Pride	0.1%	0.9%	1.1%	0.7%
	Eclectic mix of lower middle-class consumers who have settled in country and small town areas				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: cooking for fun, woodwork, country music, adult education, zoos				
	Rationale: This group shows very low indexes for all arts/cultural activities and as cost and travel time are likely to be barriers. This group should be included in the everyday market and special occasion market. This group is likely to be more attracted by commercial concerts such as country music or family trips to attractions. This is good crossover market for sports and recreation as well as health/wellness..				
O	Singles and Starters	7.6%	11.7%	10.0%	12.9%
	Renters, motivated, socially active, highly digital, mix of young kids and no kids at home				
	Demand is moderate for hands-on creative activities. Demand is below average for visual art/museums, arts performances, commercial concerts				
	Top interests (index 90+) in order: dancing, painting/drawing, adult education, zoos, playing instruments, rock music, cooking for fun, nightclubs, classical music, museums, woodwork, art galleries, dance performances,				
	Rationale: This group shows moderate demand for hands-on creative activites, but below average for visual arts/museums, arts performances and commercial concerts. However, they index just below the national average for zoos, concerts, art galleries, and museums. This group should be included in the everyday market, special occasion market, and daytrip markets. This group is likely to be more attracted by discount packages that fit the needs of very young families with young children and is a good crossover market for attractions.				
P	Cultural Connections	2.8%	3.2%	4.1%	5.4%
	Mid and low income, culturally diverse, single parents, ambitious, kids at home				
	Demand is low for all, well below the national average				
	Top interests (index 90+) dancing, adult education, zoos				
	Rationale: This group shows low demand for all arts/cultural activites. However, this may in part be due to lack of access to arts amenities. This group should be included in the everyday market, special occasion market, and daytrip markets. Price is and transportation are likely to be barriers. This is a good crossover market for health/wellness and some sports and recreational activities.				
Q	Golden Year Guardians	15.0%	14.6%	23.7%	13.1%
	Retirees living in old homes, settled residences and communities				
	Demand is moderate for arts performances. Demand is low for visual arts/museums, commercial concerts, hands-on creative activities				
	Top interests (90+) in order: theater, charitable giving, adult education, art galleries, playing instruments, classical music, museums				
	Rationale: This group shows moderate demand for arts performances and indexes just below the national average for visual arts and museums. Given it's density in the everyday, special occasion, and day trip markets, these should be the priorities for engaging full-time and seasonal residents as audiences from the overnight market for value-priced packages. They have a variety of interest. Cost may be a barrier to those in fixed incomes. This is a good crossover group for eco/nature-tourism activities and culinary arts.				
R	Aspirational Fusion	0.3%	2.9%	1.1%	2.8%
	Lower-income singles and single parents living in urban locations and striving to make a better life				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: dancing, classical music, adult education, woodwork, nightclubs, playing instruments, cooking for fun				
	Rationale: This group shows low demand for all arts/cultural activities. This group should be included in the everyday market, special occasion market for low cost or free events				
S	Economic Challenges	0.1%	2.7%	3.4%	3.1%
	Economically challenged adults living alone in urban areas				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: dancing, adult education, woodwork, classical music, cooking for fun, playing instruments				
	Rationale: This group shows low demand for all arts/cultural activities. This group should be included in the everyday market, special occasion market for low cost or free events				

	Household Types	Everyday Market	Special Occasion Market	Daytrip Market	Overnight Market
	Household Counts	122,715	189,625	238,963	4,160,119
		% of households in Area	*% of households in Area*	*% of households in Area*	*% of households in Area*
L	Blue Sky Boomers	10.8%	6.8%	13.0%	6.1%
	Lower and middle-class baby boomer-aged households living in small towns				
	Demand is low for all (although just below moderate)				
	Top interests (index 90+) in order: woodworking, charitable giving, painting/drawing, zoos, cooking for fun, theater, art galleries, country music, playing instruments, classical music, nightclubs, adult education				
	Rationale: This group shows low indexes for all arts/cultural activities. However, the indexes for zoos, theater, art galleries, country music, and classical music are just below the national average. It should be included in everyday and special occasion markets - every day for the hands-on activities and special occasion for events. Cost mayu be a barrier to some. This is good crossover market for eco/nature-tourism, culinary arts, and some leisure recreational activities.				
M	Families in Motion	0.0%	0.2%	1.1%	0.6%
	Younger, working-class families earning moderate incomes in smaller residential communities				
	Demand is low, well below national average for all.				
	Top interests (index 90+) in order: woodwork				
	Rationale: This group shows low indexes for all arts/cultural activities and as cost is also likey to be a barrier this groups should be included in the everyday market and special occasion market. This group is likely to be more attracted by crossover activities linked to family visits to attractions or recreational activities that involve the whole family. This is good crossover market for sports and recreation.				
N	Pastoral Pride	0.1%	0.9%	1.1%	0.7%
	Eclectic mix of lower middle-class consumers who have settled in country and small town areas				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: cooking for fun, woodwork, country music, adult education, zoos				
	Rationale: This group shows very low indexes for all arts/cultural activities and as cost and travel time are likely to be barriers. This group should be included in the everyday market and special occasion market. This group is likely to be more attracted by commercial concerts such as country music or family trips to attractions. This is good crossover market for sports and recreation as well as health/wellness..				
O	Singles and Starters	7.6%	11.7%	10.0%	12.9%
	Renters, motivated, socially active, highly digital, mix of young kids and no kids at home				
	Demand is moderate for hands-on creative activities. Demand is below average for visual art/museums, arts performances, commercial concerts				
	Top interests (index 90+) in order: dancing, painting/drawing, adult education, zoos, playing instruments, rock music, cooking for fun, nightclubs, classical music, museums, woodwork, art galleries, dance performances,				
	Rationale: This group shows moderate demand for hands-on creative activites, but below average for visual arts/museums, arts performances and commercial concerts. However, they index just below the national average for zoos, concerts, art galleries, and museums. This group should be included in the everyday market, special occasion market, and daytrip markets. This group is likely to be more attracted by discount packages that fit the needs of very young families with young children and is a good crossover market for attractions.				
P	Cultural Connections	2.8%	3.2%	4.1%	5.4%
	Mid and low income, culturally diverse, single parents, ambitious, kids at home				
	Demand is low for all, well below the national average				
	Top interests (index 90+) dancing, adult education, zoos				
	Rationale: This group shows low demand for all arts/cultural activites. However, this may in part be due to lack of access to arts amenities. This group should be included in the everyday market, special occasion market, and daytrip markets. Price is and transportation are likely to be barriers. This is a good crossover market for health/wellness and some sports and recreational activities.				
Q	Golden Year Guardians	15.0%	14.6%	23.7%	13.1%
	Retirees living in old homes, settled residences and communities				
	Demand is moderate for arts performances. Demand is low for visual arts/museums, commercial concerts, hands-on creative activities				
	Top interests (90+) in order: theater, charitable giving, adult education, art galleries, playing instruments, classical music, museums				
	Rationale: This group shows moderate demand for arts performances and indexes just below the national average for visual arts and museums. Given it's density in the everyday, special occasion, and day trip markets, these should be the priorities for engaging full-time and seasonal residents as audiences from the overnight market for value-priced packages. They have a variety of interest. Cost may be a barrier to those in fixed incomes. This is a good crossover group for eco/nature-tourism activities and culinary arts.				
R	Aspirational Fusion	0.3%	2.9%	1.1%	2.8%
	Lower-income singles and single parents living in urban locations and striving to make a better life				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: dancing, classical music, adult education, woodwork, nightclubs, playing instruments, cooking for fun				
	Rationale: This group shows low demand for all arts/cultural activities. This group should be included in the everyday market, special occasion market for low cost or free events				
S	Economic Challenges	0.1%	2.7%	3.4%	3.1%
	Economically challenged adults living alone in urban areas				
	Demand is low, well below national average for all.				
	Top interests (index 70+) in order: dancing, adult education, woodwork, classical music, cooking for fun, playing instruments				
	Rationale: This group shows low demand for all arts/cultural activities. This group should be included in the everyday market, special occasion market for low cost or free events				

Snapshot of Target Audience Groups by Market Area

For Every Day, Special Occasion, Day Trip, and Overnight Areas (All Four Areas)

A. Power Elite
B. Flourishing Families
C. Booming with Confidence
E. Thriving Boomers
F. Promising Families
G. Young City Solos
J. Autumn Years
Q. Golden Year Guardians

For Every Day, Special Occasion, Day Trip Areas (Three Areas)

D. Suburban Style
K. Significant Singles
O. Singles and Starters
P. Cultural Connections

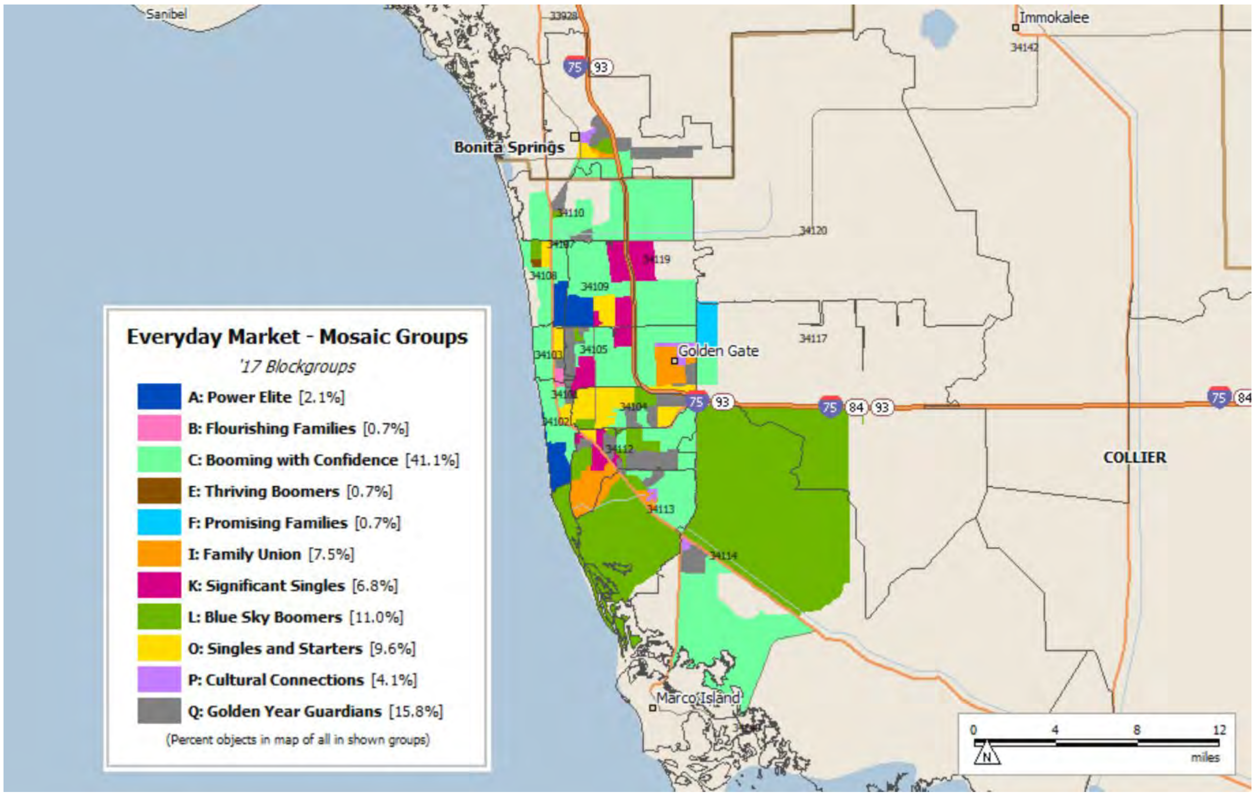
For Every Day and Special Occasion Areas (Two Areas)

H. Middle-class Melting Pot
I. Family Union
L. Blue Sky Boomers
N. Pastoral Pride
R. Aspirational Fusion
S. Economic Challenges

Target Group Location

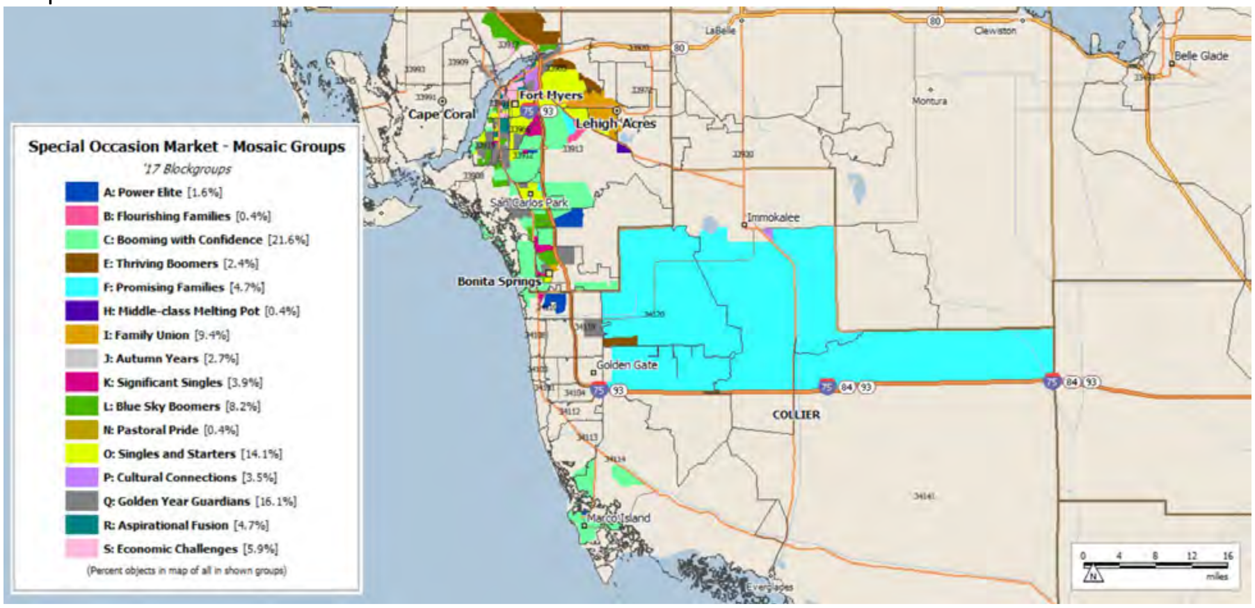
The maps below illustrate where each Mosaic group is dominant in each market.[5]

A. Everyday Market – Mosaic Profile

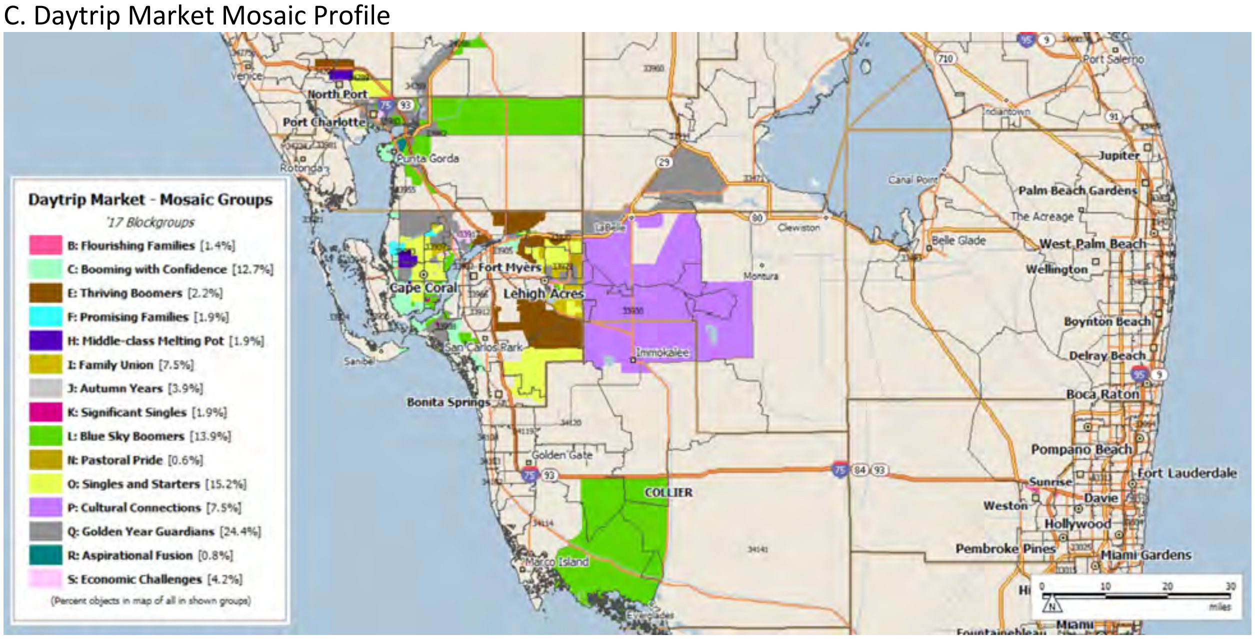


[5] Block group level of geography.

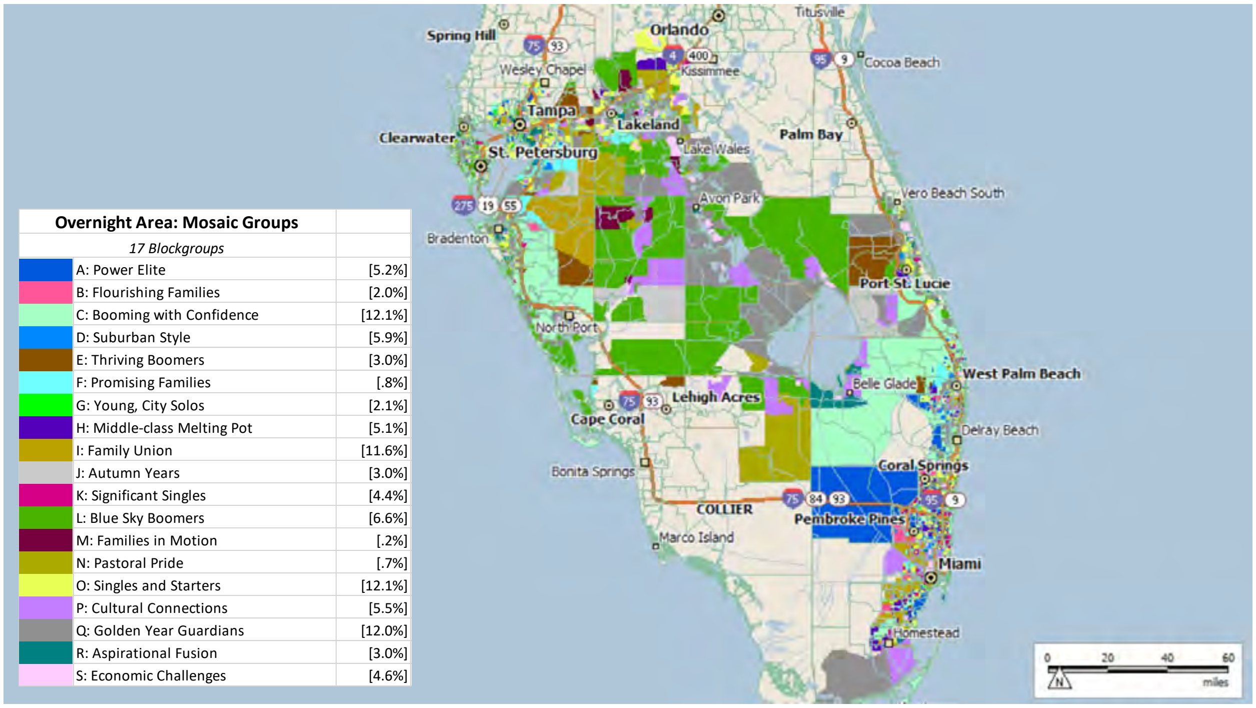
B. Special Occasion Market Mosaic Profile



C. Daytrip Market Mosaic Profile



D. Overnight Market Mosaic Profile



Crossover Interest Opportunities

The chart below summarizes crossover potential for each Mosaic Group with a variety of leisure interests related to sports and recreation, and eco/nature-tourism activities. Variables that are checked indicate an index at or above the national average.[6]

Crossover Interests (100+)	A: Power Elite	B: Flourishing Families	C: Booming with Confidence	D: Suburban Style	E: Thriving Boomers	F: Promising Families	G: Young City Solos	H: Middle-class Melting Pot	I: Family Union	J: Autumn Years	K: Significant Singles	L: Blue Sky Boomers	M: Families in Motion	N:Pastoral Pride	O: Singles and Starters	P: Cultural Connections	Q: Golden Year Guardians	R: Aspirational Fusion	S: Economic Challenges
Bird watching	✓		✓		✓				✓	✓		✓					✓		
Casino		✓	✓	✓	✓		✓	✓	✓	✓					✓			✓	✓
Gardening	✓	✓	✓	✓	✓	✓		✓		✓		✓	✓						
Culinary/gourmet	✓	✓	✓	✓	✓		✓		✓			✓					✓		
Environmental causes	✓		✓		✓	✓	✓	✓		✓									
Health/wellness	✓	✓	✓	✓	✓	✓	✓		✓					✓		✓		✓	
Green behavior	✓	✓	✓		✓	✓	✓	✓									✓		
Hiking	✓	✓	✓	✓	✓	✓	✓				✓	✓	✓						
Baseball		✓		✓		✓	✓		✓				✓		✓	✓		✓	✓
Basketball		✓		✓			✓						✓	✓	✓	✓		✓	✓
Bicycling outdoors	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓								
Fitness walking	✓	✓	✓	✓	✓	✓	✓	✓				✓							
Soccer	✓	✓				✓	✓		✓						✓	✓		✓	
Fresh-water fishing			✓	✓	✓	✓						✓	✓	✓				✓	✓
Golf	✓	✓	✓	✓		✓	✓								✓				
Horseback riding	✓	✓			✓	✓		✓	✓			✓	✓	✓	✓	✓		✓	
Jogging	✓	✓		✓		✓	✓	✓	✓		✓				✓	✓			
Motorcycling		✓	✓		✓	✓		✓	✓		✓	✓	✓	✓		✓		✓	
Power boating	✓	✓	✓	✓	✓	✓	✓					✓			✓	✓			
Swimming	✓	✓	✓			✓	✓				✓		✓				✓		
Tennis	✓	✓	✓			✓	✓				✓				✓			✓	
Beach	✓	✓	✓	✓	✓	✓	✓	✓			✓				✓				

[6] Sources: Experian, Simmons Market Research Bureau.

Communication Channels

As with the crossover interests, preferred communication channels (indexing at 150 or higher due to high cost of investment) and social media channels (indexing at 100 or higher) are provided in the chart below.

Communication Channels (150+) and Social Media (100+)	A: Power Elite	B: Flourishing Families	C: Booming with Confidence	D: Suburban Style	E: Thriving Boomers	F: Promising Families	G: Young City Solos	H: Middle-class Melting Pot	I: Family Union	J: Autumn Years	K: Significant Singles	L: Blue Sky Boomers	M: Families in Motion	N:Pastoral Pride	O: Singles and Starters	P: Cultural Connections	Q: Golden Year Guardians	R: Aspirational Fusion	S: Economic Challenges
Broadcast Cable TV	✓	✓	✓			✓	✓												
Internet Radio	✓	✓		✓		✓	✓								✓				
Mobile Display						✓							✓		✓	✓		✓	
Mobile Video						✓							✓		✓	✓		✓	✓
Online Video											✓				✓	✓		✓	✓
Online Display									✓		✓				✓	✓		✓	✓
Online Streaming TV	✓	✓				✓	✓								✓				
Satellite Radio	✓	✓	✓	✓		✓	✓												
Email receptive															✓	✓		✓	
Direct mail receptive										✓							✓		
Brick Mortar Store	✓	✓				✓	✓												
Online Mid High End	✓	✓	✓				✓												
E-tailer	✓	✓	✓	✓		✓	✓												
Online Discount	✓	✓		✓		✓	✓												
Online Bid Sites	✓	✓		✓		✓	✓						✓						
facebook	✓	✓		✓		✓	✓				✓		✓	✓	✓			✓	
twitter	✓	✓		✓		✓	✓				✓				✓	✓			
livingsocial	✓	✓	✓	✓		✓	✓	✓			✓				✓			✓	

Esri Estimated Potential Buyer Counts

Esri estimates buyer counts[7] for geographic block groups for the variables included in this analysis. The data below is the sum total of buyer counts which are not mutually exclusive, meaning that a potential buyer may be counted within more than category (e.g. art galleries and museums, within Visual Arts/Museums)

This data was useful for quantifying a large pool of potential buyers in the immediate local area within a 30-minute drive of many of Collier County venues and nearly double that for buyers willing to drive up to an hour. The day trip area that includes over 600,00 potential buyers living between one hour and 90-minutes from downtown Naples. Potential buyers living an hour and half to three hours away produce a total count of over 11 million. Frequency of participation will vary dramatically as distance increases.

ESRI Estimated Potential Buyer	Every Day	Special Ocassion	Day Trip	Overnight
Visual Arts/Museums	75,268	121,963	146,129	2,842,629
Arts Performances	49,061	74,134	88,665	1,678,565
Commercial Concerts	64,490	109,281	134,531	2,602,722
Hands-on Creative Activities	118,909	197,562	245,555	4,587,835
Totals	**307,728**	**502,940**	**614,880**	**11,711,751**
Charitable Giving	11,272	17,694	22,450	364,364

[7] Source: Esri 2019 Market Potential Data.

Target Audience Summary Snapshot-Programming

	PROGRAMMING						
Target Audience Segment	Fine Arts	Local Culture	Commercial Concerts	Crossover	Hands-on Activities	Family/Youth Activities	Cost Threshold
A. Power Elite	●●●	●	●	●●	●	●●	$$$$$
B. Flourishing Families	●	●●	●●●	●	●	●●●	$$$
C. Booming with Confidence	●●	●●	●●	●●	●	●	$$$$$
D. Suburban Style	●	●●●	●●	●●●	●●	●●	$$
E. Thriving Boomers	●●●	●●●	●●	●●	●●	●	$$$
F. Promising Families	●	●●	●●	●●	●●●	●●●	$$
G. Young City Solos	●	●●●	●●	●●●	●●●	●	$$
H. Middle-class Melting Pot	●	●●●	●	●●	●	●	$$
I. Family Union	●	●●	●	●●●	●●	●	$$
J. Autumn Years	●	●●	●●●	●●	●●	●	$$
K. Significant Singles	●●	●●●	●	●●	●●	●	$
L. Blue Sky Boomers	●	●●●	●●	●●●	●●●	●●	$$
M. Families in Motion	●	●●●	●	●●●	●●●	●●●	$
N. Pastoral Pride	●	●●●	●	●●	●●	●●	$
O. Singles and Starters	●	●●●	●●	●●	●●●	●●●	$
P. Cultural Connections	●	●●●	●	●	●	●●●	$$
Q. Golden Year Guardians	●●	●●	●●	●●●	●	●	$$
R. Aspirational Fusion	●	●	●	●●	●●	●●●	$
S. Economic Challenges	●	●●	●	●●	●●	●	$

Programming interests of each target audience are summarized by strength with one dot for "low," two dots for "moderate," and three dots for "high".

Cost threshold is represented by one to five "$" indicating level of price sensitivity. One "$" indicates the highest price sensitivity/lowest threshold and five "$$$$$" indicates low sensitivity/high threshold.

Programming examples:

Fine Arts: fine arts performances of music, theatre, opera, dance, museums, high-end galleries, high-end art fairs

Local Culture: craft and other fairs, festivals, creative places, authentic local experiences/destinations, foodways

Crossover: outdoor recreation, nature, wellness
Family Activities: arts and creative cultural activities designed for children and youth

Target Audience Summary Snapshot-Media, Messaging, Market

The chart below summarizes the type of media and messaging to which each target audience is most likely to respond followed by the market areas in which they

	MEDIA AND MESSAGING							MARKET			
Target Audience Segment	Newspapers/ Magazines	Broadcast/ Cable TV	Direct Mail Receptive	Email Receptive	Internet Radio/ Satellite Radio	Mobile	Top Message Drivers	Everyday	Special Occasion	Daytrip	Overnight
A. Power Elite	●●●	●●●	●	●	●●●	●	Peer testimonials/Eco-healthy-altruism	●	●	●	●
B. Flourishing Families	●●	●●●	●	●	●●●	●	Absolute best deal/Peer testimonials	●	●	●	●
C. Booming with Confidence	●●●	●●●	●●●	●	●●	●	Peer testimonials/Trust in reputation matters	●	●	●	●
D. Suburban Style	●	●●●	●	●●	●●●	●●	Cutting edge-early adopters/Absolute best deal	●	●	●	
E. Thriving Boomers	●	●●	●	●	●	●	Peer testimonials/Trust in reputation matters	●	●	●	●
F. Promising Families	●●	●●●	●	●	●●●	●●●	Absolute best deal/Best family fit	●	●	●	●
G. Young City Solos	●●	●●●	●	●	●●●	●●	Eco-healthy-altruism/Easy with many benefits	●	●	●	●
H. Middle-class Melting Pot	●	●●	●	●	●●	●	Absolute best deal/Face to face service	●	●		
I. Family Union	●	●●●	●	●●●	●	●●	Celebrity endorsements matter/Absolute best deal	●	●		
J. Autumn Years	●	●●●	●	●	●	●	Trust in reputation matters/Face to face service	●	●	●	●
K. Significant Singles	●●	●●	●	●●●	●●	●●	Mainstream popularity/What's in it for me?	●	●	●	
L. Blue Sky Boomers	●	●	●	●	●	●	Peer testimonials/Trust in reputation matters	●	●		
M. Families in Motion	●	●	●●●	●●	●	●●●	Easy with many benefits/Absolute best deal	●	●		
N. Pastoral Pride	●	●	●	●	●	●	Easy with many benefits/Face to face service		●		
O. Singles and Starters	●●	●	●	●●●	●●	●●●	What's in it for me?/Best family fit	●	●	●	
P. Cultural Connections	●	●	●	●●●	●	●●●	Celebrity endorsements matter/What's in it for me?	●	●	●	
Q. Golden Year Guardians	●	●	●●●	●	●	●	Trust in reputation matters/Eco-healthy-altruism	●	●	●	
R. Aspirational Fusion	●●	●		●●●	●	●●●	What's in it for me?/Celebrity endorsements matter	●	●		
S. Economic Challenges	●	●	●●	●●●	●	●●	Mainstream popularity/Easy with many benefits	●	●		

Estimated Saturation

Consistent and abundant information on audiences counts from Collier County arts and culture organizations was not available to the consultants for this project. Below is an estimated saturation rate for each of the arts/culture variables used for the study. This count is provided by Esri for persons over the age of 25 within the combined markets if “everyday” and “special occasion” as representative of the most realistic local market area from which audiences and visitors come regularly. Using the Census estimates for persons age 25 or older we estimate the saturation or reach into the market area for these various activities in a given year. This does not represent total audience counts, transactions, or visitors. It is the best attempt to reflect the percentage of estimated buyers from the local market within the local market.

	Combined Everyday/Special	
	Persons Age 25+	
	n=537,862	
	Esri Estimated Buyer Counts	Estimated Saturation
Visits art galleries	53,010	9.9%
Visits art museums	76,397	14.2%
Visits zoos	67,824	12.6%
Attends live theater	74,470	13.8%
Attends live dance	23,518	4.4%
Attends live classical music/opera	25,207	4.7%
Attends live country music concerts	35,238	6.6%
Attends live rock music concerts	48,644	9.0%
Attends nightclubs	89,889	16.7%
Danced	43,277	8.0%
Played a musical instrument	46,912	8.7%
Did painting or drawing	40,282	7.5%
Did woodworking	28,397	5.3%
Did cooking for fun	109,616	20.4%
Took adult education class	47,987	8.9%
Made a charitable contribution	28,966	5.4%

Report of Findings

Collier County Arts and Culture Strategic Plan

The Cultural Planning Group

Report Content

Introduction

What we did

Launch: Meeting of the Task Force in June 2019

Engagement: Five (5) months of stakeholder interviews, community discussions and forums

Research: Organizational and resident surveys; asset inventory; cultural vitality index profile; market demand analysis and mapping

Description	Engagement Activity	Timeframe	Overview
Stakeholder Engagement	Individual interviews and group meetings (15 interviews and meetings)	June 2019	Meetings with Task Force, County leadership and staff; community leaders, community tours- Naples, East Naples, Bayshore.
Stakeholder and Community Engagement	Individual interviews; group discussions; roundtables; community town halls (10 interviews/ meetings)	August 2019 (2 visits)	Meetings with community leaders, County leadership, arts organizations, community forum, community tours - Everglades City, Immokalee.
Stakeholder and Community Engagement	Individual interviews; forums, discussion groups (12 meetings)	September 2019	Meetings with Task Force, community and organization leaders, community forums and group discussions with artists, culinary, sports and tourism partners.
Stakeholder Engagement	Telephone interviews Non-profit Cultural Organizational Survey (8 interviews;28 organizations)	October/November 2019	Interviews with arts organization leaders and TDC members. Cultural Organizational survey completed.
Collier County Residents Survey	Open, online survey for all of County (777completes)	September - November 2019	Open-sourced survey exploring vision, attitudes, preferences for arts programming, personal participation, and community priorities.

What we asked

What is the current state of arts, culture and creativity?

What is working well?

What is missing?

What does Collier look like in the future?

How can we enhance cultural tourism?

How do we get there?

Why we did it

Bring together multiple points of view

Create legitimacy and a sense of shared responsibility

Identify creative assets within communities

Cultivate new partners/allies and collaborations

Stimulate broad awareness and momentum

What We Learned:

An Integrated Summary

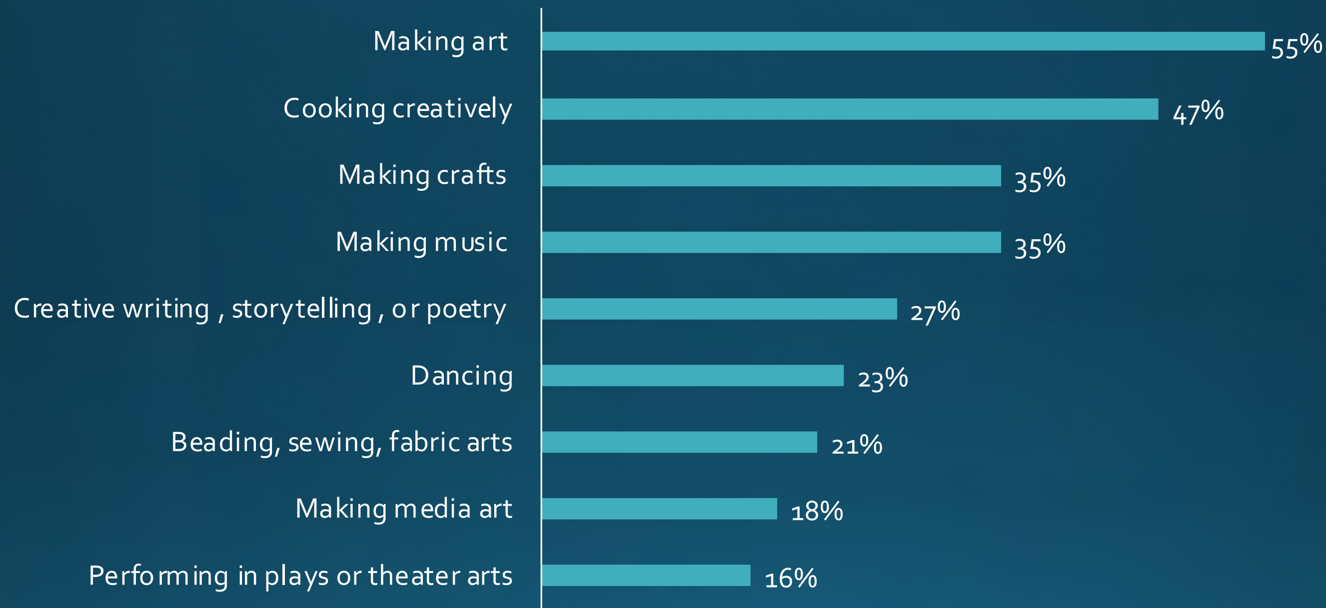
Collier Today

- Unique geography and demography
- Communities with distinct cultures
- An agricultural mecca
- Philanthropic and giving community
- Vast open spaces and scenic nature
- Rich cultural organizations and activities
- Residents and artists participate in creative activities
- Residents enjoy world class music, theater, art, and film
- Numerous opportunities for better connections of communities

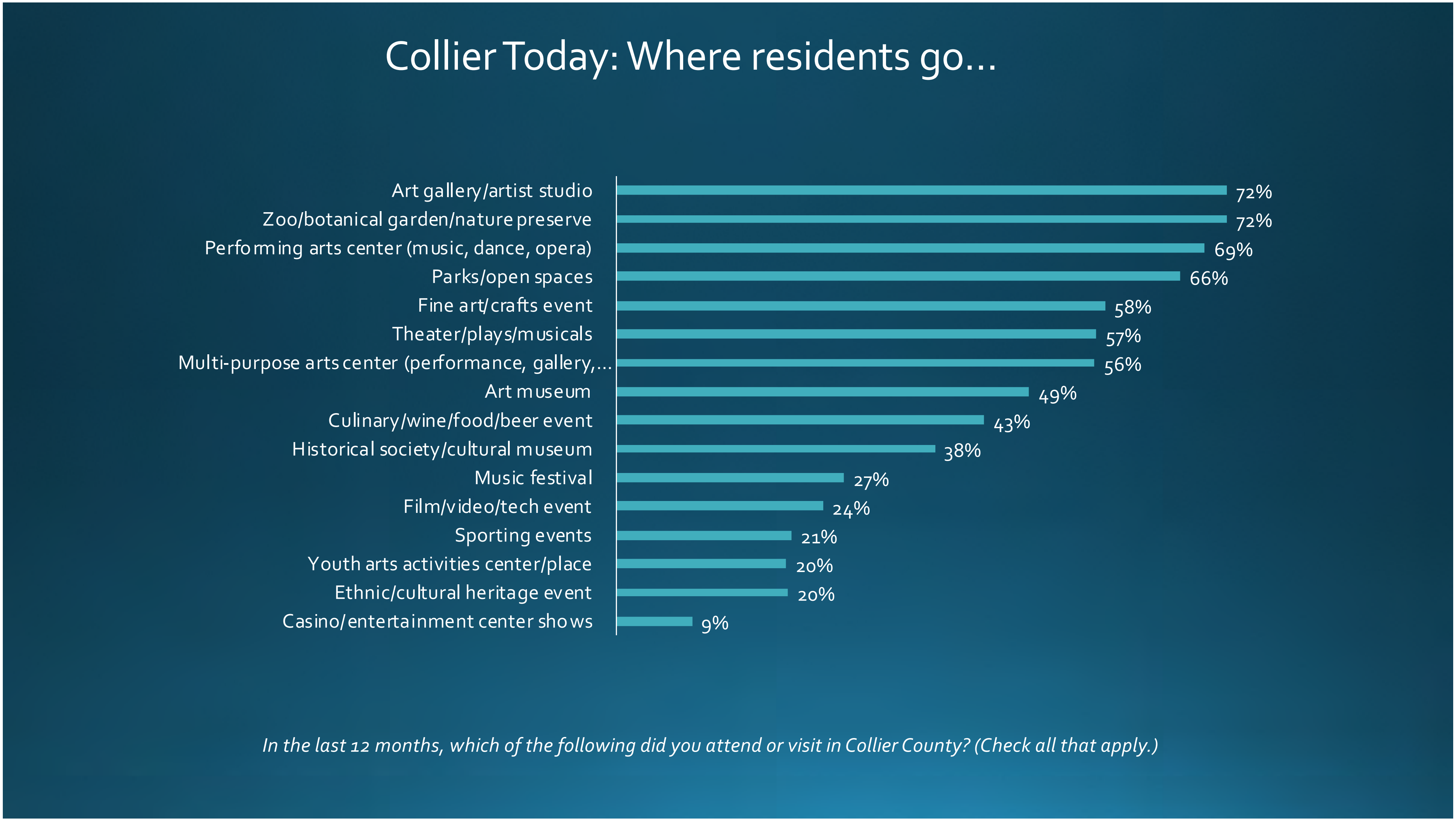
Collier Today

- More traditional than innovative
- Focus is on older generations, less creative activities and opportunity for younger residents
- Brand identity is now "Naples"
- Need for more affordable and accessible opportunities
- Need for more effective arts and cultural activities promotions/communications

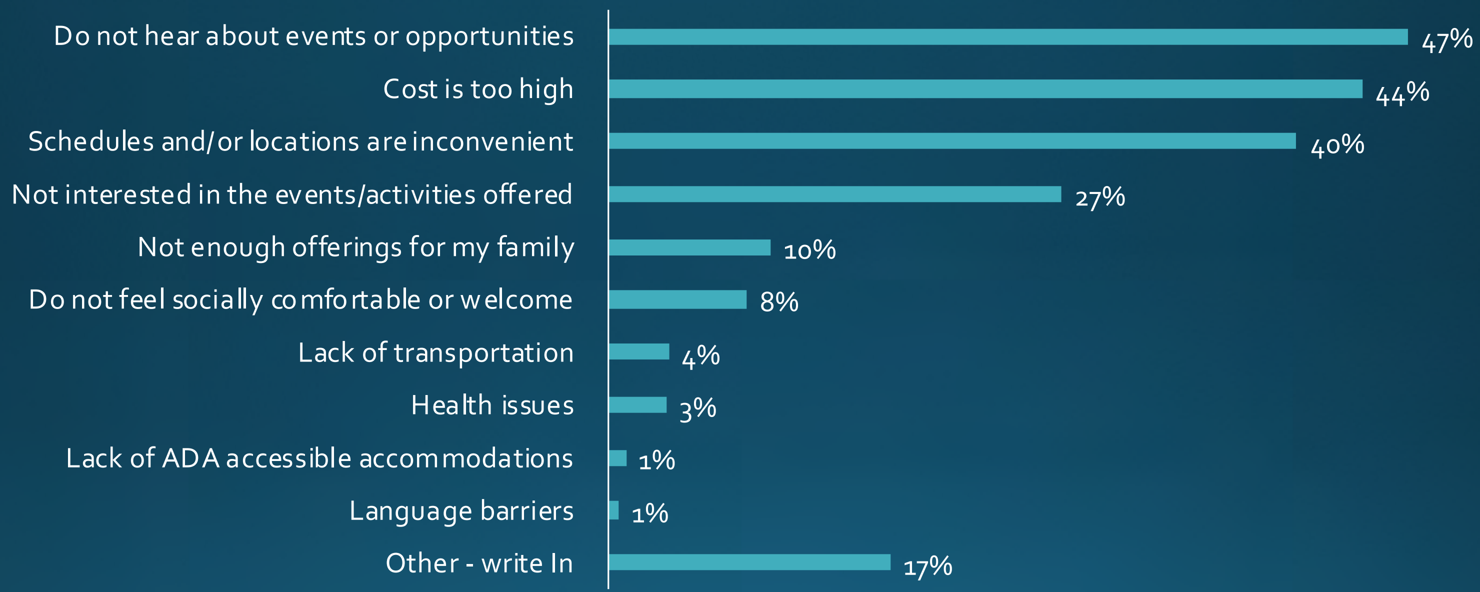
Collier Today: What residents do now…



What types of creative activities do you or your family do locally? (Check all that apply.)


Collier Today: Where residents go…
Art gallery/artist studio
72%
Zoo/botanical garden/nature preserve
72%
Performing arts center (music, dance, opera)
69%
Parks/open spaces
66%
Fine art/crafts event
58%
Theater/plays/musicals
57%
Multi-purpose arts center (performance, gallery,…
56%
Art museum
49%
Culinary/wine/food/beer event
43%
Historical society/cultural museum
38%
Music festival
27%
Film/video/tech event
24%
Sporting events
21%
Youth arts activities center/place
20%
Ethnic/cultural heritage event
20%
Casino/entertainment center shows
9%
In the last 12 months, which of the following did you attend or visit in Collier County? (Check all that apply.)

Collier Today: What keeps residents from participating…



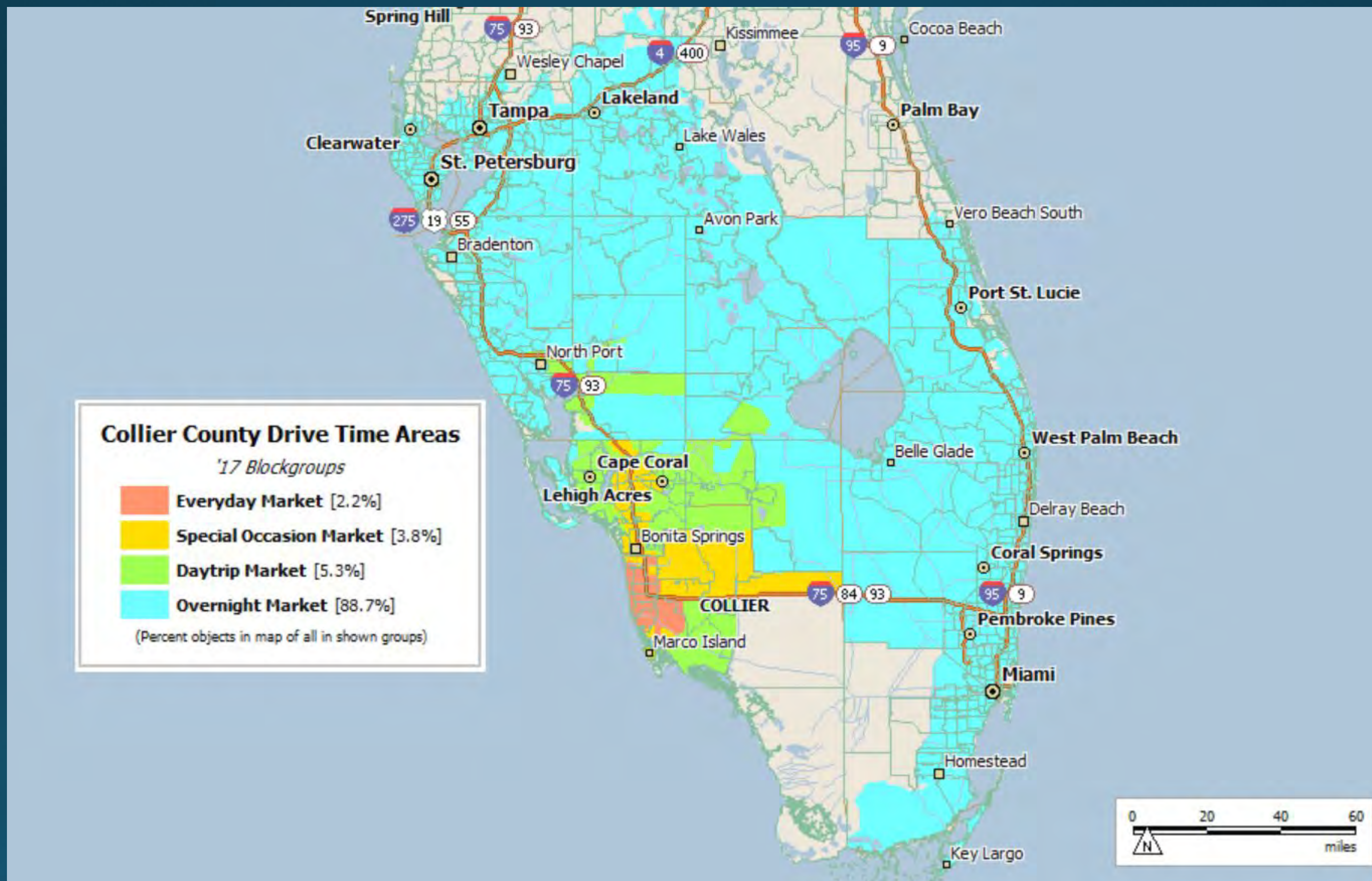
What (if anything) keeps you from attending and/or participating more in creative activities and/or arts and cultural events? Please select all that apply.

Collier Today: How residents rate opportunities

Area	Excellent	Good	Adequate	Fair	Poor
QUALITY of Opportunities	35%	44%	13%	5%	3%
VARIETY of Opportunities	26%	38%	23%	8%	5%
AFFORDABILITY of Opportunities	14%	36%	26%	17%	7%
NUMBER of Opportunities	22%	35%	23%	13%	7%
LOCATION of Opportunities	23%	41%	22%	10%	4%

How do you rate arts and cultural opportunities in Collier County?

Market Area Studied



Collier Today: Arts market demand

The arts market demand is strong.

- Highest for less than 10% of the household population.
- Cost and accessibility force most into the *moderate* and *low demand* groups.
- Estimated buyer counts in each market area align with survey findings
  - Highest counts from the *everyday market* to the *overnight market* being for *hands-on creative activities* and lowest for *arts performances.*

Collier Today: Arts market demand

- Market demand is reflective of community priorities.
  - 80% of survey respondents prioritize *making the arts more accessible* and "*providing more and different arts and cultural activities*"
- Connectivity to an abundance of arts and cultural opportunities is lacking.
  - Where: Outside of Naples
  - Reasons: lack of marketing, limited exposure, transportation issues, programming and communication within exclusive and niche audience groups
- Historical, heritage, and authentic local experiences are abundant within the county and under-developed within local and cultural visitor marketing investments

Let's Take a Look Locally – Collier County

Economic Impact of Nonprofit Arts & Culture Industry

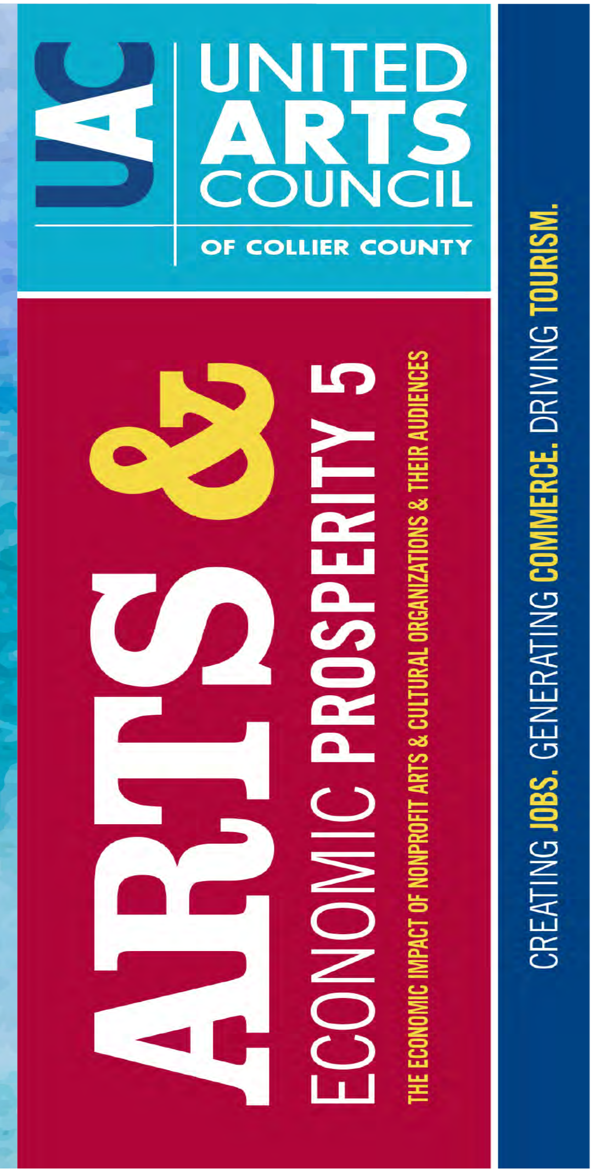
Full-Time Equivalent Jobs: 2,931

Resident Household Income: $57.399 Million

Local Government Revenue: $3.56 Million

Total State Government Revenue: $7.193 Million

$107.7 Million Annual Economic Activity (2015)



Collier Tomorrow: Summary of Vision

- Collier attracts visitors with its unique cultural brand - fusion of arts, agriculture, sports, nature, culinary, and beaches
- Artists and cultural organizations thrive
- Arts and creative hubs exist throughout the community
- Public art is part of the daily lives of residents
- Arts and activities are available for all residents and visitor groups (age, background, etc.) and easily accessible
- Schools provide artistic career pathways
- Arts and creativity relate to health and wellness initiatives and programs
- Arts and cultural sectors are supported by the government
- Communities and culturally-specific groups connect and celebrate Collier's uniqueness – for the benefit of residents and the economy

Collective Community Priorities

Arts and Culture is Essential

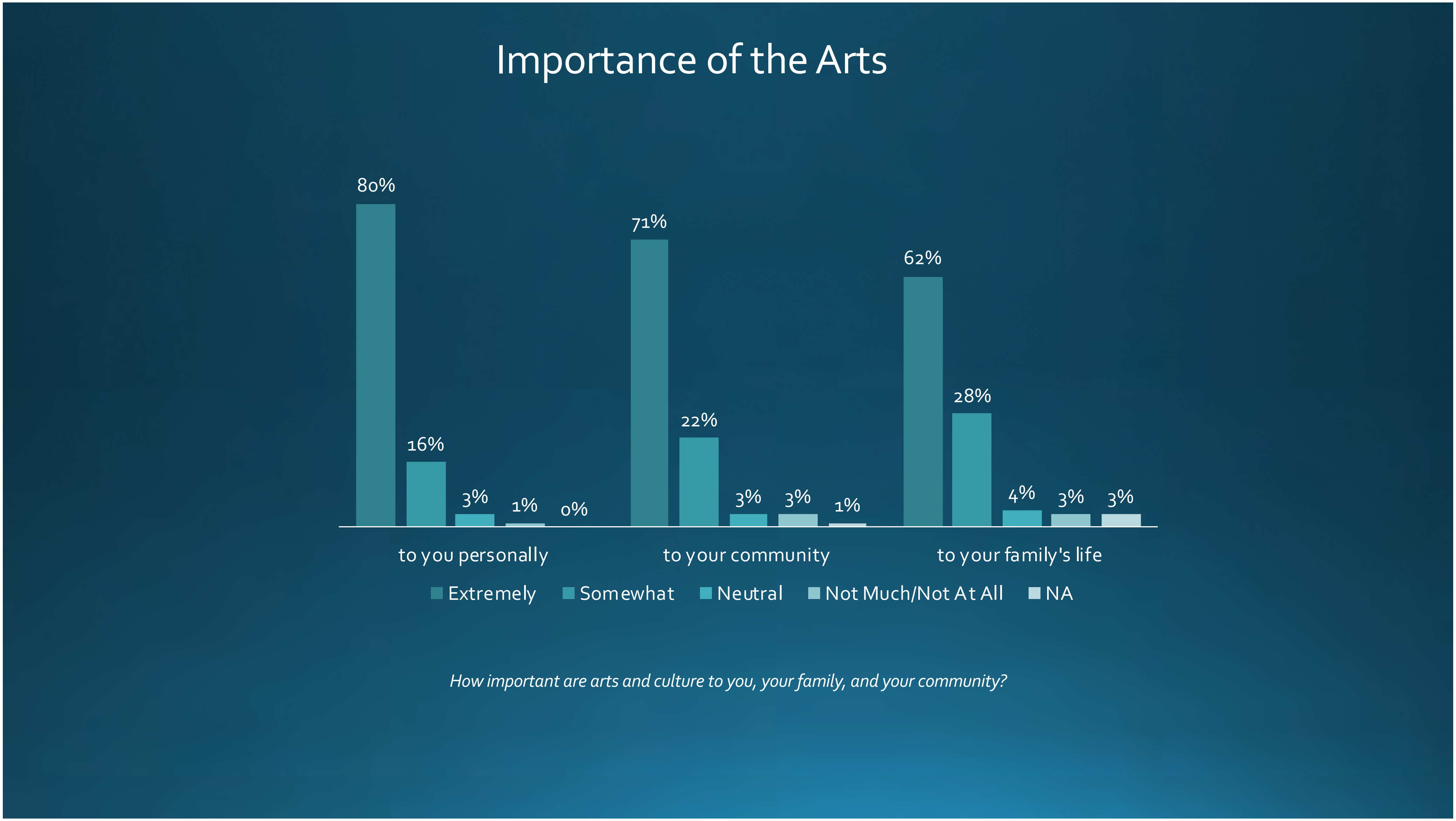
Want more creative activities and in all communities

Greater focus on arts and culture from County government

Leverage local history and heritage for residents and visitors

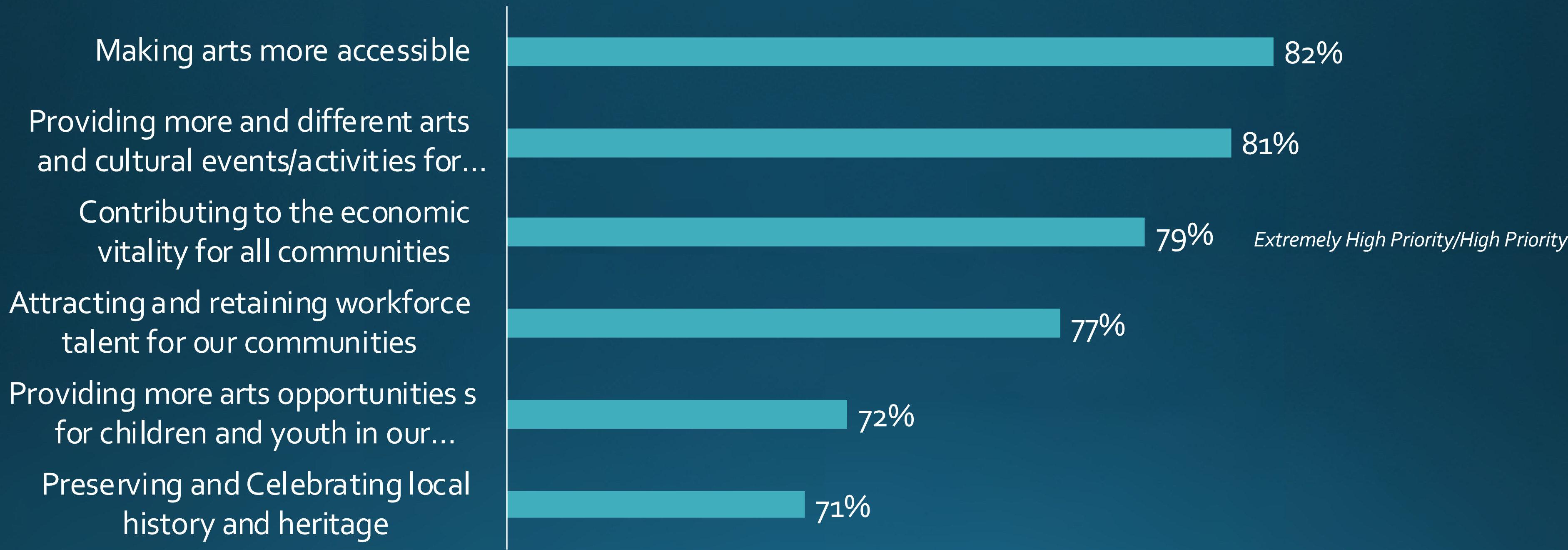
Elevate the arts, cultural, and creative sector

More opportunities for younger residents

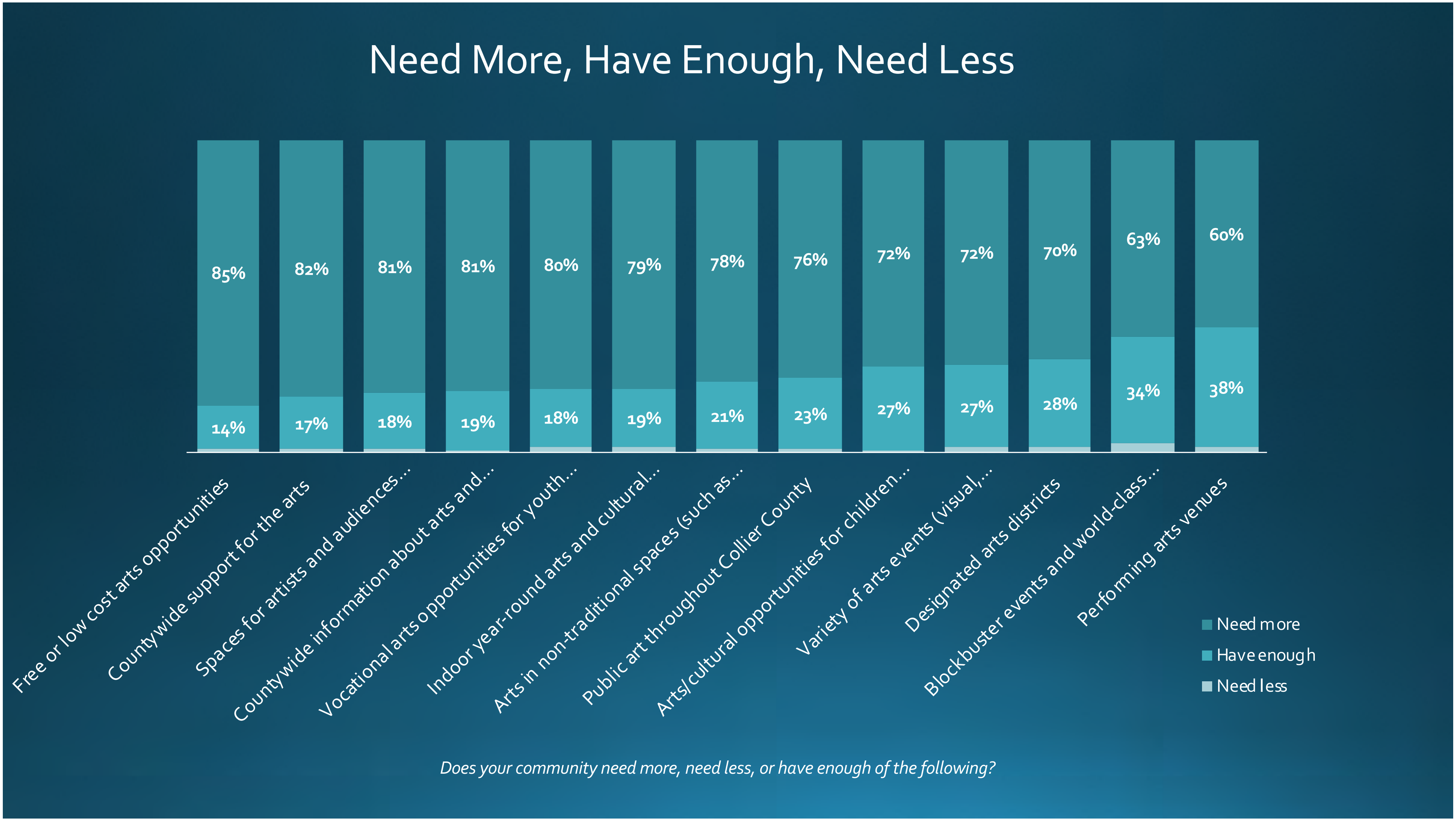


Importance of the Arts
80%
16%
3%
1%
0%
71%
22%
3%
3%
1%
62%
28%
4%
3%
3%
to you personally
to your community
to your family's life
Extremely
Somewhat
Neutral
Not Much/Not At All
NA
How important are arts and culture to you, your family, and your community?

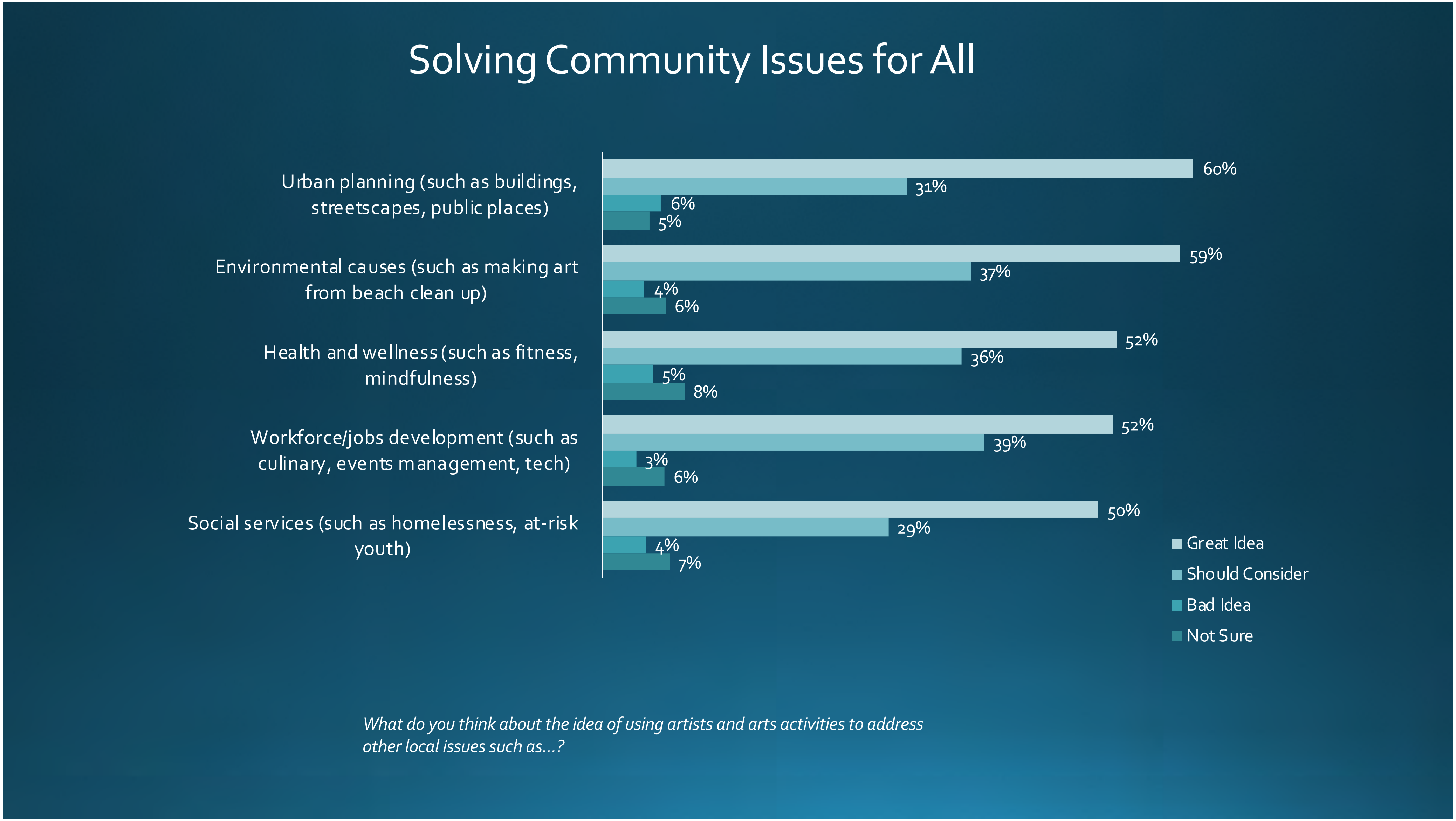
Top Plan Priorities



Thinking about priorities for the Arts and Culture Strategic Plan, please rate the following.



Need More, Have Enough, Need Less
85%
82%
81%
81%
80%
79%
78%
76%
72%
72%
70%
63%
60%
14%
17%
18%
19%
18%
19%
21%
23%
27%
27%
28%
34%
38%
Free or low cost arts opportunities
Countywide support for the arts
Spaces for artists and audiences…
Countywide information about arts and…
Vocational arts opportunities for youth…
Indoor year-round arts and cultural…
Arts in non-traditional spaces (such as…
Public art throughout Collier County
Arts/cultural opportunities for children…
Variety of arts events (visual,…
Designated arts districts
Blockbuster events and world-class…
Performing arts venues
Need more
Have enough
Need less
Does your community need more, need less, or have enough of the following?



Solving Community Issues for All
Urban planning (such as buildings, streetscapes, public places)
60%
31%
6%
5%
Environmental causes (such as making art from beach clean up)
59%
37%
4%
6%
Health and wellness (such as fitness, mindfulness)
52%
36%
5%
8%
Workforce/jobs development (such as culinary, events management, tech)
52%
39%
3%
6%
Social services (such as homelessness, at-risk youth)
50%
29%
4%
7%
Great Idea
Should Consider
Bad Idea
Not Sure
What do you think about the idea of using artists and arts activities to address other local issues such as...?

Opportunity Snapshot: *Naples Marco Island Immokalee Everglades City Bayshore Golden Gate East Naples*

Creating opportunities in **Naples** for younger, diverse residents

Supporting the creation of cultural districts in the **City and County**

Encouraging residents and visitors to travel ***over the bridge*** for **Marco Island**

Celebrating the agricultural community in **Immokalee** for unique experience for residents and visitors

Leveraging the unique geography and history of **Everglades City** for visitors and residents

Supporting the development of **Bayshore** as one of the arts destinations in Collier

Developing and promoting **Golden Gate and East Naples** cultural activities and places

Arts and Cultural Sector Priorities

Cultural Tourism Priorities

- Collier to be appreciated and known as a cultural destination
- Leverage the unique authentic experiences throughout the County
- Create identity for Collier communities through branding and public art
- Imbed arts and culture in County tourism strategy and marketing
- Improve access to funding for cultural tourism marketing efforts
- Work together with other sectors for enhanced, diversity of offerings

Arts and Cultural Organization Priorities

- Shared marketing and audience development
- Cross-sector collaborations outside the arts
- Collaborations and cooperation in the arts and cultural community
- Stronger relationship with CVB, County Museums, Parks & Rec, and school system
- Equitable access to arts programs
- Funding and Board development
- Service organization with the resources to fulfill the role as a cultural headquarters
- Address affordable housing and arts space issues

Survey: Participating Organizations

10 Multi-Disciplinary Arts

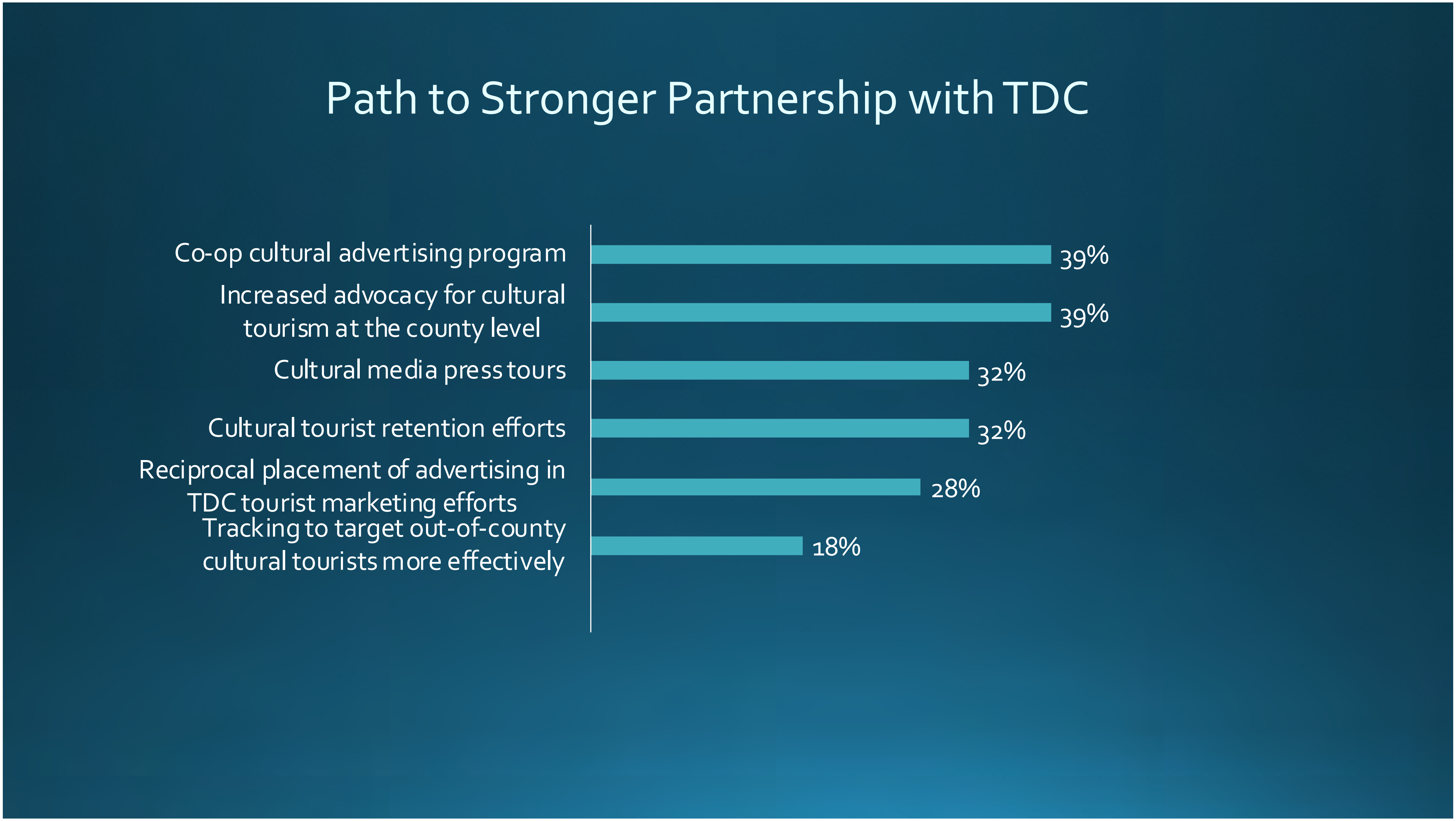
2 Music

6 Theatre Arts

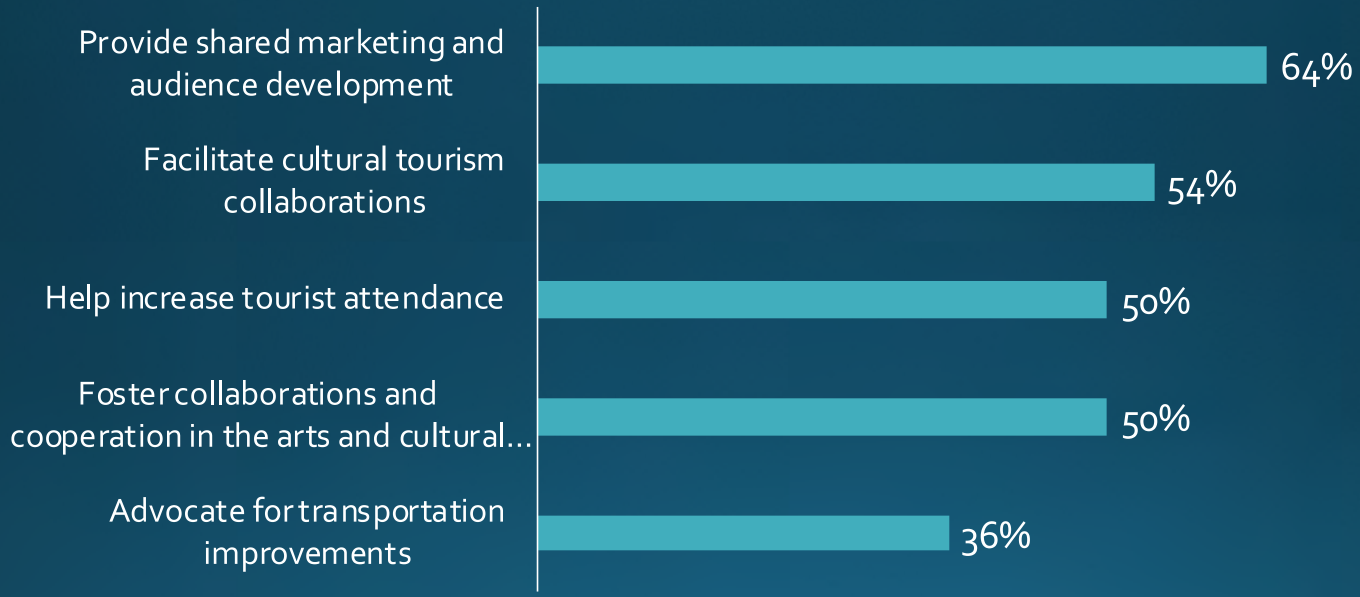
5 Visual Arts

5 Other (Art Center, Community Service, Conservation/Nature, Museum, Arts/Faith)

- Employee counts range from 1 – 150.
- Operating budgets range from less than $25,000 to over $2 million.


Path to Stronger Partnership with TDC
Co-op cultural advertising program
Increased advocacy for cultural tourism at the county level
Cultural media press tours
Cultural tourist retention efforts
Reciprocal placement of advertising in TDC tourist marketing efforts
Tracking to target out-of-county cultural tourists more effectively
39%
39%
32%
32%
28%
18%

Priorities for the Strategic Plan



Greatest Areas of Organizational Need

Additional Needs:

- Affordable housing
- Parking
- Signage

Market Demand Analysis

Estimated buyer counts in all areas from 15-minute to 3 hours are highest for:

1. *Hands-on creative activities*
2. *Visual arts/museums*
3. *Commercial concerts*
4. *Arts performances*

While capture rates will vary dramatically, potential buyer numbers are strong

- Everyday buyers: 300,00+
- Special occasion buyers: 502,000+
- Day trip buyers: 614,000+
- Overnight buyers: 11.7m+

Market Demand Analysis

HIGH DEMAND HOUSEHOLD TYPES

Quantity of high demand among households is less than 10% of any area…
9% of "everyday" market
6% of "special occasion" market
2% of "daytrip" market
9% of "overnight market"

Lifestyles of high demand households are bifurcated – highly affluent, highly educated older adults/boomers AND middle/lower income younger adults without kids

Market Demand Analysis

MODERATE DEMAND HOUSEHOLD TYPES

Quantity of moderate demand among households varies by area:
46% of "everyday" market
41% of "special occasion" market
25% of "daytrip" market
25% of "overnight market"

Lifestyles of moderate households are extremely diverse socio-economically, but skew toward older adults and seniors and families with older children (or seasonal visiting grand children)

Market Demand Analysis

LOW DEMAND HOUSEHOLD TYPES

Quantity of low demand among households varies by area:
45% of "everyday" market
53% of "special occasion" market
74% of "daytrip" market
67% of "overnight market"

Lifestyles of low demand households are a bifurcated geographically, with city and rural households dominated by lower income starter families, ethnically diverse families, and seniors on fixed incomes.

Summary of Arts/Culture Demand by Mosaic Target Groups

Summary of Market Demand				
Mosaic Groups	**Visual Arts**	**Arts Performances**	**Commercial Concerts**	**Hand-On Creative Activities**
A. Power Elite	High	High	Moderate	Moderate
B. Flourishing Families	Moderate	Moderate	High	Moderate
C. Booming with Confidence	Moderate	High	Moderate	Moderate
D. Suburban Style	Low	Low	Low	Low
E. Thriving Boomers	Moderate	Moderate	Moderate	Moderate
F. Promising Families	Moderate	Moderate	Moderate	Moderate
G. Young City Solos	High	High	High	Moderate
H. Middle-class Melting Pot	Moderate	Low	Low	Low
I. Family Union	Low	Low	Low	Low
J. Autumn Years	Low	Low	Moderate	Low
K. Significant Singles	Moderate	Moderate	Low	Moderate
L. Blue Sky Boomers	Low	Low	Low	Low
M. Families in Motion	Low	Low	Low	Low
N. Pastoral Pride	Low	Low	Low	Low
O. Singles and Starters	Low	Low	Low	Moderate
P. Cultural Connections	Low	Low	Low	Low
Q. Golden Year Guardians	Low	Moderate	Low	Low
R. Aspirational Fusion	Low	Low	Low	Low
S. Economic Challenges	Low	Low	Low	Low

Sample Target Group Descriptions

	Household Types	Everyday Market	Special Occasion Market	Daytrip Market	Overnight Market
	Household Counts	122,715	**189,625**	**238,963**	**4,160,119**
		% of households in Area	*% of households in Area*	*% of households in Area*	*% of households in Area*
A	**Power Elite**	**8.2%**	**5.4%**	**1.6%**	**6.1%**
	Wealthy, highly educated, politically conservative, donors, active/fit, married with kids (mostly teen) at home				
	High demand for visual arts/museums, arts performances, moderate demand for commercial concerts, hands-on creative activities				
	Top interests in order: classical music, art galleries, museums, charitable giving, theater, dance, rock music, adult education, playing instruments, painting/drawing				
	Rationale: This group is off the charts for interest in all types of arts and should be included in efforts to engage full-time and seasonal residents in the everyday market as well as audiences from the special occasion, daytrip, and overnight markets. They have a variety of interest. Cost is not a barrier. This is a good crossover group for a variety of eco/nature-tourism activities, culinary arts, health/wellness, and a variety of recreational activities.				
B	**Flourishing Families**	**1.2%**	**1.2%**	**1.7%**	**3.2%**
	Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable active lifestyles				
	High demand for commercial concerts, moderate demand for visual arts/museums, arts performances, hands-on creative activities				
	Top interests in order: rock music, country music, charitable giving				
	Rationale: This group shows high and moderate demand for all arts variables, but is most interested in commercial concerts such as rock and country music. It should be included in everyday, special occasion, daytrip, and overnight market for popular, non-classical performance and family day trips and family and couple overnights for special events. They have a variety of interests, cost is not a barrier. This group is abundant with cross-over interests with attractions, culinary arts, health/wellness, and nearly every sport/recreational activity.				
C	**Booming with Confidence**	**32.1%**	**24.6%**	**12.4%**	**9.4%**
	Affluent, highly educated, belong to clubs, give to environment, married no kids at home				
	High demand for arts performances, moderate demand for commercial concerts, visual arts/museums, hands-on creative activities				
	Top interests in order: theater, charitable giving, art galleries, classical music				
	Rationale: This group shows high and moderate demand for all arts variables and tops interest for theater, classical music and visiting art galleries. It should be included in everyday, special occasion, daytrip, and overnight market for adults/couples overnights for special events. Cost is not a barrier. This is good crossover group for eco/nature-tourism, attractions, culinary arts, and several sports/recreational activities.				

Sample Crossover Interests

Crossover Interest Opportunities

The chart below summarizes crossover potential for each Mosaic Group with a variety of leisure interests related to sports and recreation, and eco/nature-tourism activities. Variables that are checked indicate an index at or above the national average.[iv]

Crossover Interests (100+)	A: Power Elite	B: Flourishing Families	C: Booming with Confidence	D: Suburban Style	E: Thriving Boomers	F: Promising Families	G: Young City Solos	H: Middle-class Melting Pot	I: Family Union	J: Autumn Years	K: Significant Singles	L: Blue Sky Boomers	M: Families in Motion	N:Pastoral Pride	O: Singles and Starters	P: Cultural Connections	Q: Golden Year Guardians	R: Aspirational Fusion	S: Economic Challenges
Bird watching	✓		✓		✓				✓	✓		✓					✓		
Casino		✓	✓	✓	✓		✓	✓	✓	✓					✓			✓	✓
Gardening	✓	✓	✓	✓	✓	✓		✓		✓		✓	✓						
Culinary/gourmet	✓	✓	✓	✓	✓		✓		✓			✓					✓		
Environmental causes	✓		✓		✓	✓	✓	✓		✓									
Health/wellness	✓	✓	✓	✓	✓	✓	✓		✓					✓		✓		✓	
Green behavior	✓	✓	✓		✓	✓	✓	✓									✓		
Hiking	✓	✓	✓	✓	✓	✓	✓				✓	✓	✓						
Baseball		✓		✓		✓	✓		✓				✓		✓	✓		✓	✓
Basketball		✓		✓			✓						✓	✓	✓	✓		✓	✓
Bicycling outdoors	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓								
Fitness walking	✓	✓	✓	✓	✓	✓	✓	✓				✓							
Soccer	✓	✓				✓	✓		✓						✓	✓		✓	
Fresh-water fishing			✓	✓	✓	✓						✓	✓	✓				✓	✓
Golf	✓	✓	✓	✓		✓	✓								✓				
Horseback riding	✓	✓			✓	✓		✓	✓			✓	✓	✓	✓	✓		✓	
Jogging	✓	✓		✓		✓	✓	✓	✓		✓				✓	✓			
Motorcycling		✓	✓		✓	✓		✓	✓		✓	✓	✓	✓		✓		✓	
Power boating	✓	✓	✓	✓	✓	✓	✓					✓			✓	✓			
Swimming	✓	✓	✓			✓	✓				✓		✓				✓		
Tennis	✓	✓	✓			✓	✓				✓				✓			✓	
Beach	✓	✓	✓	✓	✓	✓	✓	✓			✓				✓				

Sample Target Audience for Programming

Target Audience Summary Snapshot-Programming

Target Audience Segment	PROGRAMMING						
	Fine Arts	Local Culture	Commercial Concerts	Crossover	Hands-on Activities	Family/Youth Activities	Cost Threshold
A. Power Elite	•••	•	•	••	•	••	$$$$$
B. Flourishing Families	•	••	•••	•	•	•••	$$$
C. Booming with Confidence	••	••	••	••	•	•	$$$$$
D. Suburban Style	•	•••	••	•••	••	••	$$
E. Thriving Boomers	•••	•••	••	••	••	•	$$$
F. Promising Families	•	••	••	••	•••	•••	$$
G. Young City Solos	•	•••	••	•••	•••	•	$$
H. Middle-class Melting Pot	•	•••	•	••	•	•	$$
I. Family Union	•	••	•	•••	••	•	$$
J. Autumn Years	•	••	•••	••	••	•	$$
K. Significant Singles	••	•••	•	••	••	•	$
L. Blue Sky Boomers	•	•••	••	•••	•••	••	$$
M. Families in Motion	•	•••	•	•••	•••	•••	$
N. Pastoral Pride	•	•••	•	••	••	••	$
O. Singles and Starters	•	•••	••	••	•••	•••	$
P. Cultural Connections	•	•••	•	•	•	•••	$$
Q. Golden Year Guardians	••	••	••	•••	•	•	$$

Programming interests of each target audience are summarized by strength with one dot for "low," two dots for "moderate," and three dots for "high".

Cost threshold is represented by one to five "$" indicating level of price sensitivity. One "$" indicates the highest price sensitivity/lowest threshold and five "$$$$$" indicates low sensitivity/high threshold.

Programming examples:

Fine Arts: fine arts performances of music, theatre, opera, dance, museums, high-end galleries, high-end art fairs

Local Culture: craft and other fairs, festivals, creative places, authentic local experiences/destinations, foodways

Crossover: outdoor recreation, nature, wellness
Family Activities: arts and creative cultural activities designed for children and youth

Sample Media Messaging, Market

Target Audience Summary Snapshot-Media, Messaging, Market

The chart below summarizes the type of media and messaging to which each target audience is likely to respond followed by the market areas in which they

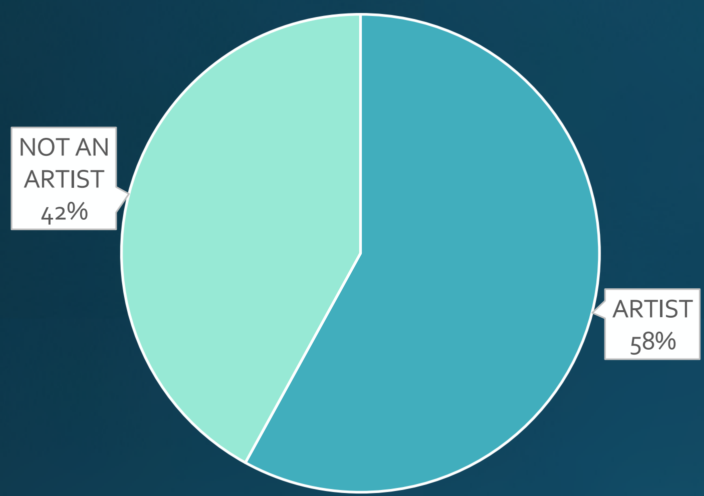
	MEDIA AND MESSAGING							MARKET			
Target Audience Segment	Newspapers/ Magazines	Broadcast/ Cable TV	Direct Mail Receptive	Email Receptive	Internet Radio/ Satellite Radio	Mobile	Top Message Drivers	Everyday	Special Occasion	Daytrip	Overnight
A. Power Elite	●●●	●●●	●	●	●●●	●	Peer testimonials/Eco-healthy-altruism	●	●	●	●
B. Flourishing Families	●●	●●●	●	●	●●●	●	Absolute best deal/Peer testimonials	●	●	●	●
C. Booming with Confidence	●●●	●●●	●●●	●	●●	●	Peer testimonials/Trust in reputation matters	●	●	●	●
D. Suburban Style	●	●●●	●	●●	●●●	●●	Cutting edge-early adopters/Absolute best deal	●	●	●	
E. Thriving Boomers	●	●●	●	●	●	●	Peer testimonials/Trust in reputation matters	●	●	●	●
F. Promising Families	●●	●●●	●	●	●●●	●●●	Absolute best deal/Best family fit	●	●	●	●
G. Young City Solos	●●	●●●	●	●	●●●	●●	Eco-healthy-altruism/Easy with many benefits	●	●	●	●
							Absolute best				

Individual Artist and Creatives Priorities

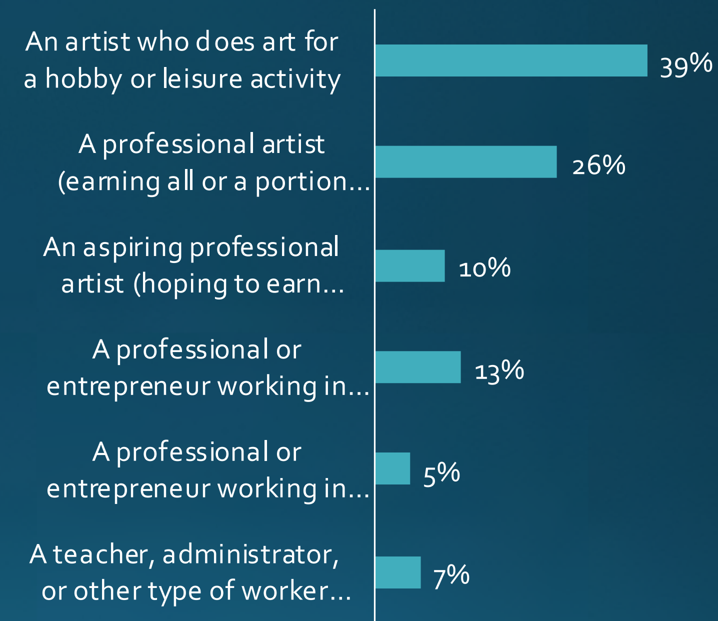
Artist Priorities

- Recognition and support for role of artists in the community
- More critical dialogue about the arts
- Support for the new and avant garde, beyond mainstream arts offerings
- Affordable live, work, exhibition, and sales spaces
- Cooperative solutions
- More public art!
- Support for existing networks and resources, such as Naples Arts District, Bayshore Arts District, Golden Gate and others.

Survey: Artist Profile



Of those 58% who identified as an artist…



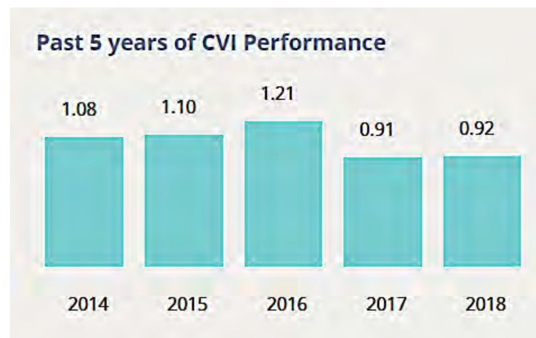
Of the 58% of respondents who identified as artists, 36% are professional or aspiring professional artists.

Professional Artist /Aspiring Artist Discipline

Visual	35%
Craft	27%
Music	21%
Design	20%
Theatre	14%
Literary	11%
Media	10%
Dance	6%
Social Practice	6%
Multidisciplinary	13%
Cross-disciplinary	5%
Another discipline	8%

Creative Economy Analysis

The foundation for a vibrant creative economy is creative sector industries and occupations. Creative workers (creatives) are individuals with advanced training and experience in the design and production of a broad range of cultural products and services, including many individual artists of all disciplines. The Creative Vitality™ Suite (CVI), a data source generated by WESTAF, provides a portrait of Collier County's creative economy. The CVI measures the creative economic health of an area by integrating economic data from both the for-profit and nonprofit sectors. This approach underscores the economic relationships between the for- and nonprofit sectors and is a mechanism for diagnosing a region's creative strengths and weaknesses.



According to the 2018 CVI, Collier County scores a .92 on the national index of 1.00. Historically, Collier County trended up from 2014 to 2016. The index slightly increased from a 2017 index of .91 to a 2018 index of .92.

Total sales for Collier County's creative industries were $1.7 billion in 2018, an increase from $1.6 billion in 2017. The top ten sectors with the highest industry sales are:

1. Full-service restaurants
2. Software publishers
3. Independent artists, writers, and performers
4. Promoters of performing arts, sports, and similar events with facilities
5. Internet publishing/broadcasting
6. Civic and social organizations
7. Interior design services
8. Architectural services
9. Newspaper publishers
10. Zoos and botanical gardens

In 2018, Collier County had 9,245 creative sector jobs[8] with total creative industry earnings of approximately $681 million.[9] Overall, creative earnings and occupations increased between 2017 and 2018, by 7% and 4%, respectively. The top ten creative sector jobs are:

1. Photographers
2. Writers and authors
3. Chefs and head cooks
4. Software developers, applications
5. Interpreters and translators
6. Musicians and singers
7. Graphic designers
8. Interior designers
9. Editors
10. Fine artists, including painters, sculptors, and illustrators, cabinetmakers

---

[8] *Creative sector jobs include four classes of workers: Extended Proprietors, Non-QCEW Employees, QCEW Employees, and Self-employed. Source: Economic Modeling Specialists International (EMSI).*
[9] *Industry earnings data is arrived at by aggregating the compensation paid for the labor of all workers in a given industry.*

Snapshot of the Arts in Collier County
2018

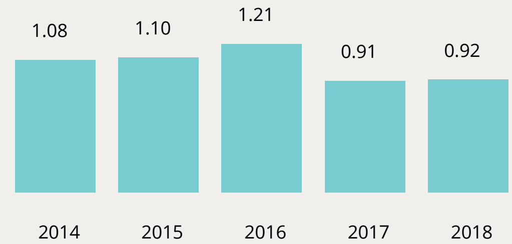
Creative Vitality SUITE

Creative Vitality Index

0.92
CVI Value
United States CVI = 1.0

This regional snapshot report gives the big picture of a region's creative landscape. It provides an overview of creative jobs, industry earnings, FDR grants, and Nonprofit revenues.

Past 5 years of CVI Performance



GAIN
▲ 4%
since 2017

2018 Creative Jobs

9,245
Total Creative Jobs

There are 345 more creative jobs in the region since 2017

Occupations with greatest number of jobs

GAIN
▲ 7%
since 2017

2018 Creative Industries

$681.3M
Total Industry Earnings

There is a gain of $46.4 million in creative industry earnings in the region since 2017

Industries with greatest earnings

Industry type	Industry Earnings
Full-service restaurants	$351.1M
Artists, Writers, & Performers	$68.7M
Software Publishers	$32.5M
Interior Design Services	$27.7M
Cultural & Historical Clubs	$25.0M

GAIN
▲ 7%
since 2017

2018 Cultural Nonprofit

$52.7M
Nonprofit Revenues

There are $4.0 million more in revenues in the region since 2017

DATA SOURCES: Economic Modeling Specialists International, National Assembly of State Arts Agencies, National Center for Charitable Statistics

CREATIVE VITALTY SUITE: The Creative Vitality Index compares the per capita concentration of creative activity in two regions. Data on creative industries, occupations, and cultural nonprofit revenues are indexed using a population-based calculation. The resulting CVI Value shows a region's creative vitality compared to another region. For more information on data sources visit: learn.cvsuite.org

Report created: 12/19/2019

COLLIER COUNTY CREATIVE INDUSTRY SALES (2018) Sourced from https://cvsuite.org/		
NAICS Code	**Industry**	**Sales 2018**
722511	Full-service restaurants *	$891,006,069
511210	Software publishers	$120,064,153
711510	Independent artists, writers, and performers	$93,746,039
711310	Promoters of performing arts, sports, and similar events with facilities	$70,961,971
519130	Internet publishing and broadcasting and web search portals	$57,337,622
813410	Civic and social organizations	$49,410,216
541410	Interior design services	$43,725,655
541310	Architectural services	$34,981,280
511110	Newspaper publishers	$32,715,006
712130	Zoos and botanical gardens *	$26,511,089
515210	Cable and other subscription programming	$22,704,282
453310	Used merchandise stores	$20,483,971
541810	Advertising agencies	$17,799,568
511120	Periodical publishers	$17,644,780
511130	Book publishers	$16,257,476
453920	Art dealers	$12,835,952
722320	Caterers *	$12,397,707
541820	Public relations agencies *	$11,852,661
711410	Agents and managers for artists, athletes, entertainers, and other public figures	$11,298,072
515112	Radio stations	$10,381,711
453110	Florists	$9,454,174
541320	Landscape architectural services	$9,066,659
512110	Motion picture and video production	$7,354,617
541430	Graphic design services	$7,215,701
712110	Museums	$7,175,502
515120	Television broadcasting	$6,411,860
711320	Promoters of performing arts, sports, and similar events without facilities	$6,189,666
541922	Commercial photography	$5,925,690
451211	Book stores	$5,048,390
711110	Theater companies and dinner theaters	$5,013,831
451130	Sewing, needlework, and piece goods stores	$5,009,311
423940	Jewelry, watch, precious stone, and precious metal merchant wholesalers	$4,943,601
323117	Books printing	$4,854,524
611610	Fine arts schools (private)	$4,668,577
312120	Breweries *	$4,411,813
541490	Other specialized design services	$3,676,999
541921	Photography studios, portrait	$3,550,510
339910	Jewelry and silverware manufacturing	$2,903,349
512250	Record Production and Distribution	$2,447,586

COLLIER COUNTY CREATIVE INDUSTRY SALES (2018) Sourced from https://cvsuite.org/		
NAICS Code	**Industry**	**Sales 2018**
512290	Other sound recording industries	$2,362,499
451140	Musical instrument and supplies stores	$2,271,943
711130	Musical groups and artists	$2,270,376
332323	Ornamental and architectural metal work manufacturing	$2,004,611
541340	Drafting services	$1,925,648
337212	Custom architectural woodwork and millwork manufacturing	$1,911,076
424920	Book, periodical, and newspaper merchant wholesalers	$1,239,180
511199	All other publishers	$1,105,481
541420	Industrial design services	$746,827
511191	Greeting card publishers	$660,161
512240	Sound recording studios	$656,681
339992	Musical instrument manufacturing	$600,086
327212	Other pressed and blown glass and glassware manufacturing	$564,608
327110	Pottery, ceramics, and plumbing fixture manufacturing	$405,078
512230	Music publishers	$380,823
711190	Other performing arts companies	$322,908
512120	Motion picture and video distribution	$232,565
711120	Dance companies	$148,281
323120	Support activities for printing	$147,589
712190	Nature parks and other similar institutions *	$57,714
519120	Libraries and archives	$0
712120	Historical sites	$0
	TOTAL	**$1,699,451,775**

COLLIER COUNTY CREATIVE JOBS (2018) Sourced from https://cvsuite.org/		
SOC Code	**Occupation**	**2018 Jobs**
27-4021	Photographers	1,334
27-3043	Writers and authors	534
35-1011	Chefs and head cooks	513
15-1132	Software developers, applications	499
27-3091	Interpreters and translators	467
27-2042	Musicians and singers	457
27-1024	Graphic designers	399
27-1025	Interior designers	370
27-3041	Editors	264
51-7011	Cabinetmakers and bench carpenters	254
27-1013	Fine artists, including painters, sculptors, and illustrators	237
51-6052	Tailors, dressmakers, and custom sewers	229
11-2021	Marketing managers *	222
41-3011	Advertising sales agents	182
27-3031	Public relations specialists	166
15-1134	Web developers	165
27-1011	Art directors	155
27-1012	Craft artists	155
27-1023	Floral designers	145
27-2099	Entertainers and performers, sports, and related workers	138
17-1011	Architects, except landscape and naval	135
51-9071	Jewelers and precious stone and metal workers	120
21-2021	Directors, religious activities and education	117
15-1131	Computer programmers *	111
17-3011	Architectural and civil drafters	109
27-2011	Actors	108
27-1026	Merchandise displayers and window trimmers	101
27-2041	Music directors and composers	100
43-4121	Library assistants, clerical	94
25-4021	Librarians	87
51-9195	Molders, shapers, and casters (except metal and plastic)	86
27-1014	Multimedia artists and animators	81
27-4011	Audio and video equipment technicians	75
27-2012	Producers and directors	71
17-1012	Landscape architects	67
49-9063	Musical instrument repairers and tuners	66
13-1011	Agents and business managers of artists, performers, and athletes	58
27-1021	Commercial and industrial designers	50
27-3099	Media and communication workers, all other	49

51-9151	Photographic process workers and processing machine operators	47
27-4014	Sound engineering technicians	43
27-3042	Technical writers	42
17-1021	Cartographers and photogrammetrists	42
27-3011	Radio and television announcers	39
51-7021	Furniture finishers	38
27-4012	Broadcast technicians	34
27-4032	Film and video editors	28
11-2031	Public relations and fundraising managers	27
27-3022	Reporters and correspondents	27
27-4031	Camera operators, television, video, and motion picture	26
11-2011	Advertising and promotions managers	24
27-1019	Artists and related workers, all other	24
27-2031	Dancers	21
51-6051	Sewers, hand	21
27-1022	Fashion designers	20
27-1029	Designers, all other	19
27-1027	Set and exhibit designers	18
51-9051	Furnace, kiln, oven, drier, and kettle operators and tenders	17
25-4031	Library technicians	14
27-3021	Broadcast news analysts	13
51-9194	Etchers and engravers	13
19-3093	Historians	9
39-5091	Makeup artists, theatrical and performance	8
27-4099	Media and communication equipment workers, all other	8
39-3092	Costume attendants	7
27-2032	Choreographers	7
25-9011	Audio-visual and multimedia collections specialists	6
39-3099	Entertainment attendants and related workers, all other	5
25-4011	Archivists	5
25-4012	Curators	4
35-2013	Cooks, private household	4
19-3091	Anthropologists and archeologists	4
25-4013	Museum technicians and conservators	3
51-7031	Model makers, wood	3
27-4013	Radio operators	1
	Total	**9,245 Jobs**

ARTS & ECONOMIC PROSPERITY 5

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

UAC
UNITED ARTS COUNCIL
OF COLLIER COUNTY

CREATING **JOBS.** GENERATING **COMMERCE.** DRIVING **TOURISM.**

in Collier County, FL

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

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

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

The Arts Mean Business

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

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

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

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

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

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

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

— Jonathan Spector
President & CEO
The Conference Board

The Economic Impact of the Nonprofit Arts and Culture Industry in Collier County

Arts & Economic Prosperity 5 provides evidence that the nonprofit arts and culture sector is a significant industry in Collier County—one that generates $107.7 million in total economic activity. This spending—$63 million by nonprofit arts and cultural organizations and an additional $44.7 million in event-related spending by their audiences—supports 2,923 full-time equivalent jobs, generates $57.4 million in household income to local residents, and delivers $10.8 million in local and state government revenue. This economic impact study sends a strong signal that when we support the arts, we not only enhance our quality of life, but we also invest in Collier County's economic well-being.

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

The geographic area analyzed in this unique report is defined as **Collier County, Florida**.

Defining Economic Impact

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

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

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

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

Economic Impact of Spending by the Nonprofit Arts and Culture Industry (Combined Spending by Both Organizations and Their Audiences) in Collier County

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

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

During fiscal year 2015, spending by both Collier County's nonprofit arts and cultural organizations and their audiences totaled $107.7 million. The table below demonstrates the total economic impact of these expenditures.

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

	Collier County	Median of Similar Study Regions *Pop. = 250,000 to 499,999*	National Median
Total Industry Expenditures	**$107,686,848**	$88,273,065	$35,750,645
Full-Time Equivalent Jobs	**2,923**	2,844	1,131
Resident Household Income	**$57,399,000**	$54,946,500	$23,154,000
Local Government Revenue	**$3,560,000**	$3,649,500	$1,407,000
State Government Revenue	**$7,193,000**	$4,168,500	$1,961,000

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

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

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

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

— Christopher Forbes, Vice Chairman, Forbes, Inc.

Economic Impact: Total, Direct, Indirect, and Induced

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

> Following the paint purchase, the hardware store may use a portion of the $100 to pay the sales clerk who sold the bucket of paint. The sales clerk then respends some of the money for groceries; the grocery store uses some of the money to pay its cashier; the cashier then spends some of the money for rent; and so on.
>
> The hardware store also uses some of the $100 to purchase goods and services from other businesses, such as the local utility company, and then to buy a new bucket of paint from the paint factory to restock its shelf. Those businesses, in turn, respend the money they earned from the hardware store to buy goods and services from still other local businesses, and so on.
>
> Eventually, the last of the $100 is spent outside of the community and no longer has a local economic impact. It is considered to have leaked out of the community.

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

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

Economic Impact of Spending by Nonprofit Arts and Cultural ORGANIZATIONS in Collier County

Nonprofit arts and culture organizations are active contributors to their business community. They are employers, producers, and consumers. They are members of the Chamber of Commerce as well as key partners in the marketing and promotion of their cities, regions, and states. **Spending by nonprofit arts and cultural organizations totaled $63 million in Collier County during fiscal year 2015**. This spending is far-reaching: organizations pay employees, purchase supplies, contract for services, and acquire assets within their community. These actions, in turn, support jobs, generate household income, and generate revenue to local and state governments.

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

Data were collected from 45 eligible nonprofit arts and cultural organizations that are located in Collier County. Each provided detailed budget information for fiscal year 2015 (e.g., labor, payments to local and nonlocal artists, operations, administration, programming, facilities, and capital expenditures/asset acquisition). The following table demonstrates the total economic impact of their aggregate spending.

TABLE 2:
Total Economic Impact of Spending by Nonprofit Arts and Cultural ORGANIZATIONS in Collier County

	Collier County	Median of Similar Study Regions *Pop. = 250,000 to 499,999*	National Median
Total Organizational Expenditures	**$62,973,722**	$32,930,341	$15,727,535
Full-Time Equivalent Jobs	**2,011**	1,115	608
Resident Household Income	**$40,879,000**	$23,272,000	$11,441,500
Local Government Revenue	**$2,305,000**	$1,292,500	$592,000
State Government Revenue	**$4,528,000**	$1,648,000	$840,500

Economic Impact Beyond Dollars: Volunteerism

While arts volunteers may not have an economic impact as defined in this study, they clearly have an enormous impact by helping nonprofit arts and cultural organizations function as a viable industry. Arts & Economic Prosperity 5 reveals a significant contribution to nonprofit arts and cultural organizations as a result of volunteerism. **During 2015, a total of 4,530 volunteers donated a total of 221,378 hours to Collier County's participating nonprofit arts and cultural organizations**. **This represents a donation of time with an estimated aggregate value of $5,215,666** (Independent Sector estimates the dollar value of the average 2015 volunteer hour to be $23.56). Volunteers can include unpaid professional staff (e.g., executive and program staff, board/commission members), artistic volunteers (e.g., artists, choreographers, designers), clerical volunteers, and service volunteers (e.g., ticket takers, docents, ushers, gift shop volunteers).

The 45 participating organizations reported an average of 100.7 volunteers who volunteered an average of 48.9 hours during 2015, for a total of 4,919.5 hours per organization.

The Value of In-Kind Contributions to Arts Organizations

The organizations were asked about the sources and value of their in-kind support. In-kind contributions are non-cash donations such as materials (e.g., office supplies from a local retailer), facilities (e.g., office or performance space), and services (e.g., printing from a local printer). **The 45 participating nonprofit arts and cultural organizations in Collier County reported that they received in-kind contributions with an aggregate value of $717,640 during fiscal year 2015**. These contributions can be received from a variety of sources including corporations, individuals, local and state arts agencies, and government agencies.

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

Economic Impact of Spending by Nonprofit Arts and Cultural AUDIENCES in Collier County

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

To measure the impact of spending by cultural audiences in Collier County, data were collected from 748 event attendees during 2016. Researchers used an audience-intercept methodology, a standard technique in which patrons are asked to complete a short survey about their event-related spending (while they are attending the event). In Collier County, cultural attendees spent an average of $32.30 per person, per event as a direct result of their attendance at the event.

The 45 participating nonprofit arts and cultural organizations reported that the aggregate attendance to their events was 1.4 million during 2015. **Event-related spending by these attendees totaled $44.7 million in Collier County during fiscal year 2015**, excluding the cost of event admission. The following table demonstrates the total economic impact of this spending.

TABLE 3:
Total Economic Impact of Spending by Nonprofit Arts and Cultural AUDIENCES in Collier County (excluding the cost of event admission[1])

	Collier County	Median of Similar Study Regions *Pop. 250,000 to 499,999*	National Median
Total Audience Expenditures	**$44,713,126**	$46,521,468	$18,871,511
Full-Time Equivalent Jobs	**912**	1,250	430
Resident Household Income	**$16,520,000**	$2,405,000	$8,402,500
Local Government Revenue	**$1,255,000**	$2,405,000	$898,000
State Government Revenue	**$2,665,000**	$2,523,500	$1,007,500

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

Cultural Tourists Spend More

The 748 audience survey respondents were asked to provide the ZIP code of their primary residence, enabling researchers to determine which attendees were local residents (live within Collier County) and which were nonresidents (live outside Collier County). In Collier County, researchers estimate that 61.2 percent of the 1.4 million nonprofit arts attendees were residents; 38.8 percent were nonresidents.

Nonresident attendees spent an average of 46 percent more per person than local attendees ($40.05 vs. $27.39) as a result of their attendance to cultural events. As would be expected from a traveler, higher spending was typically found in the categories of lodging, meals, and transportation. When a community attracts cultural tourists, it harnesses significant economic rewards.

TABLE 4: Event-Related Spending by Arts and Culture Event Attendees Totaled $44.7 million in Collier County (excluding the cost of event admission)

	Residents	Nonresidents	All Collier County Event Attendees
Total Attendance	847,141	537,077	1,384,218
Percent of Attendees	61.2%	38.8%	100%
Average Dollars Spent Per Attendee	$27.39	$40.05	$32.30
Total Event-Related Expenditures	**$23,203,192**	**$21,509,934**	**$44,713,126**

TABLE 5: Nonprofit Arts and Culture Event Attendees Spend an Average of $32.30 Per Person in Collier County (excluding the cost of event admission)

	Residents	Nonresidents	All Collier County Event Attendees
Refreshments/Snacks During Event	$3.95	$4.28	$4.08
Meals Before/After Event	$14.09	$16.29	$14.94
Souvenirs and Gifts	$3.22	$5.93	$4.27
Clothing and Accessories	$3.17	$2.73	$3.00
Ground Transportation	$2.14	$3.17	$2.54
Event-Related Child Care	$0.20	$0.12	$0.17
Overnight Lodging *(one night only)*	$0.62	$6.91	$3.06
Other	$0.00	$0.62	$0.24
Total Per Person Spending	**$27.39**	**$40.05**	**$32.30**

The Arts Drive Tourism

Each of the nonresident survey respondents (i.e., those who live outside Collier County) were asked about the purpose of their trip: **61.7 percent indicated that the primary purpose of their visit to Collier County was "specifically to attend this arts/cultural event."** This finding demonstrates the power of the arts to attract visitors to the community.

The audience-intercept survey also asked nonresident attendees if they would have traveled somewhere else (instead of to Collier County) if the event where they were surveyed had not occurred: **41.4 percent of nonresident attendees would have "traveled to a different community to attend a similar cultural event."**

Of the 38.8 percent of arts attendees who are nonresidents, 6.6 percent reported an overnight lodging expense. Not surprisingly, nonresident attendees with overnight expenses spent considerably more money per person during their visit to Collier County than did nonresident attendees without overnight lodging expenses ($183.37 and $30.01, respectively). For this analysis, only one night of lodging expenses is counted toward the audience expenditure, regardless of how many nights these cultural tourists actually stayed in the community. This conservative approach ensures that the audience-spending figures are not inflated by non-arts-related spending.

The Arts Retain Local Dollars

The survey also asked local resident attendees about what they would have done if the arts event that they were attending was not taking place: **43.2 percent of resident attendees said they would have "traveled to a different community to attend a similar cultural event."**

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

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

Travel Party and Demographic Characteristics of Arts Attendees

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

TABLE 6: Travel Party and Demographic Characteristics of Arts Audiences in Collier County

	Residents	Nonresidents
Travel Party Size		
Average number of adults (18 years or older)	2.3	2.4
Average number of children (younger than 18)	0.2	0.1
Average travel party size	2.5	2.5
Trip Characteristics		
Average number of nights spent away from home as a result of arts event	0.1	1.1
Percentage with any nights spent away from home as a result of arts event	3.3%	28.3%
Percentage attending the arts event or facility (where they were surveyed) for the first time	20.9%	46.5%
Age of Cultural Attendees		
18-34	9.8%	10.4%
35-44	4.0%	7.5%
45-54	10.5%	11.1%
55-64	17.6%	19.6%
65 or Older	58.1%	51.4%
Educational Attainment of Cultural Attendees		
Less than high school	0.9%	0.0%
High school	7.8%	8.7%
2-year college/technical/associates degree	15.6%	12.4%
4-year college/bachelors degree	34.4%	35.6%
Masters degree	32.3%	32.4%
Doctoral degree	8.9%	10.9%
Annual Household Income of Cultural Attendees		
Less than $40,000	9.0%	7.4%
$40,000 to $59,999	10.9%	7.4%
$60,000 to $79,999	12.0%	15.3%
$80,000 to $99,999	13.6%	13.2%
$100,000 to $119,999	15.2%	12.0%
$120,000 or More	39.4%	44.6%
Civic Engagement of Cultural Attendees		
Percentage that voted in 2016 U.S. presidential election	87.6%	86.7%

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

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

Conclusion

The nonprofit arts and culture sector is a $107.7 million industry in Collier County—one that supports 2,923 full-time equivalent jobs and generates $10.8 million in local and state government revenue.

Nonprofit arts and cultural organizations are businesses in their own right. They spent $63 million during fical year 2015 to employ people locally, purchase goods and services from local establishments, and attract tourists. They also leveraged a remarkable $44.7 million in additional spending by cultural audiences—spending that pumps vital revenue into restaurants, hotels, retail stores, parking garages, and other local businesses.

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

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

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

The Arts & Economic Prosperity 5 Calculator

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

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

For every $100,000 in direct spending by a nonprofit arts and cultural organization in Collier County, there was the following total economic impact.

TABLE 7:
Ratios of Economic Impact Per $100,000 of Direct Spending by Nonprofit Arts and Cultural Organizations in Collier County

	Collier County	Median of Similar Study Regions *Pop. = 250,000 to 499,999*	National Median
Full-Time Equivalent Jobs	**3.19**	3.69	3.52
Resident Household Income	**$64,914**	$79,015	$74,554
Local Government Revenue	**$3,660**	$3,698	$3,563
State Government Revenue	**$7,190**	$5,054	$4,891

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

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

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

Thus, $250,000 divided by 100,000 equals 2.5; 2.5 times 3.19 (from the top row of data on Table 1 above) equals a total of 8.0 full-time equivalent jobs supported (both directly and indirectly) within Collier County by that nonprofit arts and cultural organization. Using the same procedure, the estimate can be calculated for resident household income as well as for local and state government revenue.

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

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

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

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

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

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

	Residents	Nonresidents
Percent of Attendees	61.2%	38.8%
Average Per Person Event-Related Expenditures	$27.39	$40.05

TABLE 9: Ratios of Economic Impact Per $100,000 of Direct Spending by Nonprofit Arts and Culture Audiences in Collier County

	Collier County	Median of Similar Study Regions *Pop. = 250,000 to 499,999*	National Median
Full-Time Equivalent Jobs	**2.04**	2.78	2.46
Resident Household Income	**$36,947**	$56,692	$52,101
Local Government Revenue	**$2,807**	$4,420	$4,449
State Government Revenue	**$5,960**	$6,197	$5,692

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

An administrator wants to determine the total economic impact of the 25,000 total attendees to his/her organization's nonprofit arts and cultural events on full-time equivalent (FTE) employment in Collier 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; and
7. Multiply that figure by the FTE employment ratio per $100,000 for Collier County.

Thus, 25,000 times 61.2% (from Table 8 on the preceding page) equals 15,300; 15,300 times $27.39 (from Table 8) equals $419,067; 25,000 times 38.8% (from Table 8) equals 9,700; 9,700 times $40.05 equals $388,485; $419,067 plus $388,485 equals $807,552, $807,552 divided by 100,000 equals 8.08; 8.08 times 2.04 (from the top row of data on Table 9 on the preceding page) equals a total of 16.5 full-time equivalent jobs supported (both directly and indirectly) within Collier County by that nonprofit arts and cultural organization. Using the same procedure, the estimate can be calculated for resident household income as well as for local and state government revenue.

Making Comparisons with Similar Study Regions

For the purpose of this analysis and unique report, **the geographic region being studied is defined as Collier County, Florida**. According to the most recent data available from the U.S. Census Bureau, the population of Collier County was estimated to be 348,777 during 2015. For comparison purposes, 458 pages of detailed data tables containing the study results for all 341 participating study regions are located in Appendix B of the National Statistical Report. The data tables are stratified by population, making it easy to compare the findings for Collier County to the findings for similarly populated study regions (as well as any other participating study regions that are considered valid comparison cohorts).

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

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

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

About This Study

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

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

The 250 Local, Regional, and Statewide Study Partners

Americans for the Arts published a Call for Participants in 2015 seeking communities interested in participating in the Arts & Economic Prosperity 5 study. Of the more than 300 potential partners that expressed interest, 250 local, regional, and statewide organizations agreed to participate and complete four participation criteria: identify and code the universe of nonprofit arts and cultural organizations in their study region; assist researchers with the collection of detailed financial and attendance data from those organizations; conduct audience-intercept surveys at cultural events; and pay a modest cost-sharing fee (no community was refused participation for an inability to pay). Thirty of the 250 partners included multiple study regions as part of their AEP5 participation (e.g., a county as well as a specific city located within the county). As a result, the 250 local, regional, and statewide organizations represent a total of 341 participating study regions.

The United Arts Council of Collier County responded to the 2015 Call for Participants, and agreed to complete the required participation criteria.

Surveys of Nonprofit Arts and Cultural ORGANIZATIONS

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

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

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

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

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

Nationally, information was collected from 14,439 eligible organizations about their fiscal year 2015 expenditures, event attendance, in-kind contributions, and volunteerism. Responding organizations had budgets ranging from $0 to $785 million (Smithsonian Institution). Response rates for the 341 communities ranged from 9.5 percent to 100 percent and averaged 54.0 percent. It is important to note that each study region's results are based solely on the actual survey data collected. No estimates have been made to account for nonparticipating eligible organizations. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.

In Collier County, 45 of the 182 eligible nonprofit arts and cultural organizations identified by the United Arts Council of Collier County participated in this study—a participation rate of 24.7 percent

Surveys of Nonprofit Arts and Cultural AUDIENCES

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

In Collier County, a total of 748 valid audience-intercept surveys were collected from attendees to arts and cultural performances, events, and exhibits during 2016.

Economic Analysis

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

Studying Economic Impact Using Input-Output Analysis

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

To complete the analysis for Collier County, project economists customized an input-output

model based on the local dollar flow among 533 finely detailed industries within the unique economy of Collier County. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and cultural organizations and their audiences.

The Input-Output Process

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

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

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

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

Calculation of the total impact of the nonprofit arts on the outputs of other industries (T) can now be converted to impacts on the final incomes to residents by multiplying the outputs produced by the ratios of household income to output and employment to output. Thus, the employment impact of changes in outputs due to arts expenditures is calculated by multiplying elements in the column of total outputs by the ratio of employment to output for the 32 industries in the region. Changes in household incomes, local government revenues, and state government revenues due to nonprofit arts expenditures are similarly transformed. The same process is also used to show the direct impact on incomes and revenues associated with the column of direct local expenditures.

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

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

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

Frequently Used Terms

Cultural Tourism

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

Direct Economic Impact

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

Direct Expenditures

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

Econometrics

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

Econometrician

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

Full-Time Equivalent (FTE) Jobs

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

Indirect and Induced Economic Impact

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

Input-Output Analysis

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

Leakage

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

Multiplier (often called Economic Activity Multiplier)

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

Resident Household Income (often called Personal Income)

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

Revenue to Local and State Government

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

Frequently Asked Questions

How were the 341 participating communities and regions selected?

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

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

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

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

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

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

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

Why doesn't this study use a multiplier?

When many people hear about an economic impact study, they expect the result to be quantified in what is often called a multiplier or an economic activity multiplier. The economic activity multiplier is an estimate of the number of times a dollar changes hands within the community (e.g., a theater pays its actor, the actor spends money at the grocery store, the grocery store pays the cashier, and so on). It is quantified as one number by which expenditures are multiplied. The convenience of the multiplier is that it is one simple number. Users rarely note, however, that the multiplier is developed by making gross estimates of the industries within the local economy and does not allow for differences in the characteristics of those industries. Using an economic activity multiplier usually results in an overestimation of the economic impact and therefore lacks reliability.

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

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

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

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

Will my local legislators believe these results?

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

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

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

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

Acknowledgments

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

Generous funding for this project was provided by the United Arts Council of Collier County, which also served as the local project partner and as such was responsible for the local implentation and data collection requirements of this customized analysis for Collier County.

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

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

Collier County's Participating Nonprofit Arts and Cultural Organizations

This study could not have been completed without the cooperation of the 45 nonprofit arts and cultural organizations in Collier County, listed below, that provided detailed financial and event attendance information about their organization.

Art League Of Marco Island D/B/A/Marco Island Center For The Arts; Artis—Naples; Arts Naples World Festival; Audubon of the Western Everglades; Bach Ensemble; Bayshore Cultural And Performing Arts Center Inc Dba Capa Cultural And Performing Arts Center; Big Cypress Chapter National Society Of The Daughters Of The American Revolution (Big Cypress Chapter); Classic Chamber Concerts; Collier Child Care Resources (Lunch-Art-Auction); Collier County Agricultral Fair & Exposition; Collier County Public Schools Adult And Community Education; CommUNITY Gallery - Collier County Sheriff's Office; Conservancy of Southwest Florida; Everglades Society For Historical Preservation; First Baptist Church Of Naples (Naples Christmas Spectacular); Friends Of Delnor-Wiggins Pass State Park (Wildlife & Wildlands Art Show); Golisano Children's Museum of Naples; Goodland Arts Alliance; Gulf Coast Big Band Inc; Gulfshore Opera; Gulfshore Playhouse; Holocaust Museum & Ed. Center of SW FL; Inish/Trinity; Island Theater Company; Marco Island Historical Society; Marine Industries Association of CC; Naples Art Association; Naples Ballet; Naples Botanical Garden Inc; Naples Concert Band Inc; Naples Italian American Foundation; Naples Jazz Society; Naples Music Club; Naples Orchestra & Chorus (I Musici Di Napoli Inc); Naples Players Inc; Naples Quilters Guild Inc; Naples Zoo Inc; National Society Of Tole & Decorative Painters Inc (Naples Decorative Artists); Opera Naples; Shakespeare In Performance; Swamp Buggy; Swfl Veterans Alliance Inc; Theatrezone; United Arts Council Of Collier County Inc; and West Coast Muscle Car Club.

Collier County's Participating Cultural Event Attendees

Additionally, this study could not have been completed without the cooperation of the 748 arts and cultural audience members who generously took the time to complete the audience-intercept survey while attending a performance, event, or exhibit within Collier County during calendar year 2016.

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

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

Cover: *Andrew Shurtleff Photography*

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

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www.AmericansForTheArts.org

Cultural Assets Inventory

Collier County is home to abundant, diverse cultural assets – organizations, venues, places, natural and cultural heritage, and people. The cultural asset list, to date, is a combination of assets identified by Collier residents (during the community engagement phase and through the survey), County and UAC staff suggestions, IRS nonprofit lists, the *Collier County Guide to Historic Sites*, and other sources. Currently, there are 160 cultural assets on the list. The work of arts and culture asset identification is never complete. This list of information and assets is a living list – to be revised and updated as necessary. Provided in the appendix of this plan is the list of cultural assets identified for this plan.

Cultural asset identification plays a vital role in elevating arts, culture, and the heritage of a place, which embodies community identity, quality of life, and economic vitality. It is a crucial step in integrating culture within County decision-making and strengthening the cultural sector. For this plan, the intent of identifying Collier's cultural assets is to:

- Raise awareness of community cultural assets with residents, visitors, and tourists
- Identify strengths, gaps, needs, and opportunities in the arts and cultural sector
- Provide data necessary for better informed planning and policy decisions
- Provide information for economic development and to promote arts and cultural resources

Cultural Asset Categories

Nonprofit Community Cultural Organizations

This category includes organizations that represent arts, heritage, and cultural interests in the community. These are nonprofits essential to the cultural vitality of the community such as arts organizations, civic and social organizations, cultural organizations, and heritage groups. There are approximately 63 nonprofit community cultural organizations in the county, including five with operating budgets greater than $1 million.

Cultural Facilities/Venues, Spaces and Places

This category represents facilities, spaces, and sites where cultural activities take place. These can include spaces in the public, private, and nonprofit sectors, and include purpose-built facilities as well as facilities that offer space for cultural programming. There are numerous cultural assets in Collier County in this category including theaters, galleries, museums, art centers, farmers' markets, dance studios, and a culinary accelerator. There are natural creative areas in the County, including the design and art districts and places around the county.

Cultural Events and Festivals

This category represents recurring cultural activities. Festivals and events contribute to the animation of public and natural spaces by bringing entertainment, new experiences, and economic impacts to the community. These can include performing arts events, tours of culturally significant places, seasonal celebrations, and many others. Assets may consist of festivals and events, artists or artisan tours and activities, film festivals and events, multicultural festivals and events, art gallery tours and experiences, performing arts festivals and events, seasonal celebrations and events, and street festivals. Cultural events are broad and diverse in the county, including performances, exhibits and festivals, heritage events, and more.

Parks, Natural Heritage, Cultural Heritage

This category represents significant natural areas in the community, such as beaches, parks, botanical and community gardens, and conservation areas that offer rich cultural, recreational, and community experiences. This category also represents significant cultural heritage sites or resources. It includes buildings and places of historical, cultural and educational value, and archive collections that help pay tribute to the community's past. There are 16 parks throughout the County and 42 historic sites identified through this process. Collier County values its history and has an active preservation practice. The sites include historic buildings, churches, cemeteries, trails, and markers.

SUMMARY CULTURAL ASSET INVENTORY LIST*

160 total of cultural assets in Collier County Identified by the community and major data sources
63 nonprofit arts and cultural organizations
42 historic sites
25 recurring events, festivals, and programs
16 parks, beaches, environmental organizations and places
14 cultural places, such as arts districts, libraries and community centers
Many more arts businesses (e.g., galleries), arts people and creative professionals

* List is fluid - should be updated as needed.

NAME OF CULTURAL ASSET	PRIMARY CATEGORY
Arts and crafts fairs in the Naples area	Events/Programs
Asia Fest	Events/Programs
Empty Bowls Naples	Events/Programs
Everglades City Seafood Festival	Events/Programs
Farm Tours (University of Florida/IFAS Extension)	Events/Programs
Immokalee Cattle Drive & Jamboree at Roberts Ranch	Events/Programs
Mercato Outdoor Concerts	Events/Programs
Mullet Festival – Copeland	Events/Programs
Naples Beach Hotel Summer Concert Series	Events/Programs
Naples Flower Show	Events/Programs
Naples India Fest	Events/Programs
Naples International Film Festival	Events/Programs
Naples National Art Show	Events/Programs
Naples New Year's Art Festival	Events/Programs
Naples Pride – Cambier Park	Events/Programs
Naples Writers" Workshop	Events/Programs
National Art Show – Cambier Park	Events/Programs
New Year’s Art Show	Events/Programs
Old Florida Festival	Events/Programs
Paradise Coast Food & Wine Festival – Cambier Park	Events/Programs
Stone Crab Festival – Naples	Events/Programs
Summer Jazz on the Gulf – Naples Beach Hotel	Events/Programs
Swamp Buggy Festival & Races – E. Naples	Events/Programs
Third On Canvas	Events/Programs
Whiskey Park Shows	Events/Programs
1936 Seminole Conference Historic Marker - Along the Trail	Historic Sites
Bank of Everglades - Everglades City	Historic Sites
Bay City Walking Dredge - Along the Trail	Historic Sites
Captain Collier House - Marco Island	Historic Sites
Captain John F. Horr House	Historic Sites
Chokoloskee Cemeteries	Historic Sites
Chokoloskee Church of God - Chokoloskee	Historic Sites
Church of God and Pioneer Cemetery - Marco Island	Historic Sites
Corkscrew Settlement - Corkscrew	Historic Sites

Deep Lake - Jerome/Sunniland/Immokalee	Historic Sites
Everglades Community Church	Historic Sites
Fakahatchee Island Cemetery - Along the Trail	Historic Sites
First Baptist Church - Everglades City	Historic Sites
First Baptist Church - Immokalee	Historic Sites
Historic Palm Cottage - Naples	Historic Sites
Immokalee Pioneer Museum & Roberts Ranch	Historic Sites
Ivey House - Everglades City	Historic Sites
Joanie's Blue Crab Café - Along the Trail	Historic Sites
JT's Island Store	Historic Sites
Mercantile Building - Naples	Historic Sites
Monroe Station - Tamiami Trail Way Stations	Historic Sites
Museum of the Everglades	Historic Sites
Naples Pier	Historic Sites
Nehrling Gardens (Caribbean Gardens/Naples Zoo)	Historic Sites
Ochopee Post Office	Historic Sites
Old Collier County Courthouse - Everglades City	Historic Sites
Old Marco Inn - Marco Island	Historic Sites
Old Marco Lodge - Goodland	Historic Sites
Old Railroad Depot - Everglades City	Historic Sites
Old Tamiami Trail Marker - Naples	Historic Sites
Otter Mount - Marco Island	Historic Sites
Pepper Ranch - Jerome/Sunniland/Immokalee	Historic Sites
Rod & Gun Club - Everglades City	Historic Sites
Rosemary Cemetery - Naples	Historic Sites
Royal Palm Hammock - Tamiami Trail Way Station	Historic Sites
Site of Bula Baptist Mission and Cemetery - Copeland	Historic Sites
Sunniland Oil Field - Jerome/Sunniland/Immokalee	Historic Sites
Sunset Lodge and Brown Cemetery - Everglades City	Historic Sites
Tamiami Trail Historic Marker - Along the Trail	Historic Sites
Ted Smallwood’s Store – Chokoloskee	Historic Sites
Tin City - Naples	Historic Sites
Weaver's Station - Tamiami Trail Way Station	Historic Sites
Ah-Tah-Thi-Ki Museum	Nonprofit
Artis-Naples	Nonprofit
Bayshore Cultural and Performing Arts Center (CAPA)	Nonprofit
Bruce & Patricia Folkerth Charitable Foundation	Nonprofit
Chrysalis Chamber Players Corporation	Nonprofit
Collier County Senior Resource Center	Nonprofit
Collier Resource Center	Nonprofit
Community Foundation of Collier County	Nonprofit
Council for Hispanic Business Professionals CHBP Inc.	Nonprofit
Cultures in Context Incorporated	Nonprofit
Delta Mike Airfield	Nonprofit
Education Foundation of Collier County	Nonprofit
Florida Camera Club Council Inc.	Nonprofit
Freedom Memorial Foundation of Naples Florida Inc.	Nonprofit
Friends of Rookery Bay	Nonprofit
Genealogical Society of Collier County Inc.	Nonprofit

Golisano Children's Museum of Naples Inc.	Nonprofit
Goodland Arts Alliance Inc.	Nonprofit
Gulfshore Opera Inc.	Nonprofit
Gulfshore Playhouse	Nonprofit
Holocaust Museum & Cohen Education Center	Nonprofit
I Give A Damp	Nonprofit
India Association of Naples Inc.	Nonprofit
Island Theater Inc.	Nonprofit
Marco Island Center for the Arts (The Art League of Marco Island)	Nonprofit
Marco Island Foundation for the Arts Inc.	Nonprofit
Marco Island Historical Society/Museum	Nonprofit
Music Makers Show Band Inc.	Nonprofit
NAACP Collier County	Nonprofit
Naples American Association of Zoo Keepers	Nonprofit
Naples Art Association	Nonprofit
Naples Asian Professionals Association Foundation Incorporate	Nonprofit
Naples Backyard History Inc.	Nonprofit
Naples Ballet Inc.	Nonprofit
Naples Big Band	Nonprofit
Naples Botanical Garden	Nonprofit
Naples Concert Band	Nonprofit
Naples Dance Theater Corp.	Nonprofit
Naples Decorative Artists	Nonprofit
Naples Performing Arts Center Inc.	Nonprofit
Naples Players Endowment	Nonprofit
Naples Storytelling Guild	Nonprofit
Naples Zoo Inc.	Nonprofit
National Society of the Daughters of the American Revolution	Nonprofit
National Society of the Sons of the American Revolution	Nonprofit
National Society of Tole & Decorative Painters Inc.	Nonprofit
Opera Naples Inc.	Nonprofit
Pedro Cuban Peter Aguilar and Barbara Craddock Endowment	Nonprofit
Pfeffer-Beach Foundation Inc.	Nonprofit
ReCreation Tappers of Southwest Florida	Nonprofit
Russian Cultural Center of Naples Inc.	Nonprofit
Shakespeare in Paradise Inc.	Nonprofit
South Florida Performing Arts Development Corporation	Nonprofit
Southwest Florida Pastel Society	Nonprofit
Stage 2 Improv	Nonprofit
Storytellers Creative Arts Inc.	Nonprofit
Studio Players Inc.	Nonprofit
The Garden of Hope & Courage	Nonprofit
The Marco Players Theatre	Nonprofit
TheatreZone Inc.	Nonprofit
United Arts Council of Collier County	Nonprofit
Vineyards Radio Network Inc.	Nonprofit
Zen and the Arts	Nonprofit
Audubon Corkscrew Swamp Sanctuary	Parks/Environment
Baker Park – Naples	Parks/Environment

Barefoot Beach – N. Naples	Parks/Environment
Big Cypress National Preserve - Collier	Parks/Environment
Cambier Park	Parks/Environment
Celebration Park	Parks/Environment
Conservancy of Southwest Florida, Inc.	Parks/Environment
CREW Land & Water Trust	Parks/Environment
Delnor-Wiggins State Park and Beach	Parks/Environment
Everglades National Park	Parks/Environment
Gordon River Greenway – Naples	Parks/Environment
MarGood Harbor Park	Parks/Environment
Naples Pathways Coalition	Parks/Environment
Rookery Bay Estuarine Reserve – Naples	Parks/Environment
The Conservancy of SW FL – Naples	Parks/Environment
Tigertail Beach/Bird Sanctuary – Marco Island	Parks/Environment
Ave Maria University	Venues/Places
Bayshore Gateway Triangle District	Venues/Places
Collier County Museum (and Friends of Collier County Museum)	Venues/Places
Collier County Public Library	Venues/Places
Dogtooth Sports and Music Bar	Venues/Places
Event Center at Seminole Casino/Immokalee	Venues/Places
Farmers Markets	Venues/Places
Fifth Avenue	Venues/Places
Florida Gulf Coast University (Bower School of Music and the Arts)	Venues/Places
House of Gaia Community Center	Venues/Places
Naples Art District	Venues/Places
Naples Depot Museum	Venues/Places
Naples Design District	Venues/Places
The Norris Community Center – Naples	Venues/Places

Performing Arts Venues Comparison Study

Overview

A review of the availability of Collier County performing arts venues benchmarked to three Florida counties – Lee, Sarasota and Palm Beach – reveals useful comparisons and provides new information to inform decision-making about future cultural facilities.[10] Performing arts venues are significant because they play a key role in providing amenities for residents and visitors, and support strategies to expand cultural tourism. They also provide places for arts education, youth development, and community arts programming.

Performing arts venues included in this review are theaters, auditoriums, studio/black box theaters, and cabarets. They span a range of sizes from less than 100 seats to more than 2,000. The review tallies the total number of venues, their seating capacity, and configuration. Larger venues are those with more than 1,000 seats. Excluded are outdoor amphitheaters, arenas, churches, and night clubs.

Observations

The review indicates Collier County, with a total of 14 venues, has fewer performing arts venues than the benchmark counties, which have between 20 and 30 venues. To place this in context, Collier's population is smaller than the other counties and, compared to population, Collier's total number of available seats per person in performing arts venues is slightly more than Lee and Palm Beach Counties and about half that of Sarasota County. Collier has one large venue, Artis-Naples' Hayes Hall, while the other counties have between two and four large venues and many smaller community venues throughout the county.

Since Collier's venues are concentrated in Naples, community access to performing arts venues is limited by their location. Accessibility diminishes with distance from the venue, so this means that residents beyond a 10- or 20-minute drive time of these facilities are increasingly less likely to attend. This barrier is more pronounced for youth access since arts education programs depend on parents or others to provide transportation.

Compared to its population, Collier's total number of available seats per person in performing arts venues is about half that of Sarasota County, but on a par with Lee and Palm Beach Counties.

[10] The review includes the total number of available seats, venues, and large venues, and are compared with measures of market demand for performing arts, and with current and future projected population figures. Comparison counties were selected because they are tourism competitors to Collier and promote themselves as art and cultural destinations.

Market demand for arts performances in Collier County is strong and can support additional venues, now and in the future. Collier County's population is projected to grow by approximately 35% between 2020 and 2045. Population growth will almost certainly increase the market demand for performing arts venues and programs. Current market demand is very high (above the national average) for 19% of the region's most densely populated block groups, both in the immediate area of Naples and within a few hours' drive. Within a one-hour drive of Naples, there are an estimated 123,000 performing arts buyers and another 173,000 buyers for commercial concerts. Based on population projections, the 35% increase in buyers within a 30-minute drive of Naples (encompassing most of the Collier County) would estimate buyer potential within the county for arts and commercial performances at over 150,000 persons.

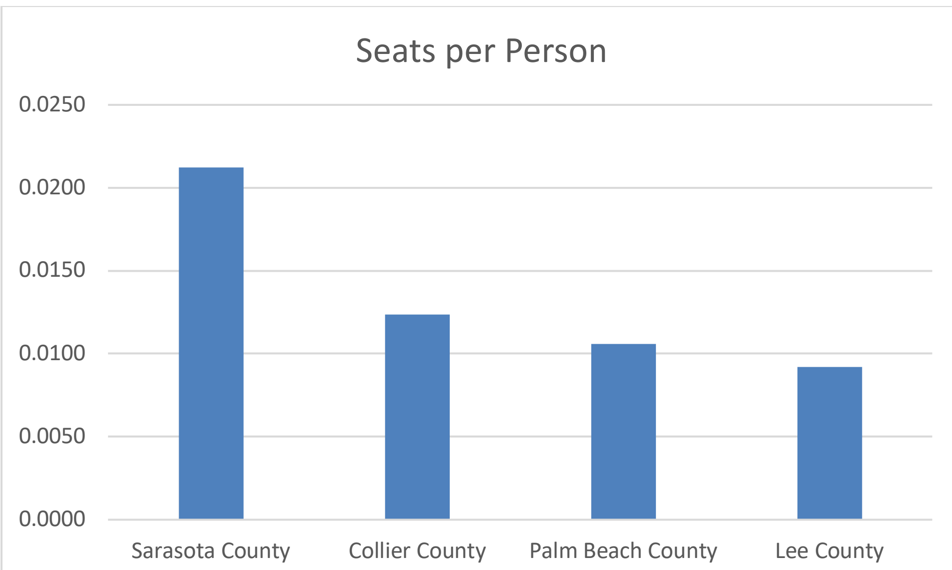
Conclusion

Collier County has lower availability of performing arts venues than the benchmark counties, in terms of their total number and size, but the comparison is more favorable when adjusted for population. More significant is that there is a location and access issue, since Collier's venues are almost all concentrated in Naples and most population growth is projected in the eastern portions of the County. This finding corroborates facility needs identified through the survey of nonprofit arts and cultural organizations conducted for this plan. It corroborates issues of geographic access heard from residents outside of Naples. These observations, combined with strong present and future market demand, illustrate an opportunity to provide or facilitate the development of additional venues, including large venues, to meet identified facility needs, and to provide greater community access. Building new facilities is not the only strategy, however, for meeting the cultural needs of a growing community. Sharing of existing facilities and addressing transportation barriers are examples of other approaches. While this study does not test the feasibility of any specific facility project, it is clear that Collier's facility needs include community-based venues in locations throughout the county, ones that are more accessible in terms of location, pricing and programming. Developing additional venues can also increase the desirability of Collier County as a cultural destination. While any specific facility project must undergo rigorous feasibility analysis, there is potential current and projected future market demand to support more venues.

Data

Comparative Analysis of Performing Arts Venues

County	2018 Population	Total # Seats	Seats per Person	Total # Venues	# of Large Venues (> 1,000 seats)	# of Small and Mid-Size Venues (< 1,000 seats)
Sarasota County	426,718	9,055	**0.0212**	**20**	**4**	16
Collier County	378,488	4,676	**0.0124**	**14**	**1**	13
Palm Beach County	1,485,941	15,714	**0.0106**	**33**	**3**	30
Lee County	754,610	6,938	**0.0092**	**20**	**2**	18



Collier County Performing Arts Facilities

Facility	Seating Capacity	Type	City
Artis-Naples / Hayes Hall	1,473	Proscenium	Naples
Artis-Naples / Daniels Pavilion	294	Black box	Naples
Seminole Casino Hotel Immokalee	836	Proscenium	Immokalee
Gulfshore Playhouse / Mainstage (planned)	375	Proscenium	Naples
Gulfshore Playhouse / Black box (planned)	175	Black box	Naples
Sugden Community Theatre / Blackburn Hall	326	Proscenium	Naples
Sugden Community Theatre / Tobye Studio Theatre	100	Black box	Naples
Norris Theatre Center	200	Proscenium	Naples
Marco Island Players	83	Proscenium	Marco Island
Community Center / Joan Jenks Auditorium	100	Auditorium	Naples
TheatreZone / G&L Theater	250	Proscenium	Naples
Opera Naples / Judy and John Hushon Theatre at the David and Cecile Wang Opera Center	264	Studio	Naples
Naples Performing Arts Center	200	Studio	Naples
Marco Island Historical Society / Rose History Auditorium	250	Studio	Marco Island
Total Seats in Collier County	4,676		

Lee County Performing Arts Facilities

Facility	Seating Capacity	Type	City
Florida Southwestern College / Barbara B. Mann Performing Arts Center	1,874	Proscenium	Fort Myers
Florida Southwestern College / Black Box Theatre	100	Black box	Fort Myers
St. Leo Parish Life Center	1,000	Assembly hall	Bonita Springs
Shell Point Retirement Community has two large spaces (1000 and 400 seats – I believe)			
Broadway Palm Dinner Theatre mainstage	448	Proscenium	Fort Myers
Broadway Palm Dinner Theatre / Off Broadway Palm	100	Dinner theater	Fort Myers
Florida Repertory Theatre / Historic Arcade Theatre	393	Proscenium	Fort Myers
Florida Repertory Theatre / Artstage Studio Theatre	120	Black box	Fort Myers
Theatre Conspiracy / Foulds Theatre	135	Proscenium	Fort Myers
Florida Gulf Coast University / U. Tobe Recital Hall	210	Proscenium	Estero
Florida Gulf Coast University / TheatreLab	60	Black box	Estero
Davis Art Center	300	Proscenium	Fort Myers
Center for the Performing Arts Bonita Springs / Hinman Auditorium	400	Proscenium	Bonita Springs
Center for the Performing Arts Bonita Springs / Moe Auditorium	200	Proscenium	Bonita Springs
Southwest Florida Event Center	650	Event space	Bonita Springs
BIG ARTS Performance Hall	410	Proscenium	Sanibel
The Shell Factory	192	Black box	North Fort Myers
Cultural Park Theatre Co.	184	Proscenium	Cape Coral
New Phoenix Theater	112	Proscenium	Fort Myers
The Laboratory Theater of Florida	50	Proscenium	Fort Myers
Total Seats in Lee County	6,938		

Sarasota County Performing Arts Facilities

Facility	Seating Capacity	Type	City
Van Wezel Performing Arts Hall / Roskamp Auditorium	1,741	Proscenium	Sarasota
Sarasota Opera House	1,119	Proscenium	Sarasota
Venice Institute for Performing Arts / Center (Venice High School)	1,090	Proscenium	Venice
Riverside Performing Arts Center (high school auditorium)	1,000	Proscenium	Sarasota
Sarasota Municipal Auditorium	900	Proscenium	Sarasota
Florida State University / Mertz Theatre	525	Proscenium	Sarasota
Florida State University / Cook Theatre	128	Proscenium	Sarasota
The Players Centre for Performing Arts	500	Proscenium	Sarasota
The Ringling / Historic Asolo Theater	285	Proscenium	Sarasota
Florida Studio Theatre / Gompertz Theatre	237	Proscenium	Sarasota
Florida Studio Theatre / Keating Theatre	173	Proscenium	Sarasota
Florida Studio Theatre / Goldstein Cabaret	100	Cabaret	Sarasota
Florida Studio Theatre / Court Cabaret	105	Cabaret	Sarasota
Florida Studio Theatre / Bowne's Lab Theatre	100	Black box	Sarasota
West Coast Black Theatre Troupe / Donnelly Theater	200	Proscenium	Sarasota
West Coast Black Theatre Troupe / Millman Theatre	60	Black box	Sarasota
McCurdy's Comedy Theatre	200	Cabaret	Sarasota
Venice Theatre / MainStage	432	Proscenium	Venice
Venice Theatre / Pinkerton	90	Black box	Venice
Urbanite Theatre	70	Black box	Sarasota
Total Seats in Sarasota County	9,055		

Palm Beach County Performing Arts Facilities

Facility	Seating Capacity	Type	City
Florida Atlantic University / Carol and Barry Kaye Auditorium	2,400	Proscenium	Boca Raton
Florida Atlantic University / Theatre Lab	75	Black box	Boca Raton
Florida Atlantic University / Studio One Theater	120	Black box	Boca Raton
Florida Atlantic University / Studio Two Theater	75	Black box	Boca Raton
Florida Atlantic University / Tamar and Milton Maltz Auditorium	500	Auditorium	Jupiter
Raymond F. Kravis Center for the Performing Arts / Dreyfoos Hall	2,195	Proscenium	West Palm Beach
Raymond F. Kravis Center for the Performing Arts / Rinker Playhouse	305	Black box	West Palm Beach
Raymond F. Kravis Center for the Performing Arts / Persson Hall	291	Black box	West Palm Beach
Spanish River Concerts	1,500	Proscenium	Boca Raton
Palm Beach State College / Eissey Campus Theatre	750	Proscenium	Palm Beach Gardens
Palm Beach State College / Dolly Hand Cultural Arts Center	466	Proscenium	Belle Glade
Palm Beach State College / Watson B. Duncan III Theatre	706	Proscenium	Lake Worth Beach
Palm Beach State College / Stage West	122	Proscenium	Lake Worth Beach
Lynn University / Keith C. and Elaine Johnson Wold Performing Arts Center	750	Proscenium	Boca Raton
Lynn University / Amarnick-Goldstein Concert Hall	220	Proscenium	Boca Raton
Lynn University / Schmidt Family Studio	100	Black box	Boca Raton
Society of the Four Arts / Walter S. Gubelmann Auditorium	698	Proscenium	Palm Beach
Maltz Jupiter Theatre	617	Proscenium	Jupiter
Improv Comedy Theatre	500	Cabaret	West Palm Beach
The Kelsey Theatre	385	Proscenium	Lake Park
Arts Garage / Stuart & Shelby Theatre	325	Proscenium	Delray Beach
Arts Garage / Schmier Theatre	140	Black box	Delray Beach
Wick Theater	332	Proscenium	Boca Raton
Old School Square Center for the Arts / Crest Theatre	323	Proscenium	Delray Beach
Delray Beach Playhouse	300	Proscenium	Delray Beach
Lake Worth Playhouse / Oakley Theatre	300	Proscenium	Lake Worth
Lake Worth Playhouse / Stonezek Theatre	60	Black box	Lake Worth
Boca Black Box	275	Black box	Boca Raton
Mizner Park Cultural Center / Studio Theater	266	Studio theater	Boca Raton
Adolph & Rose Levis Jewish Community Center / Sandler Center Biefield Auditorium	220	Proscenium	Boca Raton
Palm Beach Dramaworks	175	Proscenium	West Palm Beach
The Willow Theatre	155	Proscenium	Boca Raton
Bhetty Waldron Theatre / Actors' Rep Theatre	68	Black box	West Palm Beach
Total Seats in Palm Beach County	15,714		

Collier County Population Projections

Year	Population	Growth	Period
2010 Census	321,520		
2020 Projection	382,800	19.1%	2010-20
2025 Projection	418,400	9.3%	2020-25
2030 Projection	449,500	7.4%	2025-30
2035 Projection	475,200	5.7%	2030-35
2040 Projection	496,800	4.5%	2035-40
2045 Projection	516,100	3.9%	2040-45

Source: Bureau of Economics and Business Research, Florida Population Studies, April 2019

https://www.bebr.ufl.edu/sites/default/files/Research%20Reports/projections_2019.pdf

Population figures are the middle of a range of three figures projected for each year.

Estimated Buyers for Performing Arts and Commercial Performances

County	Projected 2024 Population	Theater	Dance	Classical Music	Country Music	Rock Music	Combined Buyers	Percentage Combined Buyers of Total Population
Collier	418,351	42,050	13,047	13,989	18,895	26,132	114,113	27%
Lee	848,269	72,405	24,007	24,048	37,873	51,275	209,608	25%
Sarasota	457,683	52,511	14,873	15,698	22,638	32,596	138,316	30%
Palm Beach	1,587,423	162,831	53,944	53,413	72,424	116,890	459,502	29%