CREATIVE INDUSTRIES IN THE SOUTH

A SOUTH ARTS RESEARCH PUBLICATION

BY ALLEN BELL

SOUTH ARTS

South Arts Staff

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Ann-Laura Parks, CFRE

www.southarts.org

1800 Peachtree Street NW, Suite 808
Atlanta, GA 30309

Phone – 404-874-7244
Fax – 404-873-2148

Board of Directors

Graphic design by Emily Hayes, intern

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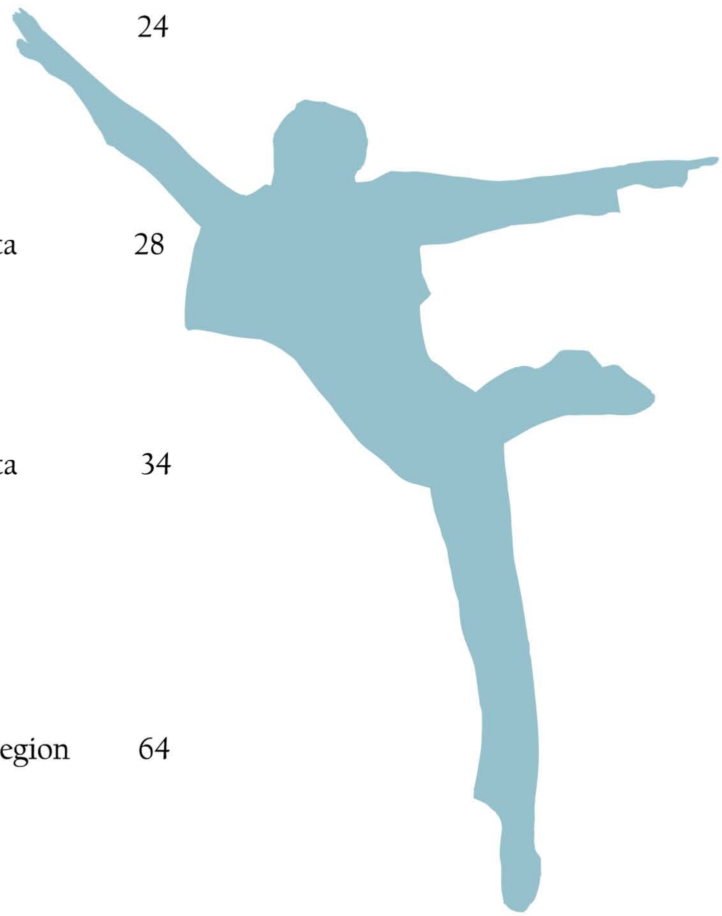

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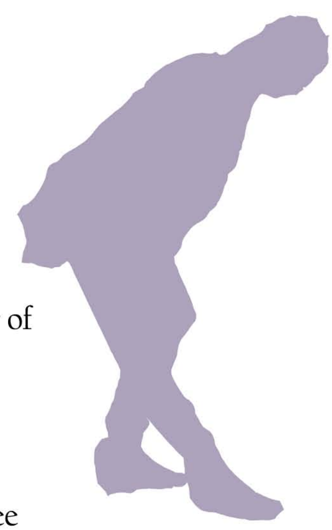

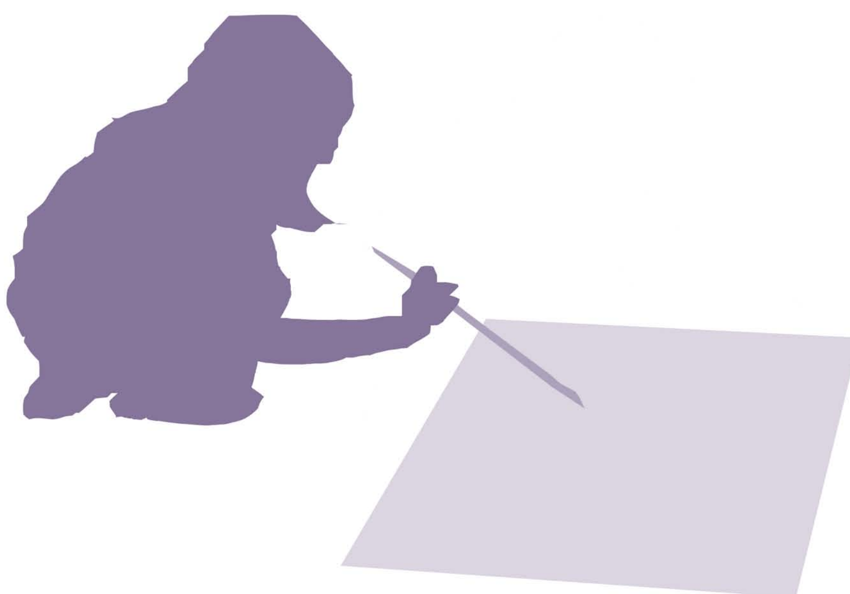

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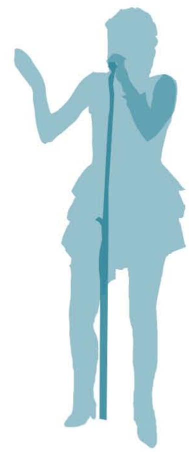

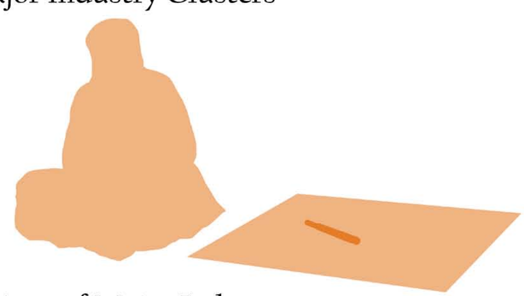

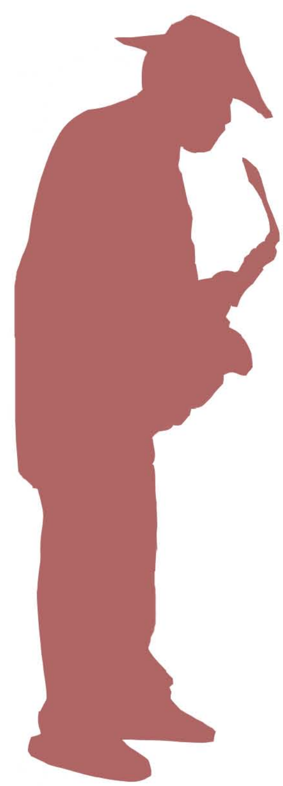

Preface

As part of the new research program developed by South Arts, explorations into the creative economy are a top priority. While numerous studies have made strong arguments about the economic benefits of the nonprofit arts, as well as the broader field of creative industries, none of those studies have taken an aggregate look at the creative industries within the American South. Hence, South Arts is pursuing a research agenda that includes the creative economy and begins with this study.

Back in 2001, in *The Creative Industries Mapping Document*, the United Kingdom Department of Culture, Media and Sport defined the creative industries as:

> … those industries which have their origin in individual creativity, skill and talent which have a potential for wealth and job creation through the generation and exploitation of intellectual property. The creative industries include: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio.[1]

This concept of creative industries helped expand the definition of arts-related work and businesses, and influenced researchers in a way that encouraged them to develop a new scope for how they measure and analyze the creative economy. The perspective of new research grew beyond just looking at the nonprofit arts industry to include the vast array of jobs and industries that require skills and knowledge in the various fields of creativity. Today, the creative economy is a major theme among economic development agencies in the U.K., Canada, Australia, and Singapore, among other countries.[2] In the U.S., however, the creative economy is just now beginning to catch on as a theme among economic developers.

The National Governor's Association recently acknowledged the importance and expansive reach of the creative industries in their 2010 study *Arts and the Economy: Using Arts and Culture to Stimulate State Economic Development*:

> Arts and culture are important to state economies. Arts and culture-related industries, also known as 'creative industries,' provide direct economic benefits to states and communities: They create jobs, attract investments, generate tax revenues, and stimulate local economies through tourism and consumer purchases. These industries also provide an array of other benefits, such as infusing other industries with creative insight for their products and services and preparing workers to participate in the contemporary workforce. In addition, because they enhance quality of life, the arts and culture are an important complement to community development, enriching local amenities and attracting young professionals to an area.[3]

While these benefits of the creative industries ring true, it makes an even more convincing argument when the scale and scope of the creative economy can be quantified and presented in a way that makes its impact clear.

The definition of the creative economy used for this report, which determines the specific North American Industrial

Classification System (NAICS) sectors included in the analysis, is a broad one. It is mostly based on areas of plurality and consensus between the creative economy studies developed by New England Foundation for the Arts (NEFA), Americans for the Arts (AFTA), Louisiana, North Carolina, Mississippi, Arkansas, and Colorado.[4]

This definition is broader than the more specific categories of nonprofit arts and culture, but it is much more restricted than Richard Florida's concept of a creative class.[5]

The data used in this study are for industry categories very similar to, but not an exact replica of, the categories used in the UK definition of the creative economy. This study includes data from industries in the following categories: the visual arts and crafts, the performing arts, film and television, broadcasting, architecture, all areas of design, advertising and public relations, writing and publishing, museums and historical sites, and software publishers.

Even with data included from all of these categories, the numbers in this study still represent an undercount of the entire creative economy in the South. By looking at creative industries, this study captures all of the workers employed in firms whose products take the form of intellectual property or whose services or products facilitate the production, distribution, marketing, sale, or consumption of intellectual property.

With a focus on the creative industries this study does not capture, however, those creative workers who are employed with firms in industry sectors that do not fall under this definition of the creative industries. So, for instance, this data does not include clothing or automobile designers. (For more details on this, see Appendix 1: Methodology.)

In light of the expanded definition of the creative industries and the importance of their broad reach into our region's economy, South Arts has conducted this study in an effort to create baseline data on the creative economy of the region. The purpose of the report is to begin the conversation on the importance of this economic sector to our region's economic stability and growth.

This report includes both aggregate data for the nine-state South Arts region as a whole, as well as individual state profiles for Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee. The regional data will help South Arts develop a picture of the creative economy in the region as a whole, while individual state profiles will help the organization see the geographic distribution of creative industries between the nine states and provide information to each state about their creative industry strengths.

This study is based on data from the 2007 Economic Census and the 2007 Non-Employer Statistics, both provided by the U.S. Census Bureau, as well as data collected and distributed by the National Center for Charitable Statistics. The exact data codes included in the study are published in Appendices 2 and 3 at the end of this report.

For the purposes of comparison and analysis, the data has been organized into six sector categories within the creative economy: design, film and media, heritage and museums, literary and publishing, performing arts, and visual arts and crafts. This breakdown of the creative industries into six sector categories borrows from the segmentation developed by the Alliance for Creative Advantage, including RTS, Inc. and Mt. Auburn Associates, for their 2008 study *The State of Colorado's Creative Economy*.[6]

Other studies, such as *Economic Contribution of the Creative Industry in North Carolina*[7] and *Louisiana: Where Culture Means Business*[8], have included additional industry categories like culinary arts and historic preservation. This study does not include those categories. Doing so will require taking percentages of sector data found within the Economic Census and Non-Employer Statistics, and based on industry profiles developed by each state. Due to limited time and resources, that work could not be completed in time to be included in this report. We hope to include data for the culinary arts and historic preservation in future reports.

While this study is the result of a tremendous amount of data mining from the U.S. Census Bureau and the National Center for Charitable Statistics, it only scratches the surface of the information that is available about the creative industries and the creative workforce. There is additional historical data available from the Economic Census, Non-Employer Statistics, and the National Center for Charitable Statistics, which will allow for the measurement of trends over time. In addition, there are numerous other data sources that can be accessed for information related to the creative economy, including the Bureau of Labor Statistics, the Bureau of Economic Analysis, the American Community Survey, and many others. This report establishes baseline data on the creative industries for the region. It is just the beginning of the creative economy research conducted by South Arts. Future research will build on the information and discoveries gleaned from this report.

Meanwhile, this is the first regional study of the creative industries in the nine-state South Arts region of Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee. In addition, for many of the states in the South Arts region, the state profiles provide the first creative economy data available at the statewide level.

This study lays the groundwork for studying the creative economy of the region, including data from companies (including for-profits and non-profits) and the self-employed, with a focus on the number of establishments, the number of employees, annual compensation, and annual revenues. In addition, this report includes some basic information on the scope of the non-profit arts and culture sector within the creative economy.

The goal of the study is to provide substantial objective and reliable data about the creative economy in the nine-state region served by South Arts. While some organizations and agencies may use this data for advocacy, policy, or educational purposes, the purpose of this study is to take a basic survey of the creative industries in the region, based on the most comprehensive, current, and reliable data available.

We hope this information will be distributed and shared widely among arts administrators, funders, policymakers, elected officials, economic developers, researchers, advocates and audiences who have an interest in the creative economy and the arts in the South. And while the focus of the report is educational and informative, we hope decision-makers will consider this research with the same gravity given to data provided by other major industries.

Acknowledgements

This study could not have been completed without the efforts and guidance of many people. First, we would like to thank Stuart Rosenfeld and Jenna Bryant with Regional Technology Strategies, Inc. for their advice regarding the structure and methodology of this study.

We would like to thank the contributions of the members of the South Arts Creative Economies Advisory Committee and the state arts agency executive directors for their advice and counsel during the process of developing this study. They include: Ted Abernathy, Southern Growth Policies Board; Stephanie Conner, Tennesseans for the Arts; Stuart Rosenfeld, Regional Technology Strategies, Inc.; Scott Shanklin-Peterson, College of Charleston; Dianne Walton, formerly with Meridian Community College; Rich Boyd, Tennessee Arts Commission; Al Head, Alabama State Council on the Arts; Dana La Fonta, Louisiana Division of the Arts; Ken May, South Carolina Arts Commission; Lori Meadows, Kentucky Arts Council; Mary Regan, North Carolina Arts Council; Sandy Shaughnessy, Florida Division of Cultural Affairs; Susan Weiner, Georgia Council for the Arts; and Malcolm White, Mississippi Arts Commission.

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The creative economies research work would not be possible without the vision and commitment demonstrated by South Arts board and staff, including Todd Lowe, board chair; Margaret Mertz, executive vice chair; Lori Meadows, vice chair for portfolio; Gerri Combs, executive director; Mollie Lakin-Hayes, deputy director; Ann-Laura Parks, development director; Patti French, administration manager; Bola Ogunlade, communications manager; Kristen Mitchell, intern; and Jenna Howard, intern. The graphic design concepts were developed and implemented by our summer intern, Emily Hayes.

We also appreciate the efforts by those who took the time to painstakingly proofread a full draft of the study: Gerri Combs, Mollie Lakin-Hayes, Ann-Laura Parks, Patti French, and Stuart Rosenfeld.

Feedback

If you have feedback on this report, *Creative Industries in the South*, please contact the author.

Allen Bell
Program Director – Arts Education, Research & Information
South Arts
1800 Peachtree Street NW, Suite 808
Atlanta, GA 30309
Phone: 404-874-7244 ext. 22
Fax: 404-873-2148
Email: abell@southarts.org
Web site: www.southarts.org

Introduction

The Value of the Arts – Intrinsic, Social, Pedagogical, Economic

The arts are essential for a variety of reasons. They provide intrinsic value through the psychological well-being experienced by individuals engaged in the creative process. The arts are a powerful catalyst for community-building through the common experiences and identities which cultural events, narratives, and traditions create. The arts enhance and enrich the education of children, adults, and seniors by engaging areas of the brain that are left untouched by pursuits in other academic areas; through the practice of creativity which translates into other fields and aspects of life; and by providing an essential part of a holistic education that engages the mind, body, and spirit. These are all reasons that are just as or more important than the economic impact of the arts, culture, and creativity in the economy. But the U.S. and global economies are just emerging from the Great Recession. While all of the previously mentioned benefits of the arts are noteworthy, it is the argument for the economic benefit of the arts, culture, and creativity that rings loud and true at a time when limited resources must be invested for the greatest gain. It is in this context that South Arts has developed this baseline study on the creative economy in its nine-state region of Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee.

The Culture of the South

The region of the southeastern United States, also known as the American South, is famous for its artists and their cultural output. The South has a rich reputation in many disciplines of the arts and culture – as the birthplace of blues, jazz, and rock; as the home of the unofficial capital of country music; as the place of origin for an unmatched tapestry of folklife and traditional artists; and as the inspiration for many of the nation's most talented writers. The South Arts region is also known for some of the largest and most important arts festivals in the country, from Spoleto to Art Basel Miami, from the National Black Arts Festival to Kentuck, from the New Orleans Jazz & Heritage Festival to Bonnaroo, from Kentucky Crafted to the Alabama Shakespeare Festival, from Full Frame to the Mississippi Delta Blues and Heritage Festival, from the Savannah Music Festival to Mardi Gras. The South is also home to some of the best arts schools in the U.S., including Savannah College of Art & Design, Full Sail University, North Carolina School of the Arts, Ringling College of Art and Design, Watkins College of Art & Design and The Watkins Film School, and the Art Institute of Atlanta. The region also boasts some of the best non-degree-granting arts programs in the nation, including Penland School of Crafts, Appalshop, John C. Campbell Folk School, Arrowmont School of Arts and Crafts, Southern Highland Craft Guild, and the Folk Arts Workshops of Warren Wilson College.

Defining the Creative Economy and Creative Industries

When most people talk about the arts, they are actually referring to independent artists and the non-profit arts sector. While both components have a significant impact on the overall creative economy, the definition of creative economy also includes for-profit businesses engaged in creative activity that may directly involve the arts and artists, or more broadly may involve applying artistic skills and creativity that does not result in a work of art, per se, but rather, produces a product or output that would not otherwise be viable if not for the value added through creative genesis or aesthetic transformation. In addition, the creative economy includes all aspects of the value chain related to creative products, including design, development, production, distribution, marketing, sales, and equipment.

There are a couple of ways to look at the scope of the creative economy based on the availability of existing data. One way is to look at the creative workforce – those who are engaged in occupations that require artistic knowledge, skills, or creative ingenuity, working in industries that may or may not be considered creative. Examples include automobile designers for a car manufacturer, and graphic designers for a financial institution. Studies looking at the creative workforce will capture all workers engaged in creative pursuits, but will miss the non-creative jobs that are generated as a result of the economic activity of creative industries.

Another way to explore the scope of the creative economy is to look at creative industries – businesses that produce, distribute, or sell goods and services that result from the application of artistic knowledge, skills, or creative ingenuity. In studies on the creative industries, the data and reports will miss some of the creative occupations that reside in industries that do not produce an artistic or mostly aesthetic product; however, such studies will capture workers within creative industries who may or may not be engaged in creative pursuits. For instance, creative industries studies will include data that represents accountants for arts organizations and salespeople for book stores.

For the purposes of this report, we are studying the creative economy through the lens of the creative industries by looking at data collected and made public by the U.S. Census Bureau through the 2007 Economic Census and 2007 Nonemployer Statistics. It is necessary to include the data from the Nonemployer Statistics because the Economic Census does not capture the economic activity of the self-employed who represent an important segment of the creative industries.

In addition, we take a brief look at the nonprofit arts, culture, and humanities, through the data made available from the National Center for Charitable Statistics. Looking at these numbers helps provide a sense of the economic size and scope of the nonprofit arts industry in the region.

Getting at the Value of the Creative Industries in the South

The creative industries in the South boast some impressive numbers – 82,852 establishments, more than 1.1 million workers, $41.4 billion in annual payroll, and $142.6 billion in annual revenues. Based on these numbers, the creative industries have a sizable impact on the economy of the South, representing 5.5% of all business establishments in the region, 4.1% of all employment, at least 3.9% of all payroll and 2.9% of all industry revenues.[9] The creative industries represent the fourth largest industry cluster in the region based on number of establishments, the fifth largest based on employment, and at least the eighth largest based on total wages.

At the heart of the creative industries are the nonprofit arts, culture, and humanities organizations. The South is home to 17,155 registered nonprofit arts, culture, and humanities organizations. Of those, 6,649 had at least $25,000 in annual revenue and therefore filed IRS form 990. The organizations that filed form 990 reported total annual revenue of approximately $3.6 billion and total assets of $9.4 billion.

In general, the largest industry sector groups in the region are film and media, and literary and publishing, followed by design, and visual arts and crafts. The most significant film and media sectors in the region include radio, television, and other electronics stores; software publishers; broadcasting; television broadcasting; advertising agencies; cable and other program distribution; and video tape and disc rental. The largest literary and publishing sectors include commercial lithographic printing, newspaper publishers, periodical publishers, and independent writers. The top design categories are architectural services, specialized design services, interior design services, graphic design services, and florists. The biggest visual arts and crafts sectors include jewelry stores, and photography studios.

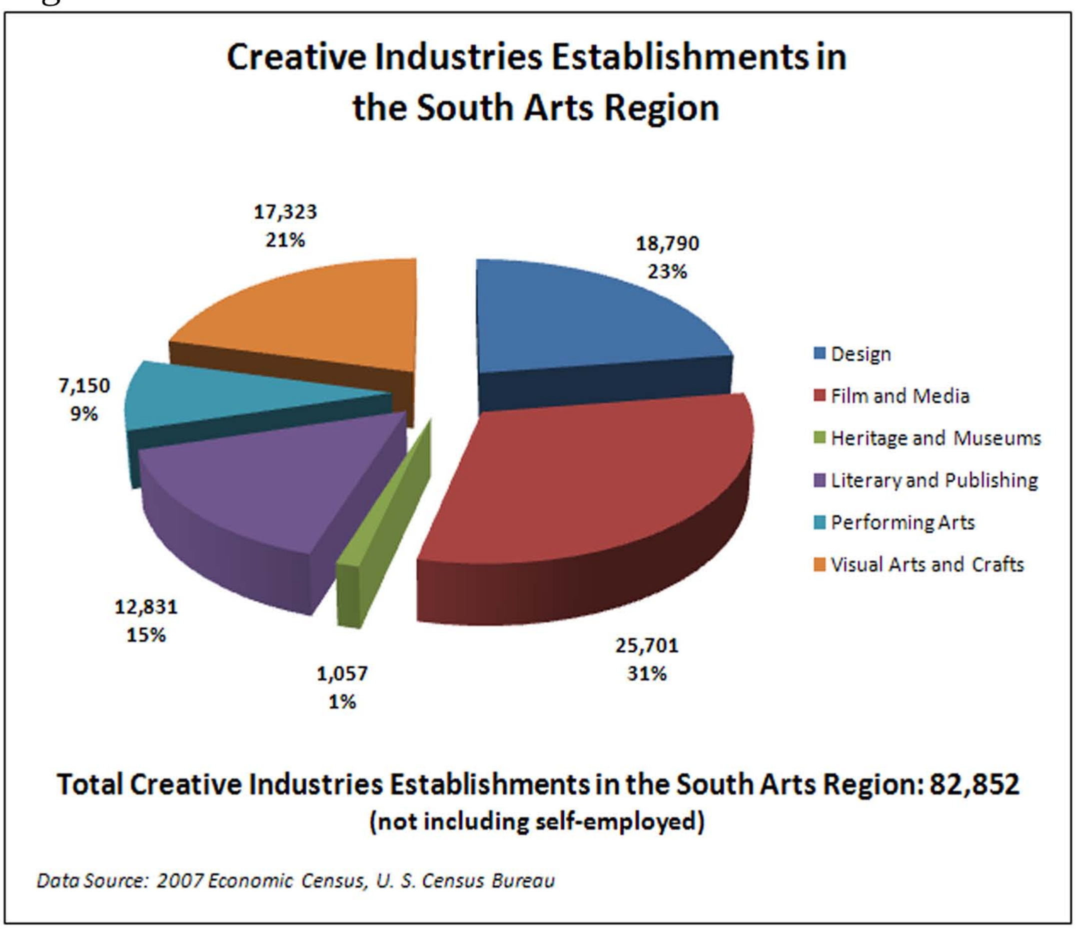
The information in the following pages presents the creative economy data for the South Arts region in more detail with appropriate documentation.

Creative Industries in the South – A Regional Overview by the Numbers

Collectively, the creative industries are a major economic force. In the South Arts region alone, there are 82,852 creative industry establishments. The creative industries in the South employ 1,167,108, including the self-employed, with annual wages totaling $41,411,115,000. Annual revenue for creative industries in the South is at least $142,625,949,000. For those whose eyes are already blurring, that's almost 83,000 businesses, with more than 1 million workers making more than $42 billion in wages, generating almost $143 billion in revenue each year.

The largest sectors in the region are film and media, and literary and publishing. Combined, the two sectors represent 46% of establishments, 60% of employment, 65% of wages, and 69% of annual revenue among the creative industries in the South. The next largest sectors are design, visual arts and crafts, and performing arts, followed by heritage and museums. As mentioned elsewhere in the report, heritage and museums data is vastly undercounted because data for federal, state, and local government-controlled creative establishments is not included in this study.

Figure 1

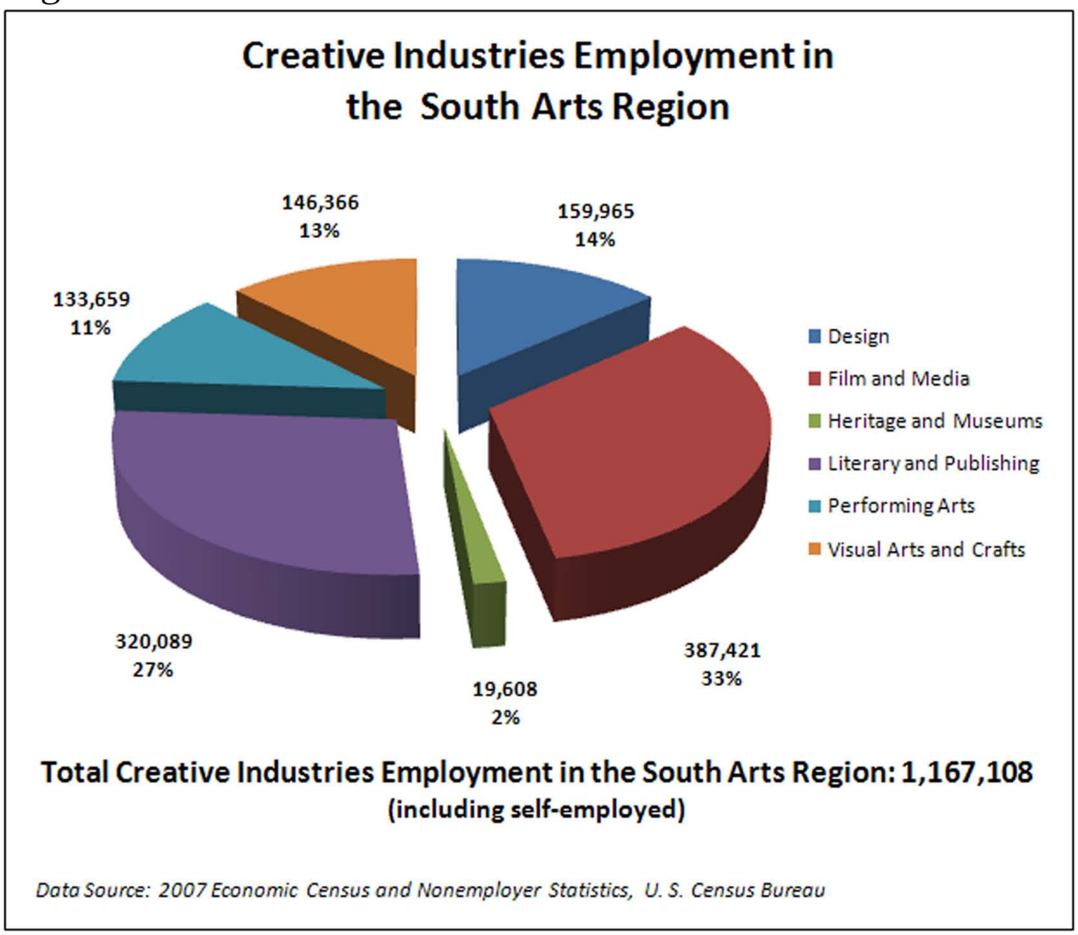


Among the total of 1,167,108 employed in creative industries in the South Arts region, 33% or 387,421 are employed in film and media, while 27% or 320,089 are employed in literary and publishing.

Among major film and media employers with a presence in the region, The Walt Disney Company is possibly the largest, with a total of approximately 133,000 employees in 2007. Disney owns numerous divisions, including ABC, the Disney Channel, Walt Disney Motion Pictures Group, ESPN, Pixar, and Marvel, as well as the Orlando, Florida-based Walt Disney World. While the data in this study does not include figures from theme or amusement parks, Disney World employs a large number of people in the creative workforce.

Another major media company based in the South is Atlanta-based Turner Broadcasting System which is one of the biggest. Divisions of the company include CNN, TBS, TNT, Cartoon Network, CNN International, HLN, TCM, and many others. The media network employed almost 9,000 people in 2007.

Figure 2

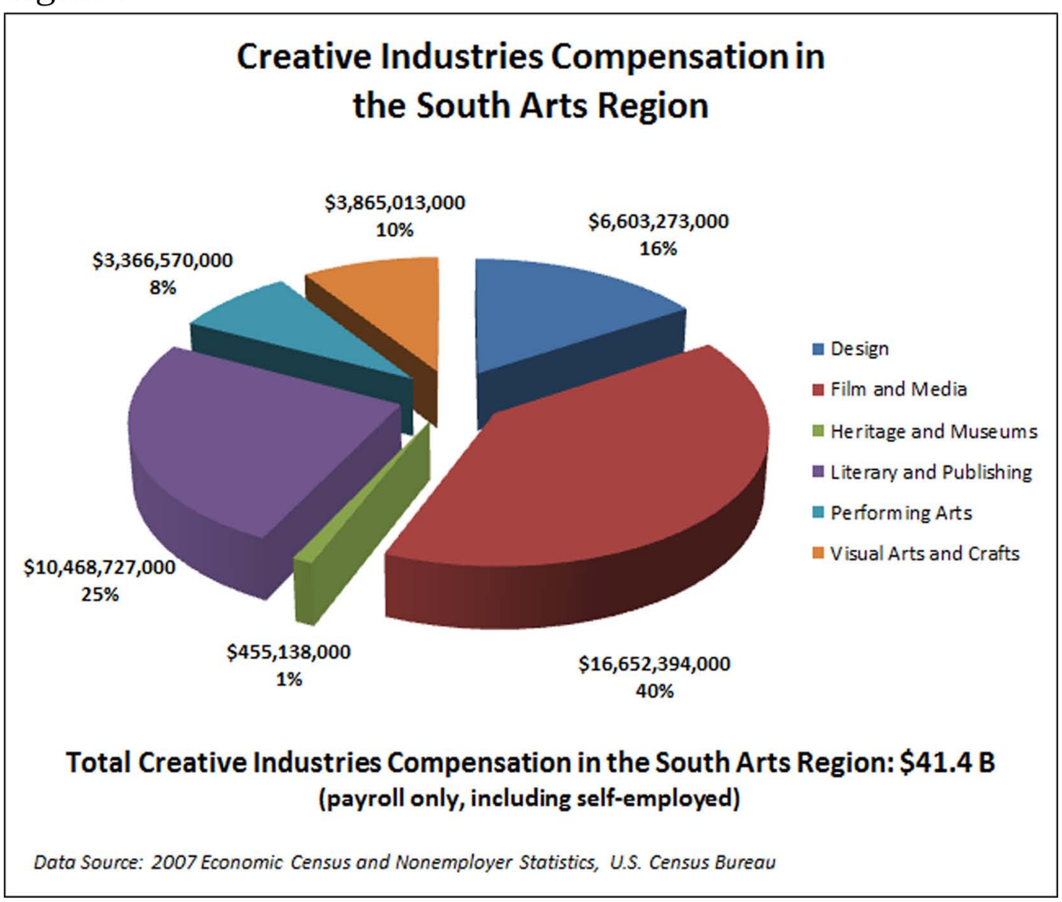


In addition, Regal Entertainment Group, based in Knoxville, Tennessee, operates the largest cinema chain in the U.S., with more than 6,000 screens in over 500 theatres in at least 40 states.

There are also major publishing companies with a presence in the South. Rand McNally, for instance, operates a distribution center in Richmond, Kentucky. In addition, Nashville, Tennessee, is home to several major publishers, including Thomas Nelson, Warner Faith, and The Southwestern/Great American Company, as well as the Ingram Book Group, the nation's largest book wholesaler. Tennessee leads all states in the nation in value of religious books shipped.

Corresponding to the large number of people employed in the creative industries in the South, the total wages of employees and the earnings of the self-employed in the creative industries are significant as well. For the region as a whole, wages and earnings total $41.4 billion. Based on the categorical breakdown of creative industries sectors, the segment with the largest share of wages and earnings is film and media with $16.7 billion, followed by literary and publishing with $10.5 billion, design with $6.6 billion, visual arts and crafts with $3.9 billion, performing arts with $3.7 billion, and heritage and museums with $455 million.

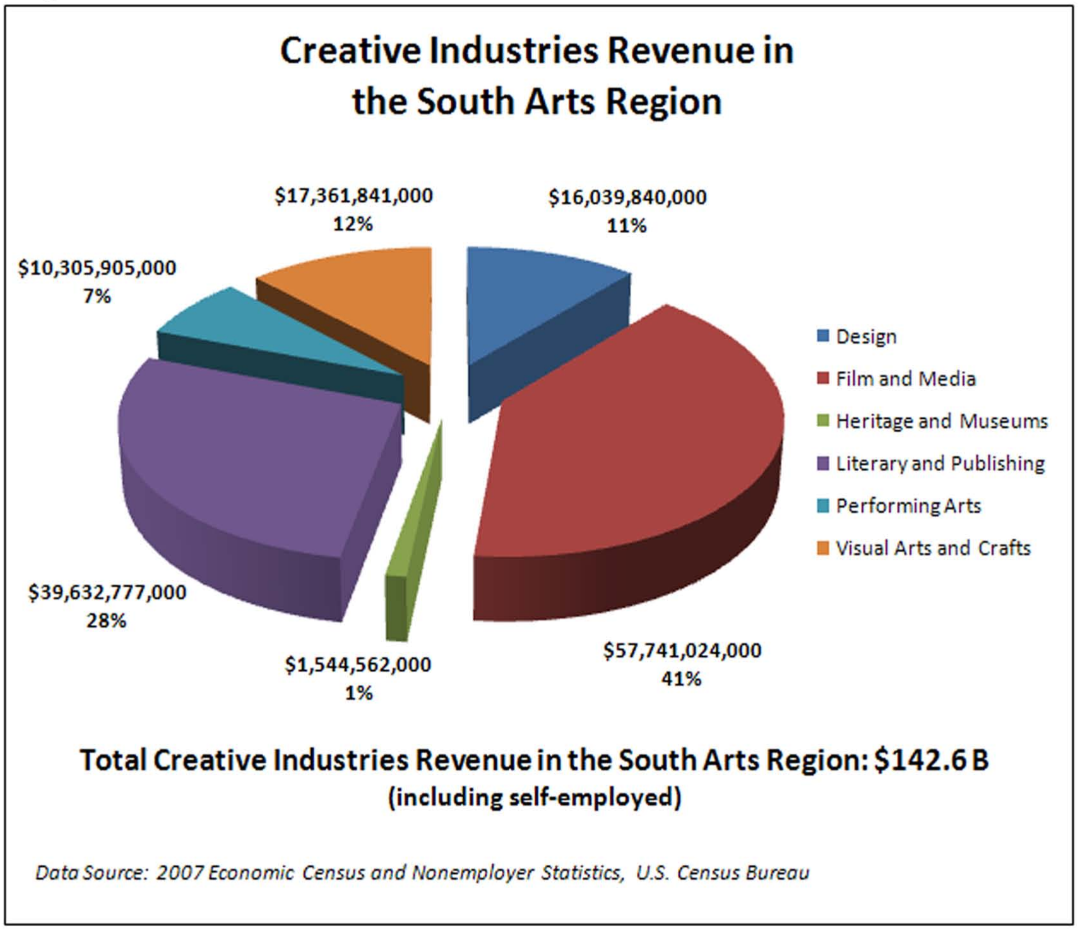
Figure 3



The $142.6 billion in revenue for the creative industries in the South Arts region, if looked at as a single entity, would be number six on the 2010 list of Fortune 500 companies and equals roughly the combined revenue of The Home Depot, United Parcel Service, and Coca-Cola, the three largest companies in Georgia.

Film and media sectors make up roughly 41%, or $57.7 billion, of the region's total creative industries revenue. Literary and publishing is the second largest group of sectors with 28%, or $39.6 billion, in revenue. Based on amount of revenue, those sector groups are followed by visual arts and crafts, design, performing arts, and heritage and museums.

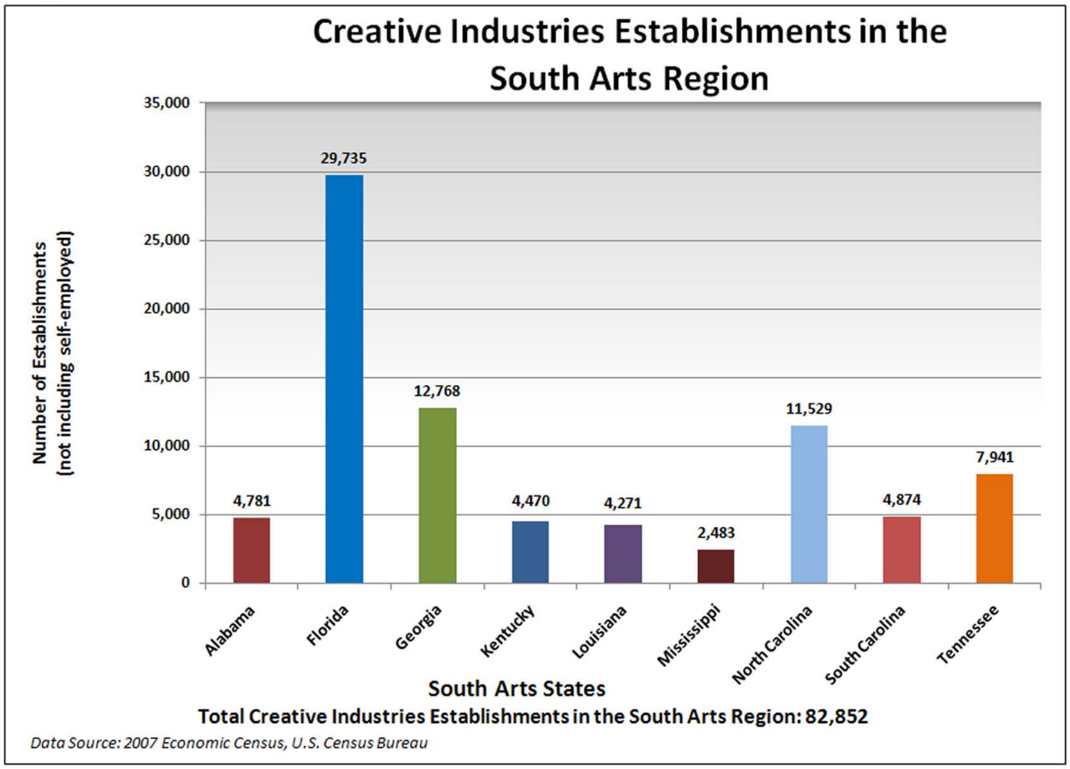
Figure 4



When the data is broken down by state rather than by discipline, we can see that the state with the largest creative economy is Florida. The states with the next largest creative economies in general are Georgia, North Carolina, and Tennessee, followed by Alabama, Kentucky, South Carolina, Louisiana, and Mississippi.

With respect to the number of creative industries establishments, Florida is home to 29,735, more than one-third of the total for the South Arts region. Florida is followed by Georgia with 12, 768 establishments, North Carolina with 11,529, and Tennessee with 7,941. Between 4,000 and 5,000 creative industries establishments are located in each of the states of South Carolina, Alabama, Kentucky, and Louisiana. Mississippi is home to 2,483 establishments.

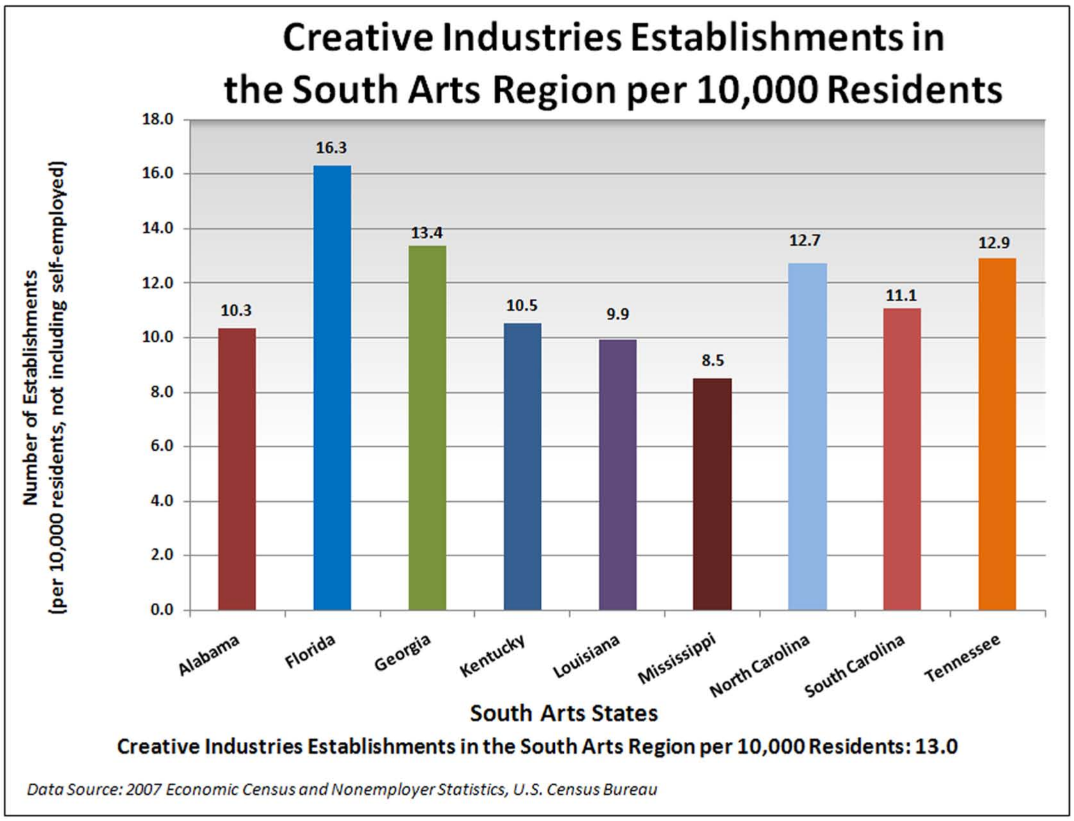
Figure 5



The disparity between the total number of establishments, employees, total wages, and revenue in each state's creative economy is attributable at least in part to the differences in population size. That is why we have also analyzed the creative industries data in each state on a per capita basis, which flattens out some of the differences and, later in the study, highlights the major creative industry sector strengths within each state.

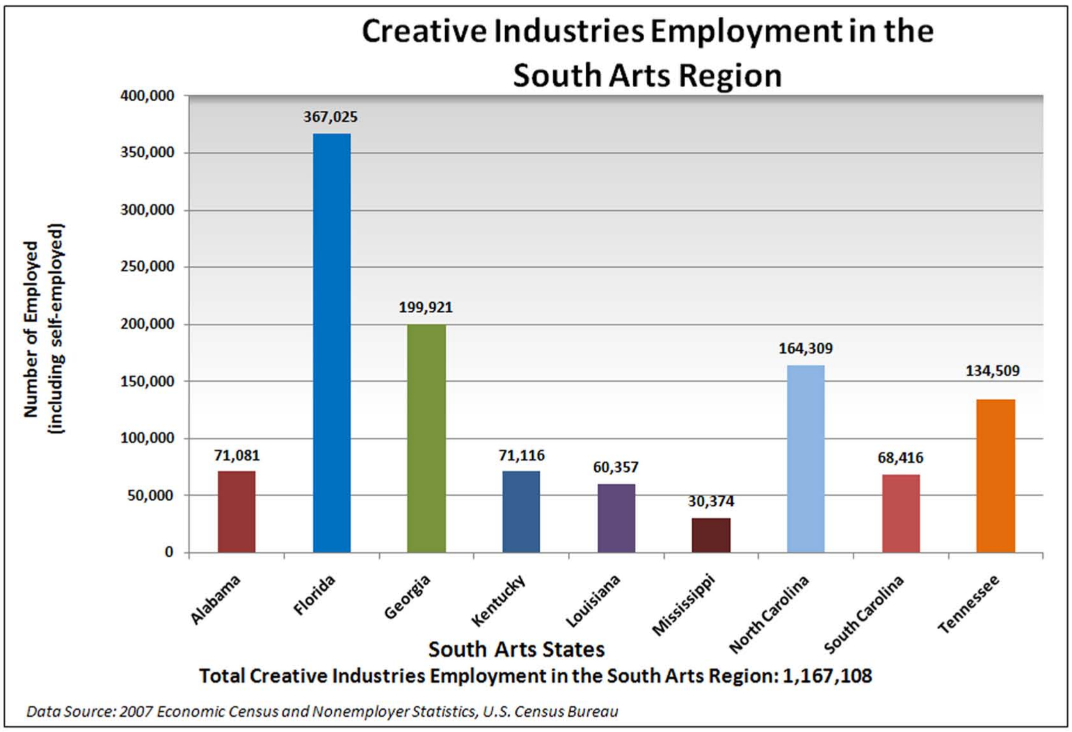
The per capita data below shows the number of creative industries establishments in each South Arts state per 10,000 residents. So, for instance, based on the data Tennessee has 12.9 creative industries establishments for every 10,000 residents in their state. The region average is 13.0.

Figure 6



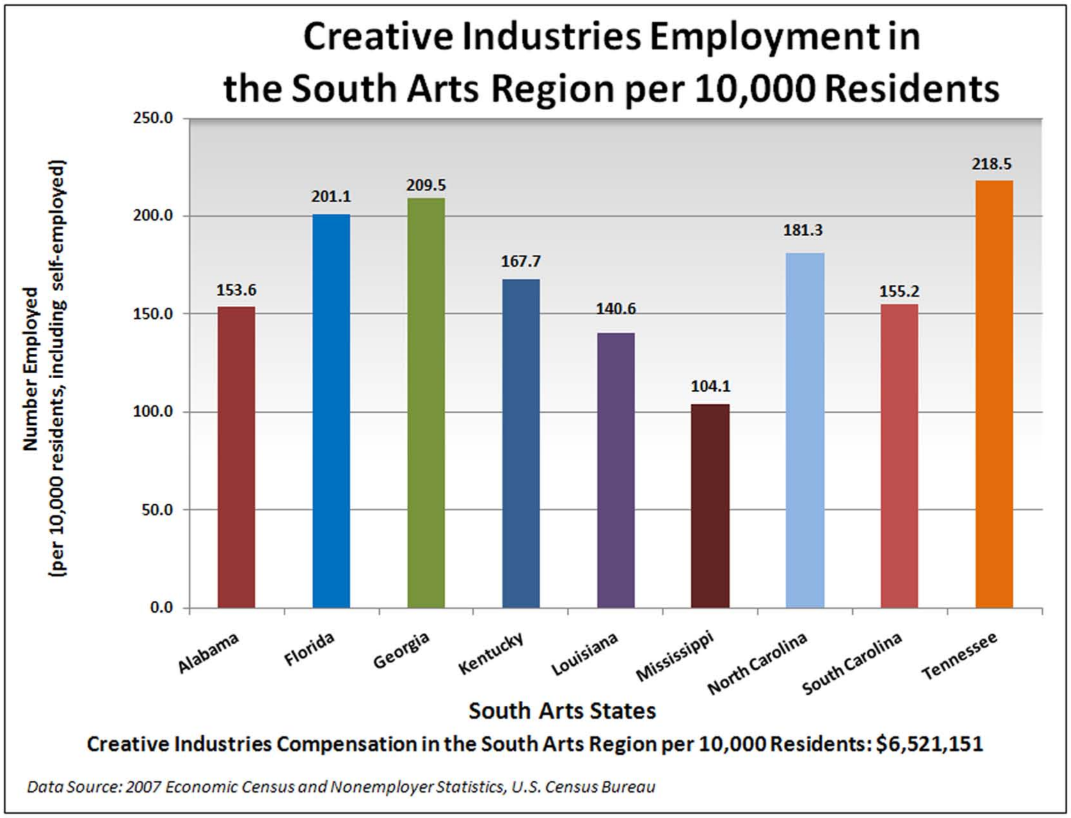
In addition, some of the differences between the totals in each state can be attributed to the suppression of data by the Census Bureau in an effort to maintain confidentiality for specific firms within smaller industry sectors in a state. Data from states such as Alabama and Mississippi, with smaller populations and therefore a smaller number of establishments, are more likely to have some data suppressed. States with large populations and a large number of establishments are less likely to have suppressed data. Either way, the data presented represents a reasonable approximation of the number of establishments and employees and the amount of wages and revenue for the creative industries in each state for the year 2007. The table below shows the number employed in the creative industries in each state in the region.

Figure 7



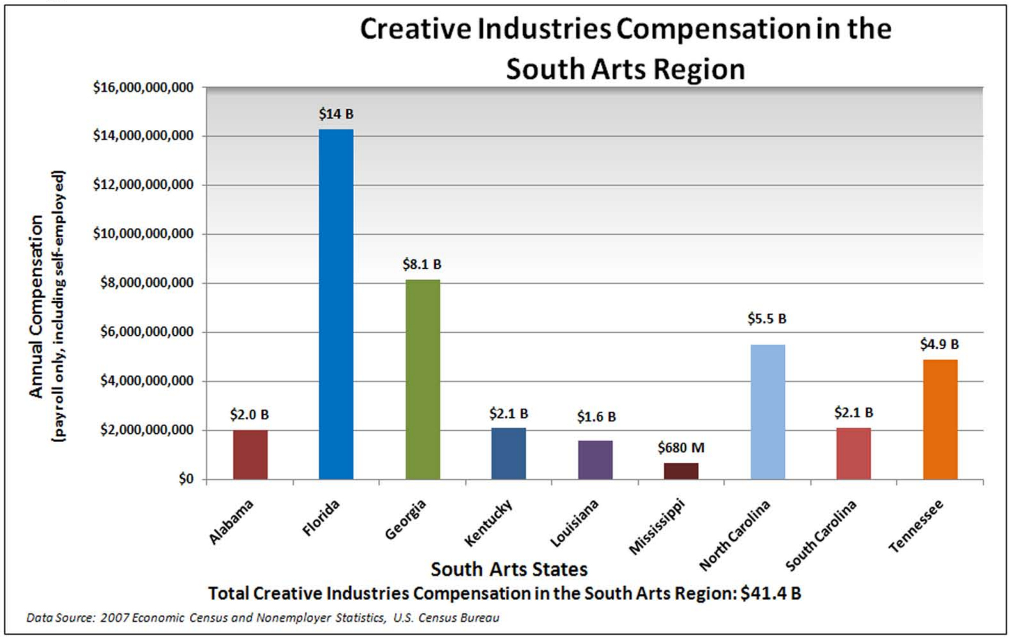
While Florida has by far the most people employed in the creative industries, when the data is broken down per capita, Tennessee has the highest number of employees per 10,000 residents at 218.5. Tennessee is followed by Georgia with 209.5, and Florida with 201.1. The remaining states in the region range from 181.3 to 104.1 people employed in the creative industries per 10,000 residents.

Figure 8



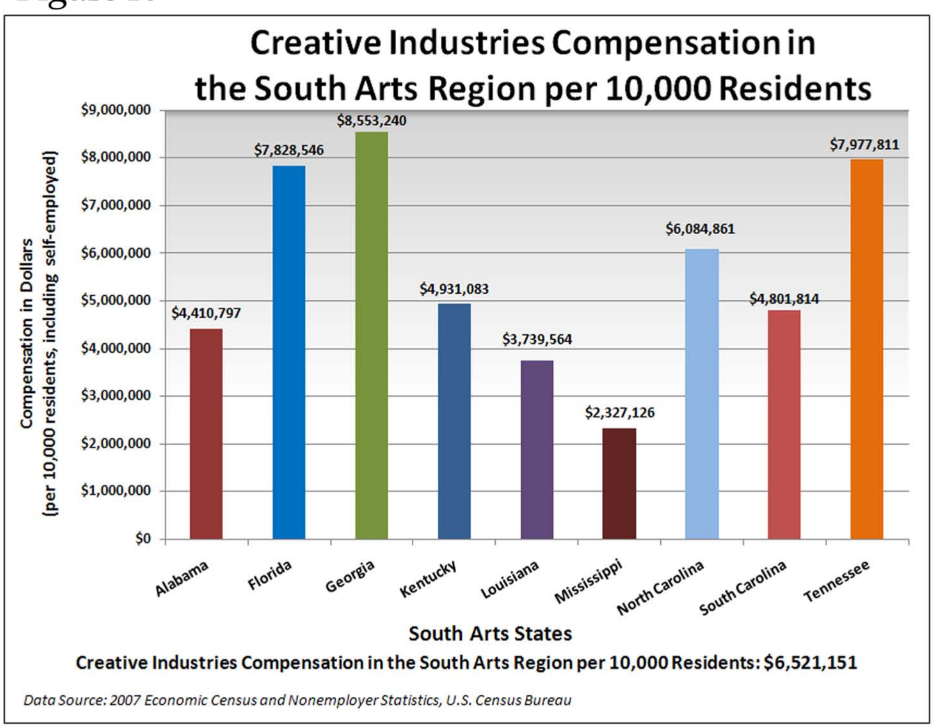
Creative industries wages in the South Arts region totaled $41.4 billion in 2007. Florida had the highest total wages with $14 billion, followed by Georgia with $8.1 billion, North Carolina with $5.5 billion, and Tennessee with $4.9 billion.

Figure 9



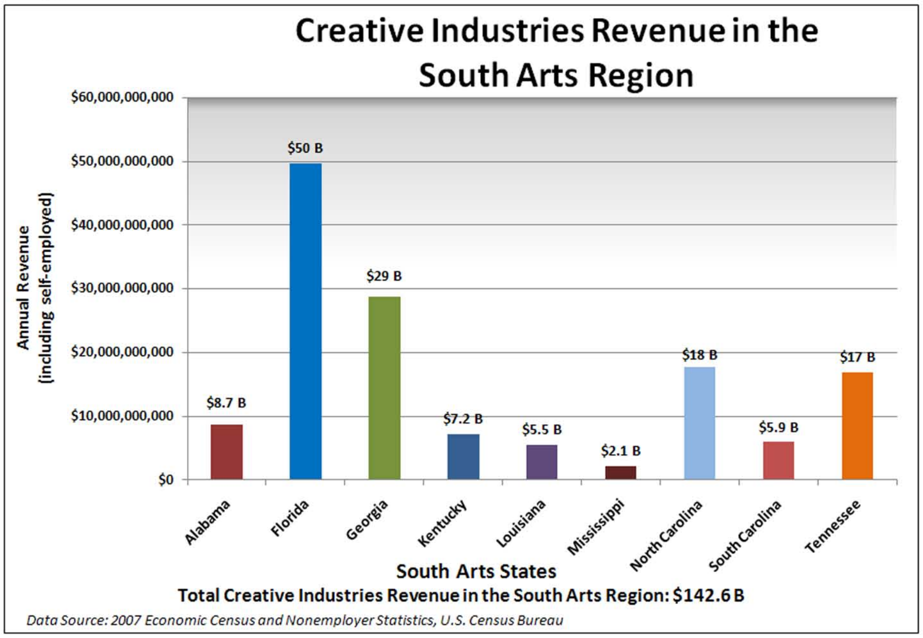
On a per capita basis, Georgia led the region with $8.55 million in creative industries wages per 10,000 residents. Tennessee followed with $7.98 million, with Florida close behind at $7.83 million in creative industries wages per 10,000 residents. North Carolina is next with $6.08 million.

Figure 10



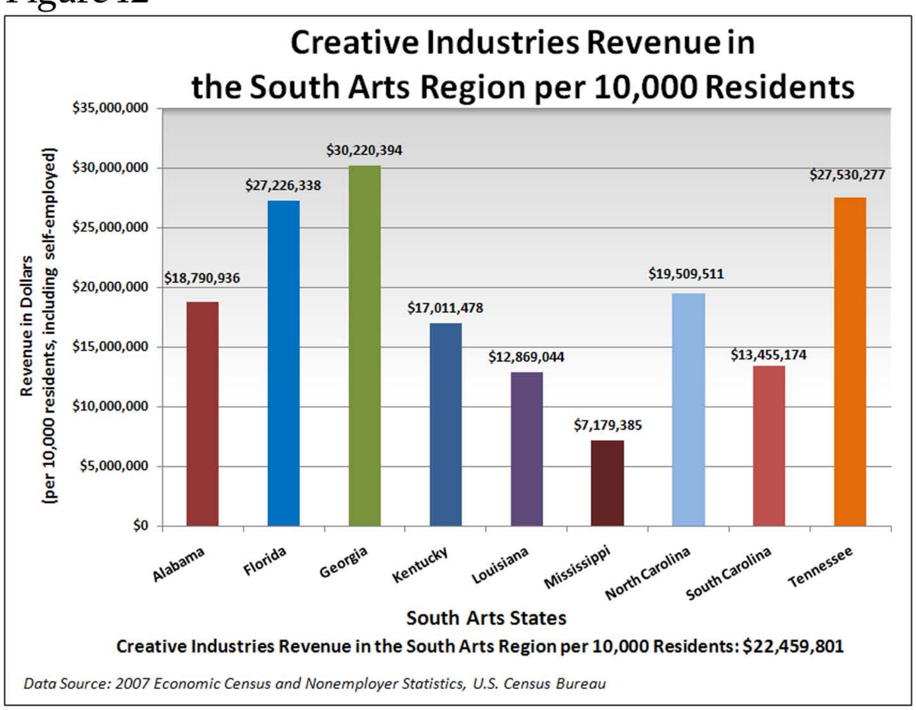
Creative industries revenue in the South Arts region totals $142.6 billion. Florida accounted for more than one-third of the region total with $50 billion in creative industries revenue. Georgia follows with $29 billion. North Carolina and Tennessee account for $18 billion and $17 billion, respectively.

Figure 11



On a per capita basis, Georgia has the highest creative industries revenue per 10,000 residents with $30.2 million. Georgia is followed by Tennessee and Florida, with $27.5 million and $27.2 million, respectively. The next two states are North Carolina with $19.5 million and Alabama with $18.8 million in creative industries revenue per 10,000 residents.

Figure 12



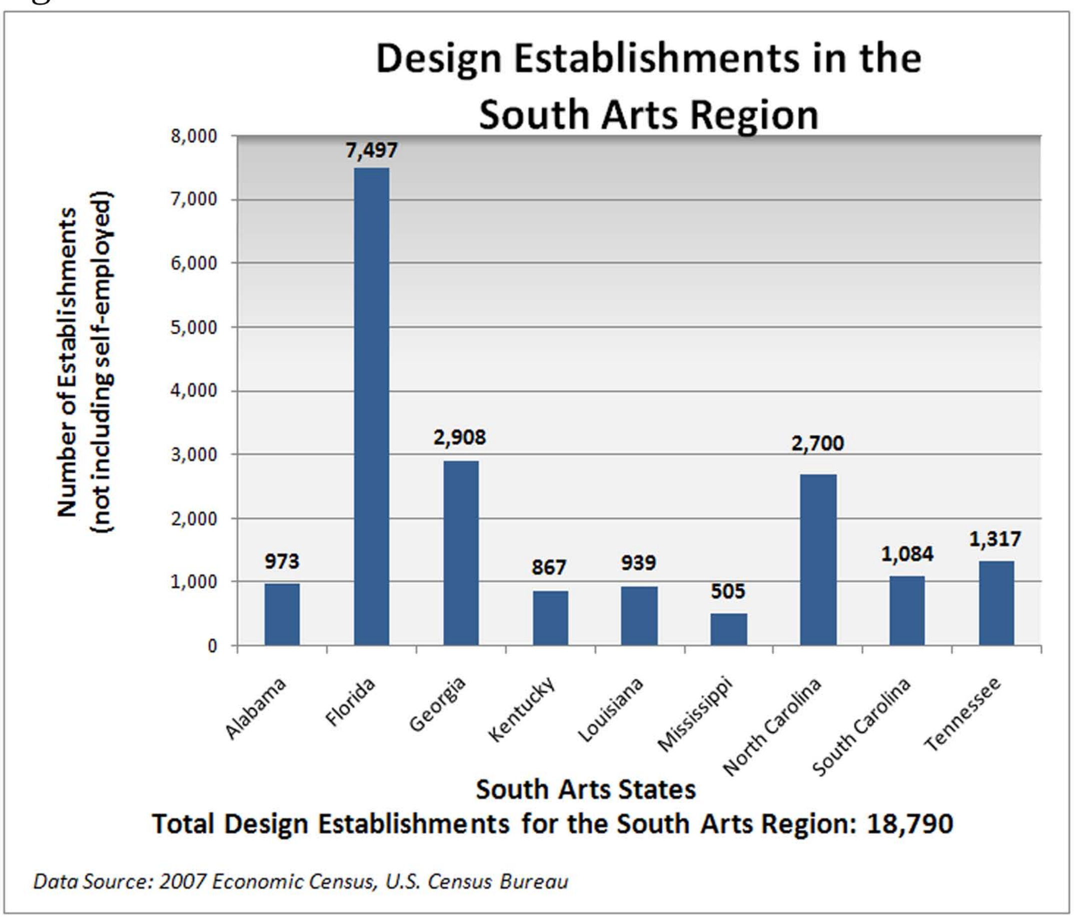
Design

The category of design is one of the six major categories into which the creative industries are divided for the purposes of this study. Design is comprised of architectural and landscape architectural services; interior, industrial, and graphic design; specialized architectural manufacturing; drafting services; and florists. The broader concept includes those industries that provide a design and work to follow that concept through to its fruition.

Those working in these sectors apply a full range of design knowledge and skills to create or add value and deliver the products and services developed by their businesses.

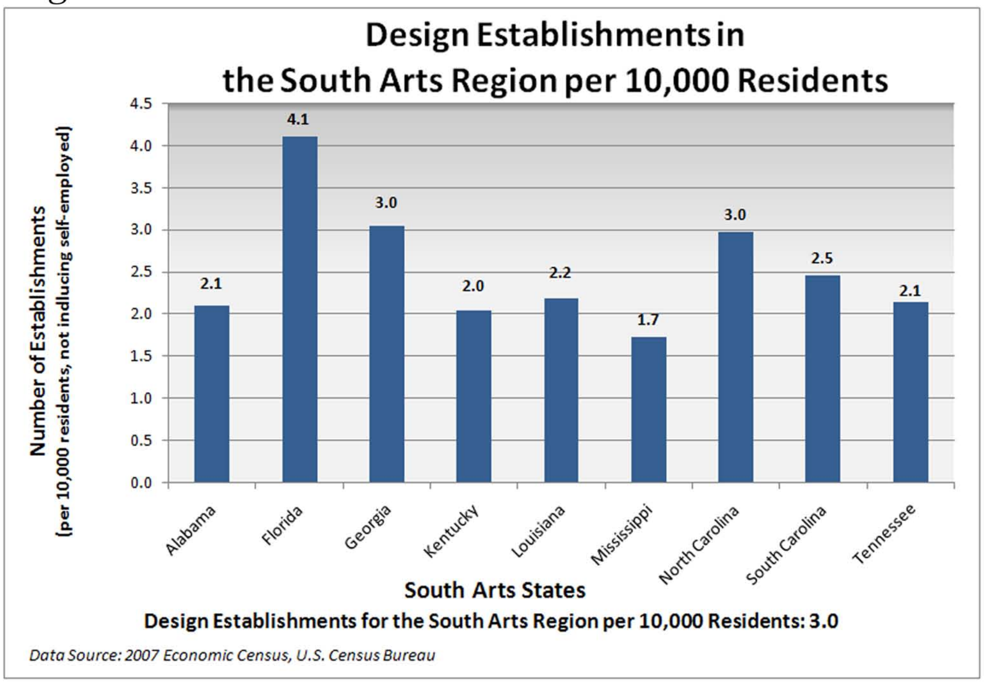
As in the aggregate data including all creative industry sectors, in the design category Florida is home to the largest number of design establishments and employed, and the highest total wages and revenue.

Figure 13



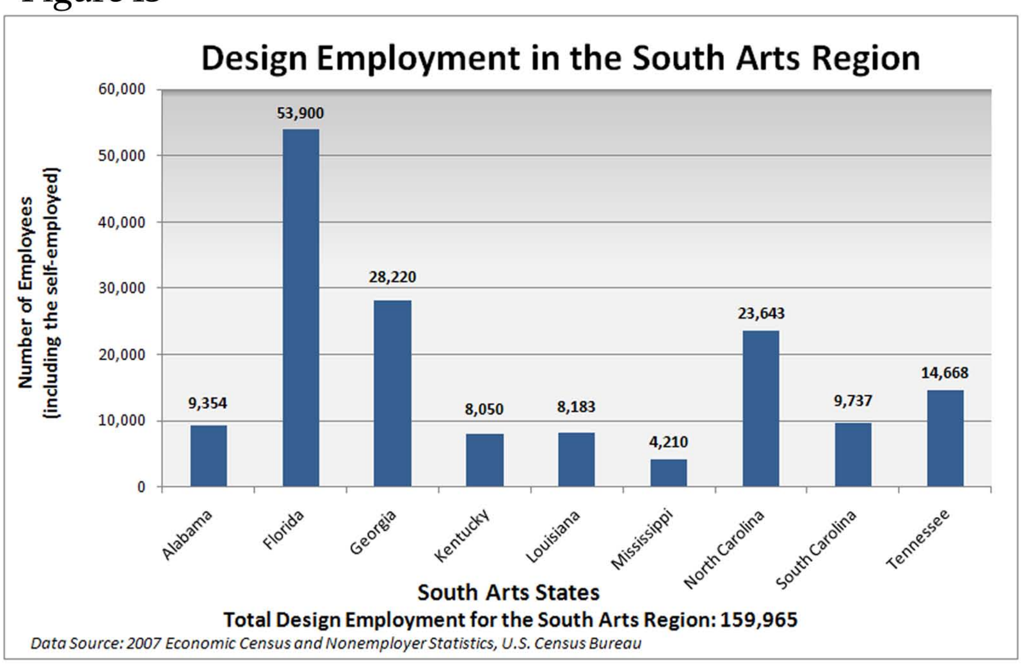
However, when the data is observed on a per-capita basis, the differences begin to flatten out. While Florida has more than double the number of design establishments as the next closest state, when divided by per capita, both Georgia and North Carolina approach 75% of the per capita number of establishments in Florida.

Figure 14



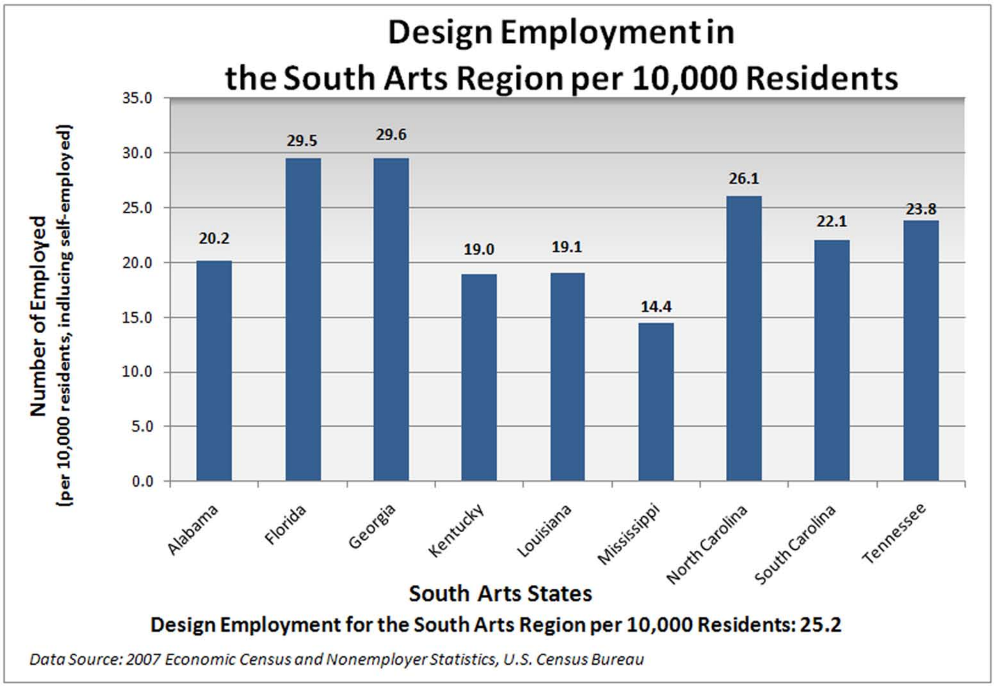
The same phenomenon is observed in design employment, where Florida has almost double the number employed in the design industries as the next closest state.

Figure 15



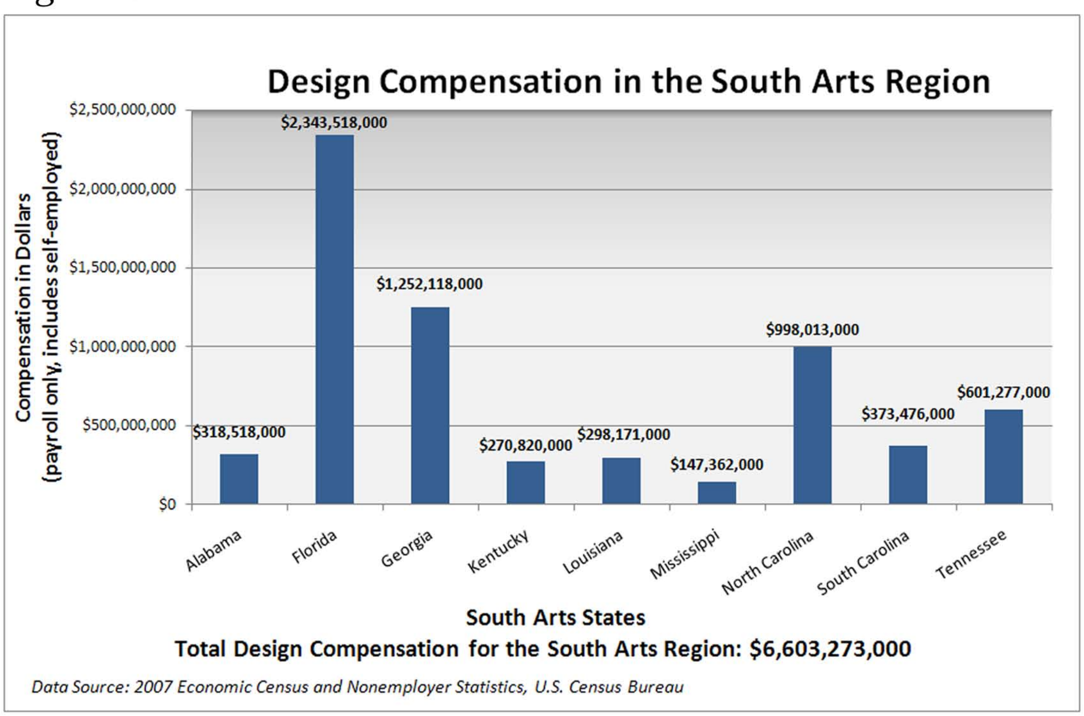
However, when the number of employed is divided per capita, then Georgia (29.6) and Florida (29.5) have almost the same number of employed in the design industry per 10,000 residents. They are closely followed by North Carolina (26.1) and Tennessee (23.8).

Figure 16



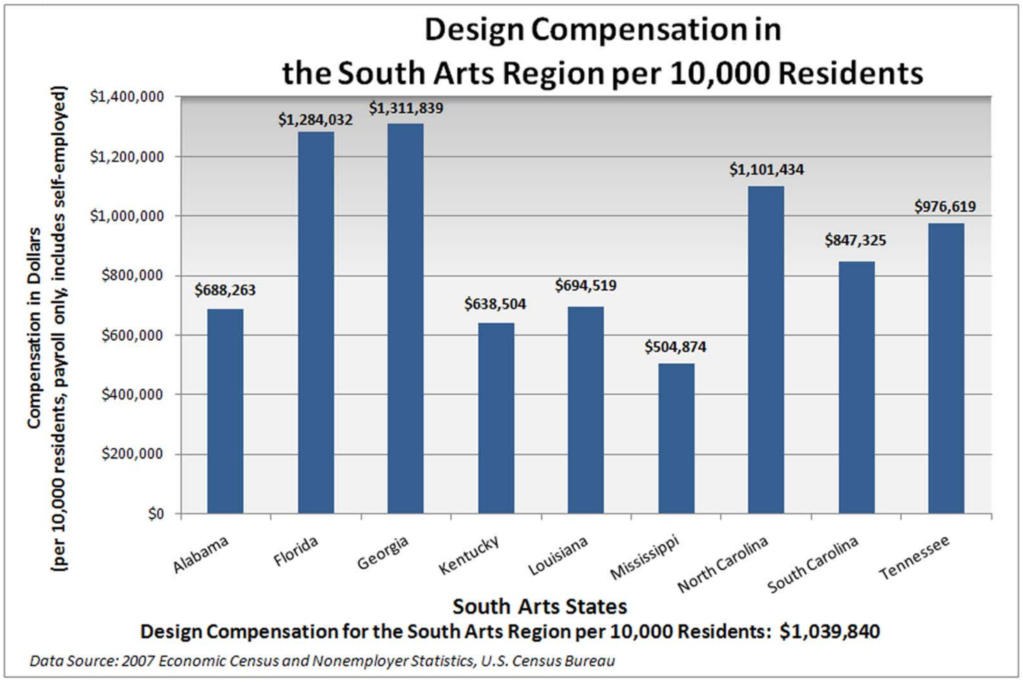
The same trend can be observed in the amount of compensation among states in the region, with Florida leading all states in the South with $2.34 billion in annual wages and income collected by those employed in the design industries. The next highest compensation totals in design are Georgia with $1.25 billion and North Carolina with $998 million, all in 2007.

Figure 17



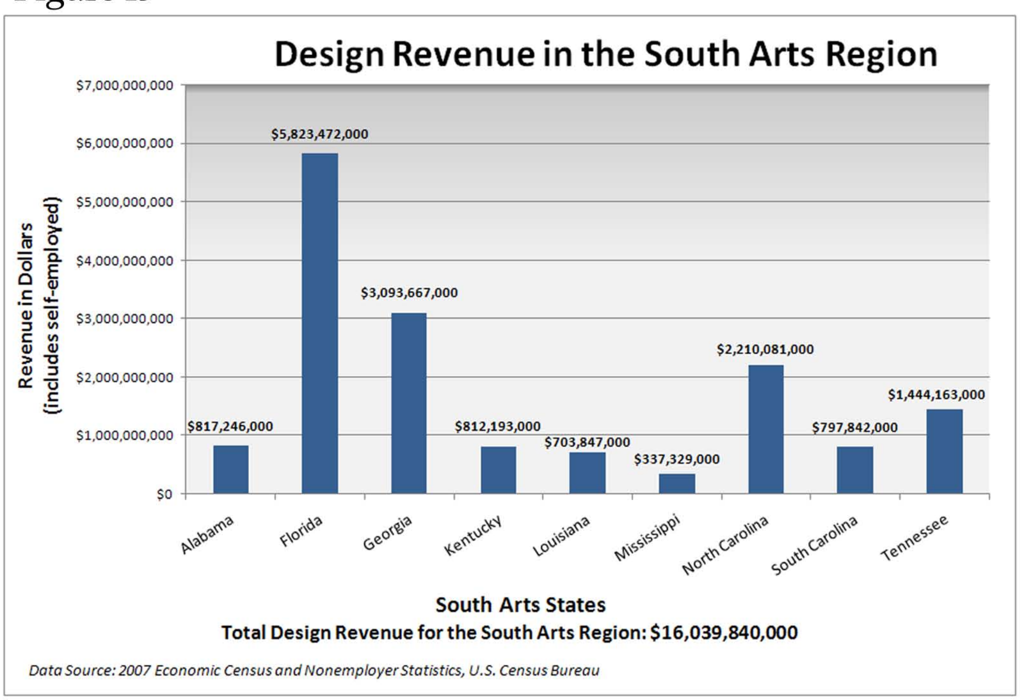
When divided on a per capita basis, Georgia design industries workers lead the region with $1.31 million in annual wages per 10,000 residents, closely followed by Florida with $1.28 million in compensation per 10,000 residents, and North Carolina with $1.10 million per 10,000 residents.

Figure 18



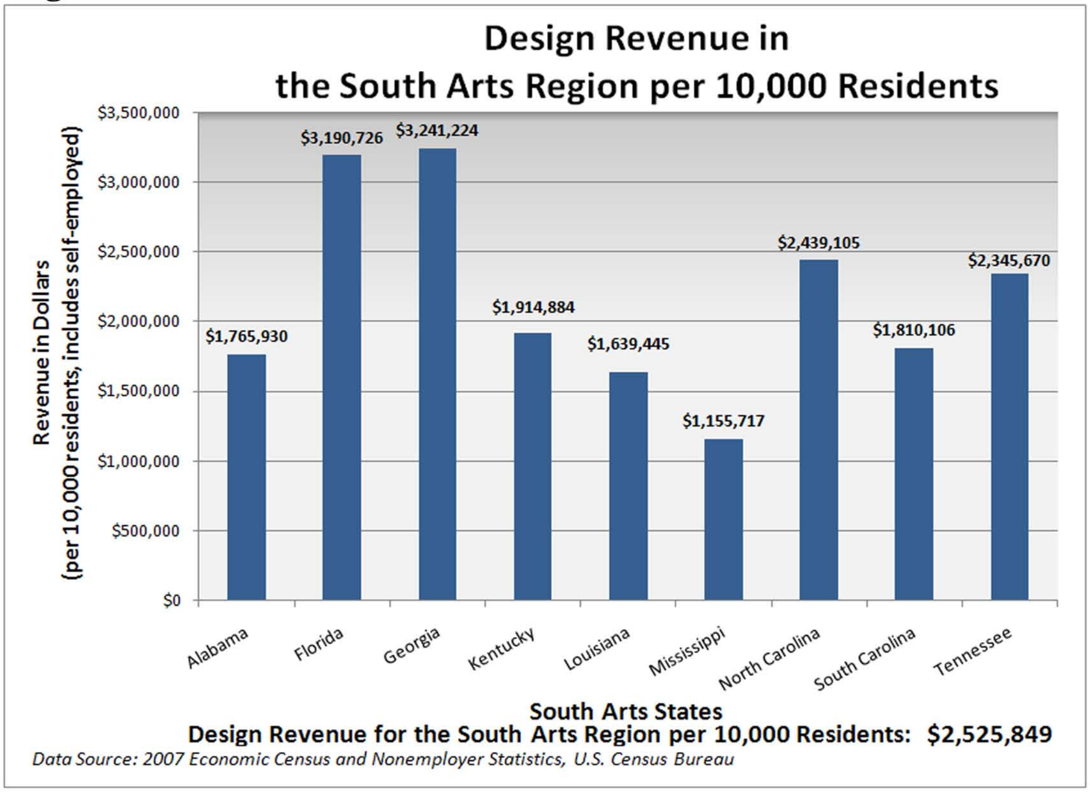
Design revenue for all establishments and the self-employed in the South Arts region is more than $16 billion for the year 2007. Florida leads the region with $5.8 billion in revenue, while Mississippi, with the lowest design industries revenue in the region, still saw more than $337 million earned by their design industries establishments and self-employed.

Figure 19



The average design industries revenue per 10,000 residents in the South Arts region is $2,525,849 for 2007. The highest per capita average is in Georgia at $3.24 million, with Florida close behind at $3.19 million. North Carolina and Tennessee had the next highest per capita design industries revenue at $2. 44 million and $2.35 million per 10,000 residents, respectively.

Figure 20

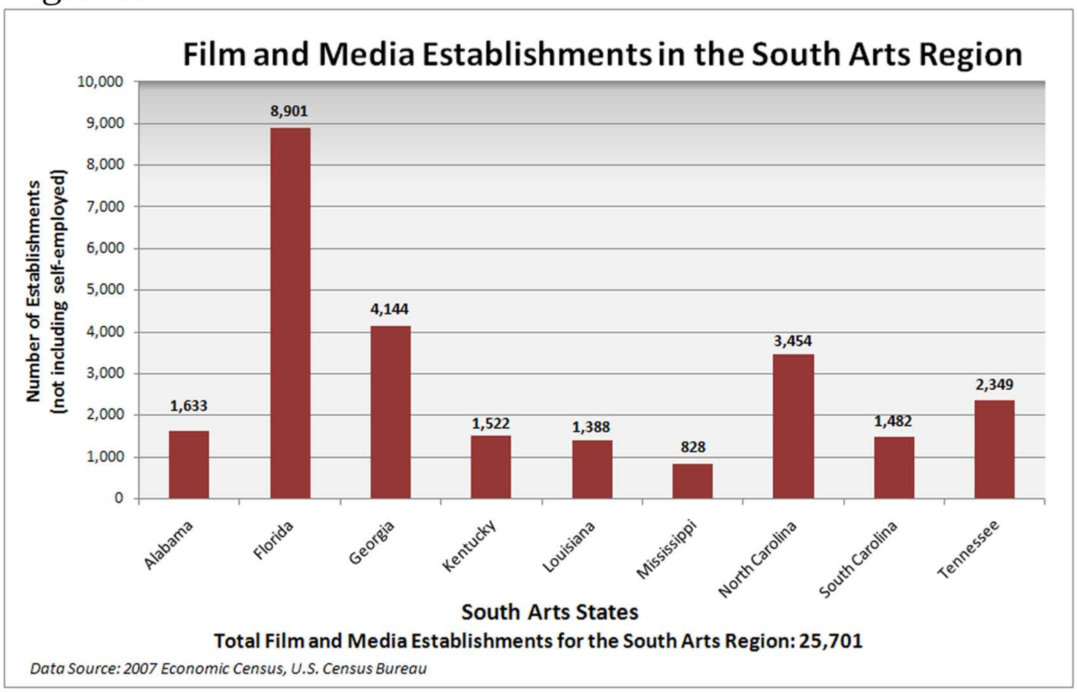


Film & Media

The sectors included in the film and media data include motion picture and video production and distribution, radio stations and networks, television broadcasting, cable and other subscription programming and distribution, advertising and public relations agencies, advertising, as well as software publishers, Internet publishing, and Internet broadcasting.

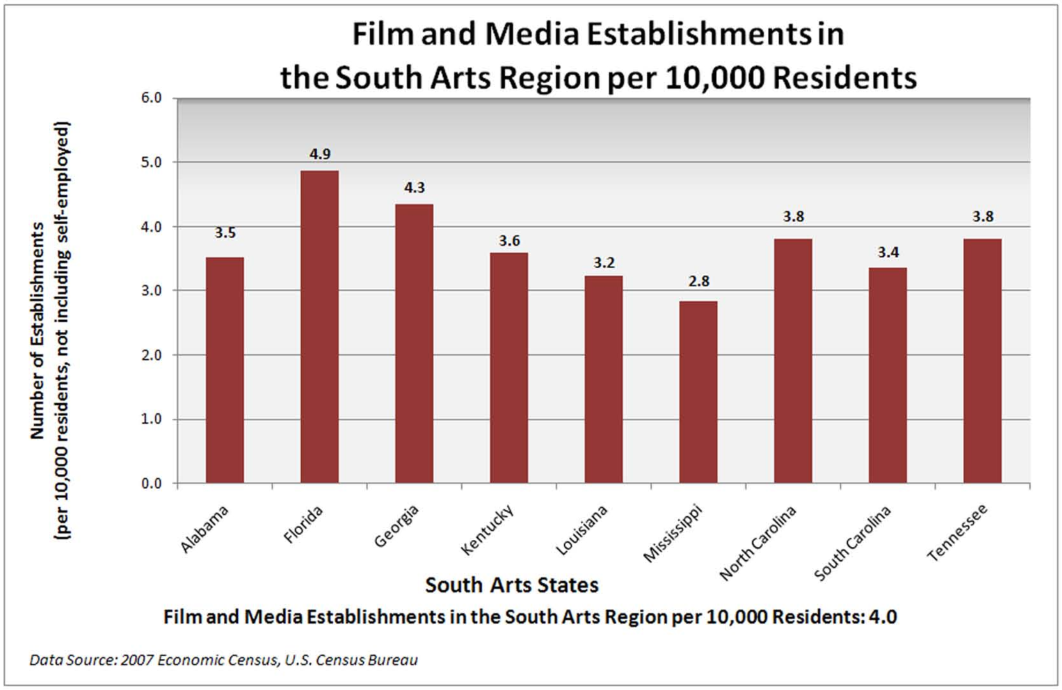
The South Arts region is home to 25,701 film and media establishments according to the 2007 Economic Census data provided by the U.S. Census Bureau, including 8,901 in Florida, 4,144 in Georgia, 5,454 in North Carolina, and 2,349 in Tennessee.

Figure 21



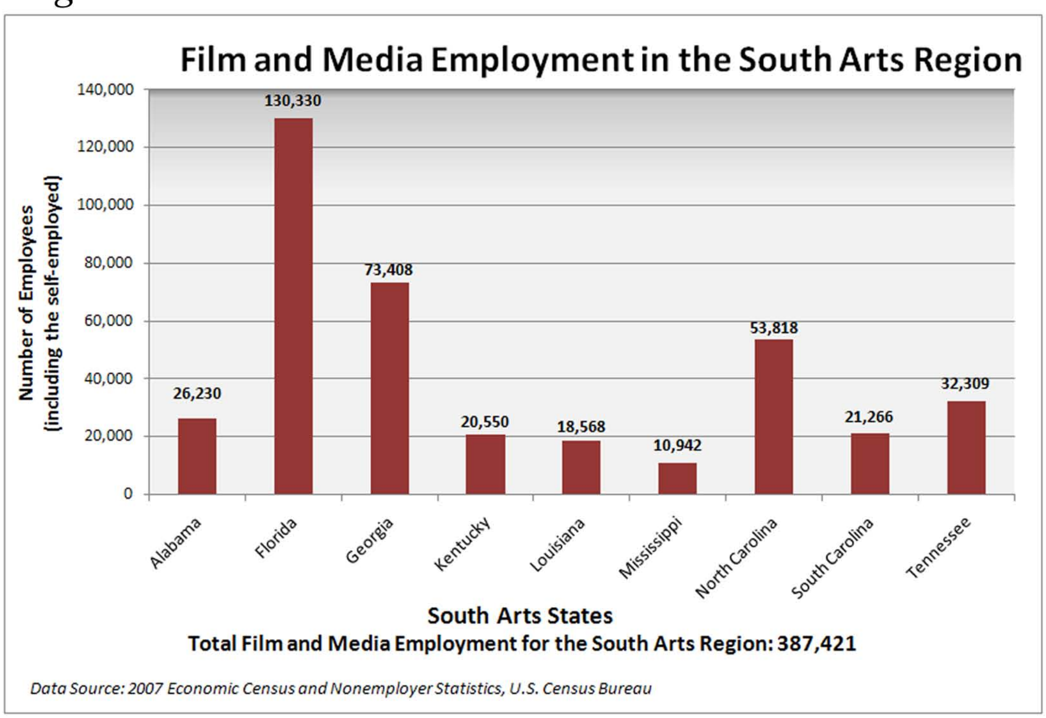
Florida leads the region with 4.9 film and media industry establishments per 10,000 residents. Georgia has the next highest number with 4.3. The rest of the region averages between 3.8 and 2.8 film and media establishments per 10,000 residents.

Figure 22



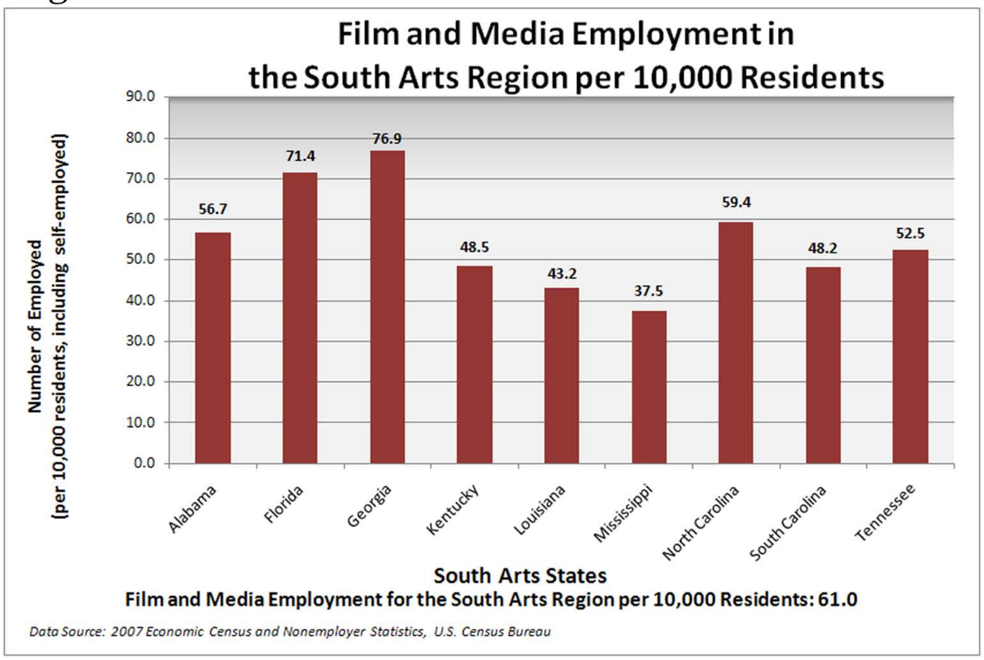
Including those employed by establishments and the self-employed, film and media employment in the South Arts region is 387,421 for the year 2007. Combined, Florida and Georgia represent more than half that number, with 130,330 and 73,408 employed in film and media, respectively.

Figure 23



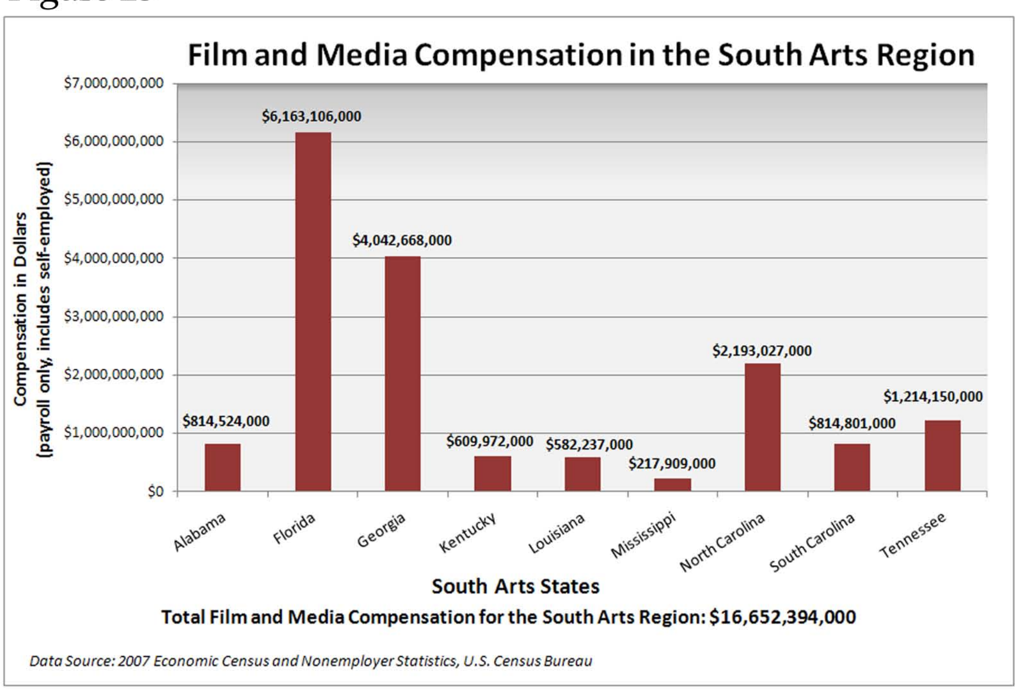
When looking at film and media employment on a per capita basis, Georgia leads the South Arts region with 76.9 employed per 10,000 residents, followed by Florida with 71.4. The rest of the region ranges between 59.4 and 37.5 people employed in film and media per 10,000 residents.

Figure 24



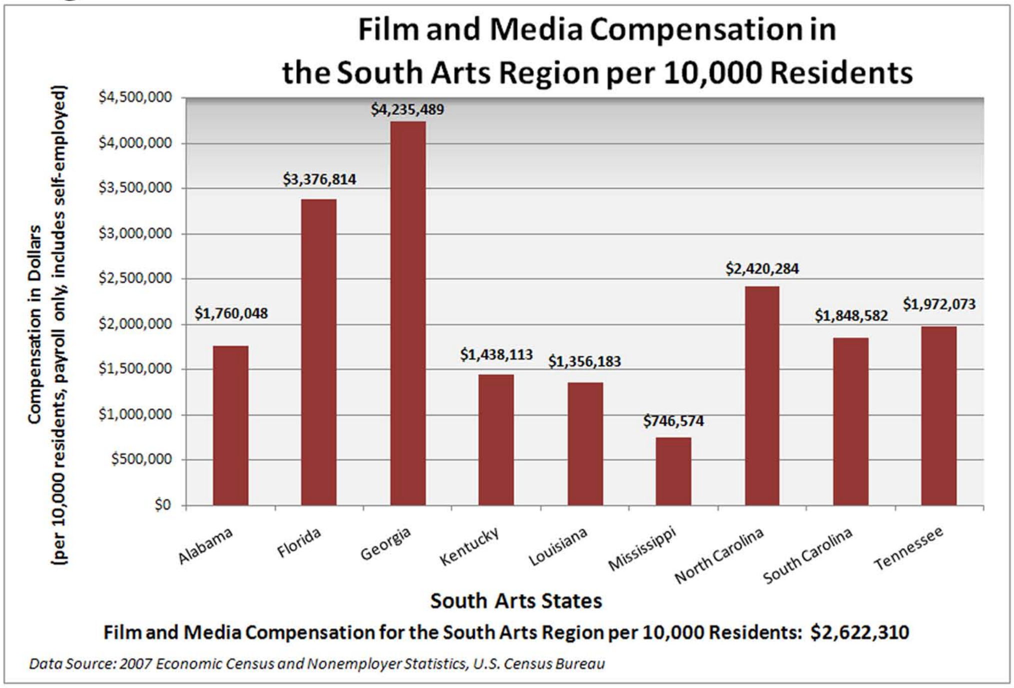
Including both the wages of the employed and the earnings of the self-employed, compensation for workers in the film and media industries in the South Arts region totaled more than \$16.6 billion for 2007. The states in the region that stand out with the highest total wages in the film and media sectors are Florida with \$6.1 billion, Georgia with \$4.0 billion, and North Carolina with \$2.2 billion.

Figure 25



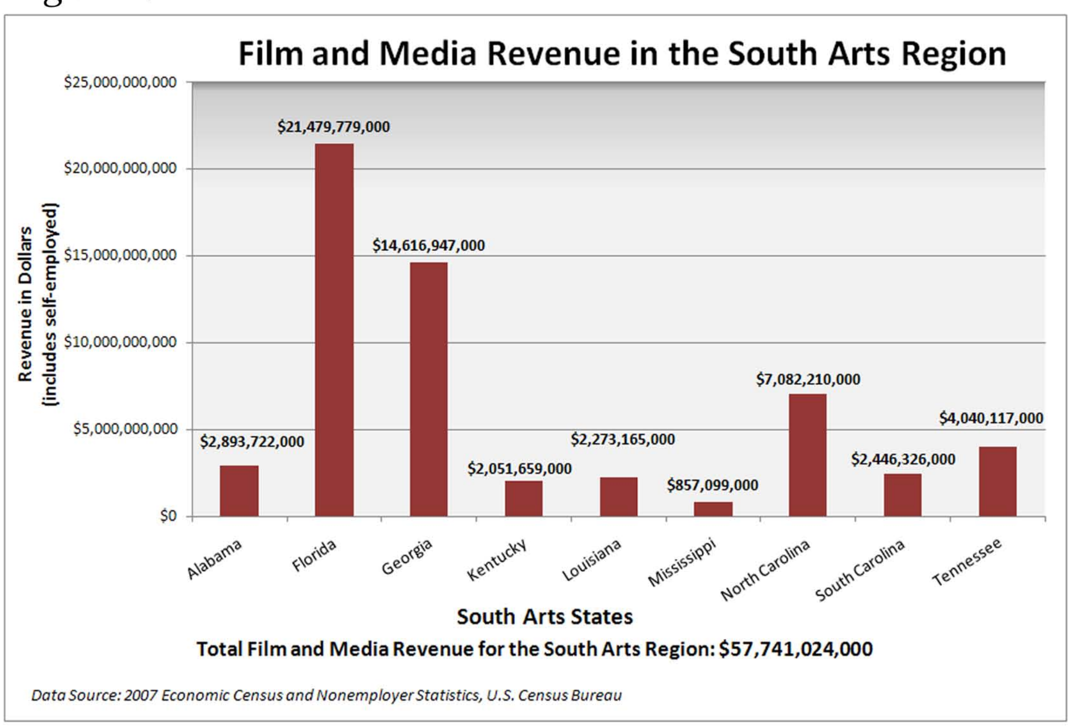
On a per capita basis, Georgia has the highest film and media sector compensation per 10,000 residents with $4.2 million. Georgia is followed by Florida with compensation of $3.4 billion, and North Carolina with $2.4 billion in wages per 10,000 residents. The rest of the region ranges between $1.9 million and $747,000 in film and media wages per 10,000 residents.

Figure 26



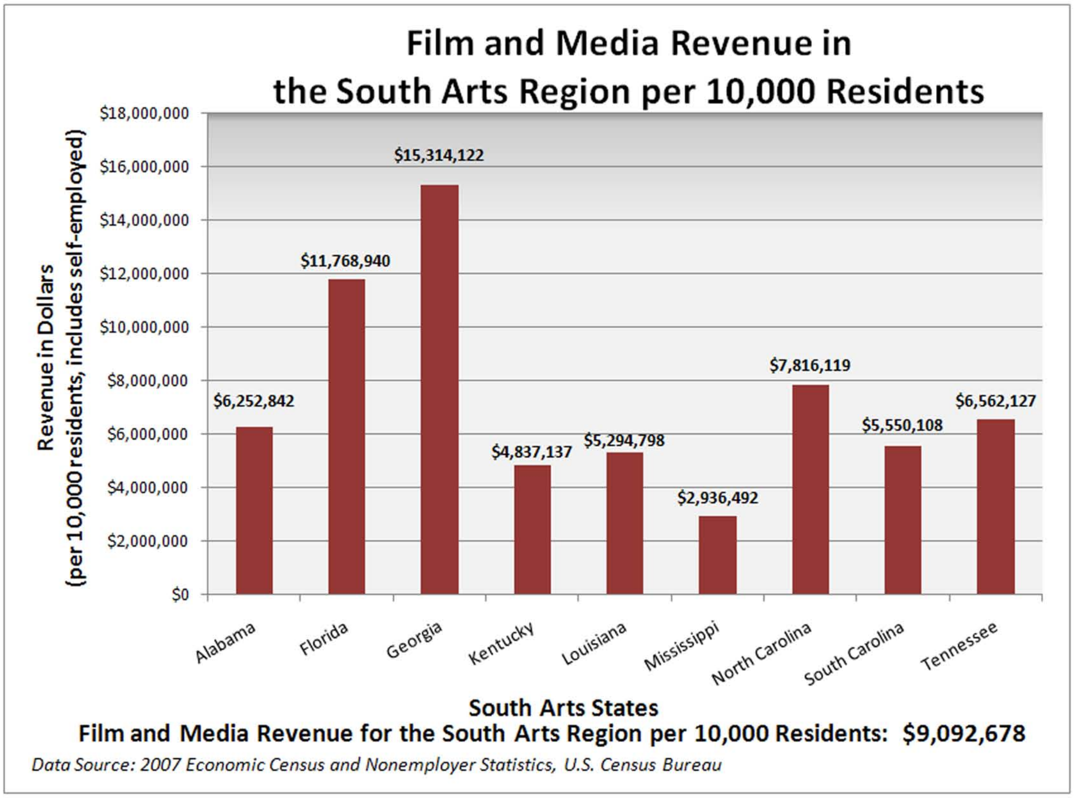
Film and media industries in the South Arts region earned more than $57.7 billion in revenue in 2007. The revenue totals include $21.5 billion in Florida, $14.6 billion in Georgia, and $7.1 billion in North Carolina.

Figure 27



On a per capita basis, Georgia has the highest film and media revenue in the South Arts region with $15.3 million per 10,000 residents, followed by Florida with $11.7 million, North Carolina with $7.8 million, Tennessee with $6.6 million, and Alabama with $6.3 million.

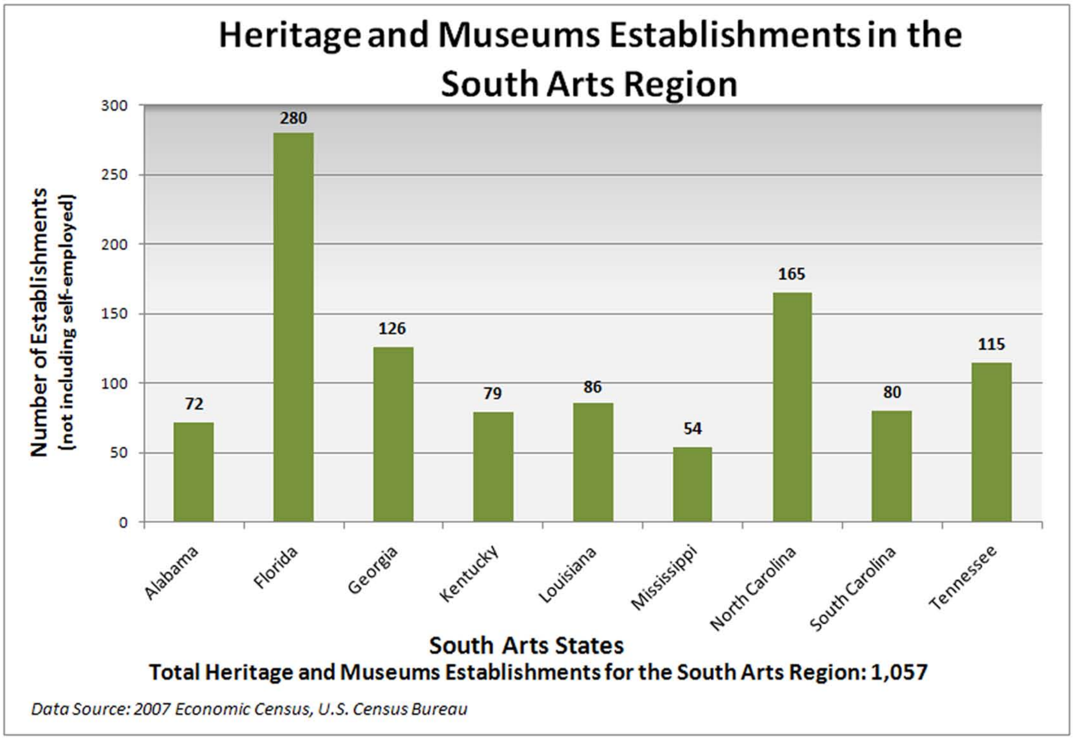
Figure 28



Heritage & Museums

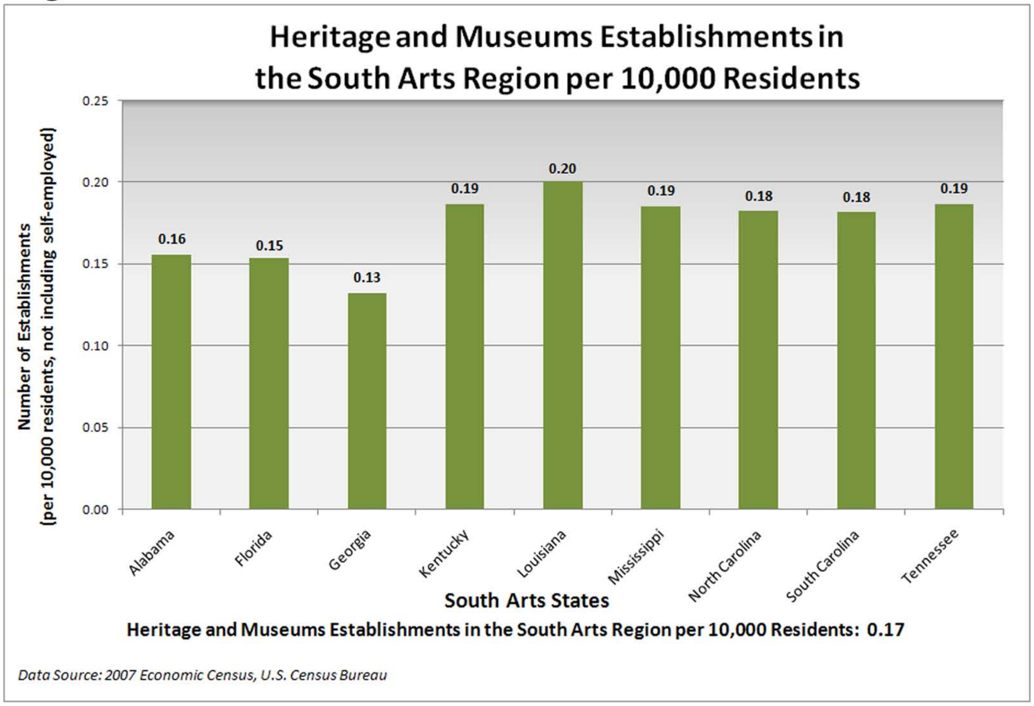
Not counting establishments owned and operated by federal, state and local governments, the South Arts region is home to 1,057 heritage and museums establishments, including museums, historical sites, zoos, and botanical gardens. For the purposes of this study, the data does not include nature parks or similar institutions. The two leading states based on raw number of establishments are Florida with 280 and North Carolina with 165.

Figure 29



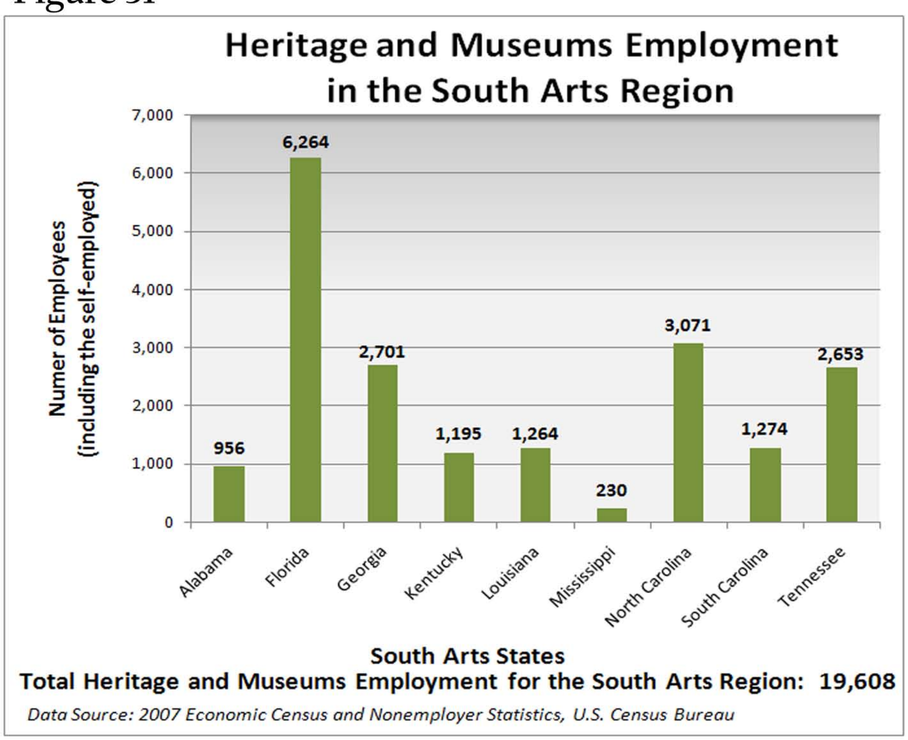
When divided per 10,000 residents, the number of heritage and museums establishments is relatively flat among the states in the South Arts region, with the highest rates occurring at 0.20 in Louisiana, 0.19 in Kentucky, Mississippi, and Tennessee, and 0.18 in North Carolina and South Carolina.

Figure 30



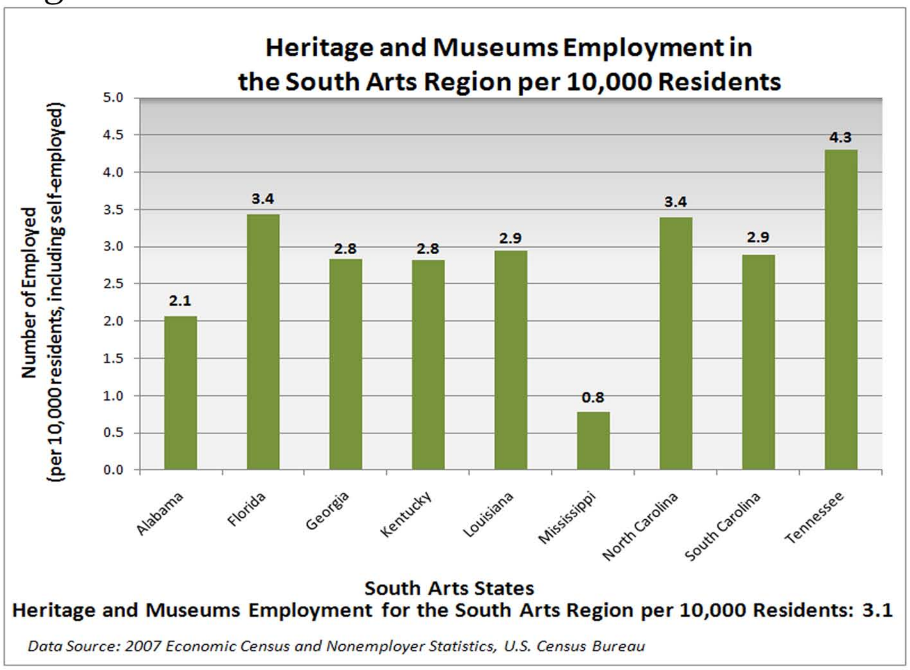
The South Arts region employs 19,608 people in the heritage and museums industries. Florida employs more than double the number of the next closest state with 6,264 workers, while North Carolina employs 3,071, Georgia employs 2,701, and Tennessee employs 2,653.

Figure 31



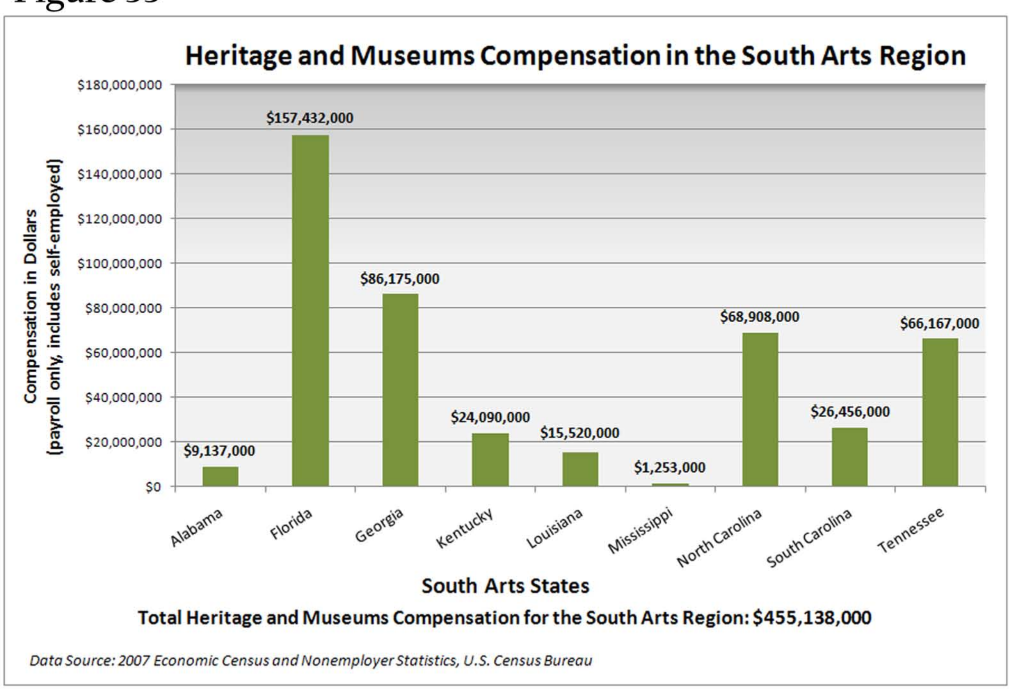
On a per capita basis, Tennessee leads the region with 4.3 workers in the heritage and museum industries per 10,000 residents. Following close behind Tennessee are Florida and Carolina, both with 3.4 workers in the heritage and museums industries per 10,000 residents, Louisiana and South Carolina with 2.9, and Georgia and Kentucky with 2.8.

Figure 32



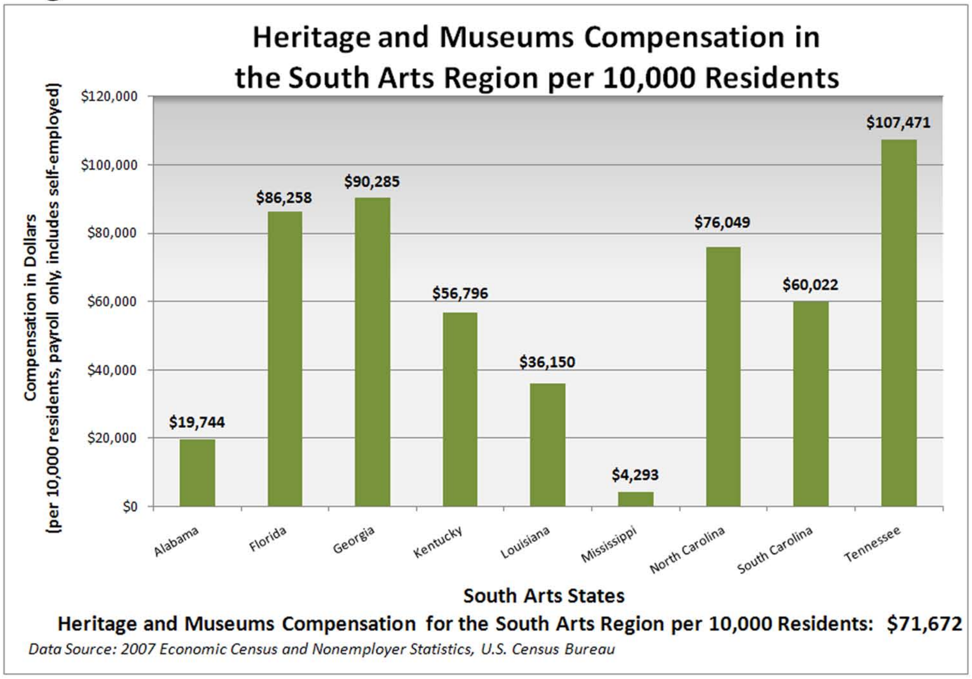
Wages earned by the employed and self-employed in the heritage and museums industries for the South Arts region totaled more than $455 million in 2007. Florida workers earned the most in wages with a total of more than $157 million. Georgia workers followed with earnings of more than $86 million, followed by North Carolina at almost $69 million and Tennessee at more than $66 million.

Figure 33



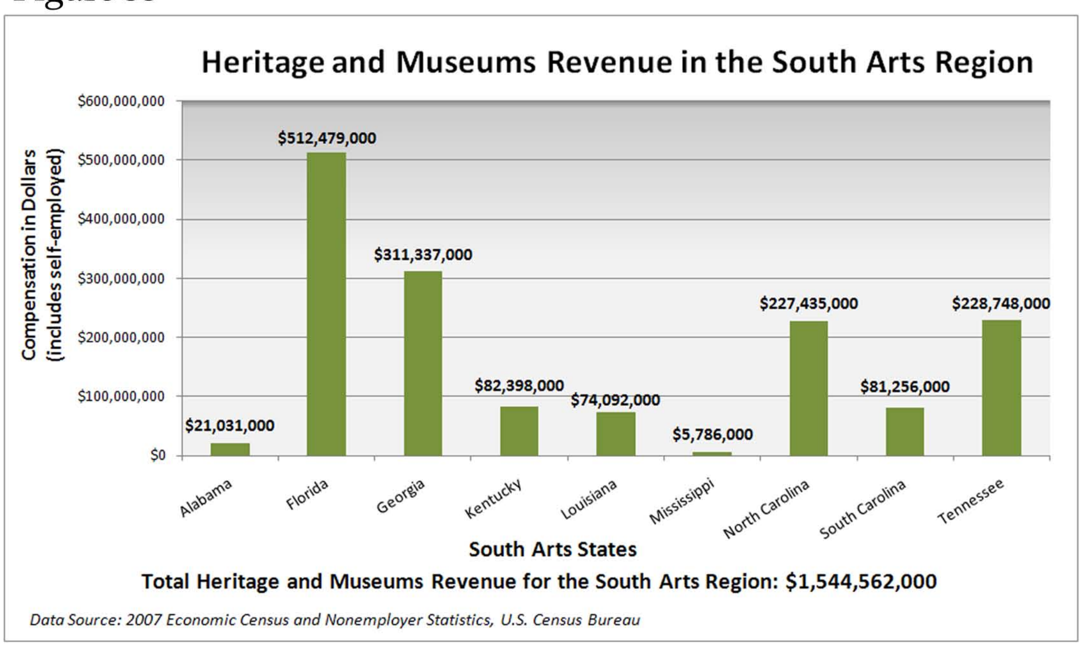
On a per capita basis, Tennessee workers in the heritage and museums industries earned $107,471 per 10,000 residents in 2007. That state had the highest average in the region followed by Georgia at $90,285, Florida at $86,258, and North Carolina at $76,049. The average for the region was $71,672 for the year 2007.

Figure 34



Total revenue for the heritage and museums industries in the South Arts region for 2007 was a little more than $1.5 billion. One third of that amount was generated in Florida with more than $512 million. Almost half of the region's total was generated in the next three states with the highest heritage and museums industries revenue: more than $311 million in Georgia, almost $229 million in Tennessee, and more than $227 million in North Carolina.

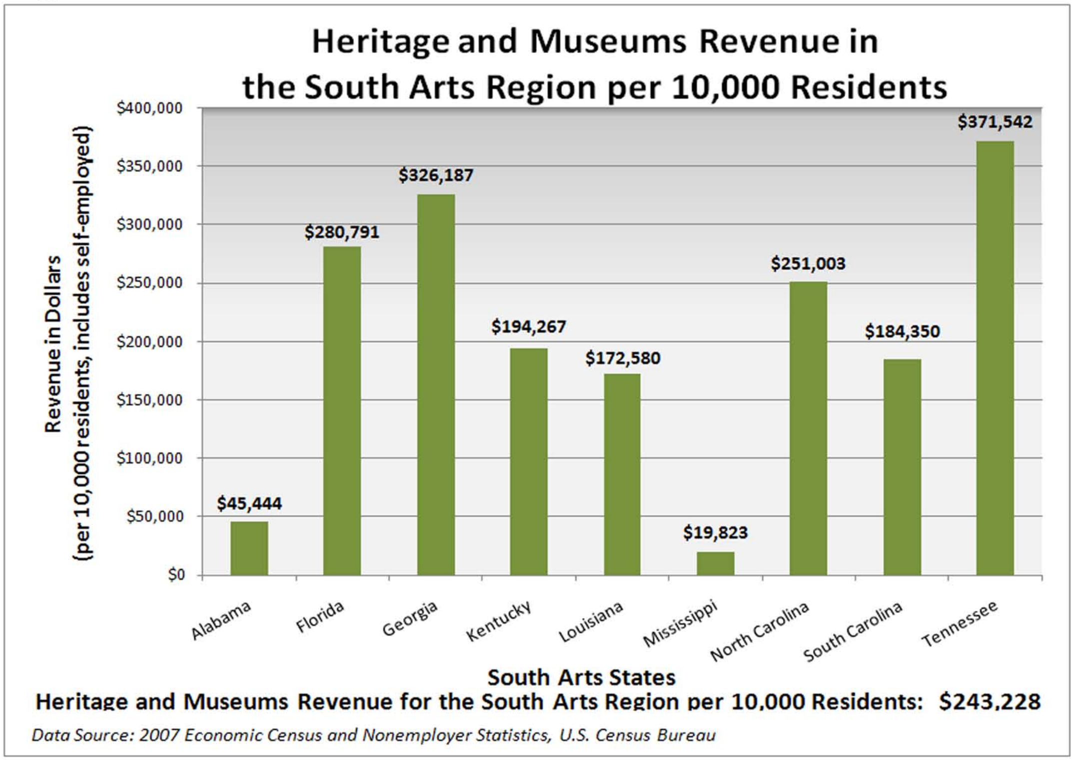
Figure 35



Tennessee generated the most heritage and museums industries revenue on a per capita basis, with more than $371, 000 of revenue per 10,000 residents. The next highest revenue levels on a per capita basis were in Georgia at more than $326,000 per 10,000 residents, Florida with almost $281,000, and North Carolina with $251,000.

The figures for Alabama, Louisiana, and Mississippi are artificially low due to data suppression by the Census Bureau in the compensation and revenue fields in the heritage and museums sectors.

Figure 36

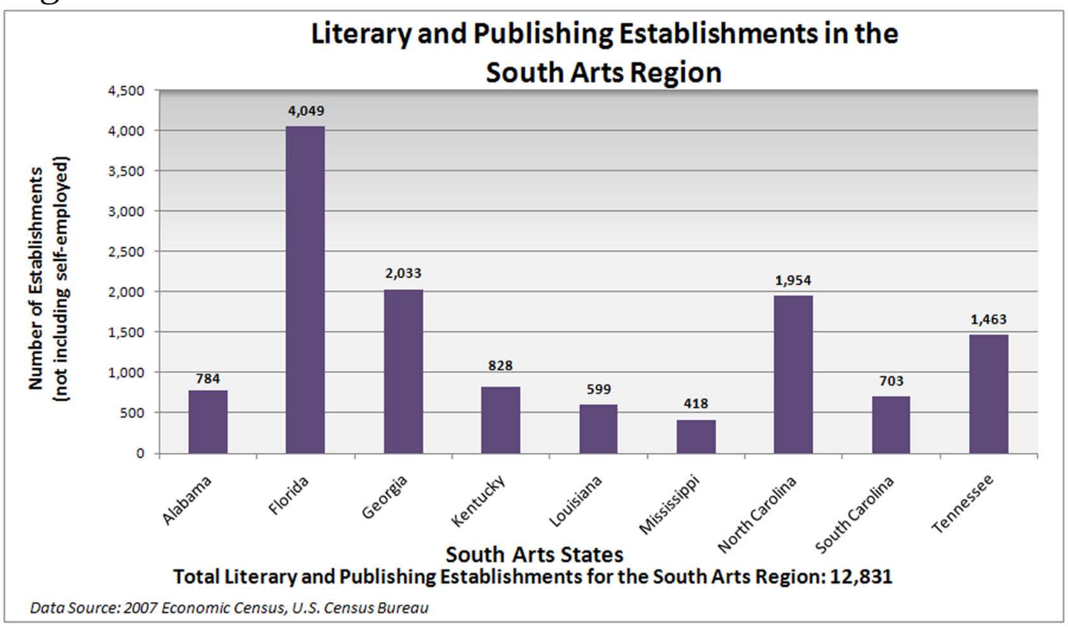


Literary & Publishing

Along with film and media, literary and publishing is one of the largest creative industries clusters in the South. Literary and publishing sectors include commercial printing, digital printing, book printing, binding and prepress services, book stores, news dealers, newspaper and periodical publishers, book publishers, libraries and archives, and independent writers, among other sectors relating to writing, printing, and publishing.

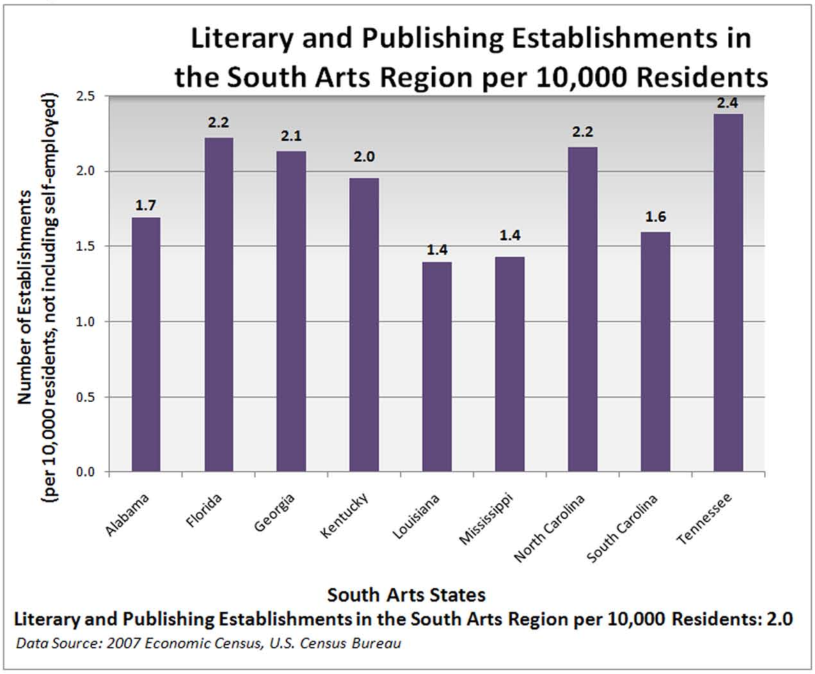
The South Arts region is home to 12,831 literary and publishing establishments. The number of establishments in each state in the region varies from 4,049 in Florida to 418 in Mississippi.

Figure 37



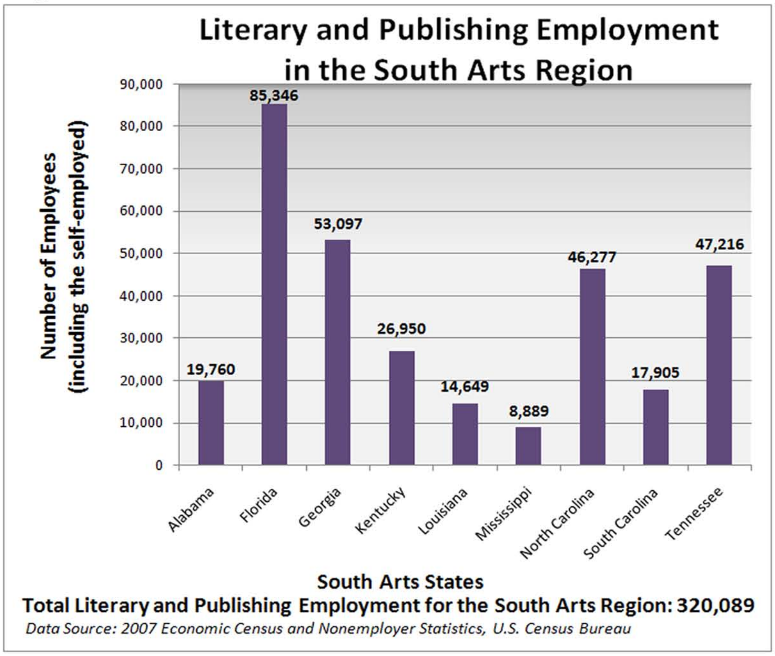
Divided per capita, the number of literary and publishing establishments in southern states flattens out – from a high of 2.4 establishments per 10,000 residents in Tennessee, to a low of 1.4 establishments per 10,000 residents in Louisiana and Mississippi. The states of North Carolina and Florida are next highest with 2.2 literary and publishing establishments per 10,000 residents, followed closely by Georgia with 2.1 and Kentucky with 2.0.

Figure 38



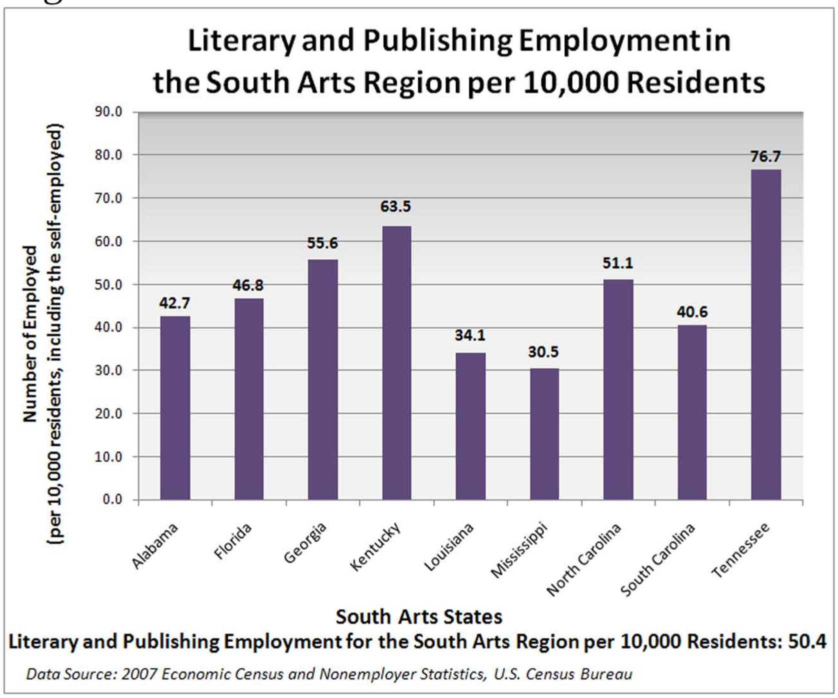
The number of employees, including the self-employed, in the literary and publishing sector in the South Arts region is 320,089. The state with the most employees in this industry cohort is Florida with 85,346, followed by Georgia with 53,097, Tennessee with 47,216, and North Carolina with 46,277.

Figure 39



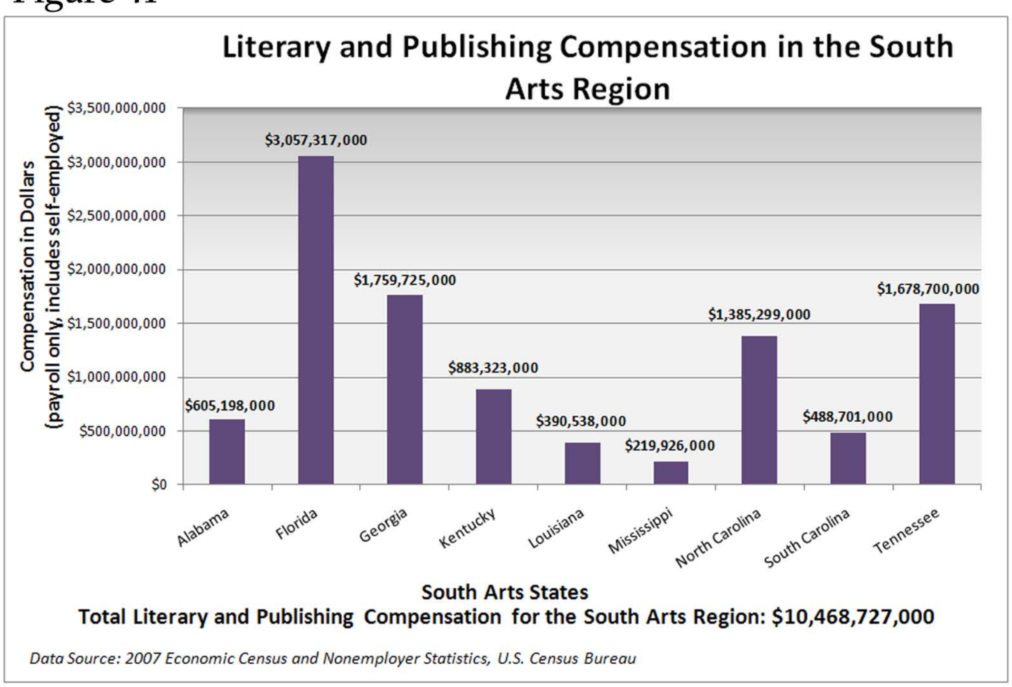
The average number of people employed in literary and publishing industries in the South Arts region is 50.4 per 10,000 residents. The states with the highest average are Tennessee with 76.7 employed in the literary and publishing industries per 10,000 residents, followed by Kentucky with 63.5, and Georgia with 55.6.

Figure 40



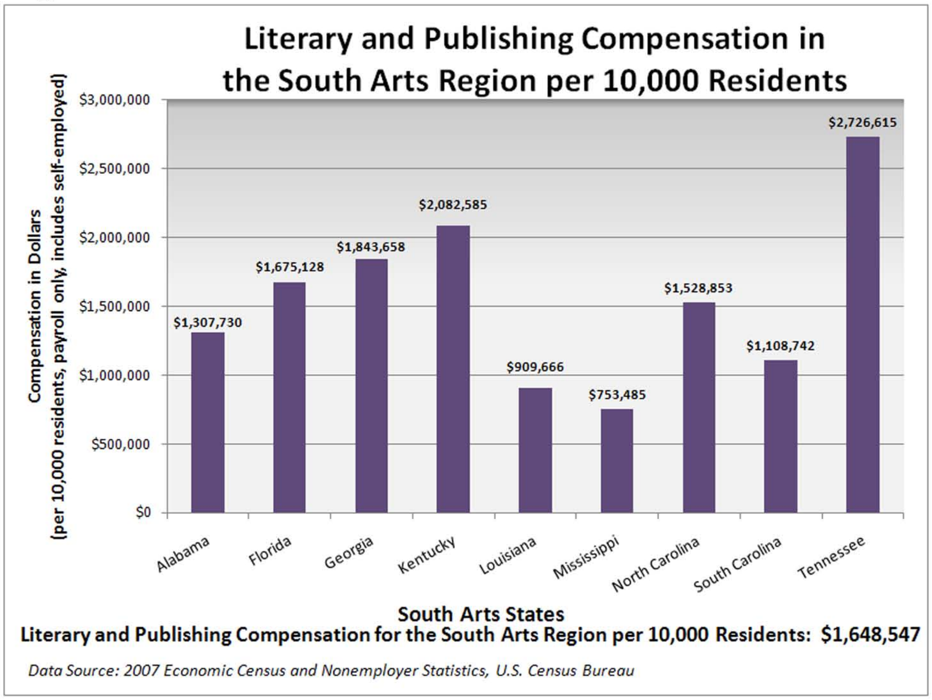
The literary and publishing industries represent almost $10.5 billion in annual wages paid to employees and earned by the self-employed in the South Arts region. More than $3 billion of those wages are earned in Florida, followed by almost $1.8 billion in Georgia, $1.7 billion in Tennessee, and $1.4 billion in North Carolina.

Figure 41



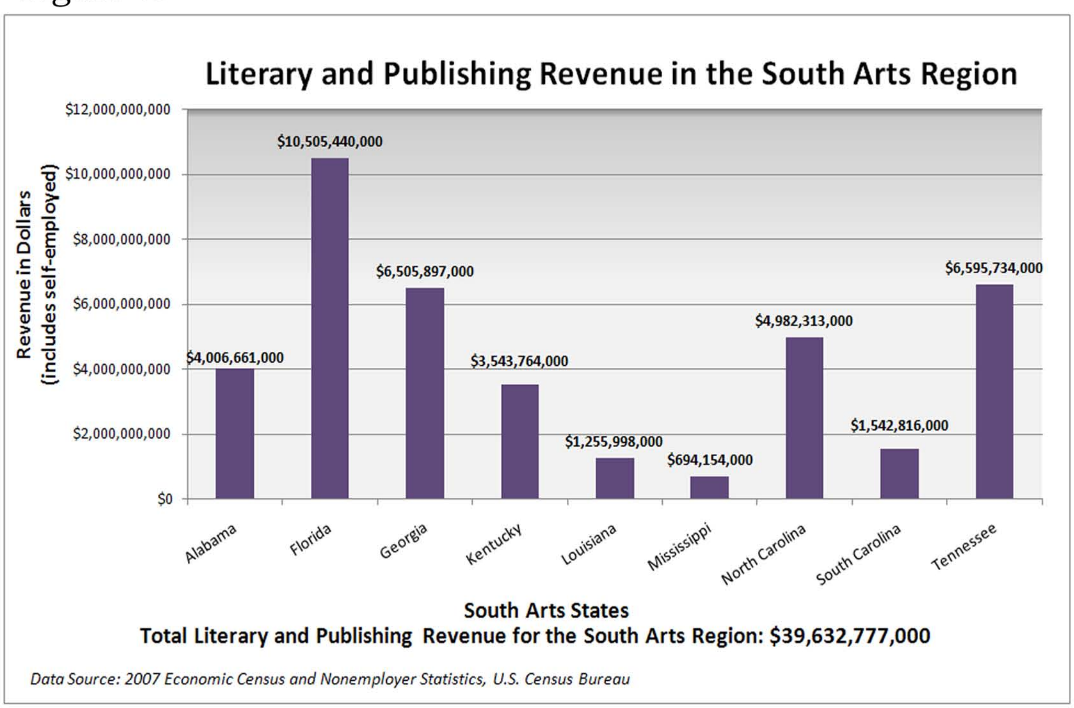
On a per capita basis, Tennessee has the highest literary and publishing wages at $2.7 million per 10,000 residents. Kentucky is next with $2.1 million in wages per 10,000 residents, followed by Georgia at $1.8 million, and Florida with $1.7 million.

Figure 42



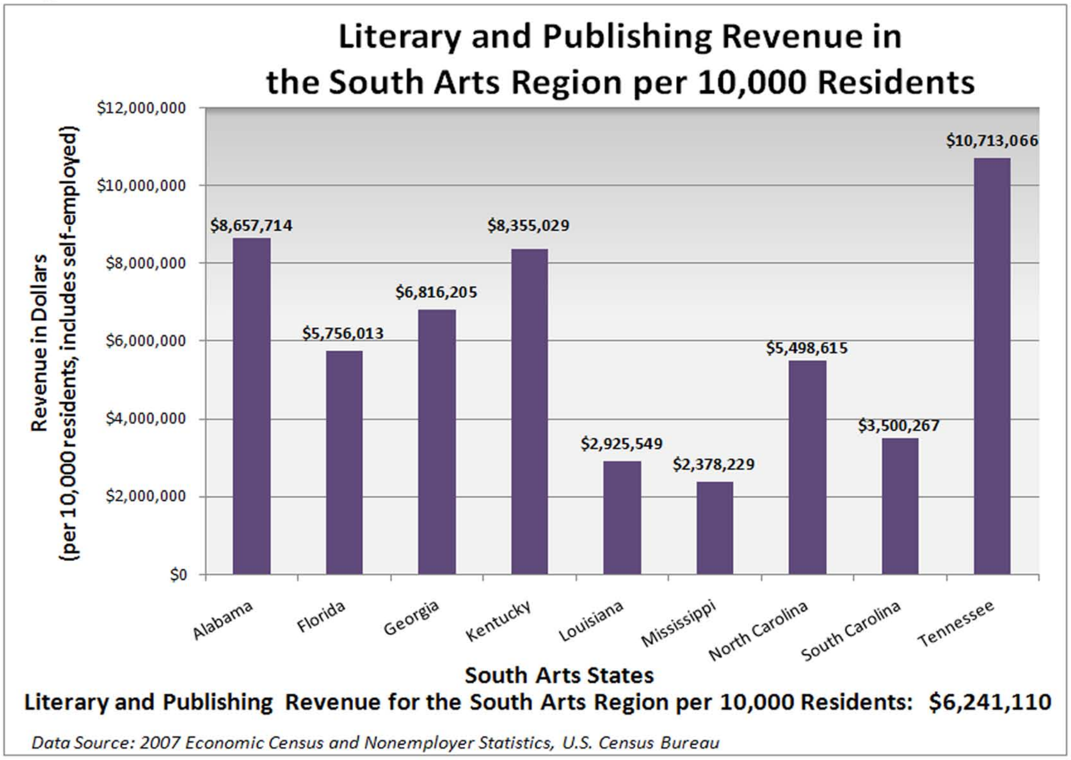
The total literary and publishing industries revenue in the South Arts Region for 2007 was more than $39.6 billion, including $10.5 billion from Florida, $6.6 billion from Tennessee, $6.5 billion from Georgia, and $4.9 billion from North Carolina.

Figure 43



Based on a per capita breakdown, Tennessee is home to the highest per capita revenue in the literary and publishing industries in the South Arts region with $10.7 million per 10,000 residents. The next largest per capita revenue figures are in Alabama with $8.7 million per 10,000 residents and Kentucky with $8.4 million.

Figure 44



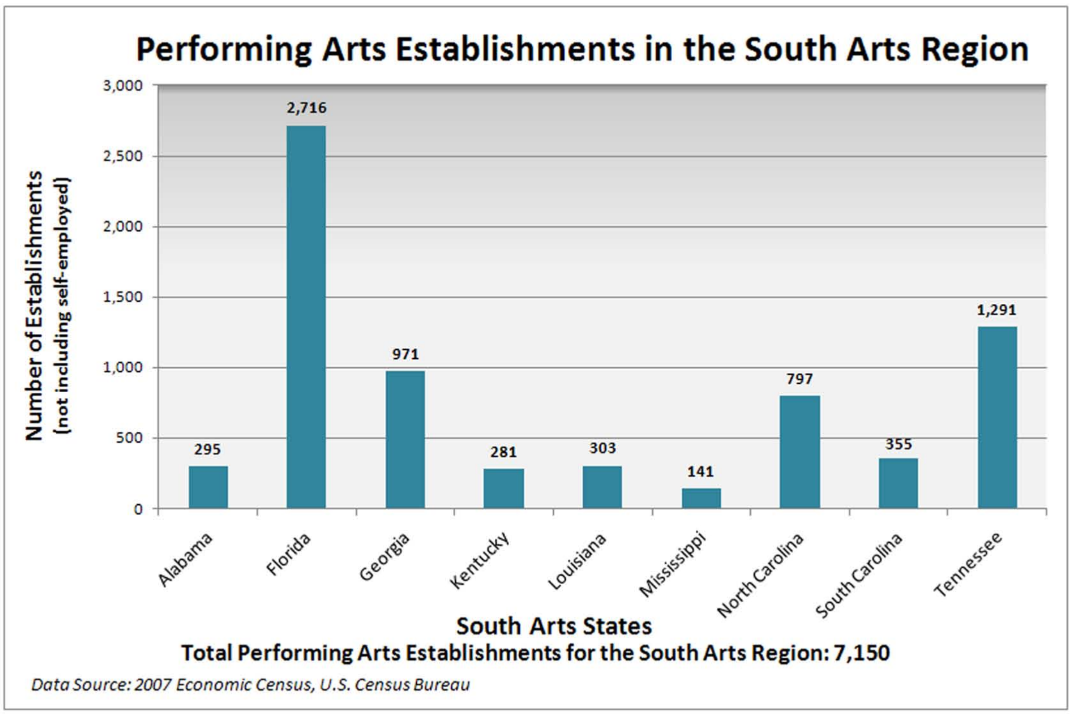
Performing Arts

Out of the six creative industries categories in this study, performing arts ranks fifth in terms of size and scale. The industry still holds significant importance, however, especially within the geographic areas where the performing arts are concentrated.

The performing arts sectors include musical instrument manufacturing and wholesalers; music instrument stores; CDs, audio tapes, and records; music publishers; recording studios; theater companies; dance companies; music groups; promoters; agents; and independent performers.

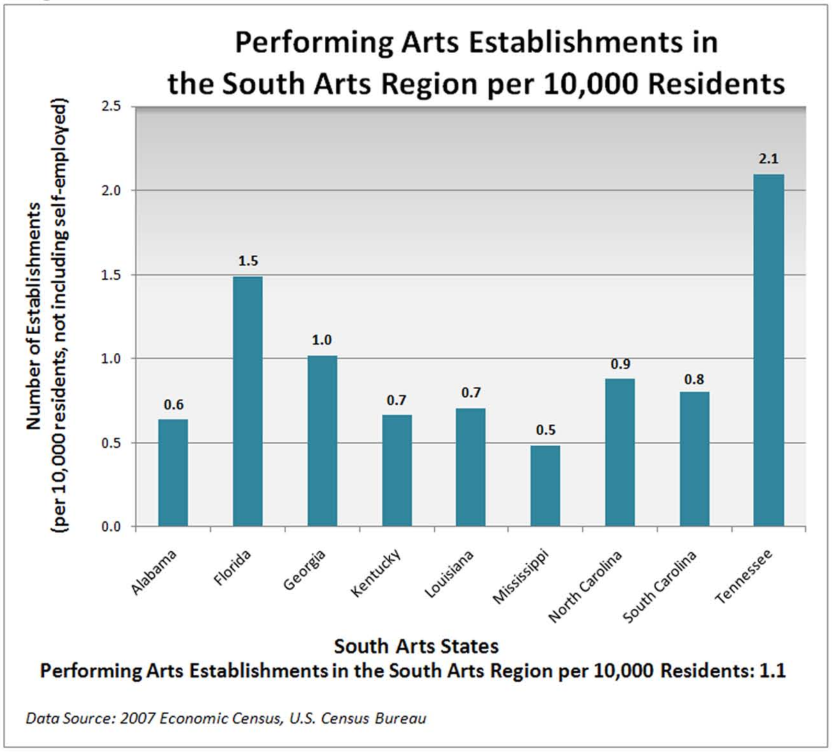
The total number of performing arts establishments in the South Arts region is 7,150. Florida is home to the greatest number with 2,716, followed by 1,291 in Tennessee, 971 in Georgia, and 797 in North Carolina.

Figure 45



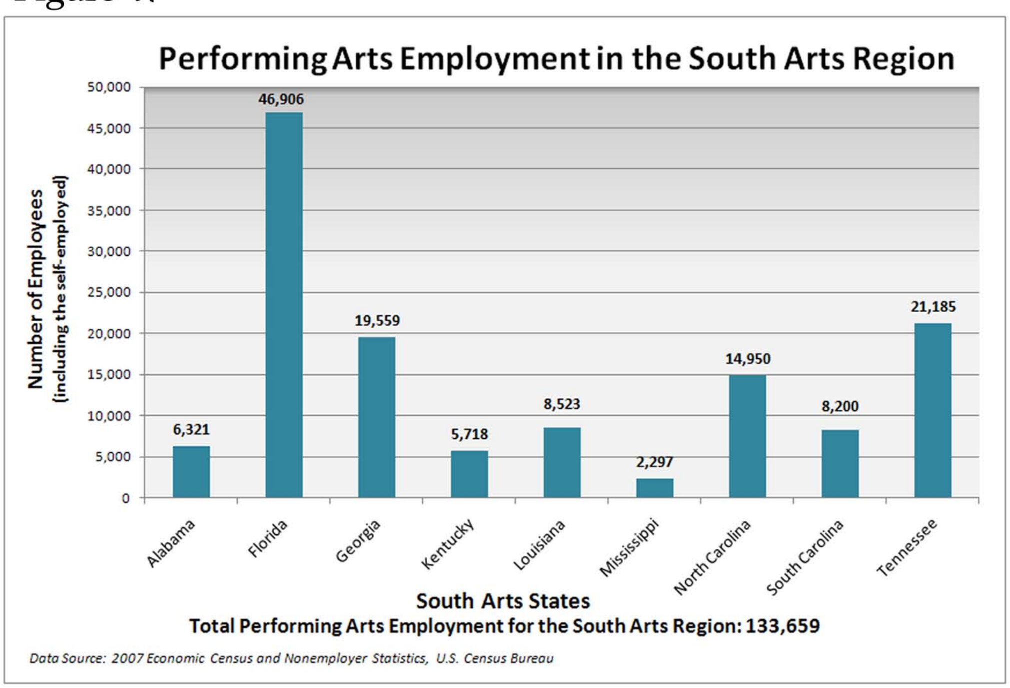
On a per capita basis, Tennessee has the highest number of performing arts establishments with 2.1 for every 10,000 residents. Florida follows with 1.5 per 10,000 residents. Georgia is next with 1.0, with North Carolina at 0.9, and South Carolina at 0.8.

Figure 46



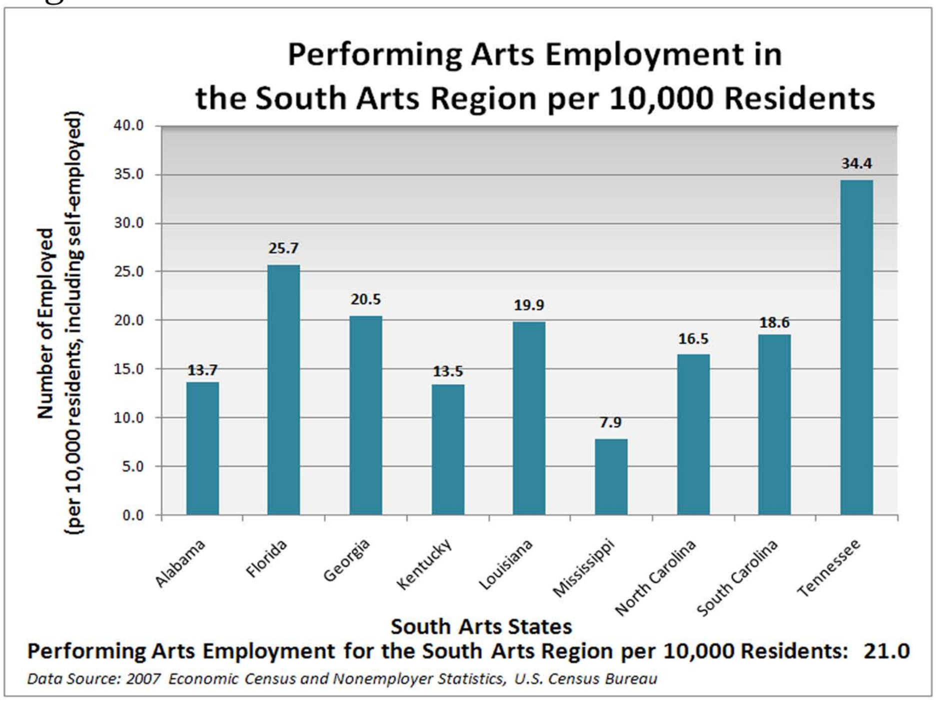
The performing arts sectors employed 133,659 people in the South Arts region in 2007. Florida led all southern states with 46,906 workers in the performing arts industries, followed by Tennessee with 21,185, Georgia with 19,559, and North Carolina with 14,950.

Figure 47



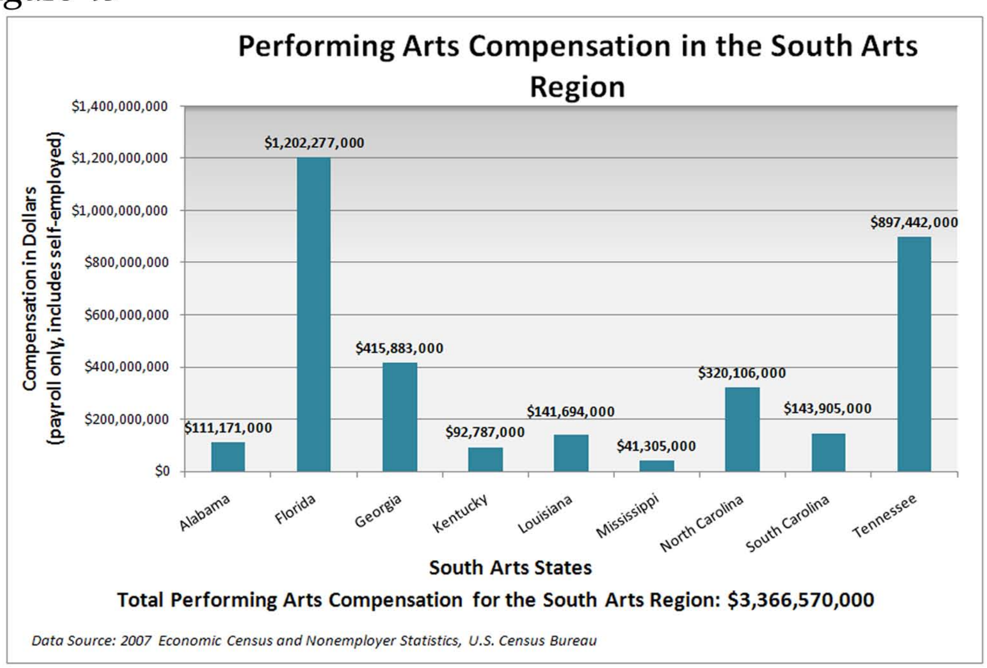
The average number of people working in the performing arts industries in the South Arts region is 21 per 10,000 residents. Tennessee has the highest average with 34.4 per 10,000 residents. The next highest average is Florida with 25.7, followed by Georgia at 20.5, Louisiana with 19.9, and South Carolina with 18.6.

Figure 48



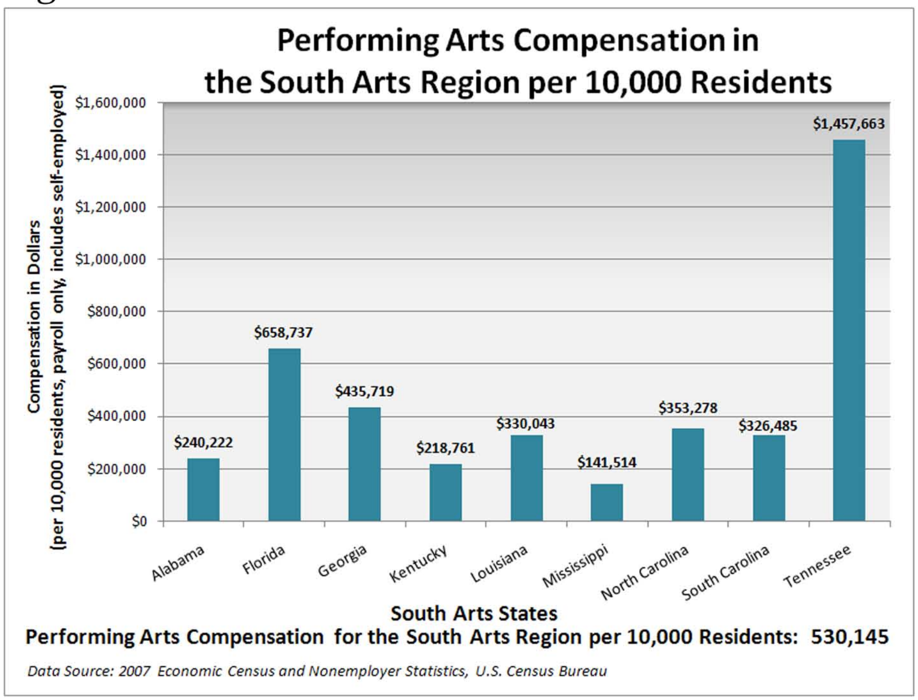
The performing arts industries represent more than $3.3 billion in compensation to creative industries workers in the South Arts region. Florida represents the highest total compensation with $1.2 billion in 2007, followed by Tennessee with total compensation of more than $897 million.

Figure 49



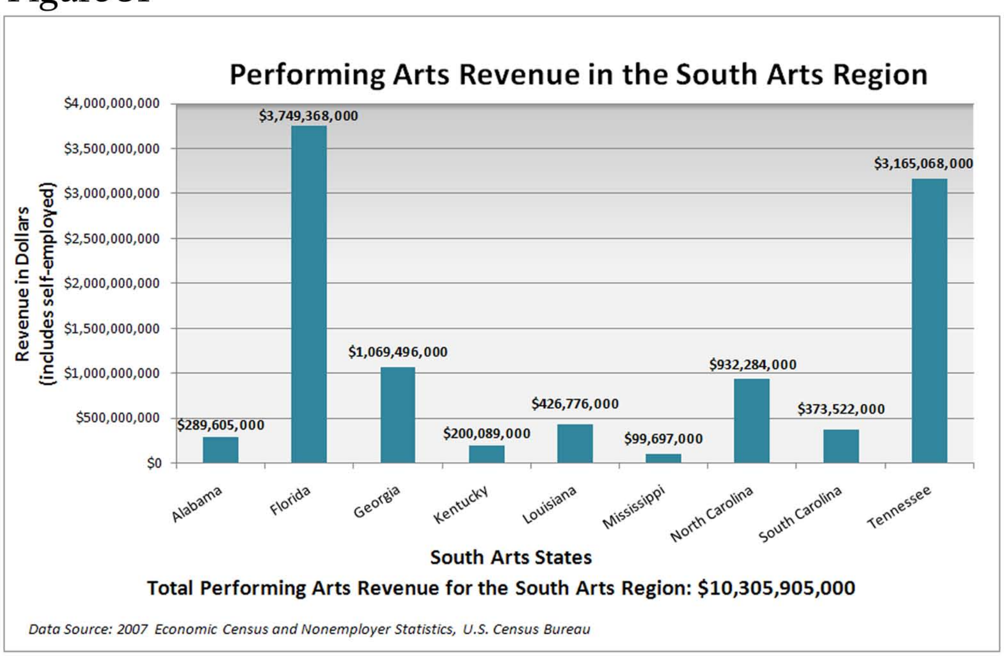
Looking at compensation in the performing arts industries on a per capita basis, Tennessee workers earn almost triple the per capita average of the region. The performing arts industries wages in Tennessee in 2007 were $1.5 million per 10,000 residents, while the region average was $530,000. The next closest states are Florida with $659,000 in performing arts industries compensation per 10,000 residents and Georgia with $436,000.

Figure 50



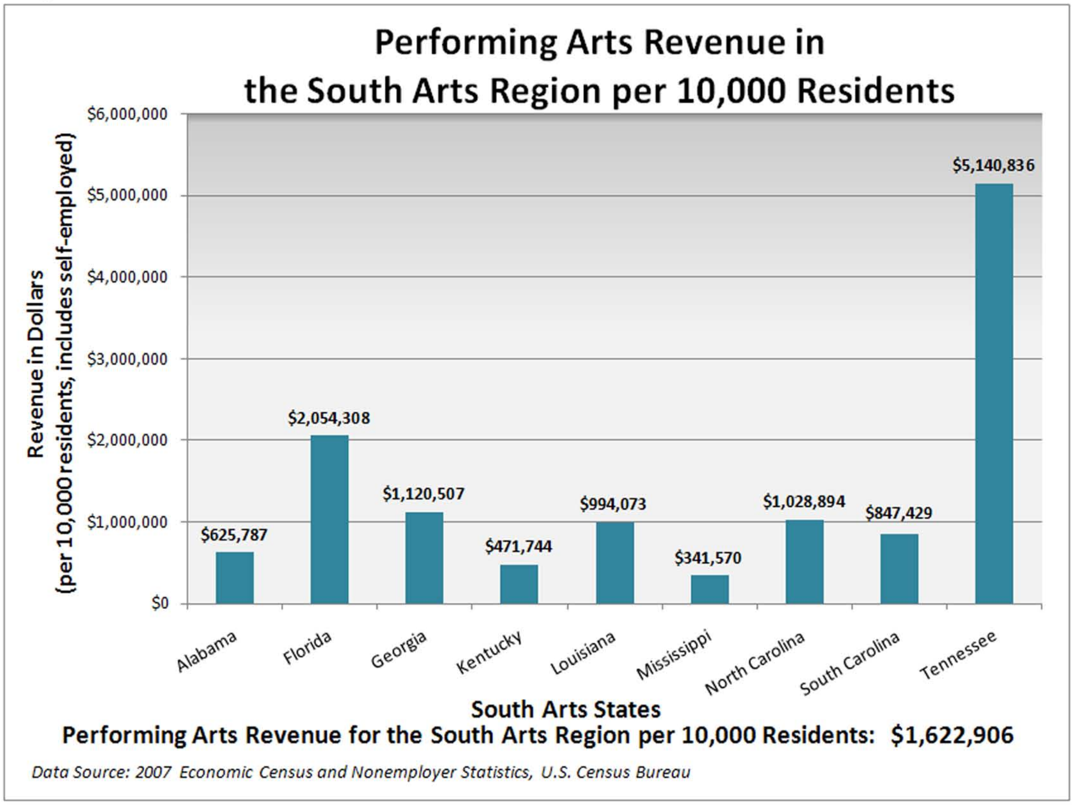
The total performing arts industries revenue in the South Arts region in 2007 was more than $10.3 billion. Performing arts establishments and the self-employed earned more than $3.7 billion in Florida, $3.1 billion in Tennessee, just over $1 billion in Georgia, and just under $1 billion in North Carolina.

Figure 51



In the per capita analysis, the average performing arts industries revenue in the South Arts region was $1.6 million in 2007. Tennessee's average was more than three times the region average, with more than $5.1 million in revenue per 10,000 residents. The states with the next highest per capita totals are Florida with $2.0 million, Georgia with $1.1 million, North Carolina with $1 million, Louisiana with $994,000, and South Carolina with $847,000, all per 10,000 residents.

Figure 52

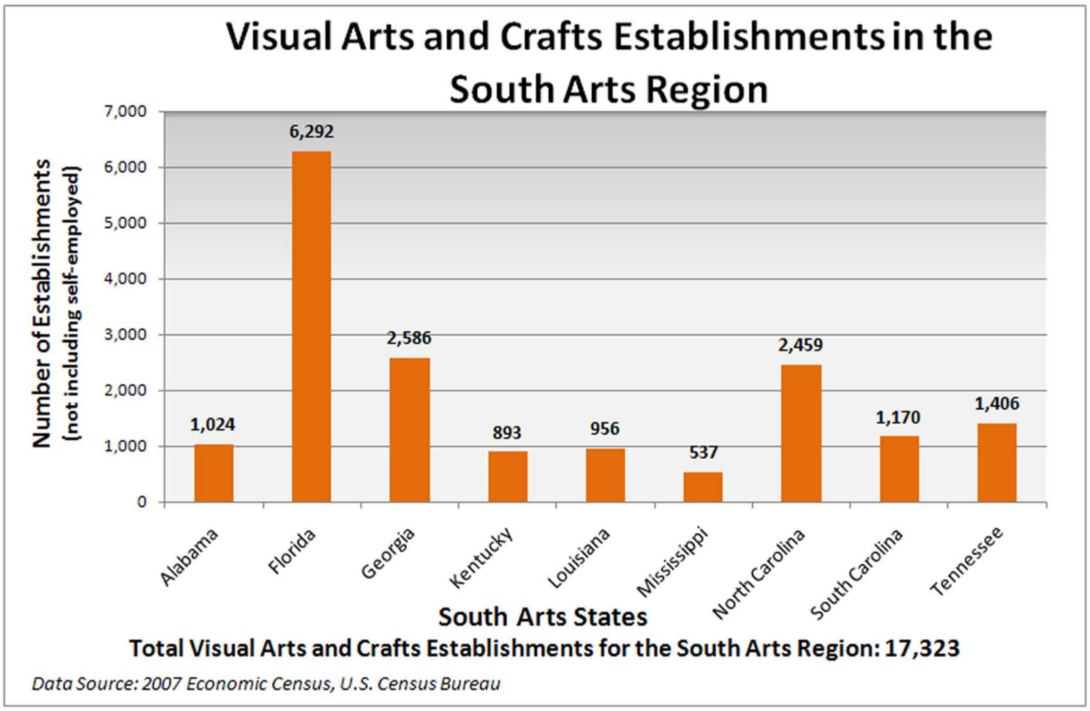


Visual Arts & Crafts

The visual arts and crafts sectors are made up of a variety of industry value chains that involve the production, distribution, and sales of physical objects brought to market for their aesthetic properties. These industries include photography, jewelry, fine arts, glass work, pottery, craft sewing and needlework, fine arts schools, and independent artists.

The South Arts region includes 17,323 visual arts and crafts establishments. More than one-third of those reside in Florida, home to 6,292 of those establishments. Georgia and North Carolina are home to 2,586 and 2,459 visual arts and crafts establishments, respectively.

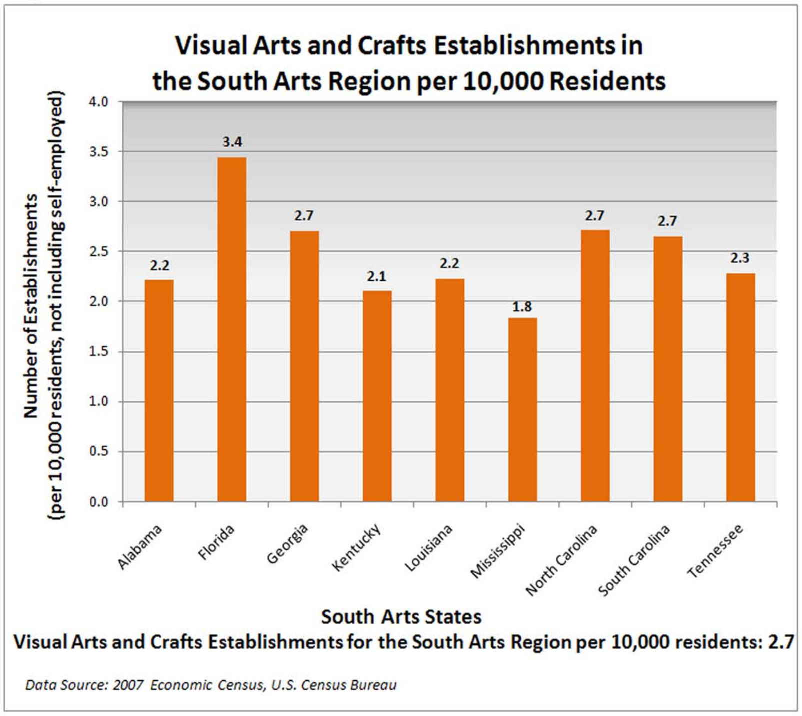
Figure 53



When breaking down the number of visual arts and crafts establishments per capita, Florida has the highest average with 3.4 establishments per 10,000 residents.

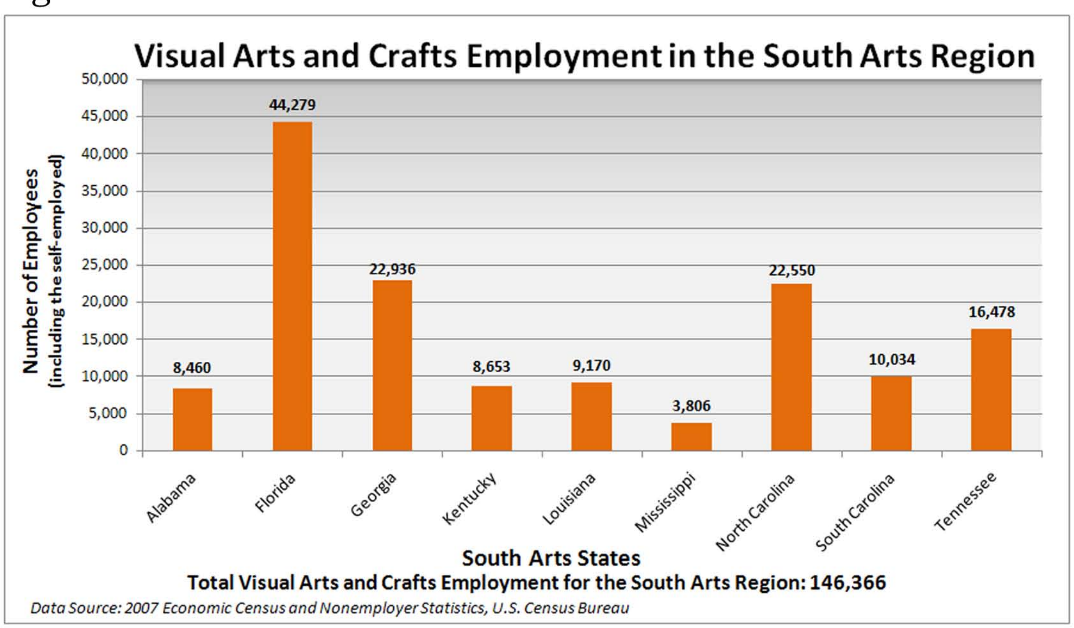
Three states – Georgia, North Carolina, and SouthCarolina – have the same number of visual arts and crafts establishments per 10,000 residents with 2.7.

Figure 54



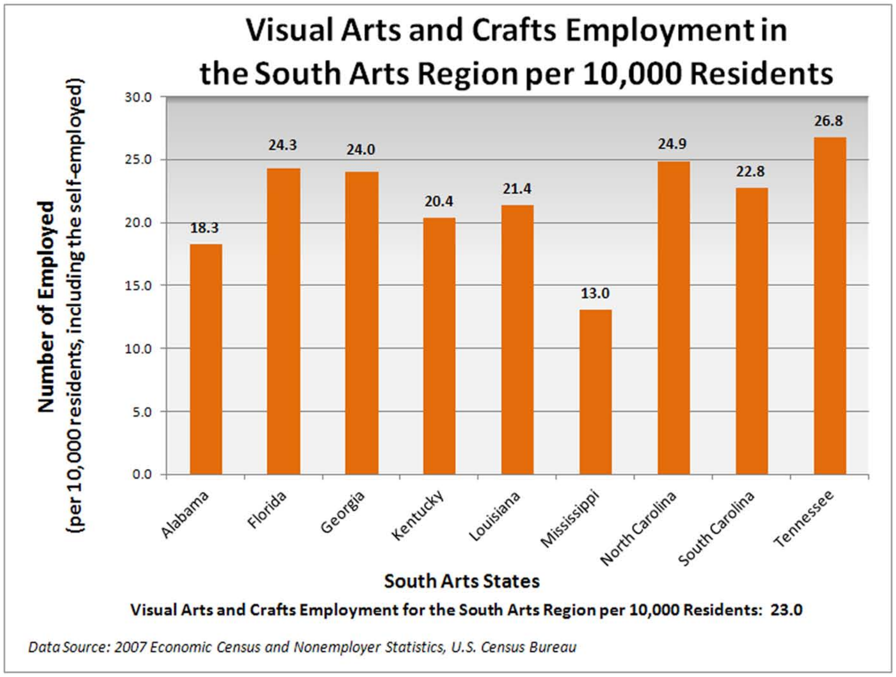
Employment in the visual arts and crafts for the South Arts region is 146,366, including the self-employed. Florida accounts for 44,279 of that total, followed by 22,936 in Georgia, 22,550 in North Carolina, 16,478 in Tennessee, and 10,034 in South Carolina.

Figure 55



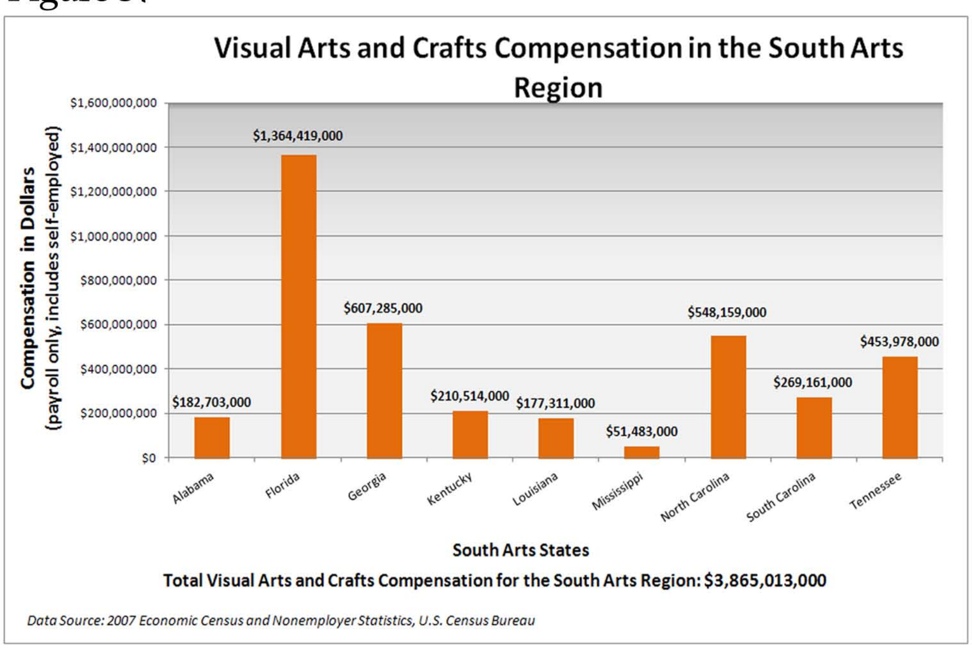
The per capita employment rate in the visual arts and crafts is more even among the states in the South Arts region than the raw totals. Per capita employment in the visual arts and crafts ranges from 26.8 people employed per 10,000 residents in Tennessee, to 13.0 people employed in Mississippi.

Figure 56



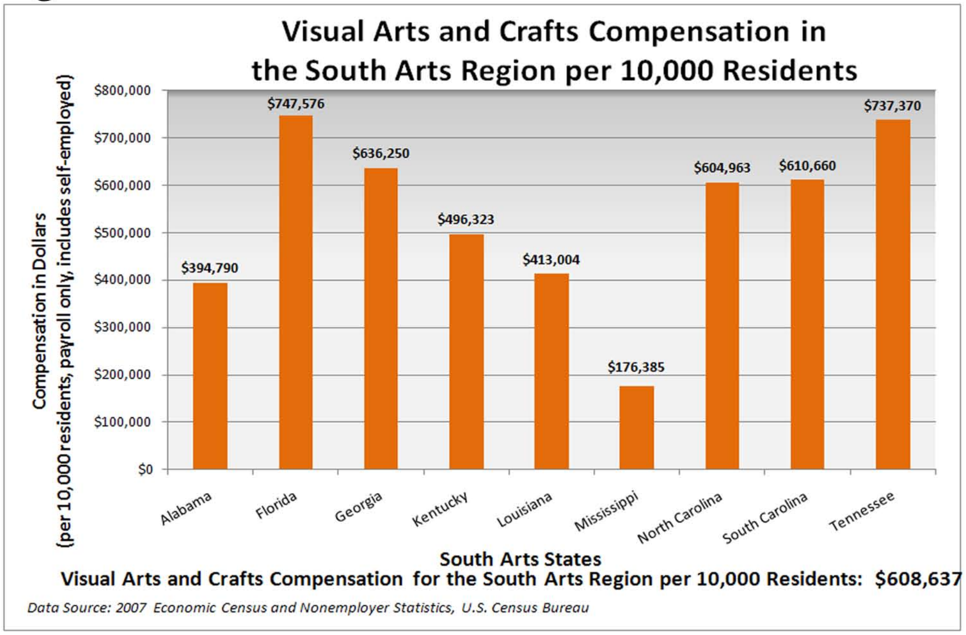
Those working in the visual arts and crafts industries in the South Arts region earned wages totaling almost $3.9 billion in 2007. One-third or $1.3 billion of the total was earned by visual arts and crafts workers residing in Florida. An additional $607 million was earned by Georgia arts and crafts workers, while $548 million was earned in North Carolina, and almost $454 million was earned in Tennessee.

Figure 57



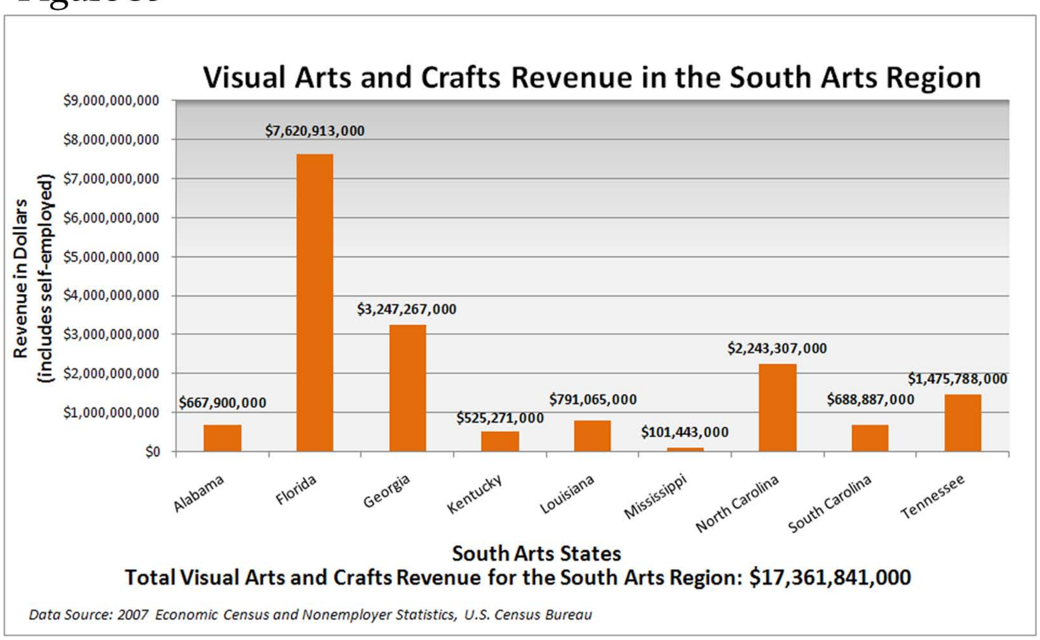
When compensation in the visual arts and crafts industries is divided per capita, the average for the South Arts region is $608,637 per 10,000 residents. Florida tops the states in the region with $747,576 in compensation per 10,000 residents, followed closely by Tennessee with $737,370. Georgia visual arts and crafts workers earn $636,250, while South Carolina and North Carolina arts and crafts workers earn $610,660 and $604,963 per 10,000 residents, respectively.

Figure 58



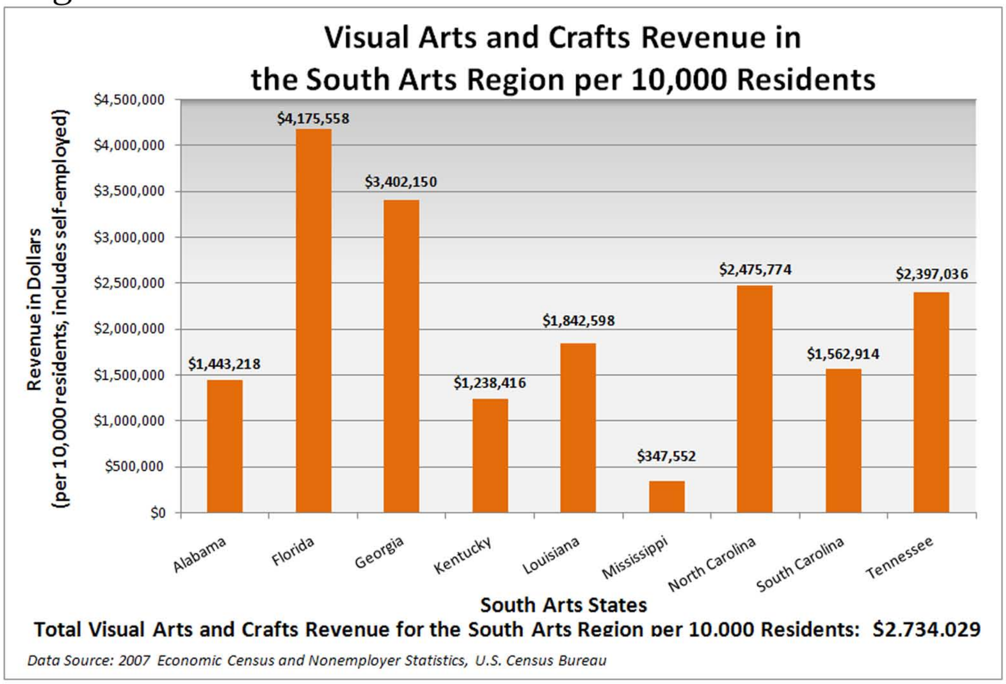
The total revenue earned by visual arts and crafts establishments and the self-employed in the South Arts region in 2007 was almost $17.4 billion. More than one-third of that total was earned in Florida with $7.6 billion in visual arts and crafts revenue. Following Florida is Georgia with $3.2 billion, North Carolina with $2.2 billion, and Tennessee with $1.5 billion in revenue earned by visual arts and crafts businesses.

Figure 59



On a per capita basis, Florida visual arts and crafts businesses are prevalent, earning $4.2 million in revenue for every 10,000 residents in the state.The next highest revenue total belongs to Georgia with $3.4 million in visual arts and crafts revenue, followed by North Carolina with $2.5 million and Tennessee with $2.4 million in revenue for every 10,000 residents.

Figure 60



Top Ten Creative Industry Sectors for the South Arts Region

Based on the number of establishments, the industry sectors below are the ten largest in the South Arts region. They mostly derive from the four largest of the six major categories into which the creative industries are divided for the purposes of this study – design, film and media, literary and publishing, and visual arts and crafts.

Table 1

South Arts Region - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	6,151
Radio, Television, and Other Electronics Stores	6,088
Architectural Services	4,674
Florists	4,249
Video Tape and Disc Rental	3,558
Interior Design Services	3,531
Photography Studios, Portrait	3,325
Advertising Agencies	2,851
Graphic Design Services	2,789
Commercial Lithographic Printing	2,334

Data Source: 2007 Economic Census, U. S. Census Bureau

Looking at creative industries sectors organized by employment, the following industry sectors represent the ten largest in the South Arts region. These numbers include both those employed by an establishment and the self-employed.

Table 2

South Arts Region - Top Ten Creative Industry Sectors by Total Employment	
Newspaper Publishers	69,902
Radio, Television, and Other Electronics Stores	65,827
Commercial Lithographic Printing	55,967
Advertising Agencies	48,409
Independent Writers	47,792
Cable and Other Program Distribution	46,018
Jewelry Stores	41,628
Software Publishers	40,645
Architectural Services	40,524
Specialized Design Services	34,799

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S.

The top ten creative industries sectors by employment compensation (wages and income, but not including benefits) in the South Arts region are below. Sectors requiring high levels of skill, with extensive distribution, and/or related to the entertainment industries dominate the top ten list of employment compensation. This data includes people both employed by establishments and self-employed.

Table 3

South Arts Region - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$3,964,912,000
Architectural Services	$2,557,794,000
Advertising Agencies	$2,539,422,000
Newspaper Publishers	$2,502,087,000
Commercial Lithographic Printing	$2,346,432,000
Cable and Other Program Distribution	$1,838,000,000
Radio, Television, and Other Electronics Stores	$1,471,330,000
Specialized Design Services	$1,426,971,000
Television Broadcasting	$1,287,357,000
Periodical Publishers	$1,116,473,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S.

Among the top ten creative industries sectors by annual revenue in the South Arts region, like employee compensation, the list tends to be dominated by sectors requiring high levels of skill, with extensive distribution, and/or related to the entertainment industries.

Table 4

South Arts Region - Top Ten Creative Industry Sectors by Annual Revenue	
Radio, Television, and Other Electronics Stores	$13,963,923,000
Software Publishers	$10,400,580,000
Commercial Lithographic Printing	$8,244,006,000
Newspaper Publishers	$7,970,942,000
Broadcasting	$6,911,568,000
Architectural Services	$6,170,524,000
Jewelry Stores	$5,931,453,000
Periodical Publishers	$5,626,866,000
Television Broadcasting	$5,251,391,000
Advertising Agencies	$4,832,263,000

Data Source: 2007 Economic Census, U. S. Census Bureau

Regional Comparison of Creative Industries to All Regional Industries

The creative industries are an economic engine for the South Arts region. The 82,852 creative industries establishments represent 5.5% of all industry establishments for the nine-state region.

Table 5

Comparison of Regional Creative Industries to Total Industries	
Category	**Establishments**
South Arts Region Creative Industries Totals	82,852
% of South Arts Region Total Industries	5.5%
South Arts Region Total Industries	1,510,167

Data Source: 2007 Economic Census, U. S. Census Bureau

Including both employment in establishments and the self-employed, the creative industries represent 4.1% of all employment for the South Arts region.

Table 6

Comparison of Regional Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
South Arts Region Creative Industries Totals	862,927	304,181	1,167,108
% of South Arts Region Total Industries	3.7%	6.4%	4.1%
South Arts Region Total Industries	23,541,548	4,772,110	28,313,658

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The creative industries also represent 3.9% of all wages in the South Arts region with over $41 billion earned by people both employed and self-employed.

Table 7

Comparison of Regional Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
South Arts Region Creative Industries Totals	$31,914,530,000	$9,496,585,000	$41,411,115,000
% of South Arts Region Total Industries	3.8%	4.5%	3.9%
South Arts Region Total Industries	$844,146,954,000	$212,121,119,000	$1,056,268,073,000

Data Source: 2007 Economic Census and 2007 Nonemployer Statistics, U. S. Census Bureau

In addition, the creative industries represent 2.9%, or $142 billion, of all industry revenues in the region. The self-employment revenue of $9.5 billion in the creative industries represents 4.5% of all self-employment revenue in the South Arts region.

Table 8

Comparison of Regional Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
South Arts Region Creative Industries Totals	$133,129,364,000	$9,496,585,000	$142,625,949,000
% of South Arts Region Total Industries	2.8%	4.5%	2.9%
South Arts Region Total Industries	$4,729,957,000,000	$212,121,119,000	$4,942,078,119,000

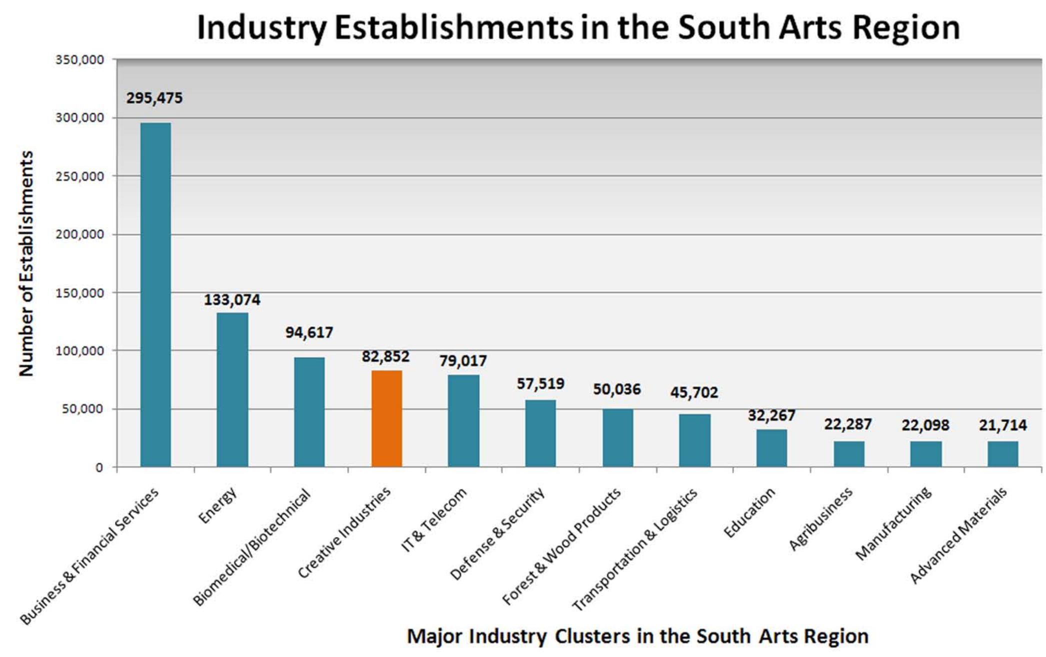
Data Source: 2007 Economic Census and Nonemployer Statistics, U. S.

Based on this data, wages and revenue appear lower on average for the creative industries than the wages and revenues in other industries in the region. However, much of this disparity may be accounted for by the data suppression by the Economic Census which is employed to ensure the anonymity of those providing data. In addition, the creative industries represent a higher percentage of self-employed workers, including a higher percentage of wages and revenues earned by the self-employed.

Regional Comparison of Creative Industries to Other Industry Clusters

The number of creative industries establishments in the South Arts region is 82,852, which is fourth among all industry clusters in the nine-state region. The creative industries are behind business and financial services, energy, and biomedical/biotechnical, but there are more creative industries establishments than there are in information technology and telecommunications, defense and security, forest and wood products, transportation and logistics, education, agribusiness, and manufacturing. This total number of establishments for the creative industries does not include the self-employed.

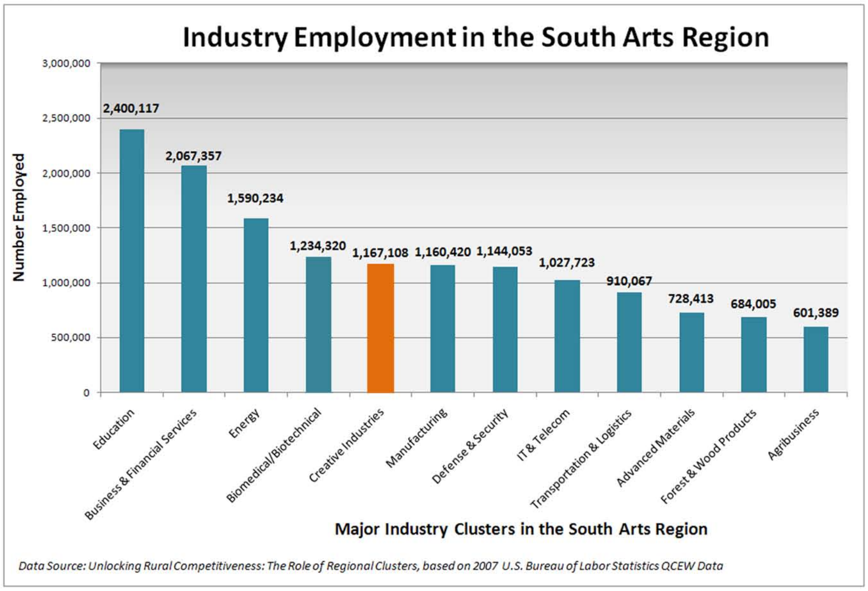
Figure 61



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

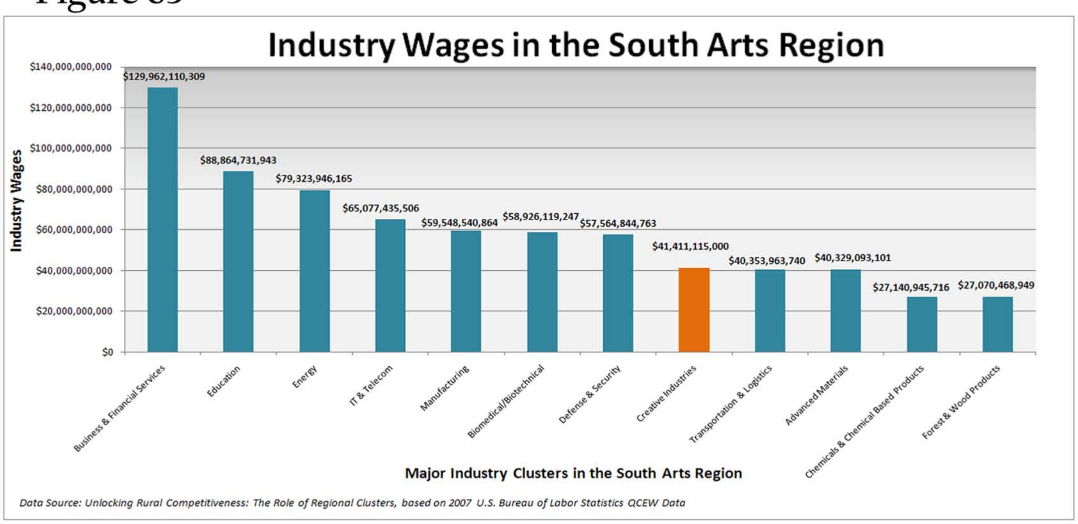
The creative industries are fifth in the region for the number of people employed, with 1,167,108. Most clusters maintained their relative positions in relation to the number of establishments in the previous bar graph, except for education, which moved to first for the number employed.

Figure 62



In measuring total wages, the creative industries fall back to eighth place in the South Arts region, with \$41,411,115,000 in wages for both the employed and self-employed. The industry clusters of information technology and telecommunications, manufacturing, and defense and security moved ahead of the creative industries in comparison to the data for employment in the previous bar graph. Part of this disparity may is explained by the data suppression implemented by the Economic Census in several sectors of the creative industries in the payroll field.

Figure 63



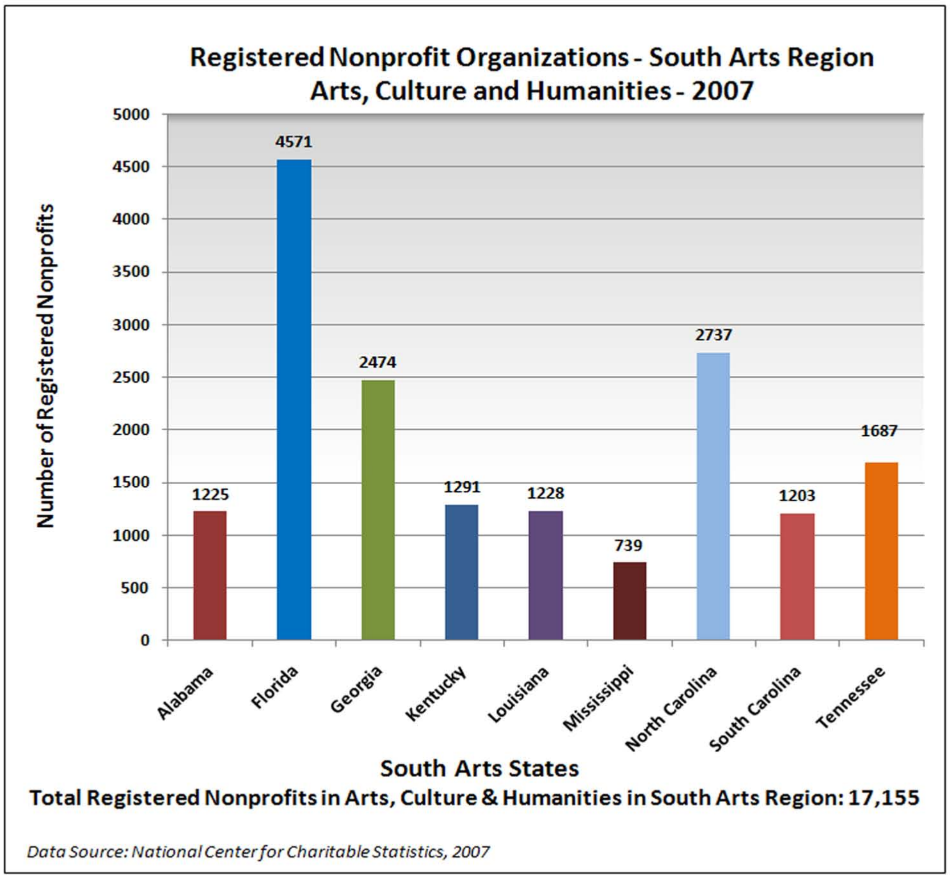
Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare thecreative industries to other industry clusters on that basis.

Nonprofit Arts in the Region

The nonprofit organizations included in the National Center for Charitable Statistics data for arts, culture, and the humanities represent a wide variety, from art museums, arts councils, theaters, symphony orchestras, and dance companies, to film and video, radio, arts education, history museums, performing arts schools, arts service organizations, and the like.

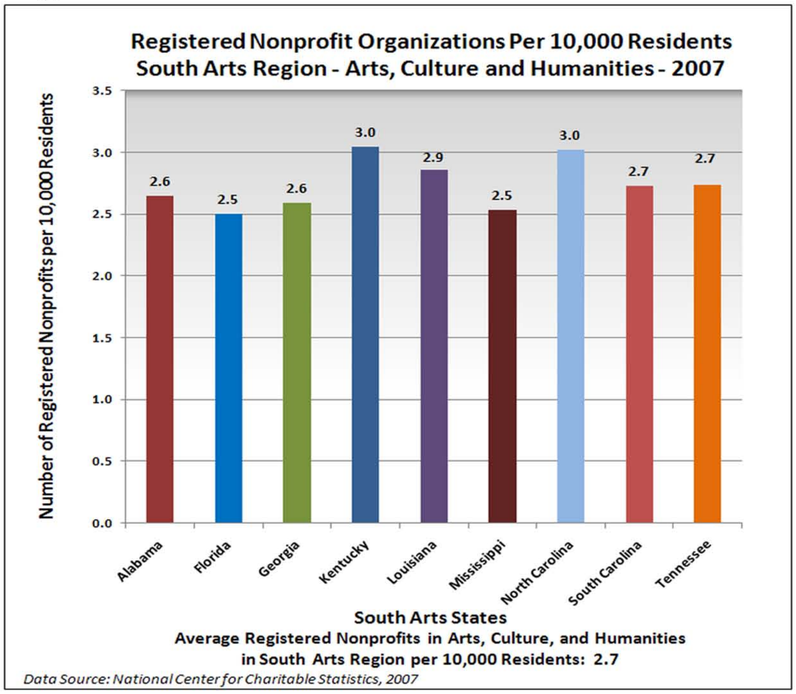
The South Arts region is home to 17,155 registered nonprofit organizations in the arts, culture, and humanities. Florida is where the most are located with 4,571, while North Carolina has 2,737, Georgia has 2,474, and Tennessee has 1,687.

Figure 64



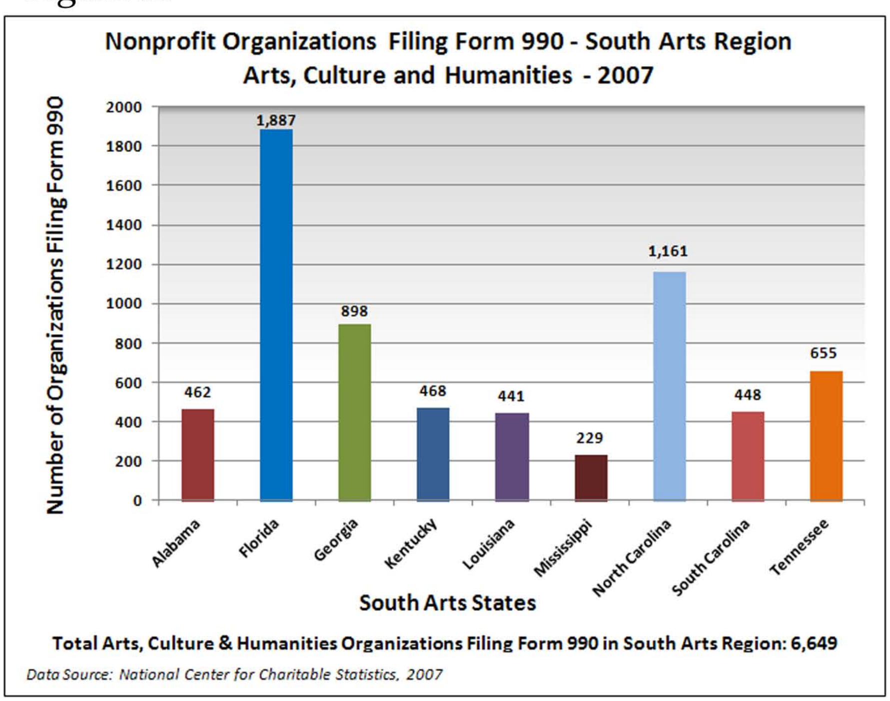
On a per capita basis, both Kentucky and North Carolina are home to 3.0 registered nonprofit organizations in the arts, culture and humanities per 10,000 residents. Louisiana is close behind with 2.9, followed by South Carolina and Tennessee, both with 2.7. The region average is also 2.7.

Figure 65



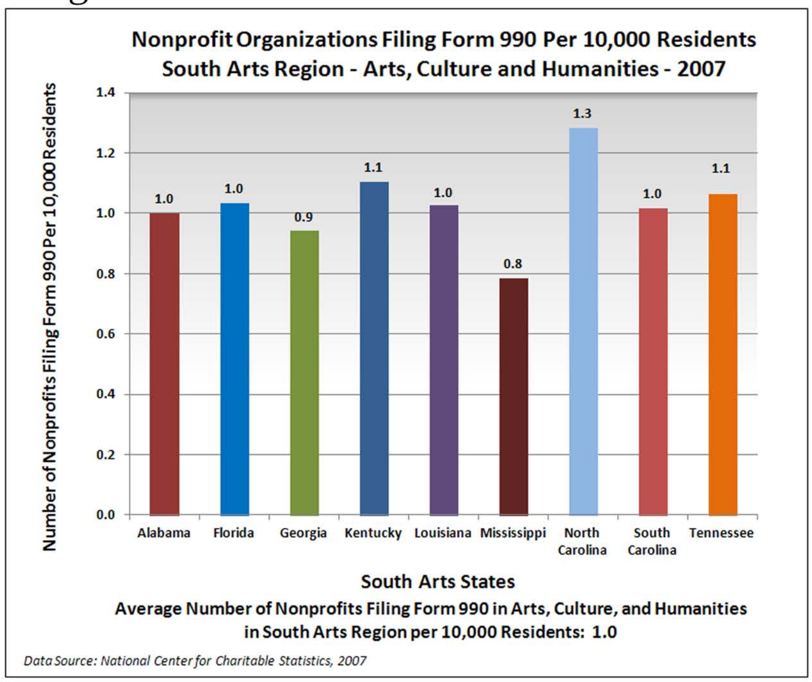
Of the registered arts, culture, and humanities nonprofits in the South Arts region, 6,649 of them, or a little more than one-third, had annual revenues of more than $25,000 and therefore filed IRS form 990 in 2007. The total includes 1,887 from Florida, 1,161 from North Carolina, 898 from Georgia, and 655 from Tennessee.

Figure 66



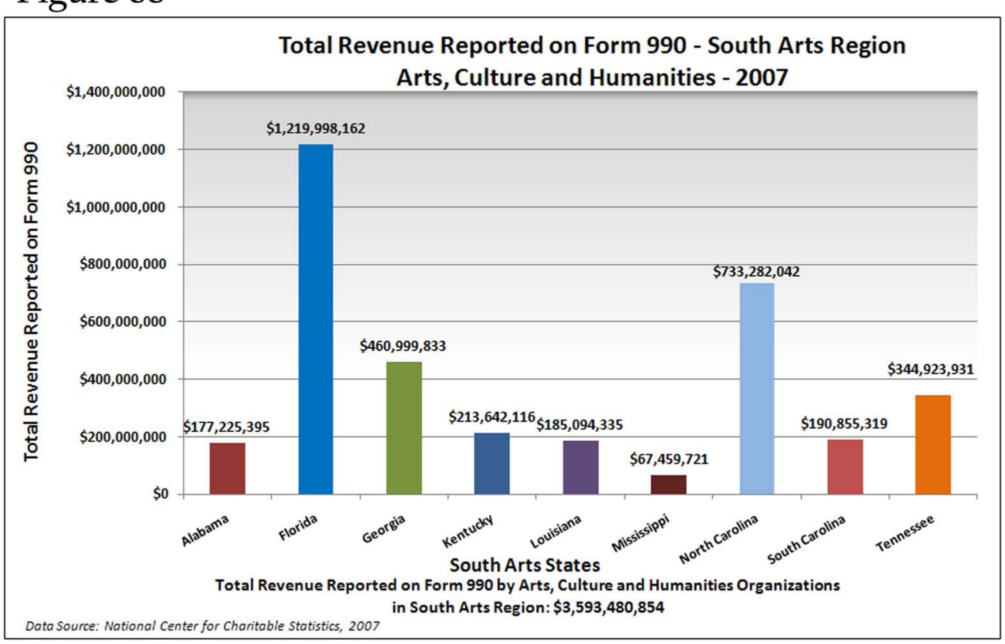
An average of 1.0 arts, culture, or humanities organization per 10,000 residents filed form 990 in the South Arts region. The state with the highest average is North Carolina at 1.3, followed by Kentucky and Tennessee, both with 1.1. Four states equaled the region average of 1.0 – Alabama, Florida, Louisiana and South Carolina.

Figure 67



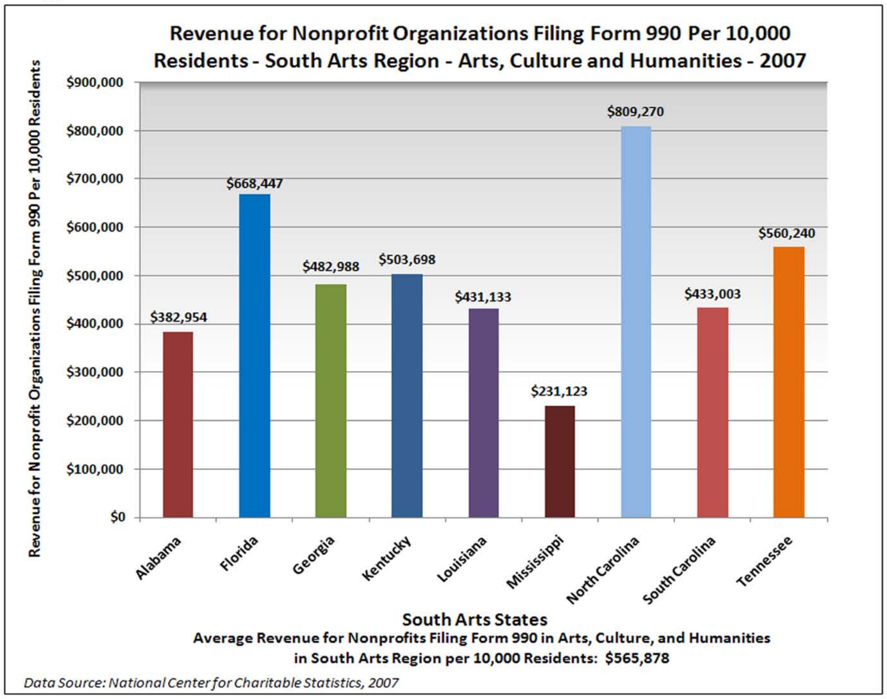
The total revenue for those arts, culture, and humanities nonprofit organizations in the South Arts region which filed form 990 in 2007 was almost $3.6 billion. $1.2 billion of that revenue, or roughly one-third of the total for the region, was generated by organizations based in Florida. North Carolina organizations earned more than $733 million, while organizations in Georgia and Tennessee earned $461 million and $345 million respectively.

Figure 68



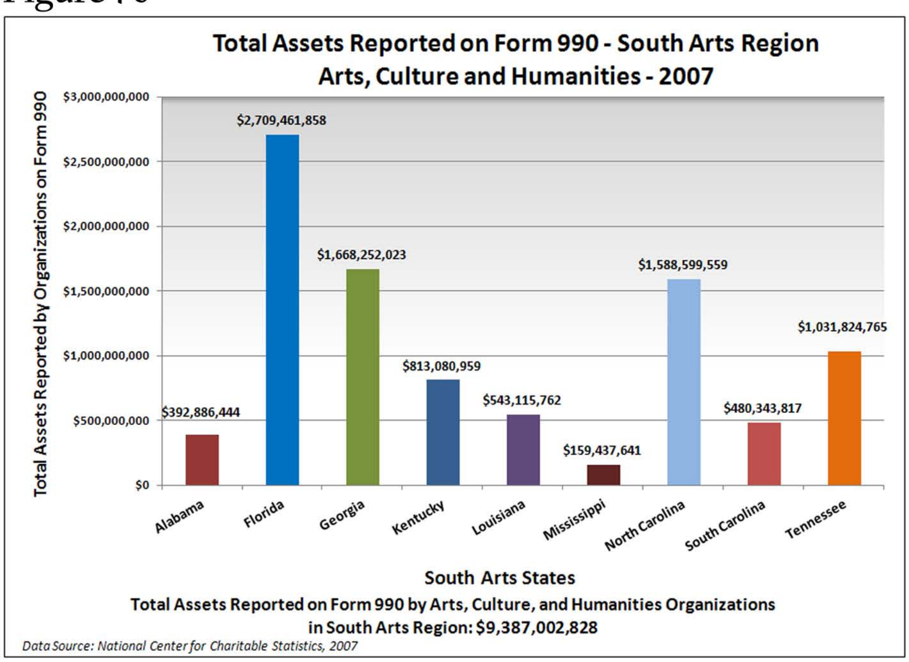
Among the arts, culture, and humanities nonprofits that filed form 990 in the South Arts region in 2007, the average revenue was $565,878. The state with organizations that have the highest average revenue is North Carolina at $809,000. Florida is second at $668,000, followed by Tennessee at $560,000, and Kentucky at $504,000.

Figure 69



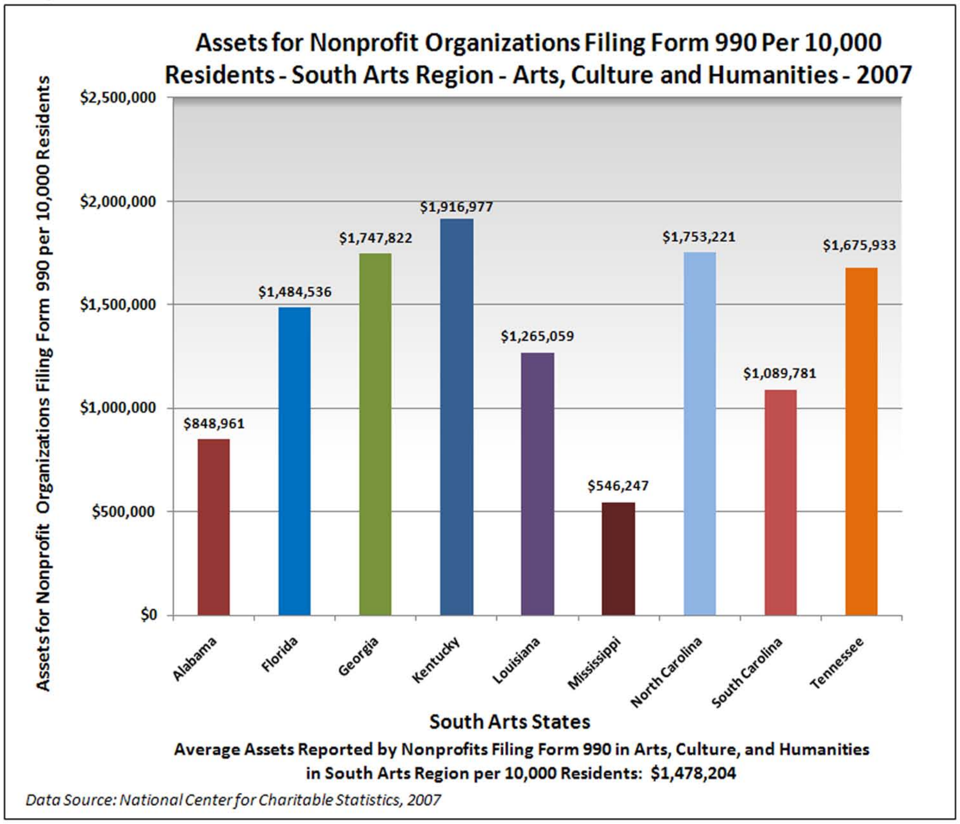
In addition to revenue, nonprofits that file form 990 also report total assets. In 2007, arts, culture, and humanities nonprofit organizations in the South Arts region reported total assets of almost $9.4 billion. The total includes $2.7 billion in assets managed by organizations in Florida, as well as $1.7 billion in Georgia, $1.6 billion in North Carolina, and just over $1 billion in Tennessee.

Figure 70



The average assets per 10,000 residents of arts, culture, and humanities organizations which filed form 990 in the South Arts Region are worth $1,478,204. In Kentucky the assets for arts, culture, and humanities organizations filing form 990 averaged $1.92 million per 10,000 residents. The average in North Carolina is $1.75 million, followed by Georgia with $1.75 million, Tennessee at $1.68 million, Florida at $1.48 million, Louisiana at $1.27 million, South Carolina at $1.09 million, Alabama at $849,000, and Mississippi at $546,000.

Figure 71



Alabama

Creative Industries Profile

Alabama – Creative Industries Profile

From Hank Williams to Harper Lee, from the Alabama Shakespeare Festival to Mobile's Mardi Gras, from the Birmingham Museum of Art to the Jule Collins Smith Museum of Fine Art, from the Blind Boys of Alabama to the Gee's Bend Quilters, from the Coleman Center for the Arts to the Capri Theatre, Alabama has a rich and diverse culture full of stories, icons, and institutions that help define the state's identity and reputation.

While the arts and culture are important for the state's image and for drawing tourists, they also serve as the foundational base for Alabama's creative economy, which includes a significant number of publishers with the corporate headquarters for Books-A-Million and its subsidiaries located in Florence, a significant presence by Time, Inc. division Southern Progress Corporation which produces lifestyle magazines such as Southern Living, Coastal Living, and Cooking Light based in Birmingham, the headquarters of newspaper conglomerate Community Newspaper Holdings, and periodical publisher Paragon Press in Montgomery.

The creative industries in Alabama represent 4,781 businesses, employing a total of 71,081 people, who earn annual wages totaling more than $2 billion, and generate almost $8.7 billion in annual revenue. These figures represent 4.9% of the state's businesses, 3.7% of the state's employment, at least 2.9% of all wages earned, and 2.5% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Alabama are at the core of the state's creative industries. Of the 1,225 registered arts and culture nonprofits in the state, 462 of those filed IRS form 990, reporting more than $177 million in annual revenue and almost $393 million in assets.

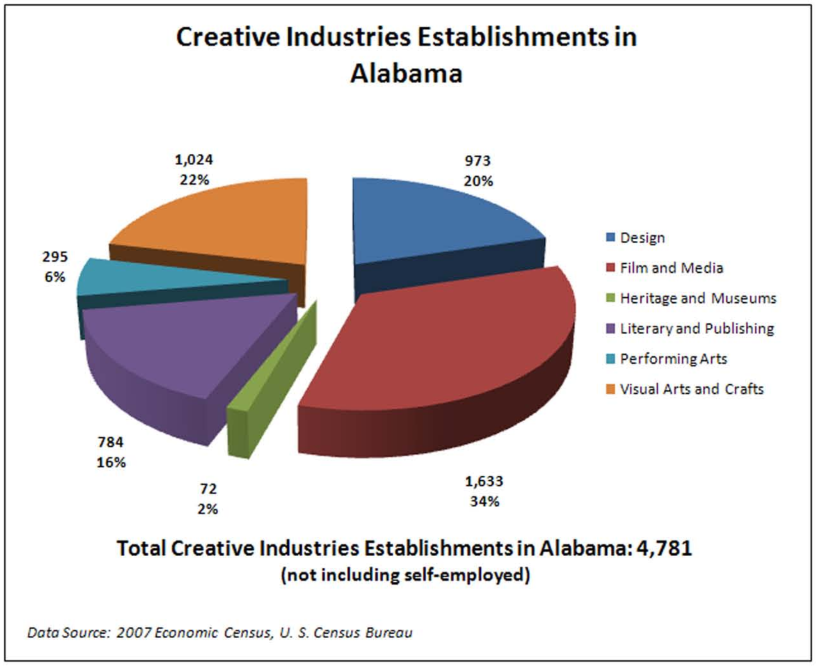
The creative industries that fall within the film and media sector and the literary and publishing sector make up the largest percentage of the state's creative economy. The literary and publishing sector is led by periodical publishers, newspaper publishers, commercial lithographic printing, and independent writers. Meanwhile, the leading industries within the film and media sector include radio, television, and other electronics stores, cable and other program distribution, software publishers, advertising agencies, and television broadcasting. Other leading sectors include independent performers, jewelry stores, and architectural services.

The information in the following pages presents the creative economy data for Alabama in more detail with appropriate documentation.

Creative Industries in Alabama – By the Numbers

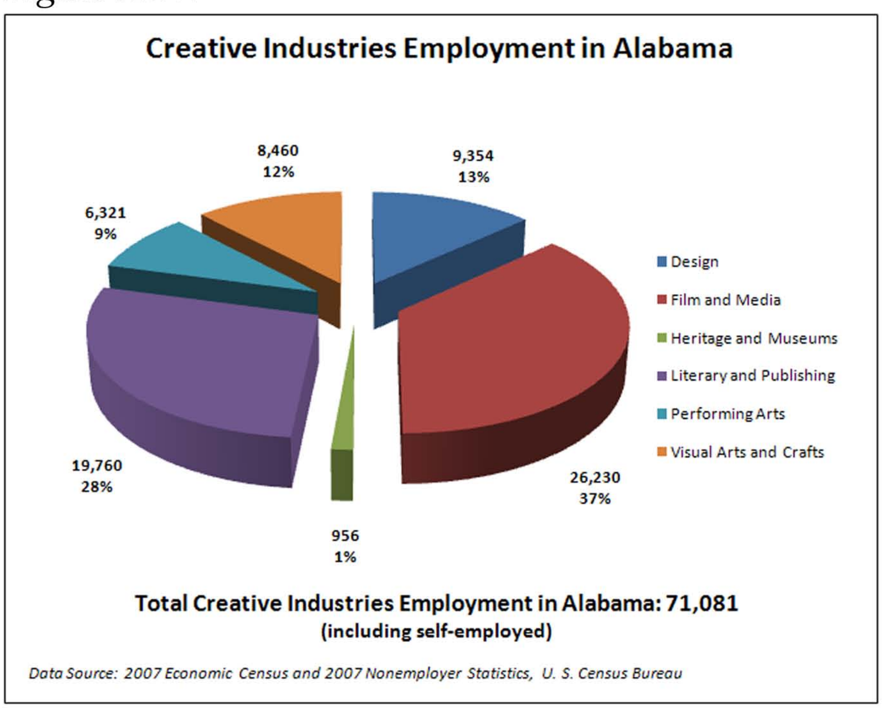
The creative industries in Alabama are driven by 4,781 creative industries establishments, including 1,633 in film and media, 1,024 in visual arts and crafts, 973 in design, and 784 in literary and publishing.

Figure AL-1



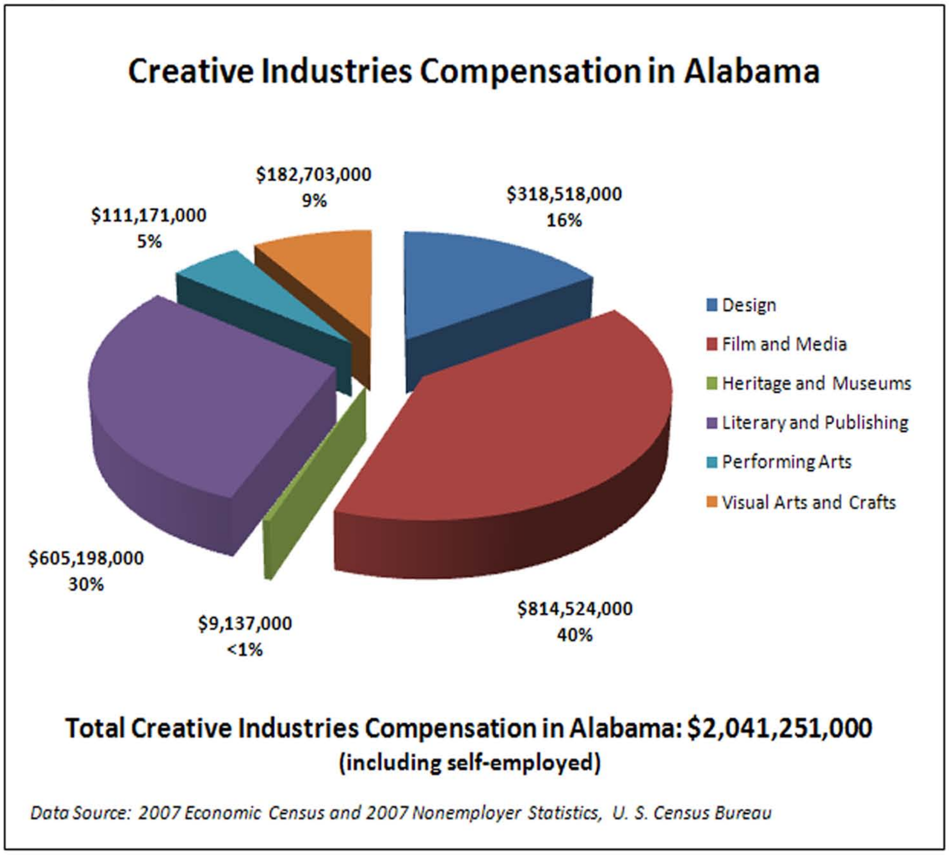
The creative industries employ 71,081 people in Alabama, including the self-employed. The largest employment sector among the creative industries is film and media with 26,230, followed by literary and publishing with 19,760 employed. The next three largest are the design sectors employing 9,354, visual arts and crafts with 8,460, and performing arts with 6,321 people employed.

Figure AL-2



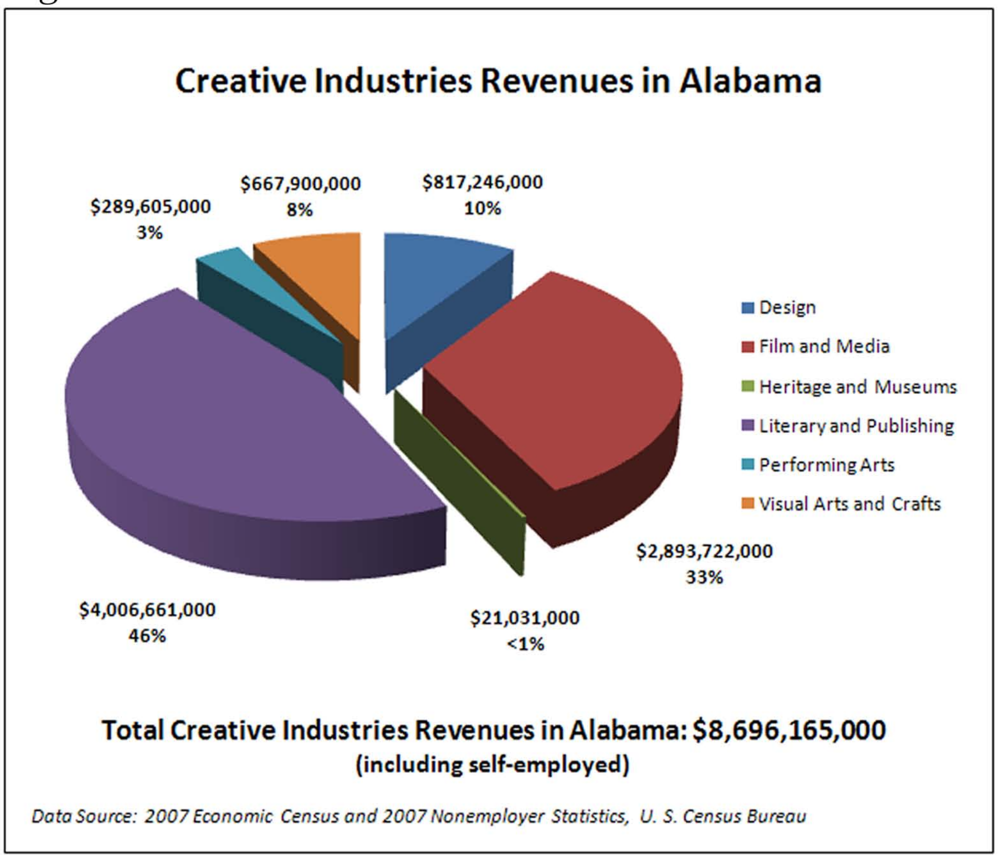
Workers in the creative industries in Alabama earned more than $2 billion in 2007. About 40% of that total, or almost $815 million, was earned by people working in film and media. Workers in literary and publishing earned more than $605 million or 30% of the total, while those employed in design earned almost $319 million. Wages in the visual arts and crafts totaled $182.7 million, with $111.2 million earned in the performing arts, and $9 million earned in heritage and museums.

Figure AL - 3



Total annual revenue for the creative industries in Alabama is $8.7 billion. The largest sector based on revenue is literary and publishing with more than $4 billion, and 46% of the total creative industries revenue for the state. Film and media revenue totaled $2.9 billion, or 33% of the total creative industries revenue for Alabama. Creative industries revenue for the state also included $817 million in design, $668 million in visual arts and crafts, $290 million in performing arts, and $21 million in heritage and museums.

Figure AL-4



Per Capita Data for Alabama Creative Industries

Based on number of establishments, the film and media sector group is the largest among the creative industries in Alabama with 1,633 businesses in the state, or 3.53 for every 10,000 residents. The state is also home to 1,024 visual arts and crafts establishments or 2.21 for every 10,000 residents. The remaining Alabama creative industries establishments include 2.1 in design, 1.69 in literary and publishing, 0.64 in performing arts, and 0.16 in heritage and museums for every 10,000 residents.

Table AL - 1

Creative Industries Establishments in Alabama – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	973	2.10
Film and Media	1,633	3.53
Heritage and Museums	72	0.16
Literary and Publishing	784	1.69
Performing Arts	295	0.64
Visual Arts and Crafts	1,024	2.21
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN ALABAMA	4,781	10.33

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,627,851 from the Economic Census.

The film and media sector employs 56.7 people for every 10,000 residents in the state of Alabama. Film and media is followed by literary and publishing with 42.7 workers, design with 20.2 workers, visual arts and crafts with 18.3 workers, performing arts with 13.7 workers, and heritage and museums with 2.1 workers for every 10,000 residents.

Table AL - 2

Creative Industries Employment in Alabama – Per 10,000 Residents	Employment	Employment Per 10,000
Design	9,354	20.2
Film and Media	26,230	56.7
Heritage and Museums	956	2.1
Literary and Publishing	19,760	42.7
Performing Arts	6,321	13.7
Visual Arts and Crafts	8,460	18.3
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN ALABAMA	71,081	153.6

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic Census.

Wages from work in the creative industries in Alabama totaled more than $2 billion in 2007. The total included more than $1.7 million for every 10,000 residents in film and media, $1.3 million in literary and publishing, $688,000 in design, $395,000 in visual arts and crafts, $240,000 in performing arts, and $20,000 in heritage and museums for every 10,000 residents. The total of all creative industries wages equals $4.4 million for every 10,000 residents of Alabama.

Table AL-3

Creative Industries Establishments in Alabama – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	973	2.10
Film and Media	1,633	3.53
Heritage and Museums	72	0.16
Literary and Publishing	784	1.69
Performing Arts	295	0.64
Visual Arts and Crafts	1,024	2.21
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN ALABAMA	**4,781**	**10.33**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic

Total revenue from the creative industries in Alabama in 2007 was $8.7 billion or $18.8 million for every 10,000 state residents. These totals include $4 billion or $8.6 million for every 10,000 residents from literary and publishing; and $2.9 billion or $6.3 million for every 10,000 residents from film and media. In addition, $1.7 million in revenue for every 10,000 residents was generated in design, followed by $1.4 million in the visual arts and crafts, $626,000 in the performing arts, and $45,000 in heritage and museums for every 10,000 residents.

Table AL-4

Creative Industries Revenue in Alabama – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$817,246,000	$1,765,930
Film and Media	$2,893,722,000	$6,252,842
Heritage and Museums	$21,031,000	$45,444
Literary and Publishing	$4,006,661,000	$8,657,714
Performing Arts	$289,605,000	$625,787
Visual Arts and Crafts	$667,900,000	$1,443,218
TOTAL CREATIVE INDUSTRIES REVENUE IN ALABAMA	**$8,696,165,000**	**$18,790,936**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic

Top Ten Creative Industry Sectors for Alabama

The top ten creative industry sectors based on number of establishments in Alabama are jewelry stores; radio, television, and other electronics stores; florists; video tape and disc rental; photography studios; architectural services; book stores; commercial lithographic printing; radio stations; and fine arts schools. The sectors are spread throughout the larger categories of film and media; visual arts and crafts; design; and literary and publishing.

Table AL-5

Alabama - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	386
Radio, Television, and Other Electronics Stores	381
Florists	367
Video Tape and Disc Rental	348
Photography Studios, Portrait	260
Architectural Services	241
Book Stores	165
Commercial Lithographic Printing	149
Radio Stations	147
Fine Arts Schools	140

Data Source: 2007 Economic Census, U. S. Census Bureau

The largest creative industry employment sectors in the state are periodical publishers; radio, television, and other electronics stores; newspaper publishers; cable and other program distribution; commercial lithographic printing; software publishers; jewelry stores; photography studios; independent writers; and independent performers.

Table AL-6

Alabama - Top Ten Creative Industry Sectors by Total Employment	
Periodical Publishers	4,473
Radio, Television, and Other Electronics Stores	3,899
Newspaper Publishers	3,877
Cable and Other Program Distribution	3,276
Commercial Lithographic Printing	3,102
Software Publishers	2,879
Jewelry Stores	2,699
Photography Studios, Portrait	2,676
Independent Writers	2,611
Independent Performers	2,505

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on wages, the top creative industry sectors in Alabama include software publishers; periodical publishers; newspaper publishers; advertising agencies; commercial lithographic printing; architectural services; cable and other program distribution; television broadcasting; radio, television, and other electronics stores; and jewelry stores.

Table AL-7

Alabama - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$196,368,000
Periodical Publishers	$179,617,000
Newspaper Publishers	$143,972,000
Advertising Agencies	$137,943,000
Commercial Lithographic Printing	$123,802,000
Architectural Services	$122,097,000
Cable and Other Program Distribution	$111,577,000
Television Broadcasting	$104,982,000
Radio, Television, and Other Electronics Stores	$90,295,000
Jewelry Stores	$69,889,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Predicated on annual revenue, the largest creative industry sectors in Alabama are periodical publishers; radio, television, and other electronics stores; book, periodical, and newspaper merchant wholesalers; softwarepublishers; direct mail advertising; newspaper publishers; commercial lithographic printing; television broadcasting; jewelry stores; and architectural services.

Table AL-8

Alabama - Top Ten Creative Industry Sectors by Annual Revenue	
Periodical Publishers	$2,077,848,000
Radio, Television, and Other Electronics Stores	$797,256,000
Book, Periodical, and Newspaper Merchant Wholesalers	$622,019,000
Software Publishers	$560,493,000
Direct Mail Advertising	$541,860,000
Newspaper Publishers	$443,087,000
Commercial Lithographic Printing	$423,051,000
Television Broadcasting	$362,555,000
Jewelry Stores	$322,613,000
Architectural Services	$302,125,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Alabama Creative Industries to All Alabama Industries

The 4,781 creative industries establishments in Alabama represent 4.9% of all industry establishments in the state.

Table AL-9

Comparison of Alabama Creative Industries to Total Industries	
Category	**Establishments**
Alabama Creative Industries Totals	4,781
% of Alabama Total Industries	4.9%
Alabama Total Industries	98,013

Source: 2007 Economic Census, U.S. Census Bureau

The creative industries employ 71,081 people in the state of Alabama, including 17,272 who are self-employed. Creative industries workers represent 3.7% of all those employed in the state, including 5.6% of all self-employed.

Table AL-10

Comparison of Alabama Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Alabama Creative Industries Totals	53,809	17,272	71,081
% of Alabama Total Industries	3.3%	5.6%	3.7%
Alabama Total Industries	1,625,863	309,180	1,935,043

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The creative industries in Alabama paid wages totaling $2,041,251,000 in 2007, representing 2.9% of all wages paid to workers in the state. The total includes $463,703,000 earned by the self-employed in the creative industries, representing 3.5% of all earnings by the self-employed in the state.

Table AL-11

Comparison of Alabama Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Alabama Creative Industries Totals	$1,577,548,000	$463,703,000	$2,041,251,000
% of Alabama Total Industries	2.8%	3.5%	2.9%
Alabama Total Industries	$56,068,331,000	$13,276,335,000	$69,344,666,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Total revenues generated by the creative industries in Alabama equaled $8,696,165,000 in 2007, representing 2.5% of all revenue generated by industries in the state.

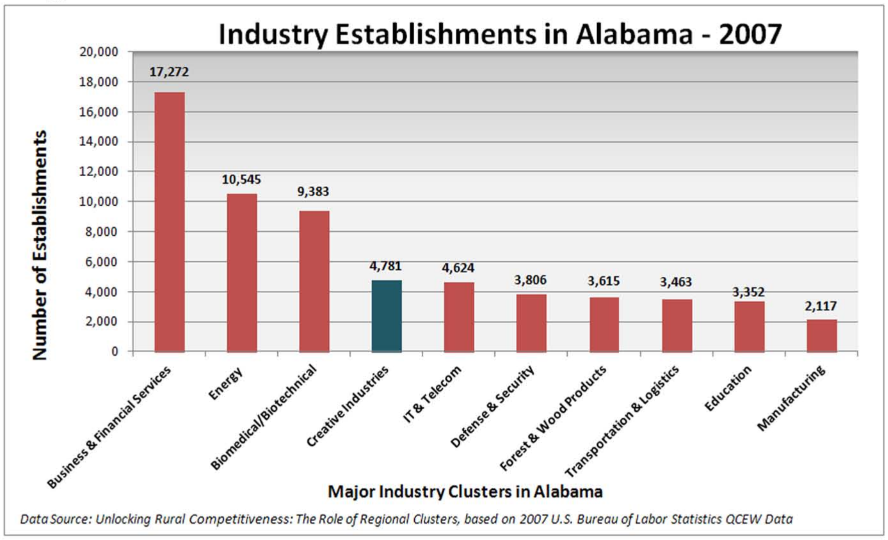
Table AL-12

Comparison of Alabama Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Alabama Creative Industries Totals	$8,232,462,000	$463,703,000	$8,696,165,000
% of Alabama Total Industries	2.4%	3.5%	2.5%
Alabama Total Industries	$337,362,121,000	$13,276,335,000	$350,638,456,000

Comparison of Alabama Creative Industries to Other Alabama Industry Clusters

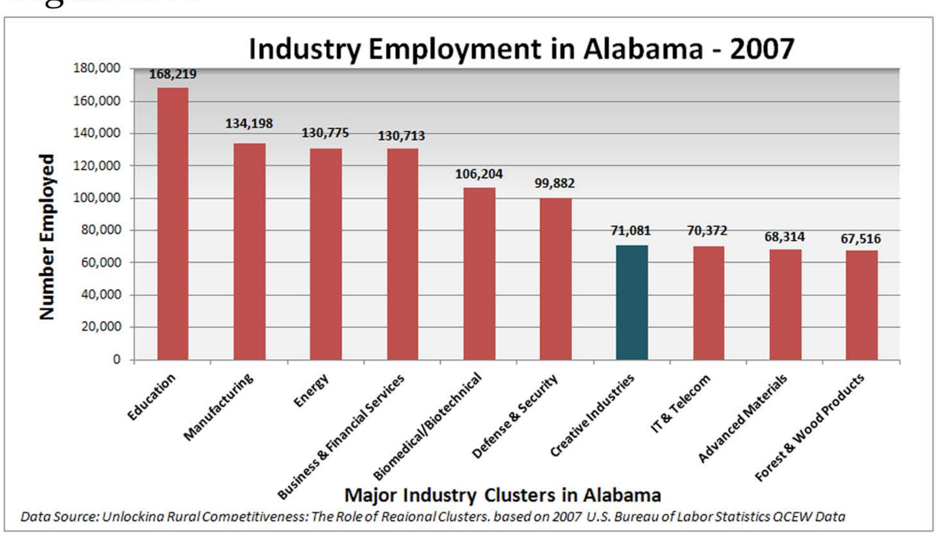
The creative industries cluster in Alabama represents 4,781 establishments, the fourth largest industry cluster in the state, eclipsing information technology and telecommunications, defense and security, forest and wood products, transportation and logistics, and manufacturing. This total number of establishments for the creative industries does not include the self-employed.

Figure AL-5



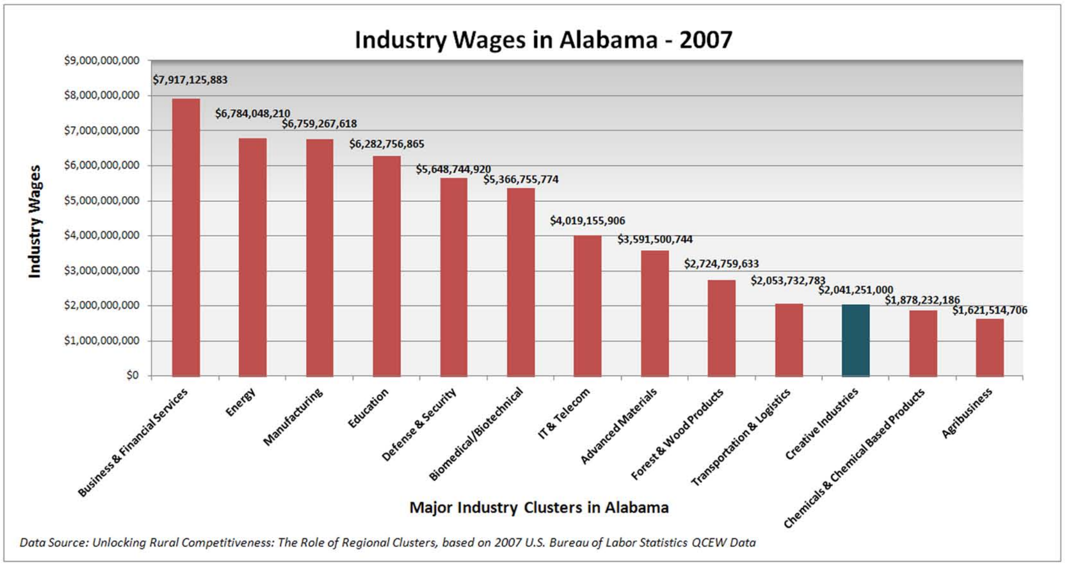
The creative industries cluster is the seventh largest in the state of Alabama based on the number employed, with 71,081 workers. The creative industries employ more than the industry clusters of information technology and telecommunications, advanced materials, and the forest and wood products industry. The actual number employed in the creative industries cluster is higher, since for 29 sectors within the creative industries the lowest number of an approximate range was selected to represent the number employed in those sectors. The approximate data is used for these sectors due to data suppression used by the Economic Census to maintain the confidentiality of data associated with individual firms within each sector.

Figure AL-6



Based on available data, the creative industries represent at least the eleventh largest industry cluster in Alabama based on payroll, larger than chemicals and chemical based products, and agribusiness industry clusters. However, it is likely that the actual total and the ranking of the creative industries cluster for Alabama is higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll in 27 separate creative industries sectors means that the total represented below is a major undercount for Alabama.

Figure AL-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Alabama

There were 1,225 registered arts, culture, and humanities nonprofit organizations in Alabama in 2007, representing 1.1% of the national total and 7.1% of the South Arts region total. Of those, 462 had annual revenues above $25,000 and therefore filed form 990 with the IRS, representing 1.0% of all arts, culture, and humanities non-profits filing form 990 in the U.S, and 6.9% of those in the South Arts region.

Table AL-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Alabama	1,225	1.10%	462	1.00%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The organizations filing form 990 from Alabama reported total revenue of more than $177 million in 2007, 0.4% of the national total revenue for all arts, culture, and humanities nonprofit organizations, and 4.9% of the South Arts region total. Those same organizations reported total assets of almost $393 million in 2007, representing 0.3% of the total arts, culture, and humanities nonprofit organization assets reported nationally, and 4.2% of the total reported for the South Arts region.

Table AL-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Alabama	$177,225,395	0.40%	$392,886,444	0.30%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Florida

Creative Industries Profile

Florida – Creative Industries Profile

Florida is a vast state with an abundance of natural resources and a temperate climate, bordering on tropical, which draws residents and visitors in droves. But just as influential as the physical environment of beaches, palm trees, and wetlands, is the rich cultural environment that pervades every corner of the state.

From the laid back and quirky culture of Key West, to the art deco architecture and international mix of cultures, artists, and designers in Miami; from the contemporary arts scene and numerous festivals in Jacksonville, to the world-class Tampa Bay Performing Arts Center and the Salvador Dali Museum in Tampa Bay/St. Petersburg; from the University Center for the Performing Arts at the University of Florida in Gainesville, to what has been called possibly the best independent film theater in the country, the Enzian Theater in Maitland , every corner of Florida is impacted by the arts and culture.

The state is home to 29,735 nonprofit and for-profit creative industries establishments, employing 367,025 people, who receive more than $14 billion in annual payroll, and who help their companies generate $49.7 billion in annual revenues.

At this scale, Florida's creative industries are a powerful economic force. They represent 5.9% of all industry establishments in the state, 4.2% of all employment, 4.3% of all employee payroll, and at least 3.9% of all industry revenues.

The nonprofit arts, culture, and humanities organizations in Florida are at the core of the state's creative industries. Of the 4,571 registered arts and culture nonprofits in the state, 1,887 of those filed IRS form 990, reporting more than $1.2 billion in annual revenue and $2.7 billion in assets.

The state has very large creative industry sectors, with film and media representing the largest segment, and including the leading sectors of radio, television, and other electronics stores, advertising agencies, software publishers, cable and other program distribution, television broadcasting, video tape and disc rental, and motion picture and video production. The state's creative industries are also carried by the significant literary and publishing segment, with leading sectors that include newspaper publishers, commercial lithographic printing, and periodical publishers. The design industry segment is also a significant contributor to the state's economy, including the sectors of architectural services, interior design services, graphic design services, and a combination of other specialized design services.

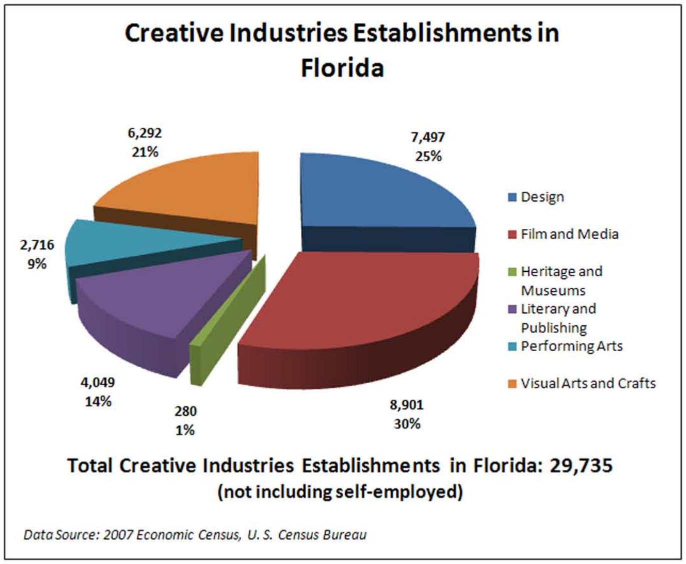
The creative industries represent the third largest industry cluster in the state based on establishments, the fifth largest cluster based on employment, and the sixth largest cluster based on total payroll.

The information in the following pages presents the creative economy data for Florida in more detail with appropriate documentation.

Creative Industries in Florida – By the Numbers

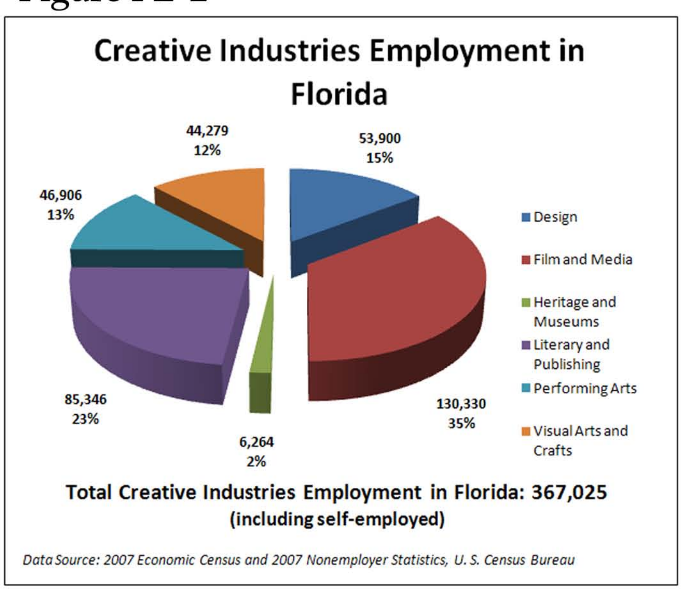
The creative industries in Florida are by far the largest among the states in the South Arts region. The total number of creative industries establishments in the state is 29,735, including 8,901 in film and media, 7,497 in design, 6,292 in visual arts and crafts, 4,049 in literary and publishing, 2,716 in performing arts, and 280 in heritage and museums.

Figure FL-1



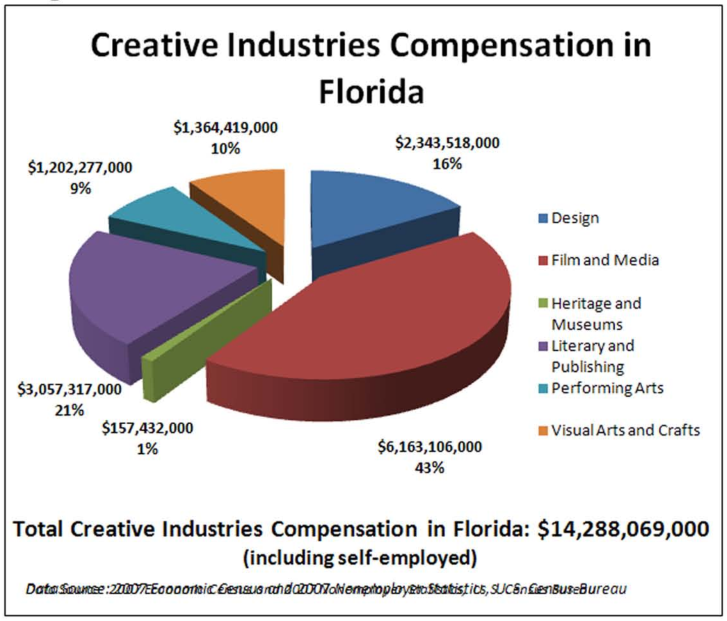
The creative industries represent a major sector of employment in Florida, as well. With 367,025 employed in the creative industries, including the self-employed, more than one-third of that total work in film and media with 130, 330 people employed. The second largest sector based on employment is literary and publishing, with 85,346 people employed. There is a fairly even breakdown of employment numbers among the next three sectors, with 53,900 in design, 46,906 in performing arts, and 44,279 in visual arts and crafts. They are followed by heritage and museums with 6,264 people employed.

Figure FL-2



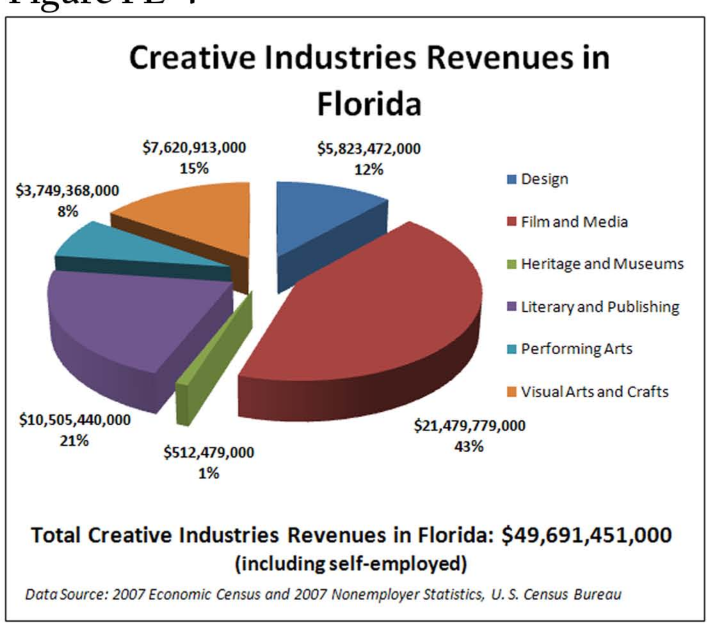
Annual payroll and income earned by individuals self-employed in the creative industries in Florida total more than $14 billion. The largest sector in the state is film and media, with more than $6.1 billion in payroll, followed by literary and publishing with more than $3.0 billion, design with more than $2.3 billion, visual arts and crafts with more than $1.3 billion, performing arts with $1.2 billion, and heritage and museums with $157 million in compensation.

Figure FL-3



Based on total annual revenues, Florida's revenues of almost $49.7 billion represent more than one-third of all creative industries revenues in the South Arts region. The state is led by film and media with $21.5 billion in annual revenues, followed by literary and publishing with $10.5 billion, visual arts and crafts with $7.6 billion, design with $5.8 billion, performing arts with $3.7 billion, and heritage and museums with $512 million in annual revenues.

Figure FL-4



Per Capita Data for Florida Creative Industries

Across the board, Florida's largest creative industry segment is film and media, with 4.88 establishments, 71.4 employees, $3.4 million in payroll, and $11.8 million in annual revenues per 10,000 residents in the state. While design has the second largest number of establishments per 10,000 residents with 4.11, it slips to the position ofthird largest segment based on employees, with 29.5 for every 10,000 residents, and compensation, with $1.3 million for every 10,000. Design is the fourth largest sector in the state based on revenues with $3.2 million per 10,000 residents.

Table FL-1

Creative Industries Establishments in Florida – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	7,497	4.11
Film and Media	8,901	4.88
Heritage and Museums	280	0.15
Literary and Publishing	4,049	2.22
Performing Arts	2,716	1.49
Visual Arts and Crafts	6,292	3.45
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN FLORIDA	29,735	16.29

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 18,251,243 from the Economic Census.

Generally, literary and publishing is the second largest creative industries segment in Florida, although the segment has only the fourth most establishments with 2.22 per 10,000 residents. Literary and publishing has the second most in the remaining categories, with 46.8 employees per 10,000 residents, $1.7 million in payroll per 10,000 residents, and $5.8 million in annual revenue per 10,000 residents.

Table FL-2

Creative Industries Employment in Florida – Per 10,000 Residents	Employment	Employment Per 10,000
Design	53,900	29.5
Film and Media	130,330	71.4
Heritage and Museums	6,264	3.4
Literary and Publishing	85,346	46.8
Performing Arts	46,906	25.7
Visual Arts and Crafts	44,279	24.3
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN FLORIDA	367,025	201.1

Source: 2007 Economic Census, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 18,251,243 from the Economic Census.

In some respects, the visual arts and crafts and performing arts segments in Florida are comparable in size. The visual arts and crafts include 3.45 establishments, 24.3 employees, $748,000 in payroll, and $4.1 million in annual revenues for every 10,000 residents. Meanwhile, the performing arts segment boasts 1.49 establishments, 25.7 employees, $659,000 in payroll, and $2 million in annual revenues per 10,000 residents in the state.

Table FL-3

Creative Industries Compensation in Florida – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$2,343,518,000	$1,284,032
Film and Media	$6,163,106,000	$3,376,814
Heritage and Museums	$157,432,000	$86,258
Literary and Publishing	$3,057,317,000	$1,675,128
Performing Arts	$1,202,277,000	$658,737
Visual Arts and Crafts	$1,364,419,000	$747,576
TOTAL CREATIVE INDUSTRIES COMPENSATION IN FLORIDA	**$14,288,069,000**	**$7,828,546**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 18,251,243 from the Economic Census.

Meanwhile, the smallest creative industries segment is heritage and museums, due in large part to the exclusion of data that represents parks and museums owned by federal, state, and local governments. The remaining heritage and museums establishments in Florida include 0.15 establishments, 3.4 employees, $86,258 in payroll, and $280,791 in annual revenue for every 10,000 residents in the state.

Table FL-4

Creative Industries Revenue in Florida – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$5,823,472,000	$3,190,726
Film and Media	$21,479,779,000	$11,768,940
Heritage and Museums	$512,479,000	$280,791
Literary and Publishing	$10,505,440,000	$5,756,013
Performing Arts	$3,749,368,000	$2,054,308
Visual Arts and Crafts	$7,620,913,000	$4,175,558
TOTAL CREATIVE INDUSTRIES REVENUE IN FLORIDA	**$49,691,451,000**	**$27,226,338**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 18,251,243 from the Economic Census.

Top Ten Creative Industry Sectors for Florida

Among all industry sectors, the largest in Florida based on number of establishments is jewelry stores, with 2,283. Also based on number of establishments, the major design sectors in the state are architectural services; interior design services; graphic design services; and florists. The major film and media sectors are radio, television, and other electronics stores; advertising agencies; video tape and disc rental; and motion picture and video production. The major visual arts and crafts sector is photography studios.

Table FL-5

Florida - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	2,283
Radio, Television, and Other Electronics Stores	2,053
Architectural Services	1,924
Interior Design Services	1,874
Graphic Design Services	1,184
Advertising Agencies	1,167
Florists	1,051
Photography Studios, Portrait	930
Video Tape and Disc Rental	855
Motion Picture and Video Production	754

Data Source: 2007 Economic Census, U. S. Census Bureau

The aggregate film and media sectors make up the largest employment segment among the creative industries, including radio, television, and other electronics stores; advertising agencies; cable and other program distribution; and software publishers. The literary and publishing sectors make up a significant segment of creative industries employment as well, including newspaper publishers, and commercial lithographic printing. The major design employment sectors are architectural services, and specialized design services, which includes 11,584 self-employed. Other major creative industries employment sectors include jewelry stores; and promoters of performing arts, sports, and similar events with facilities.

Table FL-6

Florida - Top Ten Creative Industry Sectors by Total Employment	
Radio, Television, and Other Electronics Stores	24,085
Newspaper Publishers	22,760
Advertising Agencies	18,926
Architectural Services	14,958
Jewelry Stores	14,652
Cable and Other Program Distribution	14,619
Software Publishers	13,622
Commercial Lithographic Printing	12,896
Specialized Design Services	12,334
Promoters of Performing Arts, Sports, and Similar Events with Facilities	11,608

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The film and media sectors also make up the largest creative industries segment based on compensation. The major film and media sectors for compensation are software publishers; advertising agencies; cable and other program distribution; television broadcasting; and radio, television, and other electronics stores. Literary and publishing also maintain a large percentage of creative industries payroll, including the sectors of newspaper publishing, and commercial lithographic printing. The major design sectors for compensation are architectural services, and specialized design services. The remaining top ten creative industries sector based on compensation is jewelry stores.

Table FL-7

Florida - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$1,415,133,000
Advertising Agencies	$1,007,542,000
Newspaper Publishers	$913,537,000
Architectural Services	$893,469,000
Cable and Other Program Distribution	$691,095,000
Television Broadcasting	$655,463,000
Specialized Design Services	$584,808,000
Radio, Television, and Other Electronics Stores	$556,917,000
Commercial Lithographic Printing	$551,623,000
Jewelry Stores	$451,001,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The creative industries represent a total of $49.7 billion in annual revenue in the state of Florida. The major sectors include several from film and media, including radio, television, and other electronics stores; software publishers; television broadcasting; and advertising agencies. Major literary and publishing revenue generators include newspaper publishers; commercial lithographic printing; and periodical publishers. The major revenue-producing sector within design is architectural services, while the visual arts and crafts are represented in the top ten by jewelry stores; and jewelry, watch, precious stone, and precious metal merchant wholesalers.

Table FL-8

Florida - Top Ten Creative Industry Sectors by Annual Revenue	
Radio, Television, and Other Electronics Stores	$5,647,181,000
Software Publishers	$3,837,990,000
Newspaper Publishers	$3,186,647,000
Television Broadcasting	$3,046,922,000
Jewelry Stores	$2,638,547,000
Architectural Services	$2,162,415,000
Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers	$2,035,880,000
Commercial Lithographic Printing	$1,766,641,000
Advertising Agencies	$1,734,816,000
Periodical Publishers	$1,509,879,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Florida Creative Industries to All Florida Industries

The 29,735 creative industries establishments in Florida represent 5.9% of the 501,422 industry establishments located in the state.

Table FL-9

Comparison of Florida Creative Industries to Total Industries	
Category	Establishments
Florida Creative Industries Totals	29,735
% of Florida Total Industries	5.9%
Florida Total Industries	501,422

Source: 2007 Economic Census, U.S. Census Bureau

Meanwhile, the total creative industries employment of 367,025 in Florida also represents 4.2% of all industry employment in the state, including 5.6% of all self-employed individuals.

Table FL-10

Comparison of Florida Creative Industries to Total Industries			
Category	Employment in Establishments	Self-Employment	Total Employment
Florida Creative Industries Totals	276,970	90,055	367,025
% of Florida Total Industries	3.9%	5.6%	4.2%
Florida Total Industries	7,163,066	1,604,734	8,767,800

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total payroll and self-employed income for workers in the creative industries of Florida is more than $14 billion, representing at least 4.3% of the state's overall industry payroll, including 4.6% of all earnings by Floridians who are self-employed.

Table FL-11

Comparison of Florida Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Florida Creative Industries Totals	$10,842,503,000	$3,445,566,000	$14,288,069,000
% of Florida Total Industries	4.2%	4.6%	4.3%
Florida Total Industries	$256,208,677,000	$75,092,467,000	$331,301,144,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The Florida creative industries generated almost $49.7 billion in revenue in 2007, representing at least 3.9% of all industries revenues earned in the state that year.

Table FL-12

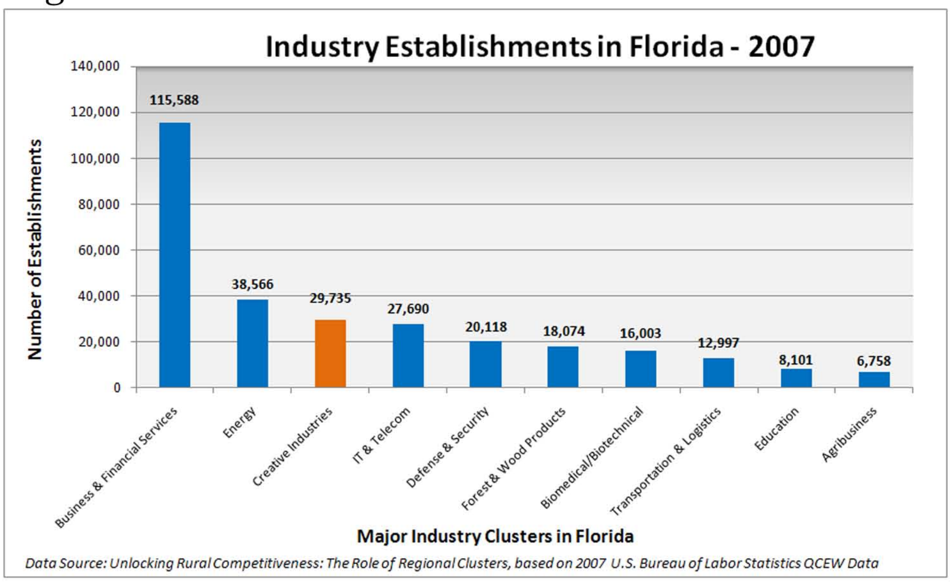
Comparison of Florida Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Florida Creative Industries Totals	$46,245,885,000	$3,445,566,000	$49,691,451,000
% of Florida Total Industries	3.8%	4.6%	3.9%
Florida Total Industries	$1,202,376,931,000	$75,092,467,000	$1,277,469,398,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Florida Creative Industries to Other Florida Industry Clusters

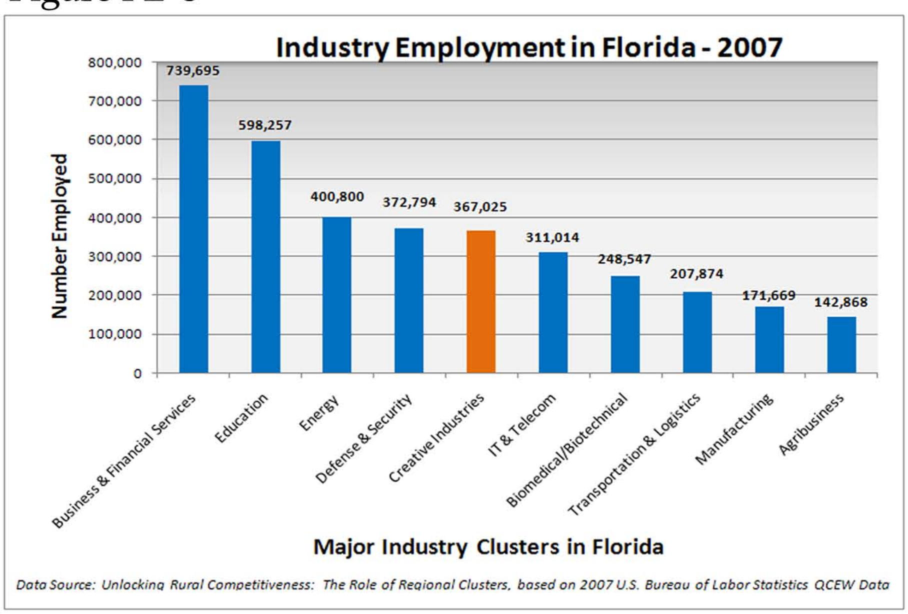
Based on the number of industry establishments, the creative industries are the third largest among all industry clusters in the state, bigger than information technology and telecommunications, defense and security, forest and wood products, biomedical and biotechnical, transportation and logistics, education, and agribusiness. This total number of establishments for the creative industries does not include the self-employed.

Figure FL-5



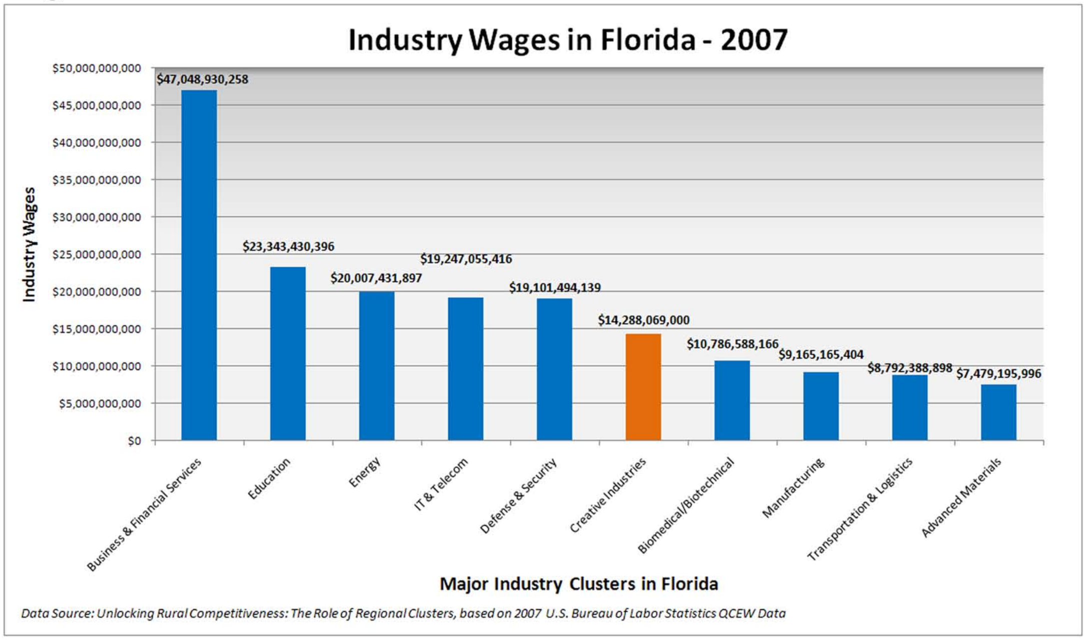
Based on the number employed, Florida creative industries are at least the fifth largest industry cluster in the state, exceeding the number employed in information technology and telecommunications, biomedical and biotechnical, transportation and logistics, manufacturing, and agribusiness.

Figure FL-6



Based on available data, the creative industries represent at least the sixth largest industry cluster in Florida based on payroll, larger than biomedical and biotechnical, manufacturing, transportation and logistics, and advanced materials. However, it is likely that the actual total and the ranking of the creative industries cluster for Florida is higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census for the payroll category in 11 separate creative industries sectors means that the total represented below is an undercount for the creative industries cluster in Florida.

Figure FL-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Florida

There are 4,571 nonprofit arts, culture, and humanities organizations in Florida, which make up 3.9% of all arts, culture, and humanities nonprofits in the U.S., and 26.6% of those in South Arts region. Of the 4,571 total arts, culture, and humanities organizations in Florida, 1,887 had annual revenues above $25,000 and therefore filed IRS form 990 in 2007.

Table FL-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Florida	4,571	3.90%	1,887	3.90%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

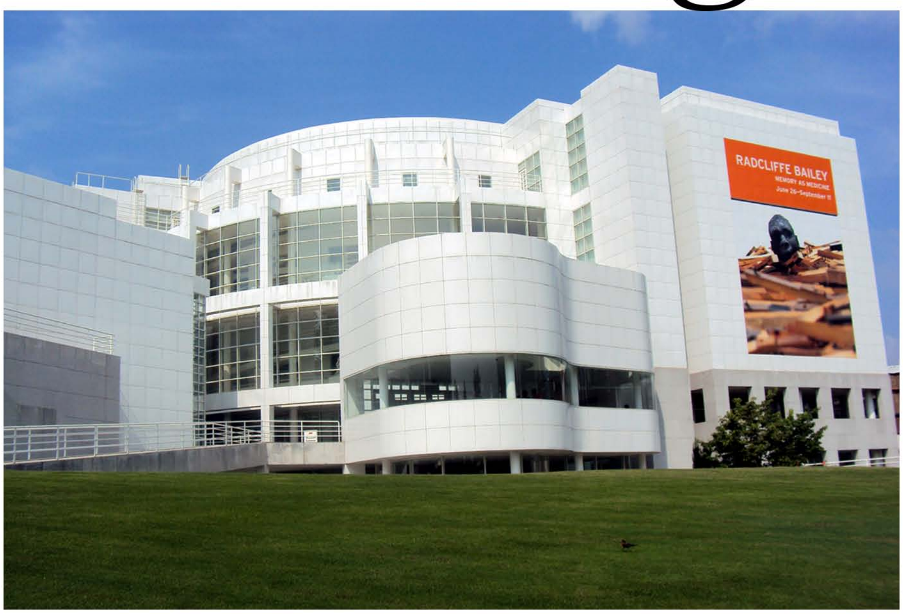
The Florida nonprofit arts, culture, and humanities organizations which filed form 990 reported more than $1.2 billion in revenue, representing 2.8% of the national total, and 34.0% of the South Arts region total. Those same Florida organizations also reported more than $2.7 billion in assets, representing 2.2% of the national total, and 28.9% of the South Arts region total.

Table FL-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Florida	$1,219,998,162	2.80%	$2,709,461,858	2.20%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Georgia



Creative Industries Profile

Georgia – Creative Industries Profile

The largest state east of the Mississippi River, Georgia has a diverse landscape – from the Appalachian Mountains at the north end of the state, to the Piedmont of the central area, to the farmlands and plains of the south, to the coastal marshlands and island beaches bordering the Atlantic. The cultural diversity of Georgia matches and perhaps even exceeds the diversity of its ecosystem. From the Bavarian-style village of Helen in the mountains, to the sprawling metropolis of Atlanta, from the military and agricultural center of Warner Robins, to the historic streets and squares of Savannah, to uninhabited Cumberland Island, the diversity of the state is pervasive and reaches to all four corners. The cultural heritage and institutions of the state are rich, as well. Folk artists Howard Finster, Nellie Mae Rowe, and Benny Andrews, authors Margaret Mitchell, Jean Toomer, James Dickey, and Flannery O'Connor, actors Julia Roberts, Tyler Perry, Holly Hunter, Ossie Davis, and Joanne Woodward, and musicians Ray Charles, The Allman Brothers Band, James Brown, Little Richard, Otis Redding, The Black Crowes, The B-52's, and R.E.M. have all called Georgia home. The political capital of the state, Atlanta also serves as a cultural capital for the region. From the Woodruff Arts Center and the High Museum of Art, to the historic Fox Theatre and the Georgia Aquarium – the world's largest – Atlanta is a mecca for arts and culture writ large. But the rest of the state is populated with cultural gems as well, including the Telfair Museum of Art, Jepson Center for the Arts and the Lucas Theatre in Savannah, the Springer Opera House and River-Center for the Arts in Columbus, the Morris Museum of Art and Sacred Heart Cultural Center in Augusta, the Grand Opera House and the Douglass Theatre in Macon, and The Arts Council Depot and the Smithgall Arts Center in Gainesville. Georgia and Atlanta are central to the region's creative economy as well – with Turner Broadcasting, CNN, and a plethora of film, broadcasting, music production, and publishing businesses calling the state home.

The creative industries in Georgia represent 12,768 businesses, employing a total of 199,921 people, who earn annual wages totaling more than $8 billion, and generate almost $29 billion in annual revenue. These figures represent 5.8% of the state's businesses, 4.7% of the state's employment, 4.8% of all wages earned, and 3.7% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Georgia are at the core of the state's creative industries. Of the 2,474 registered arts and culture nonprofits in the state, 898 of those filed IRS form 990, reporting approximately $461 million in annual revenue and almost $1.7 billion in assets.

The creative industries that fall within the film and media sector group and the literary and publishing sector group make up the largest percentage of the state's creative economy. The film and media sectors are led by broadcasting; software publishers; cable and other program distribution; advertising agencies; and radio, television, and other electronics stores. Meanwhile, the leading industries among the literary and publishing sectors include commercial lithographic printing; newspaper publishers; periodical publishers; independent writers; and book, periodical, and newspaper merchant wholesalers. Other leading sectors include independent performers, jewelry stores, architectural services, graphic design services, and specialized design services.

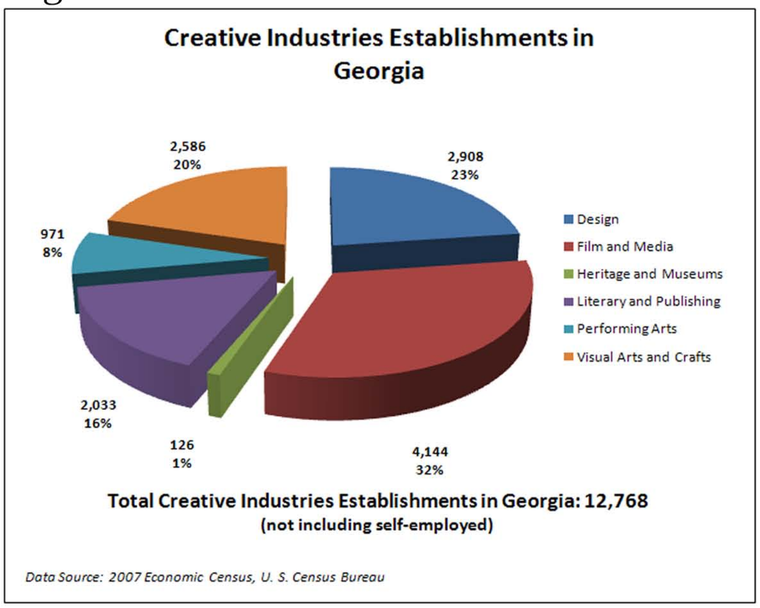
The information in the following pages presents the creative economy data for Georgia in more detail with appropriate documentation.

"Georgia and Atlanta are central to the region's creative economy–with Turner Broadcasting, CNN, and a plethora of film, broadcasting, music production, and publishing businesses calling the state home."

Creative Industries in Georgia – By the Numbers

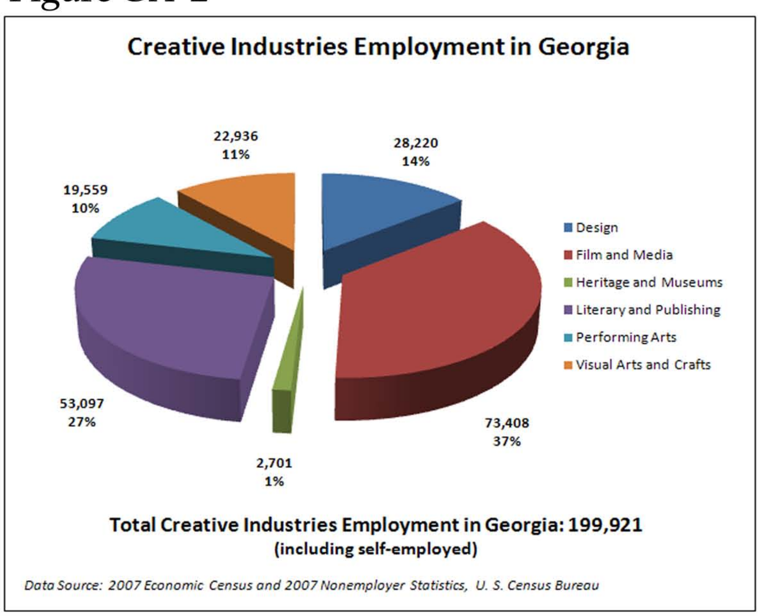
Based on total establishments, the creative industries in Georgia are second only to Florida in the South Arts region. There are 12,768 creative industries establishments in Georgia, with almost one-third of those in the film and media sector group with 4,144, followed by 2,908 establishments in design, 2,586 in visual arts and crafts, and 2,033 in literary and publishing. Behind those four major sector groups are the performing arts with 971 establishments and heritage and museums with 126.

Figure GA-1



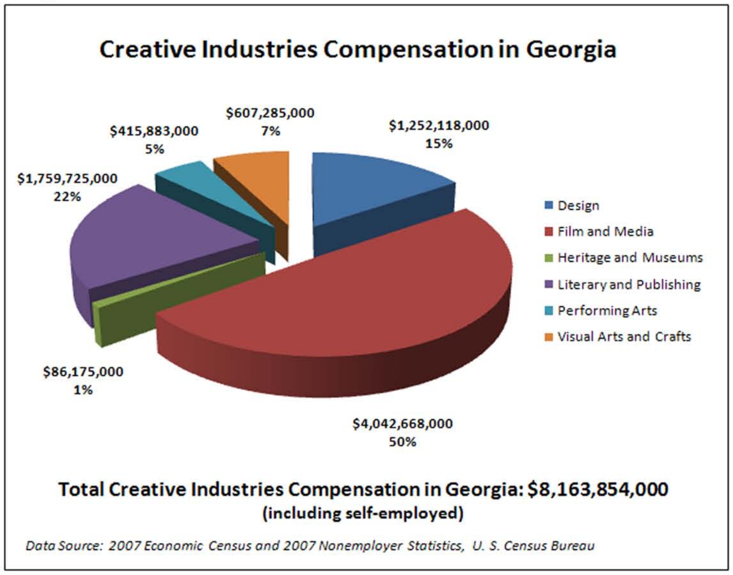
The creative industries in Georgia employ 199,921 people, including the self-employed. The total is comprised of 73,408 people employed in film and media, 53,097 in literary and publishing, 28,220 in design, 22,936 in visual arts and crafts, 19,559 in performing arts, and 2,701 in heritage and museums.

Figure GA-2



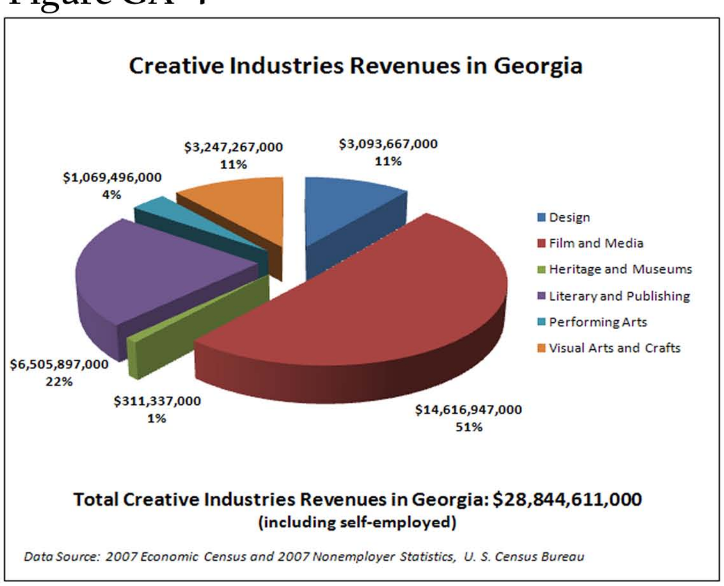
The total creative industries compensation in Georgia is more than $8 billion. Almost exactly half of that compensation is in the film and media sector group with just over $4 billion in payroll and earnings by the self-employed. The second half of the total is led by the literary and publishing sector with $1.8 billion in payroll, followed by design with $1.3 billion, visual arts and crafts with $607 million, performing arts with $416 million, and heritage and museums with $86 million in payroll and earnings by the self-employed.

Figure GA-3



The percentage breakdown of revenues earned by the creative industries sectors in Georgia match closely the percentage breakdown of compensation. The creative industries in Georgia generate annual revenues that approach $29 billion, including $14.6 billion from the film and media sector and $6.5 billion from literary and publishing. Those sectors are followed by visual arts and crafts with $3.2 billion in revenue, design with $3.1 billion, performing arts with $1.1 billion, and heritage and museums with $311 million in annual revenues.

Figure GA-4



Per Capita Data for Georgia Creative Industries

To provide another perspective on the size and reach of the creative industries, the data totals are broken down on a per capita basis using the base number of 10,000 people. There are 13.4 creative industries establishments for every 10,000 people in Georgia, which includes 4.3 film and media establishments, 3.05 design establishments, 2.7 visual arts and crafts establishments, 2.1 in literary and publishing, 1.0 in performing arts, and 0.13 in heritage and museums.

Table GA-1

Creative Industries Establishments in Georgia – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	2,908	3.05
Film and Media	4,144	4.30
Heritage and Museums	126	0.13
Literary and Publishing	2,033	2.10
Performing Arts	971	1.00
Visual Arts and Crafts	2,586	2.70
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN GEORGIA	**12,768**	**13.40**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 9,544,750 from the Economic Census.

Looking at employment, there are 209.5 people employed in the creative industries in Georgia for every 10,000 residents. That total includes 76.9 people employed in film and media for every 10,000 Georgians, 55.6 in literary and publishing, 29.6 in design, 24.0 in visual arts and crafts, 20.5 in the performing arts, and 2.8 in heritage and museums.

Table GA-2

Creative Industries Employment in Georgia – Per 10,000 Residents	Employment	Employment Per 10,000
Design	28,220	29.6
Film and Media	73,408	76.9
Heritage and Museums	2,701	2.8
Literary and Publishing	53,097	55.6
Performing Arts	19,559	20.5
Visual Arts and Crafts	22,936	24.0
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN GEORGIA	**199,921**	**209.5**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic Census.

The total per capita compensation for the creative industries in Georgia is $8.5 million for every 10,000 residents. This includes $4.2 million in payroll and earnings by self-employed people working in film and media for every 10,000 residents, as well as $1.8 million in literary and publishing, $1.3 million in design, $636,000 in visual arts and crafts, $436,000 in the performing arts, and $90,000 for heritage and museum compensation for every 10,000 residents.

Table GA-3

Creative Industries Compensation in Georgia – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$1,252,118,000	$1,311,839
Film and Media	$4,042,668,000	$4,235,489
Heritage and Museums	$86,175,000	$90,285
Literary and Publishing	$1,759,725,000	$1,843,658
Performing Arts	$415,883,000	$435,719
Visual Arts and Crafts	$607,285,000	$636,250
TOTAL CREATIVE INDUSTRIES COMPENSATION IN GEORGIA	**$8,163,854,000**	**$8,553,240**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 9,544,750 from the Economic Census.

The per capita creative industries revenue for Georgia is $30,220,394 per 10,000 residents. More than half of that total is accounted for by the sectors in film and media with more than $15 million generated in revenue per 10,000 residents. The other half of the state's per capita creative industries revenue includes literary and publishing with $6.8 million per 10,000 residents, visual arts and crafts with $3.4 million, design with $3.2 million, performing arts with $1.1 million, and heritage and museums with $326,000 in compensation per 10,000 residents.

Table GA-4

Creative Industries Revenue in Georgia – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$3,093,667,000	$3,241,224
Film and Media	$14,616,947,000	$15,314,122
Heritage and Museums	$311,337,000	$326,187
Literary and Publishing	$6,505,897,000	$6,816,205
Performing Arts	$1,069,496,000	$1,120,507
Visual Arts and Crafts	$3,247,267,000	$3,402,150
TOTAL CREATIVE INDUSTRIES REVENUE IN GEORGIA	**$28,844,611,000**	**$30,220,394**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 9,544,750 from the Economic Census.

Top Ten Creative Industry Sectors for Georgia

The top creative industry sectors in the state of Georgia based on number of establishments include a variety from several sectors. From film and media, the top ten sectors include radio, television, and other electronics stores with 937, video tape and disc rental with 503, and advertising agencies with 436. From design, the list includes architectural services with 658, graphic design services with 616, florists with 603, and interior design services with 550. Visual arts and crafts include jewelry stores with 849, and photography studios with 524. The sole sector from literary and publishing in the top ten creative industry establishments in Georgia is commercial lithographic printing with 394.

Table GA-5

Georgia - Top Ten Creative Industry Sectors by Number of Establishments	
Radio, Television, and Other Electronics Stores	937
Jewelry Stores	849
Architectural Services	658
Graphic Design Services	616
Florists	603
Interior Design Services	550
Photography Studios, Portrait	524
Video Tape and Disc Rental	503
Advertising Agencies	436
Commercial Lithographic Printing	394

Data Source: 2007 Economic Census, U. S. Census Bureau

The top creative industry employment sector in Georgia is newspaper publishers with 11,880. Other major creative industries employment sectors from literary and publishing include commercial lithographic printing with 8,534, and independent writers with 8,272. Film and media is represented by software publishers with 10,875 people employed, radio, television, and other electronics stores with 9,873, advertising agencies with 8,746, and cable and other program distribution with 7,569. The design sectors among the top ten in employment include architectural services at 7,194, and specialized design services at 6,453. From the performing arts sector the largest is independent performers at 7,193 workers.

Table GA-6

Georgia - Top Ten Creative Industry Sectors by Total Employment	
Newspaper Publishers	11,880
Software Publishers	10,875
Radio, Television, and Other Electronics Stores	9,873
Advertising Agencies	8,746
Commercial Lithographic Printing	8,534
Independent Writers	8,272
Cable and Other Program Distribution	7,569
Architectural Services	7,194
Independent Performers	7,193
Specialized Design Services	6,453

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on employee compensation the largest creative industries sector in Georgia is software publishers with more than $1 billion in payroll and earnings by the self-employed. Additional film and media sectors in the top ten are broadcasting with $646 million in compensation, cable and other program distribution with $498 million, advertising agencies with $460 million, internet publishing and broadcasting with $300 million, and radio, television, and other electronics stores with $222 million. Design sectors in the top ten for compensation are architectural services at $514 million, and specialized design services at $228 million. Literary and publishing sectors in the top ten for compensation are newspaper publishers at $380 million and commercial lithographic printing at $378 million.

Table GA-7

Georgia - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$1,092,687,000
Broadcasting	$646,239,000
Architectural Services	$514,946,000
Cable and Other Program Distribution	$497,897,000
Advertising Agencies	$460,083,000
Newspaper Publishers	$380,124,000
Commercial Lithographic Printing	$378,197,000
Internet Publishing and Broadcasting	$300,468,000
Specialized Design Services	$228,139,000
Radio, Television, and Other Electronics Stores	$222,430,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The largest creative industries sector in Georgia based on annual revenue is broadcasting with $5.8 billion. The next largest film and media sectors are software publishers at $2.6 billion, radio, television, and other electronics stores at $2.0 billion, and advertising agencies at $968 million. Literary and publishing sectors in the top ten for annual revenue are commercial lithographic printing at $1.4 billion, newspaper publishers at $970 million, book, periodical, and newspaper merchant wholesalers at $901 million, and periodical publishers at $898 million. The design sector in the top ten for annual revenue is architectural services at $1.2 billion, and the visual arts and crafts sector in the top ten for annual revenue is jewelry stores with $841 million.

Table GA-8

Georgia - Top Ten Creative Industry Sectors by Annual Revenue	
Broadcasting	$5,819,605,000
Software Publishers	$2,563,985,000
Radio, Television, and Other Electronics Stores	$2,031,965,000
Commercial Lithographic Printing	$1,350,669,000
Architectural Services	$1,236,274,000
Newspaper Publishers	$970,064,000
Advertising Agencies	$967,711,000
Book, Periodical, and Newspaper Merchant Wholesalers	$901,219,000
Periodical Publishers	$897,998,000
Jewelry Stores	$841,215,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Georgia Creative Industries to All Georgia Industries

The 12,768 creative industries in Georgia represent 5.8% of all industry establishments in the state of Georgia.

Table GA-9

Comparison of Georgia Creative Industries to Total Industries	
Category	**Establishments**
Georgia Creative Industries Totals	12,768
% of Georgia Total Industries	5.8%
Georgia Total Industries	220,134

Source: 2007 Economic Census, U.S. Census Bureau

The 199,921 people employed in the creative industries in Georgia represent 4.7% of all employed in the state, including 52,016 or 7.1% of all self-employed.

Table GA-10

Comparison of Georgia Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Georgia Creative Industries Totals	147,905	52,016	199,921
% of Georgia Total Industries	4.2%	7.1%	4.7%
Georgia Total Industries	3,513,218	732,636	4,245,854

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Creative industries workers in Georgia earn more than $8 billion annually or 4.8% of all wages in the state, including $1.5 billion earned by the self-employed, which represents 4.6% of all self-employed earnings.

Table GA-11

Comparison of Georgia Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
Georgia Creative Industries Totals	$6,693,093,000	$1,470,761,000	$8,163,854,000
% of Georgia Total Industries	4.9%	4.6%	4.8%
Georgia Total Industries	$136,763,601,000	$31,734,859,000	$168,498,460,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The creative industries in Georgia generate at least $28.8 billion in annual revenues or 3.7% of all industry revenues in the state.

Table GA-12

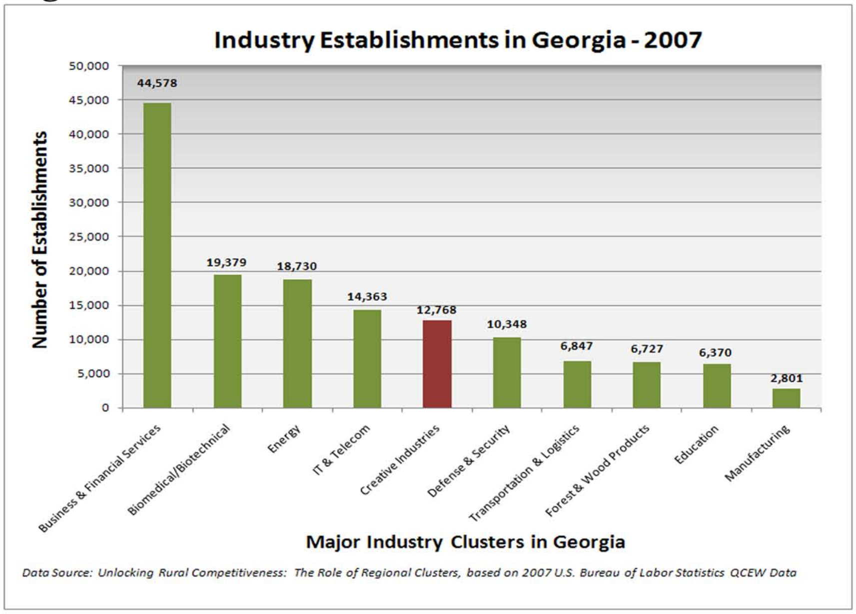
Comparison of Georgia Creative Industries to Total Industries			
Category	**Establishment Revenues**	**Self-Employment Revenues**	**Total Revenues**
Georgia Creative Industries Totals	$27,373,850,000	$1,470,761,000	$28,844,611,000
% of Georgia Total Industries	3.6%	4.6%	3.7%
Georgia Total Industries	$750,089,549,000	$31,734,859,000	$781,824,408,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Georgia Creative Industries to Other Georgia Industry Clusters

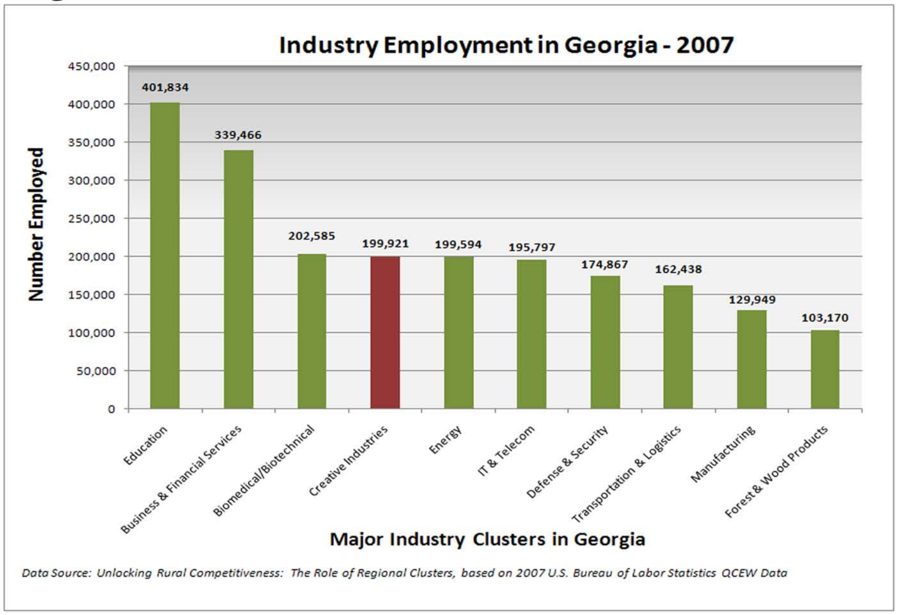
The creative industries includes 12,768 establishments in Georgia, which makes the industry cluster the fifth largest among all industry clusters in the state – larger than defense and security, transportation and logistics, forest and wood products, education, and manufacturing. This total number of establishments for the creative industries does not include the self-employed.

Figure GA-5



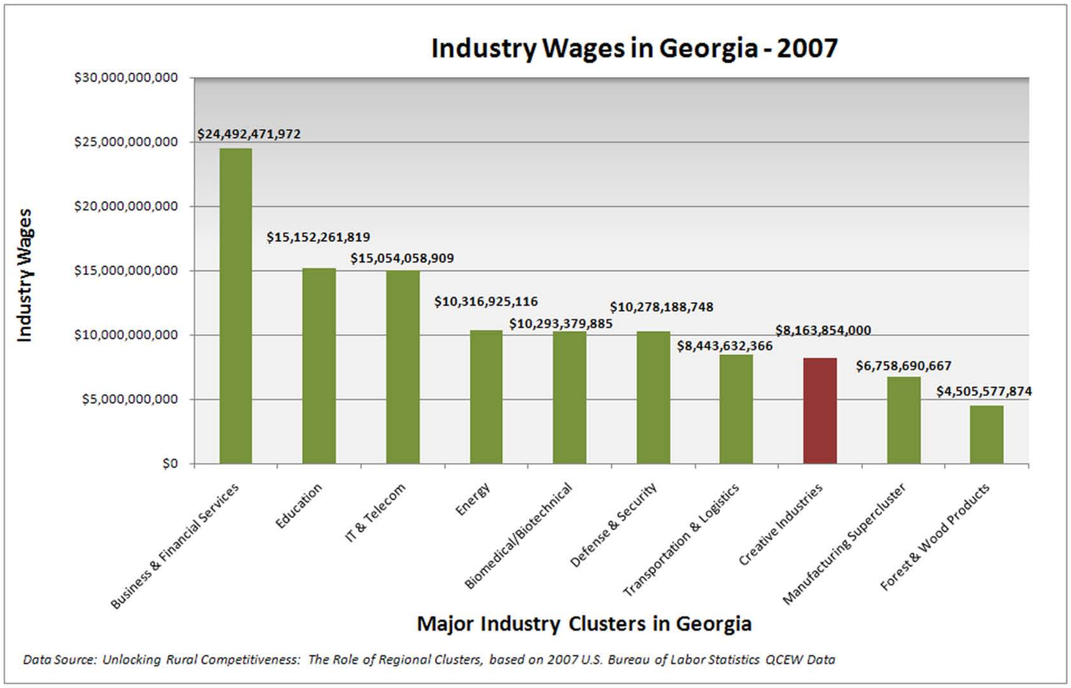
Based on industry employment, Georgia's creative industries represent the fourth-largest industry cluster in the state. The creative industries employ more people in Georgia than the industry clusters of energy, information technology and telecommunications, defense and security, transportation and logistics, manufacturing, and forest and wood products.

Figure GA-6



Georgia's creative industries pay more than $8 billion in wages each year, ranking the industry sector eighth in total payroll among all industry sectors in the state. However, it is likely that the actual total wages and the ranking of wages for the creative industries cluster in Georgia are higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for the payroll category in 11 separate creative industries sectors means that the total represented below is an undercount for the creative industries cluster in the state.

Figure GA-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable tocompare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Georgia

There are 2,474 arts, culture and humanities nonprofit organizations in Georgia, representing 2.1% of all arts, culture, and humanities nonprofits in the U.S. and 14.4% of those organizations in the South Arts region. Of the total, 898 organizations had annual revenues above $25,000 and therefore filed form 990 in 2007.

Table GA-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Georgia	2,474	2.10%	898	1.90%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The arts, culture and humanities nonprofit organizations in the state that filed form 990 generated total revenues of $461 million in 2007, representing 1.0% of revenue generated by all arts, culture and humanities nonprofits in the U.S. and 12.8% of the total revenue generated by those organizations in the South Arts region. The Georgia organizations also reported almost $1.7 billion in assets, representing 1.4% of the national total and 17.8% of the South Arts region total.

Table GA-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Georgia	$460,999,833	1.00%	$1,668,252,023	1.40%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Kentucky

Creative Industries Profile

Kentucky – Creative Industries Profile

Think of Kentucky and the first thing that comes to mind is probably the Kentucky Derby, and then maybe the song "My Old Kentucky Home." What you probably don't think about is the size and scale of the printing and publishing industry in the state, with its large employment base and huge annual revenues. You probably also do not think of the more than 3,500 independent writers who reside in the state. Like most, you probably underestimate the size, scale, and diversity of the culture and creative industries in the state of Kentucky.

Kentucky is known for a number of major cultural events, from the Kentucky Derby Festival to the award-winning Kentucky Crafted, from the Kentucky Shakespeare Festival to the Kentucky Bourbon Festival to the National Quartet Convention. Kentucky is also home to its fair share of major cultural institutions, such as the Kentucky Center for the Performing Arts, the Speed Art Museum, the Kentucky Music Hall of Fame and Museum, the Paramount Arts Center, the International Bluegrass Music Museum, and the Appalachian Artisan Center. Cutting-edge arts organizations and programs that are based in Kentucky include Appalshop in Whitesburg and the LowerTown Arts District in Paducah. The state is home to major performing arts organizations such as Kentucky Opera, Actors Theatre of Louisville, and the Kentucky Theater Project. The state also boasts America's largest Victorian neighborhood in Old Louisville.

The state of Kentucky is also home to numerous accomplished writers, including Wendell Berry, Hunter S. Thompson, Robert Penn Warren, Barbara Kingsolver, and Bobbie Ann Mason. John James Audubon also called the state home, as have a number of actors and musicians – from Stephen Foster and Loretta Lynn, to George Clooney and Billy Ray Cyrus, from The Judds and The Everly Brothers, to Crystal Gayle and Bill Monroe, from Ricky Skaggs and Dwight Yoakum, to Patty Loveless, Lionel Hampton, and Johnny Depp.

While the arts and culture in Kentucky loom large, they only represent a percentage of the overall creative industries in the state, which are dominated by large industry sectors such as commercial lithographic printing, book and greeting card publishers, newspaper publishers, and advertising agencies. In a state where the creative industries earn more than $7 billion in revenue and pay more than $2 billion in payroll, it takes more than high profile organizations and famous individuals to make an economic contribution this significant.

The creative industries of Kentucky are represented by 4,470 establishments, employing more than 71,000 people, who earn wages totaling more than $2 billion, and generate $7.2 billion in annual revenue. The creative industries represent a full 5% of the industry establishments in the state, 4.1% of the state's employment,, at least 3.4% of all wages, and at least 2% of all industry revenues.

At the core of the state's creative industries, there are 1,291 nonprofit arts, culture, and humanities organizations registered in Kentucky, 468 of which filed IRS form 990 in 2007. These organizations reported almost $214 million in revenue and more than $813 million in assets.

Many of the top creative industry sectors in Kentucky fall under literary and publishing – including commercial lithographic printing, newspaper publishers, book and greeting card publishers, book stores, and independent writers. Within film and media, the state's major industry sectors include cable and other program distribution; radio, television, and other electronics stores; television broadcasting; advertising agencies; audio and video equipment manufacturing; and video tape and disc rental. Other major creative industry sectors in the state include jewelry stores, photography studios, florists, architectural services, blown glass and glassware, and ornamental and architectural metal work.

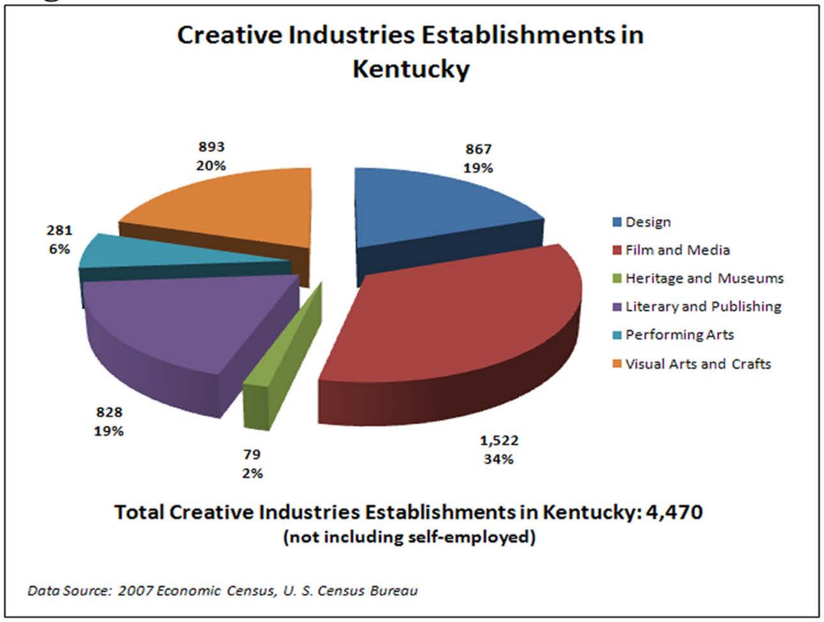
The information in the following pages presents the creative economy data for Kentucky in more detail with appropriate documentation.

"Think of Kentucky and the first thing that comes to mind is probably the Kentucky Derby, and then maybe the song 'My Old Kentucky Home.' What you probably don't think about is the size and scale of the printing and publishing industry in the state, with its large employment base and huge annual revenues."

Creative Industries in Kentucky – By the Numbers

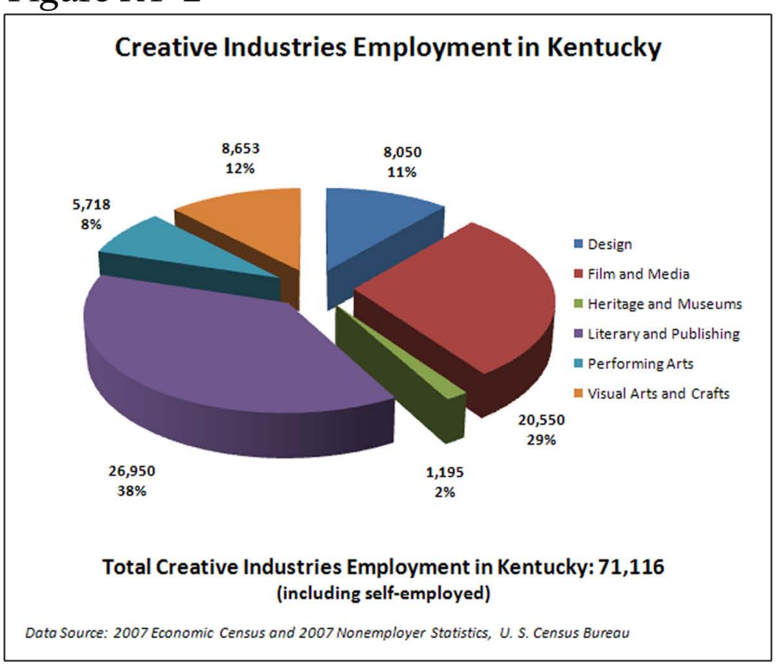
The creative industries of Kentucky are represented by 4,470 establishments. That number includes 1,522 in film and media, 893 in visual arts and crafts, 867 in design, 828 in literary and publishing, followed by 281 in performing arts and 79 in heritage and museums.

Figure KY-1



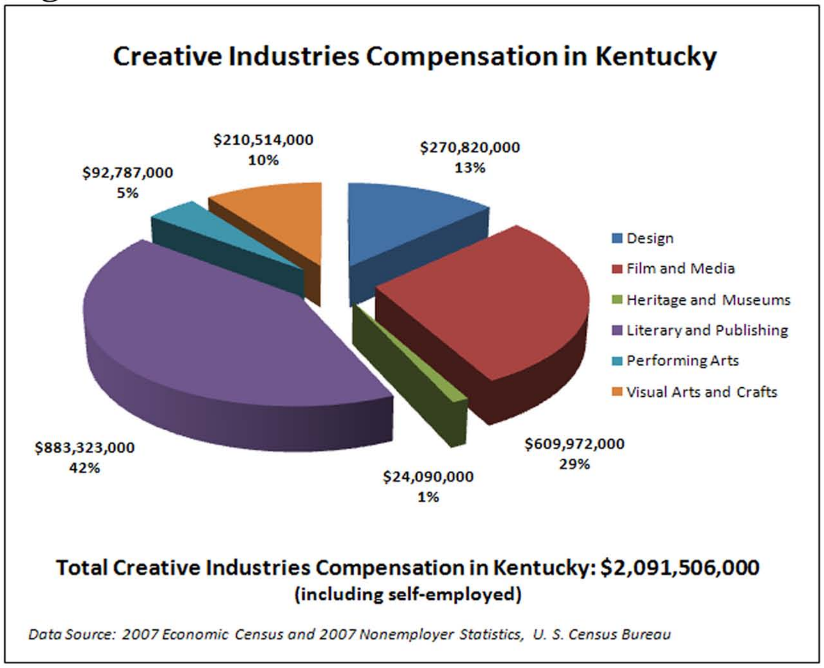
Based on employment, the largest sector group among the creative industries in Kentucky is literary and publishing. Of the 71,116 employed by the creative industries in the state, 26,950 are employed in literary and publishing. The second largest is film and media with 20,550 people employed, followed by visual arts and crafts with 8,653, design with 8,050, performing arts with 5,718, and heritage and museums with 1,195.

Figure KY-2



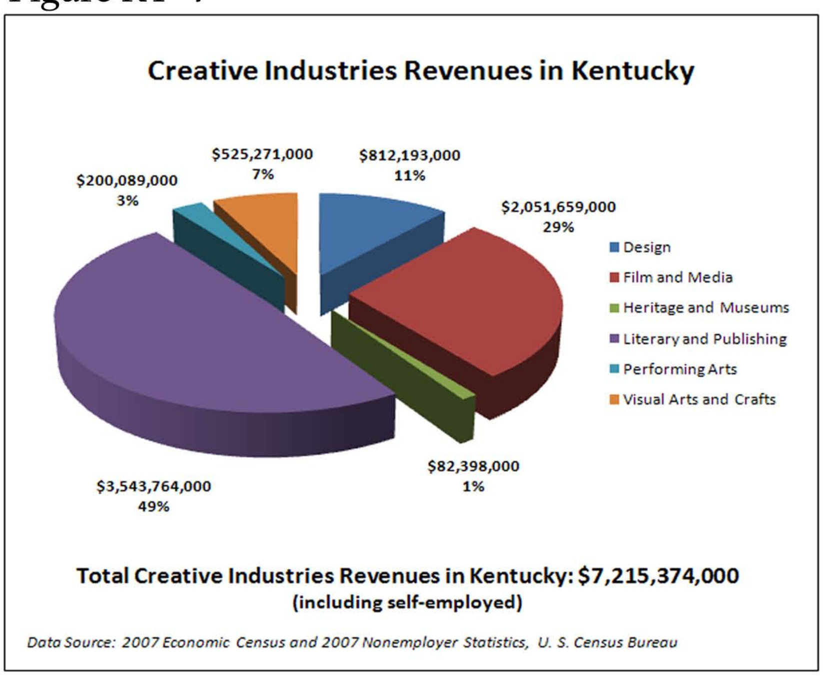
Workers in Kentucky creative industries earned a total of more than $2 billion in 2007. That total included $883 million in literary and publishing, $610 million in film and media, $271 million in design, and $211 million in visual arts and crafts, followed by $93 million in performing arts, and $24 million in heritage and museums.

Figure KY-3



The creative industries in Kentucky earned more than $7.2 billion in revenue in 2007. Almost half of that total was earned in literary and publishing with more than $3.5 billion in revenue. The second largest category is film and media with $2.1 billion in revenue, followed by design with $812 million, visual arts and crafts with $525 million, performing arts with $200 million, and heritage and museums with $82 million.

Figure KY-4



Per Capita Data for Kentucky Creative Industries

Based on number of establishments, film and media is the largest sector group in Kentucky, with 3.6 establishments for every 10,000 residents. It is followed by visual arts and crafts with 2.1, and design and literary and publishing, both with 2.0 establishments for every 10,000 residents. The performing arts represent 0.7 establishments, and heritage and museums account for 0.2 establishments for every 10,000 residents.

Table KY-1

Creative Industries Establishments in Kentucky – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	867	2.0
Film and Media	1,522	3.6
Heritage and Museums	79	0.2
Literary and Publishing	828	2.0
Performing Arts	281	0.7
Visual Arts and Crafts	893	2.1
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN KENTUCKY	4,470	10.5

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

Based on employment levels, literary and publishing is the largest sector group in the state with 63.5 employed for every 10,000 people, followed by film and media with 48.5. The next sector groups are visual arts and crafts with 20.4, design with 19.0, performing arts with 13.5, and heritage and museums with 2.8 employed for every 10,000 residents.

Table KY-2

Creative Industries Employment in Kentucky – Per 10,000 Residents	Employment	Employment Per 10,000
Design	8,050	19.0
Film and Media	20,550	48.5
Heritage and Museums	1,195	2.8
Literary and Publishing	26,950	63.5
Performing Arts	5,718	13.5
Visual Arts and Crafts	8,653	20.4
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN KENTUCKY	71,116	167.7

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

Literary and publishing is also the largest sector group in Kentucky based on compensation, with more than $2 million in wages paid to employees and earned by the self-employed for every 10,000 residents. Film and media is the second largest sector group with more than $1.4 million paid in wages for every 10,000 residents. The two largest sector groups are followed by design with $639,000, visual arts and crafts with $496,000, performing arts with $218,000, and heritage and museums with $57,000 in wages paid per 10,000 Kentucky residents.

Table KY-3

Creative Industries Compensation in Kentucky – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$270,820,000	$638,504
Film and Media	$609,972,000	$1,438,113
Heritage and Museums	$24,090,000	$56,796
Literary and Publishing	$883,323,000	$2,082,585
Performing Arts	$92,787,000	$218,761
Visual Arts and Crafts	$210,514,000	$496,323
TOTAL CREATIVE INDUSTRIES COMPENSATION IN KENTUCKY	**$2,091,506,000**	**$4,931,083**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

Literary and publishing is also the largest creative industries sector group based on annual revenue, with $8.4 million earned per 10,000 residents in 2007. It is followed by film and media with $4.8 million earned for every 10,000 residents. The other sector groups are design with $1.9 million, visual arts and crafts with $1.2 million, performing arts with $472,000, and heritage and museums with $194,000 earned in revenue for every 10,000 residents in Kentucky.

Table KY-4

Creative Industries Revenue in Kentucky per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$812,193,000	$1,914,884
Film and Media	$2,051,659,000	$4,837,137
Heritage and Museums	$82,398,000	$194,267
Literary and Publishing	$3,543,764,000	$8,355,029
Performing Arts	$200,089,000	$471,744
Visual Arts and Crafts	$525,271,000	$1,238,416
TOTAL CREATIVE INDUSTRIES REVENUE IN KENTUCKY	**$7,215,374,000**	**$17,011,478**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

Top Ten Creative Industry Sectors for Kentucky

Based on the number of establishments, the top creative industry sectors in Kentucky are radio, television, and other electronics stores; florists; jewelry stores; video tape and disc rental; photography studios; radio stations; architectural services; newspaper publishers; book stores; and commercial lithographic printing.

Table KY-5

Kentucky - Top Ten Creative Industry Sectors by Number of Establishments	
Radio, Television, and Other Electronics Stores	358
Florists	341
Jewelry Stores	327
Video Tape and Disc Rental	283
Photography Studios, Portrait	235
Radio Stations	170
Architectural Services	162
Newspaper Publishers	154
Book Stores	152
Commercial Lithographic Printing	151

Data Source: 2007 Economic Census, U. S. Census Bureau

The top creative industry sector in Kentucky based on employment is commercial lithographic printing with 8,423 employees, more than twice the total of the next largest sector, newspaper publishers, which employs 3,792. The largest sectors that follow are cable and other program distribution; independent writers; radio, television, and other electronics stores; advertising agencies; jewelry stores; photography studios; video tape and disc rental; and florists.

Table KY-6

Kentucky - Top Ten Creative Industry Sectors by Total Employment	
Commercial Lithographic Printing	8,423
Newspaper Publishers	3,792
Cable and Other Program Distribution	3,582
Independent Writers	3,534
Radio, Television, and Other Electronics Stores	3,354
Advertising Agencies	2,631
Jewelry Stores	2,358
Photography Studios, Portrait	2,067
Video Tape and Disc Rental	1,978
Florists	1,943

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Also the top creative industry sector by employee compensation, workers in the commercial lithographic printing sector in Kentucky earned wages totaling more than $356 million in 2007. Again, that is more than twice the wages earned in the next largest sector, cable and other program distribution, where workers earned almost $137 million in wages, closely followed by newspaper publishers which paid more than $135 million to employees. The next largest sectors based on employee compensation are advertising agencies; architectural services; radio, television, and other electronics stores; book publishers; other pressed and blown glass and glassware manufacturing; television broadcasting; and radio broadcasting.

Table KY-7

Kentucky - Top Ten Creative Industry Sectors by Employee Compensation	
Commercial Lithographic Printing	$356,215,000
Cable and Other Program Distribution	$136,648,000
Newspaper Publishers	$135,267,000
Advertising Agencies	$122,047,000
Architectural Services	$83,548,000
Radio, Television, and Other Electronics Stores	$70,426,000
Book and Greeting Card Publishers	$70,218,000
Other Pressed and Blown Glass and Glassware Manufacturing	$69,111,000
Television Broadcasting	$64,468,000
Radio Broadcasting	$57,852,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Commercial lithographic printing also tops the list of largest creative industry sectors in Kentucky based on annual revenue with more than $1.3 billion. The top sector is followed by book and greeting card publishers which generated more than $699 million in 2007. The next largest sectors are radio, television, and other electronics stores; newspaper publishers; advertising agencies; audio and video equipment manufacturing; jewelry stores; ornamental and architectural metal work manufacturing; television broadcasting; and book stores.

Table KY-8

Kentucky - Top Ten Creative Industry Sectors by Annual Revenue	
Commercial Lithographic Printing	$1,301,231,000
Book and Greeting Card Publishers	$699,027,000
Radio, Television, and Other Electronics Stores	$554,709,000
Newspaper Publishers	$440,901,000
Advertising Agencies	$307,937,000
Audio and Video Equipment Manufacturing	$276,519,000
Jewelry Stores	$267,670,000
Ornamental and Architectural Metal Work Manufacturing	$244,896,000
Television Broadcasting	$225,451,000
Book Stores	$219,601,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Kentucky Creative Industries to All Kentucky Industries

The creative industries in Kentucky represent 4,470 establishments, a full 5% of the 88,531 industry establishments in the state as of 2007.

Table KY-9

Comparison of Kentucky Creative Industries to Total Industries	
Category	**Establishments**
Kentucky Creative Industries Totals	4,470
% of Kentucky Total Industries	5.0%
Kentucky Total Industries	88,531

Source: 2007 Economic Census, U.S. Census Bureau

The creative industries employ 71,116 people in the state, including 16,188 that are self-employed. This represents 4.1% of all employment in Kentucky, including 5.9% of the self-employed.

Table KY-10

Comparison of Kentucky Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Kentucky Creative Industries Totals	54,928	16,188	71,116
% of Kentucky Total Industries	3.7%	5.9%	4.1%
Kentucky Total Industries	1,479,591	272,983	1,752,574

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The Kentucky creative industries pay more than $2 billion in wages, including more than $390 million earned by the self-employed. This represents 3.4% of all wages paid in the state in 2007, including for-profits, nonprofits, and the self-employed.

Table KY-11

Comparison of Kentucky Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
Kentucky Creative Industries Totals	$1,701,431,000	$390,075,000	$2,091,506,000
% of Kentucky Total Industries	3.4%	3.5%	3.4%
Kentucky Total Industries	$50,508,502,000	$11,078,531,000	$61,587,033,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The creative industries in Kentucky generated more than $7.2 billion in revenue in 2007, representing at least 2% of all industry revenues in the state.

Table KY-12

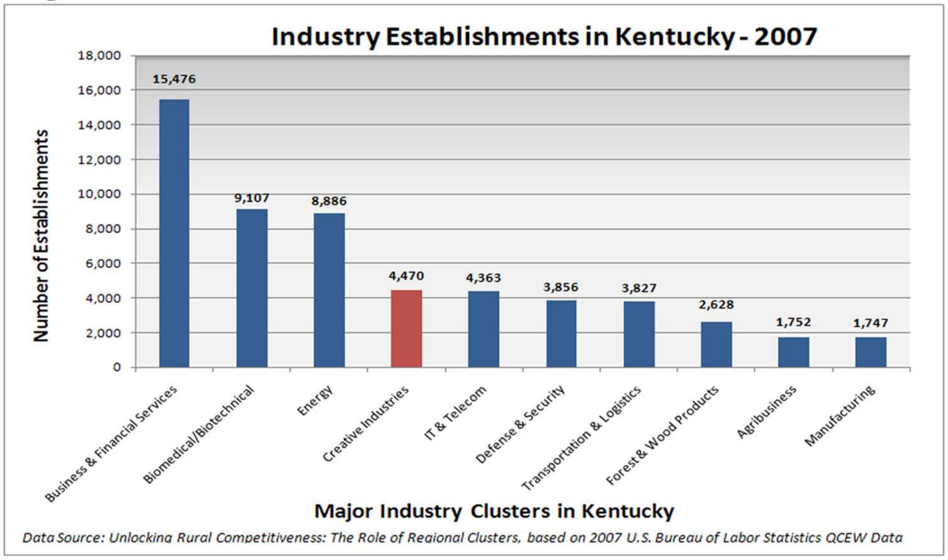
Comparison of Kentucky Creative Industries to Total Industries			
Category	**Establishment Revenues**	**Self-Employment Revenues**	**Total Revenues**
Kentucky Creative Industries Totals	$6,825,299,000	$390,075,000	$7,215,374,000
% of Kentucky Total Industries	1.9%	3.5%	2.0%
Kentucky Total Industries	$351,297,453,000	$11,078,531,000	$362,375,984,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Kentucky Creative Industries to Other Kentucky Industry Clusters

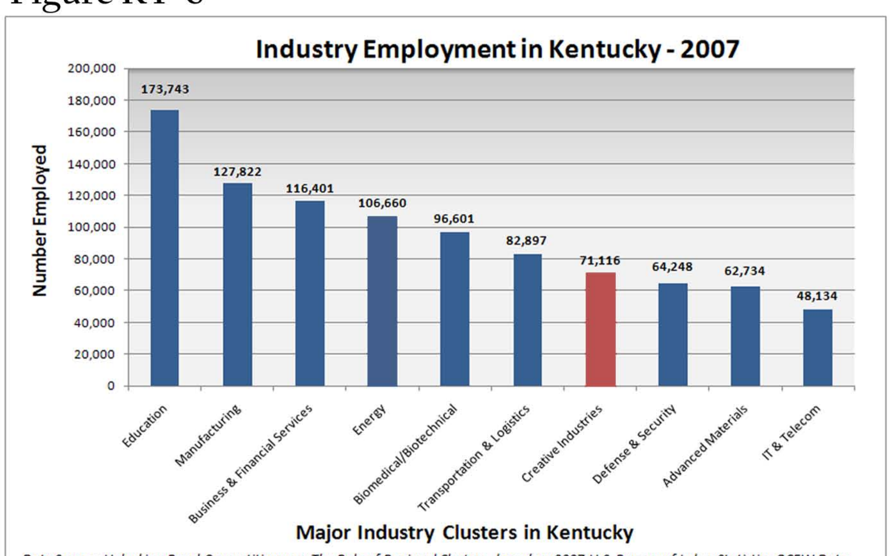
Based on the number of establishments, the creative industries cluster is the fourth largest industry cluster in Kentucky with 4,470 establishments. The creative industry cluster eclipses the clusters of information technology and telecommunications, defense and security, transportation and logistics, forest and wood products, agribusiness, and manufacturing. This total number of establishments for the creative industries does not include the self-employed.

Figure KY-5



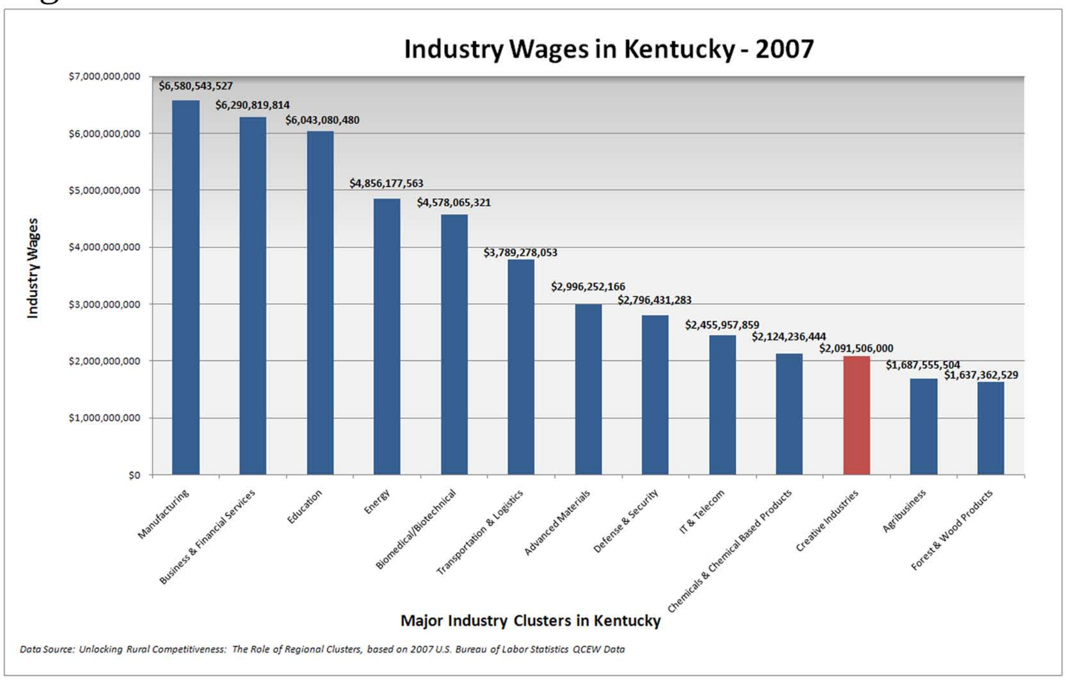
The creative industries cluster is the seventh largest employer in the state of Kentucky with 71,116 people employed or self-employed. Based on employment levels, the creative industries cluster is larger than defense and security, advanced materials, and information technology and telecommunications.

Figure KY-6



Based on available data, the creative industries represent at least the eleventh largest industry cluster in Kentucky based on payroll, larger than agribusiness and forest and wood products. However, it is likely that the actual total and the ranking of the creative industries cluster for Kentucky is much higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll in 28 separate creative industries sectors means that the total represented below is a major undercount for Kentucky.

Figure KY-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Kentucky

There are 1,291 arts, culture, and humanities nonprofit organizations registered in Kentucky, representing 1.1% of the national total and 7.5% of the South Arts region total. Of the registered organizations, 468 had annual revenues above $25,000 and therefore filed IRS form 990 in 2007.

Table KY-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Kentucky	1,291	1.10%	468	1.00%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The nonprofit arts, culture, and humanities organizations in Kentucky which filed form 990 reported almost $214 million in revenue in 2007. That number represents 0.5% of the national total and 5.9% of the South Arts region total. Those same organizations reported more than $813 million in assets, representing 0.7% of the national total and 8.7% of the South Arts region total for assets.

Table KY-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Kentucky	$213,642,116	0.50%	$813,080,959	0.70%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Louisiana

Creative Industries Profile

Louisiana – Creative Industries Profile

Although Louisiana has struggled mightily to overcome significant obstacles over a number of years, the unique culture of the state has persisted and remains as a source of great pride and civic unity for its citizens. When most people think of Louisiana, they think of New Orleans and its lively French Quarter District. "The Big Easy" has been home to such esteemed authors as William Faulkner, Tennessee Williams, and John Kennedy Toole, musicians such as the Neville family, the Marsalis family, and Harry Connick, Jr., as well as some of the largest festivals in the country, including Mardi Gras and the New Orleans Jazz & Heritage Festival. Significant cultural institutions such as the New Orleans Museum of Art, the Ogden Museum of Southern Art, the Contemporary Arts Center, the Ashé Cultural Arts Center, and the National World War II Museum also call the city home. But New Orleans isn't the only place in Louisiana that is overflowing with cultural heritage and artistic amenities. Another example is Shreveport, home to the Robinson Film Center, Barnwell Garden & Art Center, Multicultural Center of the South, Meadows Museum of Art, the R.W. Norton Art Gallery, and the Southern University Museum of Art, among many other organizations, institutions, and events. Home to Louisiana State University, Baton Rouge is bursting at the seams with arts and culture as well. Their major cultural organizations include the Louisiana Art & Science Museum, the LSU Museum of Art, Shaw Center for the Arts and the Manship Theatre, and the Louisiana Music Hall of Fame. The arts, culture, festivals, and celebrations of Louisiana culture permeate the entire state – from Monroe to Lafayette, from Alexandria to Lake Charles, from Bastrop to Eunice, and everywhere in between.

While the arts and culture are important for the state's image and for drawing tourists, they also serve as the foundational base for Louisiana's creative economy. But most of what is mentioned above falls only within the nonprofit arts and culture sector. These organizations and events do not include the large contributions of for-profit establishments to the creative economy of the state; however, the data in this study includes the vast array of both the nonprofit and for-profit creative industries of Louisiana.

The creative industries in Louisiana represent 4,271 businesses, employing a total of 60,357 people, who earn annual wages totaling more than $1.6 billion, and generate more than $5.5 billion in annual revenue. These figures represent 4.3% of the state's businesses, 3.2% of the state's employment, at least 2.3% of all wages earned, and 1.1% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Louisiana are at the core of the state's creative industries. Of the 1,228 registered arts and culture nonprofits in the state, 441 of those filed IRS form 990, reporting more than $185 million in annual revenue and $543 million in assets.

The creative industries that fall within the film and media sector group and the literary and publishing sector group make up the largest percentage of the state's creative economy. Literary and publishing is led by newspaper publishers, commercial lithographic printing, independent writers, and book stores. Meanwhile, the leading industries within film and media include cable and other program distribution; advertising agencies; radio, television, and other electronics stores; television broadcasting; radio stations; display advertising; and video tape and disc rental. Other leading sectors include independent performers; jewelry stores; architectural services; florists; and promoters of performing arts, sports, and similar events with facilities.

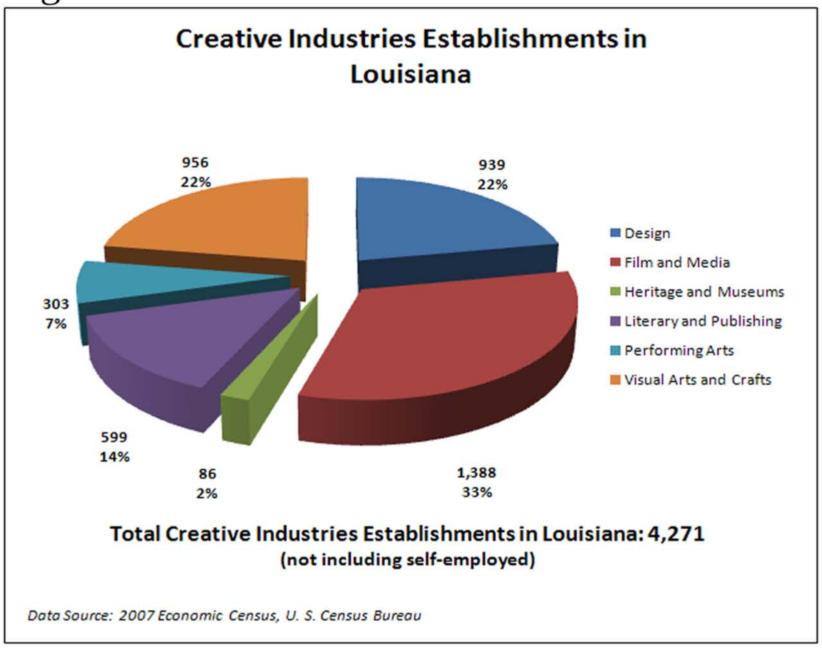
The information in the following pages presents the creative economy data for Louisiana in more detail with appropriate documentation.

"Although Louisiana has struggled mightily to overcome significant obstacles over a number of years, the unique culture of the state has persisted and remains as a source of great pride and civic unity for its citizens."

Creative Industries in Louisiana – By the Numbers

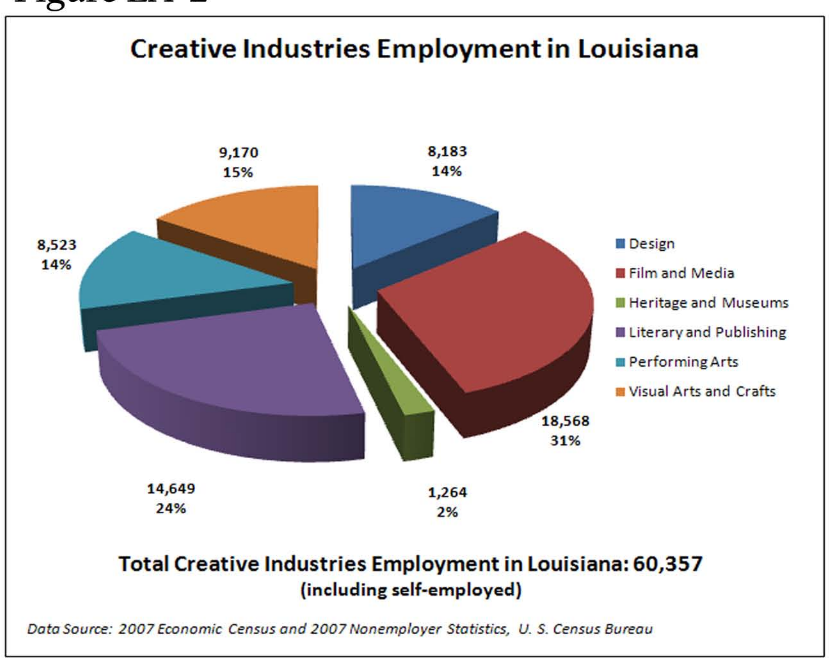
The creative industries establishments in Louisiana total 4,271, including 1,388 film and media establishments, 956 in visual arts and crafts, 939 from design, 599 in literary and publishing, 303 in the performing arts, and 86 heritage and museums establishments.

Figure LA-1



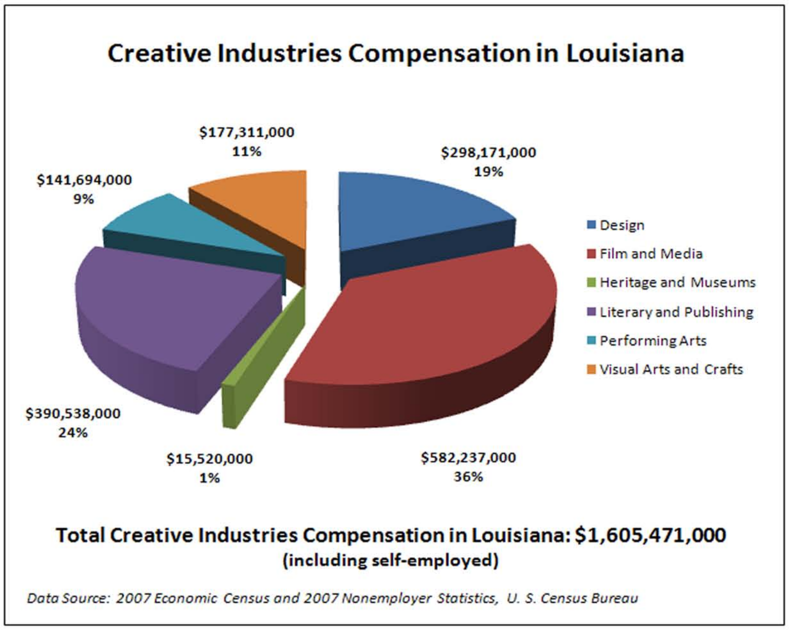
Louisiana's creative industries employment of 60,357 is widely distributed among five of the six main creative industries sector groups, including 18,568 in film and media, 14,649 in literary and publishing, 9,170 in visual arts and crafts, 8,523 in performing arts, 8,183 in design, and 1,264 in heritage and museums.

Figure LA-2



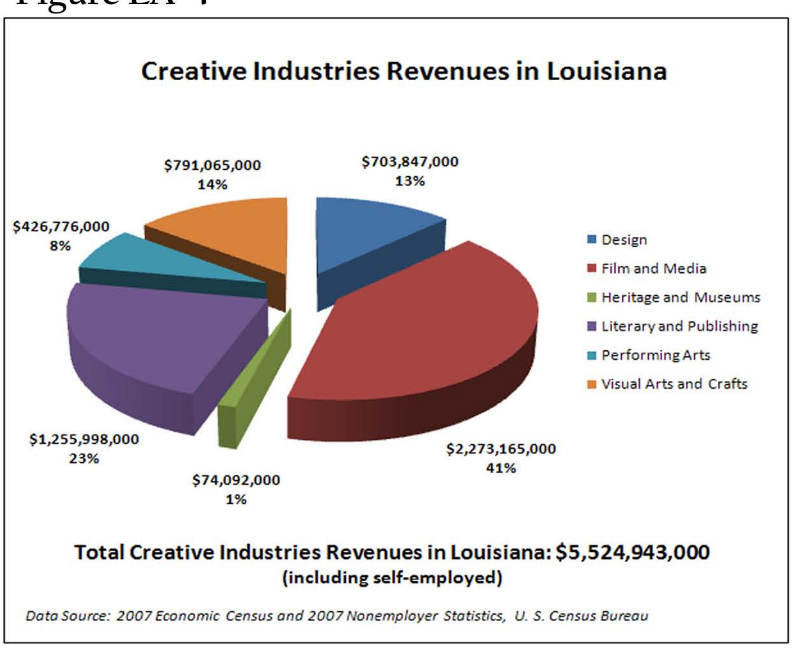
Total creative industries compensation in Louisiana is more than $1.6 billion, including $582 million in the film and media sector group, more than $390 million in literary and publishing, and almost $299 million in design. Compensation in the remaining sector groups is more than $177 million in visual arts and crafts, almost $142 million in performing arts, and $15.5 million in heritage and museums.

Figure LA-3



Annual revenues for the creative industries in Louisiana total more than $5.5 billion. More than 40% of the total is represented by the film and media sector group with almost $2.3 billion in revenue. Film and media is followed by literary and publishing with almost $1.3 billion, visual arts and crafts with $791 million, design with almost $704 million, performing arts with almost $427 million, and heritage and museums with more than $74 million in annual revenues.

Figure LA-4



Per Capita Data for Louisiana Creative Industries

The largest creative industries sector group in Louisiana, film and media represents 3.2 establishments for every 10,000 residents of the state. Both visual arts and crafts, and design represent 2.2 establishments per 10,000 residents. Of the remaining three sector groups, there are 1.4 establishments per 10,000 residents in literary and publishing, 0.7 in the performing arts, and 0.2 in heritage and museums.

Table LA-1

Creative Industries Establishments in Louisiana – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	939	2.2
Film and Media	1,388	3.2
Heritage and Museums	86	0.2
Literary and Publishing	599	1.4
Performing Arts	303	0.7
Visual Arts and Crafts	956	2.2
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN LOUISIANA	**4,271**	**9.9**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,293,204 from the Economic Census.

For every 10,000 residents in Louisiana, 140.6 people are employed in the creative industries, including 43.2 in film and media, 34.1 in literary and publishing, 21.4 in visual arts and crafts, 19.9 in performing arts, 19.1 in design, and 2.9 in heritage and museums.

Table LA-2

Creative Industries Employment in Louisiana – Per 10,000 Residents	Employment	Employment Per 10,000
Design	8,183	19.1
Film and Media	18,568	43.2
Heritage and Museums	1,264	2.9
Literary and Publishing	14,649	34.1
Performing Arts	8,523	19.9
Visual Arts and Crafts	9,170	21.4
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN LOUISIANA	**60,357**	**140.6**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,293,204 from the Economic Census.

The total creative industries compensation for people employed and self-employed is more than $1.6 billion. That works out to approximately $3.7 million in payroll for every 10,000 residents of Louisiana. That number includes almost $1.4 million in payroll per 10,000 residents in film and media, $910,000 in literary and publishing, $695,000 in design, $413,000 in visual arts and crafts, $330,000 in the performing arts, and $36,000 in annual compensation for heritage and museums.

Table LA-3

Creative Industries Compensation in Louisiana – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$298,171,000	$694,519
Film and Media	$582,237,000	$1,356,183
Heritage and Museums	$15,520,000	$36,150
Literary and Publishing	$390,538,000	$909,666
Performing Arts	$141,694,000	$330,043
Visual Arts and Crafts	$177,311,000	$413,004
TOTAL CREATIVE INDUSTRIES COMPENSATION IN LOUISIANA	$1,605,471,000	$3,739,564

Payroll only. Including self-employed. Using 2007 population estimate of 4,293,204 from the Economic Census.

Establishments and the self-employed in the creative industries generate more than $5.5 billion in annual revenue, which is equal to almost $13 million per 10,000 residents. The largest sector group is film and media with almost $5.3 million in annual revenue for every 10,000 residents of Louisiana. Film and media is followed by literary and publishing with more than $2.9 million, $1.8 million in visual arts and crafts, $1.6 million in design, $994,000 in the performing arts, and $173,000 in heritage and museums.

Table LA-4

Creative Industries Revenue in Louisiana – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$703,847,000	$1,639,445
Film and Media	$2,273,165,000	$5,294,798
Heritage and Museums	$74,092,000	$172,580
Literary and Publishing	$1,255,998,000	$2,925,549
Performing Arts	$426,776,000	$994,073
Visual Arts and Crafts	$791,065,000	$1,842,598
TOTAL CREATIVE INDUSTRIES REVENUE IN LOUISIANA	$5,524,943,000	$12,869,044

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,293,204 from the Economic Census.

Top Ten Creative Industry Sectors for Louisiana

The largest creative industry sectors in the state of Louisiana based on number of establishments include radio, television and other electronics stores; video tape and disc rental; and advertising agencies from the film and media sector group. The list also includes jewelry stores, photography studios, and fine arts schools from the visual arts and crafts sector group; architectural services, and florists from the design sector group; and book stores, and commercial lithographic printing from the literary and publishing sector group.

Table LA-5

Louisiana - Top Ten Creative Industry Sectors by Number of Establishments	
Radio, Television, and Other Electronics Stores	361
Jewelry Stores	360
Architectural Services	296
Florists	281
Video Tape and Disc Rental	223
Photography Studios, Portrait	209
Advertising Agencies	150
Book Stores	122
Commercial Lithographic Printing	107
Fine Arts Schools	107

Data Source: 2007 Economic Census, U. S. Census Bureau

Four of the largest creative industry sectors by employment are from the film and media sector group, including radio, television, and other electronics stores; cable and other program distribution; television broadcasting; and advertising agencies. Other major sectors include newspaper publishers, and independent writers from literary and publishing; promoters of performing arts, sports, and similar events with facilities, and independent performers from the performing arts; jewelry stores from visual arts and crafts; and architectural services from the design sector group.

Table LA-6

Louisiana - Top Ten Creative Industry Sectors by Total Employment	
Radio, Television, and Other Electronics Stores	4,377
Newspaper Publishers	4,047
Independent Writers	3,761
Promoters of Performing Arts, Sports, and Similar Events with Facilities	3,006
Jewelry Stores	2,591
Cable and Other Program Distribution	2,481
Independent Performers	2,220
Architectural Services	2,208
Television Broadcasting	1,930
Advertising Agencies	1,924

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Three of the largest creative industry sectors by annual employee payroll and self-employed earnings are from the literary and publishing sector group, including newspaper publishers at almost $146 million, commercial lithographic printing at almost $71 million, and independent writers at more than $58 million. Five of the largest are from the film and media sector group, with cable and other program distribution at almost $106 million, advertising agencies at almost $93 million, radio, television, and other electronics stores at more than $91 million, television broadcasting at more than $90 million, and radio stations at almost $51 million. The top creative industry sectors based on employee compensation also include jewelry stores at almost $75 million from the visual arts and crafts, and architectural services at almost $93 million from the design sector.

Table LA-7

Louisiana - Top Ten Creative Industry Sectors by Employee Compensation	
Newspaper Publishers	$145,719,000
Architectural Services	$125,761,000
Cable and Other Program Distribution	$105,511,000
Advertising Agencies	$92,757,000
Radio, Television, and Other Electronics Stores	$91,247,000
Television Broadcasting	$90,169,000
Jewelry Stores	$74,958,000
Commercial Lithographic Printing	$70,653,000
Independent Writers	$58,302,000
Radio Stations	$50,774,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on annual revenue, the largest creative industry sectors include radio, television, and other electronics stores at $888 million, television broadcasting at $324 million, advertising agencies at $187 million, display advertising at $181 million, and radio stations at $155 million, all from the film and media sector group. The top industry sectors also include newspaper publishers at $467 million, commercial lithographic printing at $203 million, and book stores at $200 million from literary and publishing, as well as jewelry stores at $382 million from visual arts and crafts, and architectural services at $338 million from the design sector group.

Table LA-8

Louisiana - Top Ten Creative Industry Sectors by Annual Revenue	
Radio, Television, and Other Electronics Stores	$887,932,000
Newspaper Publishers	$466,839,000
Jewelry Stores	$381,912,000
Architectural Services	$337,706,000
Television Broadcasting	$323,997,000
Commercial Lithographic Printing	$202,884,000
Book Stores	$199,585,000
Advertising Agencies	$187,281,000
Display Advertising	$180,693,000
Radio Stations	$155,218,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Louisiana Creative Industries to All Louisiana Industries

The 4,271 creative industries establishments in Louisiana represent 4.3% of all industries in the state.

Table LA-9

Comparison of Louisiana Creative Industries to Total Industries	
Category	**Establishments**
Louisiana Creative Industries Totals	4,271
% of Louisiana Total Industries	4.3%
Louisiana Total Industries	98,956

Source: 2007 Economic Census, U.S. Census Bureau

There are a total of 60,357 people employed in the creative industries in Louisiana, representing 3.2% of all employment in the state, including 5.8% of all self-employed.

Table LA-10

Comparison of Louisiana Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Louisiana Creative Industries Totals	43,217	17,140	60,357
% of Louisiana Total Industries	2.7%	5.8%	3.2%
Louisiana Total Industries	1,576,354	294,173	1,870,527

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total payroll and self-employed earnings for people working in the creative industries in Louisiana is more than $1.6 billion. That represents at least 2.3% of all compensation in the state and 3.6% of all earnings by the self-employed.

Table LA-11

Comparison of Louisiana Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
Louisiana Creative Industries Totals	$1,153,995,000	$451,476,000	$1,605,471,000
% of Louisiana Total Industries	2.0%	3.6%	2.3%
Louisiana Total Industries	$56,836,286,000	$12,419,950,000	$69,256,236,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Total revenues for the creative industries in Louisiana are more than $5.5 billion, representing at least 1.1% of revenues earned by all industries in the state.

Table LA-12

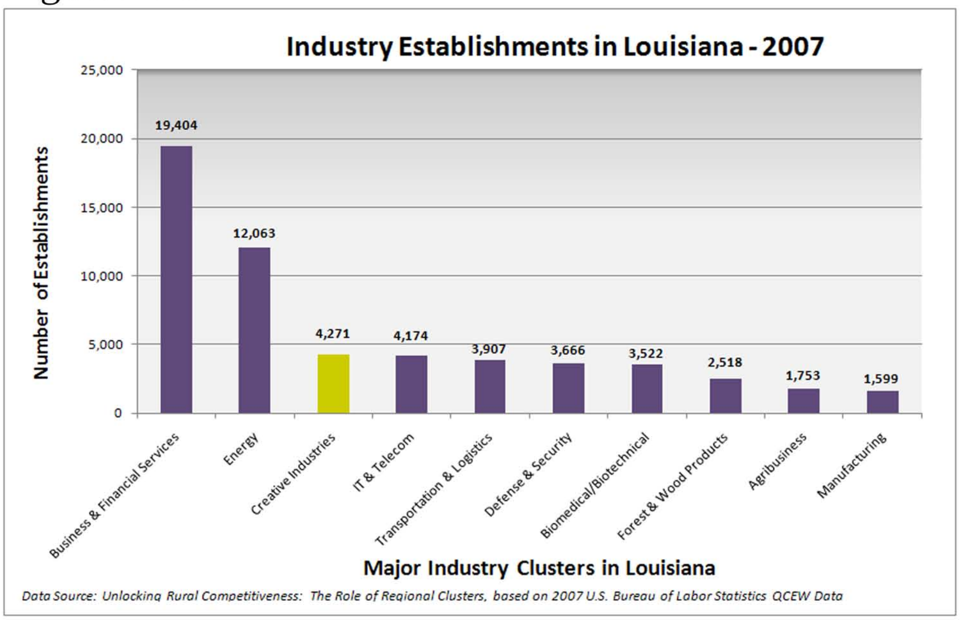
Comparison of Louisiana Creative Industries to Total Industries			
Category	**Establishment Revenues**	**Self-Employment Revenues**	**Total Revenues**
Louisiana Creative Industries Totals	$5,073,467,000	$451,476,000	$5,524,943,000
% of Louisiana Total Industries	1.1%	3.6%	1.1%
Louisiana Total Industries	$477,440,705,000	$12,419,950,000	$489,860,655,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Louisiana Creative Industries to Other Louisiana Industry Clusters

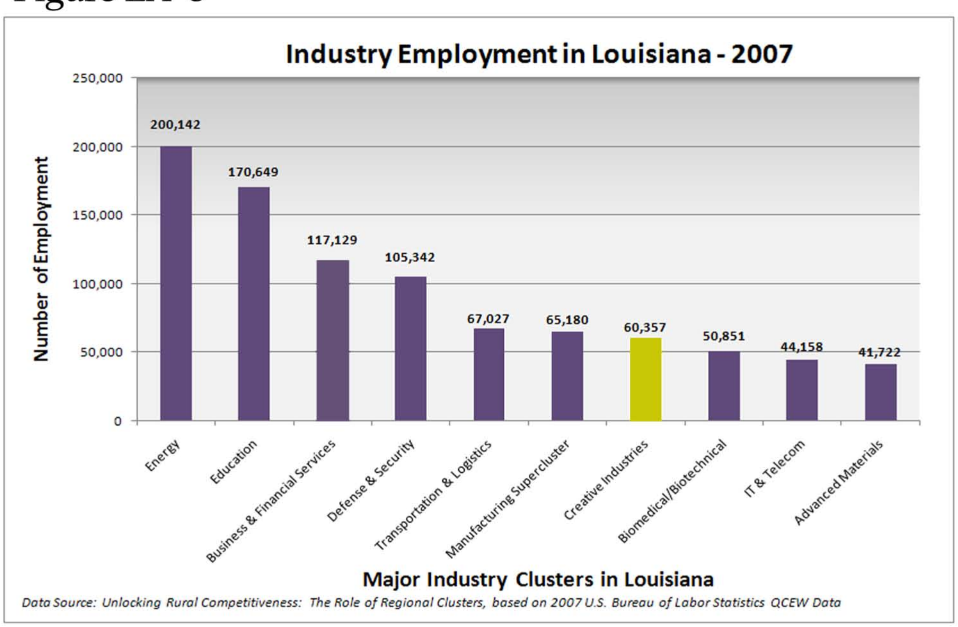
The 4,271 creative industries establishments in Louisiana represent the third largest industry cluster in the state, ranking above information technology and telecommunications, transportation and logistics, defense and security, biomedical and biotechnical, forest and wood products, agribusiness, and manufacturing. This total for the creative industries does not include the self-employed.

Figure LA-5



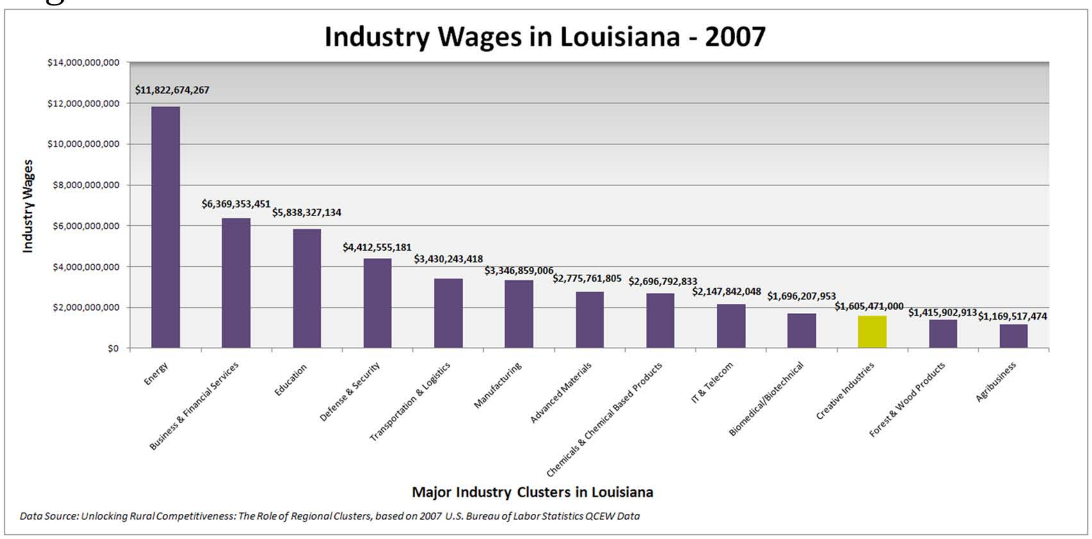
Based on the number employed, Louisiana creative industries are at least the seventh largest industry cluster in the state, exceeding the number employed in biomedical and biotechnical, information technology and telecommunications, and advanced materials.

Figure LA-6



The creative industries in Louisiana pay more than $1.6 billion in wages each year, ranking the industry sector eleventh in total payroll among all industry sectors in the state. However, it is likely that the actual total wages and the ranking of wages for the creative industries cluster in Louisiana are much higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for the payroll category in 17 separate creative industries sectors means that the total represented below is a significant undercount for the creative industries cluster in the state.

Figure LA-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Louisiana

There are 1,228 registered arts, culture and humanities nonprofits in Louisiana, representing 1.1% of all arts, culture and humanities nonprofits in the U.S. and 7.2% of organizations in the South Arts region. Of that total, 441 had annual revenues above $25,000 and therefore filed IRS form 990, representing 0.9% of the national total and 6.6% of the South Arts region total.

Table LA-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Louisiana	1,228	1.10%	441	0.90%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The arts, culture, and humanities nonprofit organizations in Louisiana which filed form 990 reported total revenues of more than $185 million, which is 0.4% of the national total and 5.2% of the South Arts region total. In addition, those Louisiana organizations reported more than $543 million in assets, which represents 0.5% of the national total and 5.8% of the South Arts region total.

Table LA-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Louisiana	$185,094,335	0.40%	$543,115,762	0.50%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Mississippi

Creative Industries Profile

Mississippi – Creative Industries Profile

Arts and cultural gems dot the landscape of Mississippi, from the Ohr-O'Keefe Museum in Biloxi, to Rowan Oak in Oxford, from the Walter Anderson Museum of Art and the Mary C. O'Keefe Cultural Center in Ocean Springs, to the Link Centre in Tupelo, from the B.B. King Museum and Delta Interpretive Center in Indianola, to the Saenger Theatre in Hattiesburg, from the Mississippi Delta Blues Museum in Clarksdale, to the Mississippi Museum of Art and Mississippi Children's Museum in Jackson.

Mississippi has also been home to some of the best writers, musicians, and entertainers in the country. Music legends such as Bo Diddley, B.B. King, Howlin' Wolf, Elvis Presley, Jimmy Buffett, Muddy Waters, Charley Pride, Tammy Wynette, and Faith Hill have all called the state home. Iconic writers such as William Faulkner, Eudora Welty, Richard Wright, Shelby Foote, Tennessee Williams, Richard Ford, and Barry Hannah have called Mississippi home, as well. Groundbreaking entertainers such as Jim Henson and Oprah Winfrey , and actors Morgan Freeman and James Earl Jones, also hail from that fair state and help make up Mississippi's rich arts and cultural heritage.

While the arts and culture are at the heart of Mississippi's creative industries, they only represent the tip of the iceberg. The state is home to 2,483 nonprofit and for-profit creative industries establishments, employing 30,374 people, who earn more than $679 million in annual payroll, and who help their companies generate more than $2 billion in annual revenues.

Mississippi's creative industries are an important economic force. They represent 4.3% of all industry establishments in the state, 2.8% of all employment, at least 1.9% of all employee compensation, and at least 1.2% of all industry revenues.

The nonprofit arts, culture, and humanities organizations in Mississippi are at the core of the state's creative industries. Of the 739 registered arts and culture nonprofits in the state, 229 of those filed IRS form 990, reporting more than $67 million in annual revenue and more than $159 million in assets.

The state has significant creative industry sectors, with film and media representing the largest sector group and including the leading sectors of radio, television, and other electronics stores; advertising agencies; cable and other program distribution; television broadcasting; video tape and disc rental; and radio stations. The state's creative industries are also carried by the literary and publishing sector group, with leading sectors that include newspaper publishers, commercial lithographic printing, independent writers, and book stores. The design industry sectors are also a significant contributor to the state's economy, including architectural services, florists, and other specialized design services. Meanwhile, the visual arts and crafts include major sectors such as photography studios and jewelry stores.

The creative industries represent the fifth largest industry cluster in the state based on establishments, the eleventh largest cluster based on employment, and at least the fourteenth largest cluster based on total payroll.

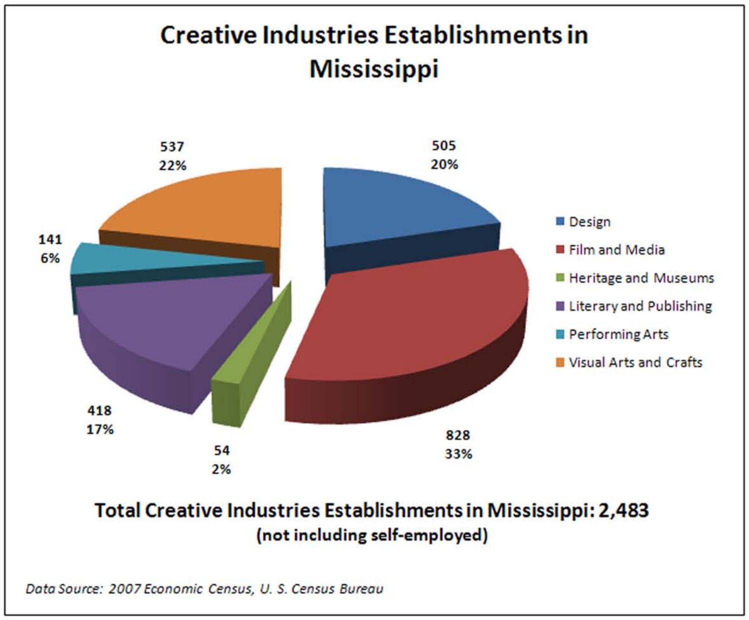
The information in the following page-presents the creative economy data for Mississippi in more detail with appropriate documentation.

"Looking at the number of creative industries establishments in Mississippi and comparing them to other industry clusters in the state, the creative industries are the fifth-largest sector in the state, with more establishments than forest and wood products, information technology and telecommunications, agribusiness, defense and security, and education."

Creative Industries in Mississippi – By the Numbers

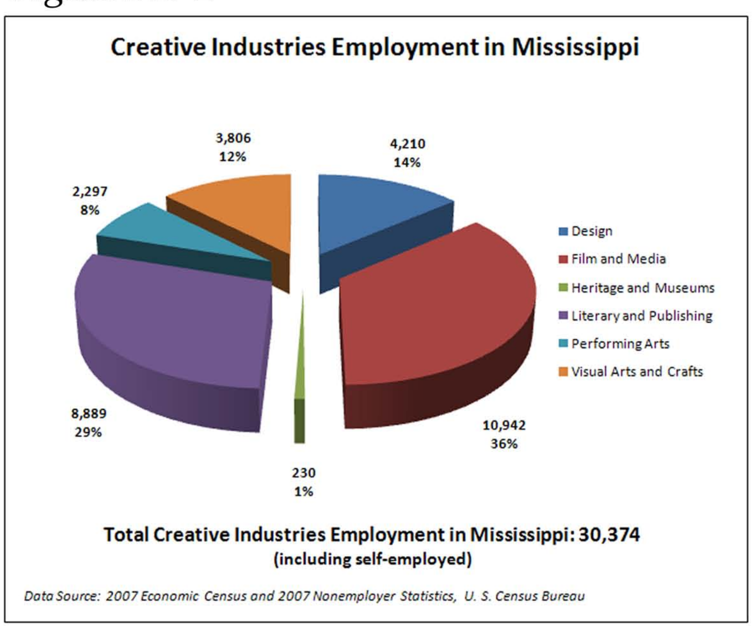
The creative industries in Mississippi represent 2,483 establishments throughout the state, including 828 in film and media, 537 in visual arts and crafts, 505 in design, 418 in literary and publishing, 141 in the performing arts, and 54 in heritage and museums.

Figure MS-1



Mississippi's creative industries represent 30,374 workers, including the self-employed. A little more than one-third of the total is represented by film and media with 10,942 people employed. Just under one-third of the total is represented by literary and publishing, with 8,889 employed. The remaining sectors include design with 4,210 employed, visual arts and crafts with 3,806, performing arts with 2,297, and heritage and museums with 230.

Figure MS-2



The total creative industries compensation in Mississippi is more than $679 million. The largest sector group based on compensation is literary and publishing with almost $220 million in payroll and earnings by the self-employed, followed closely by film and media with almost $218 million, and design with more than $147 million. Workers in the visual arts and crafts represent more than $51 million in annual earnings, followed by the performing arts with more than $41 million, and heritage and museums with more than $1.2 million.

Figure MS-3

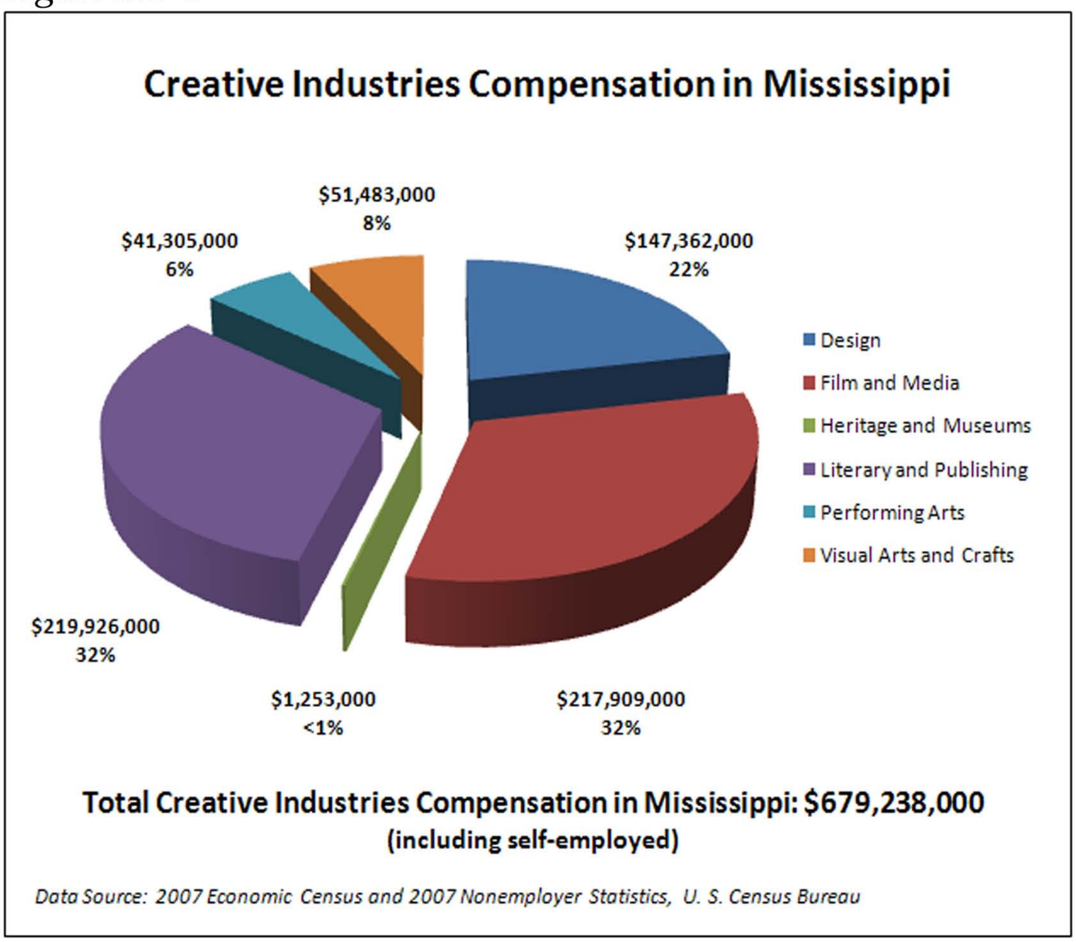
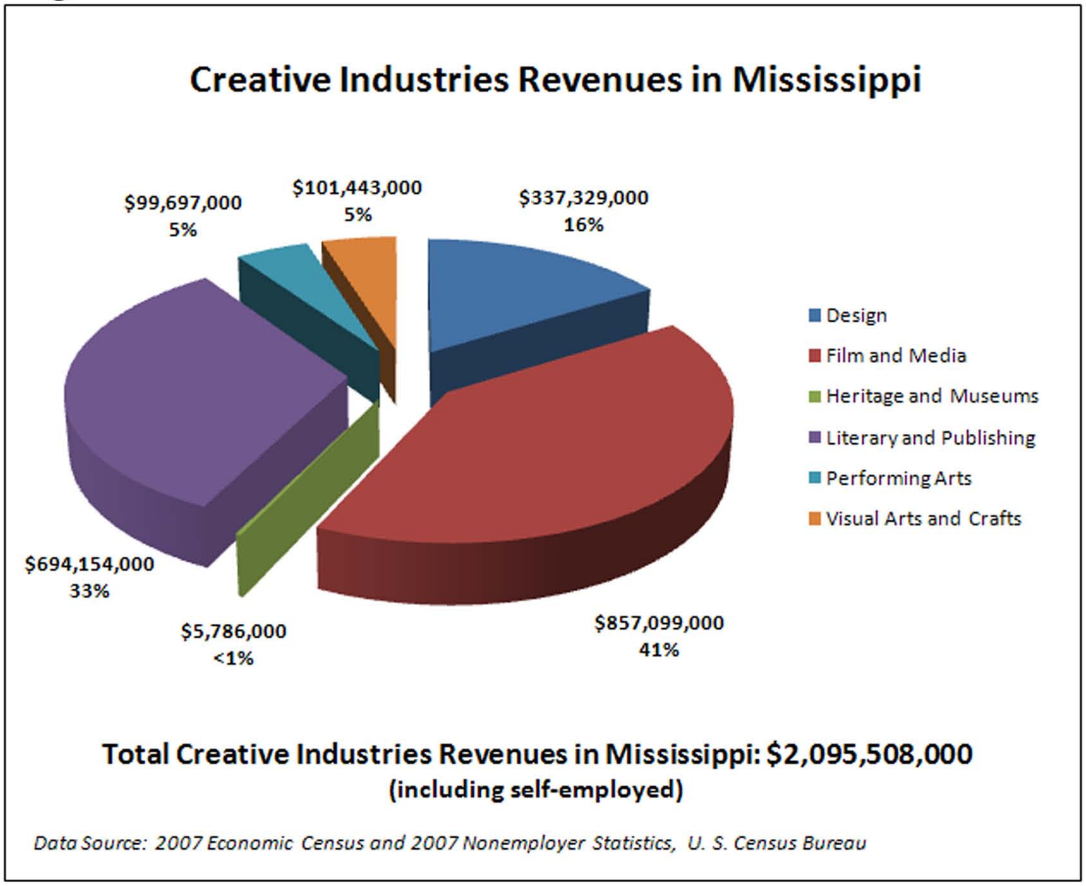


Figure MS-4



The total annual revenue for the creative industries in Mississippi is more than $2 billion. Film and media is the largest sector group in the state based on annual revenue with more than $857 million generated in 2007. The second largest sector group by total revenue is literary and publishing withmore than $694 million, followed by design with more than $337 million. The remaining sector groups are visual arts and crafts with more than $101 million in annual revenue, the performing arts with almost $100 million in revenue, and heritage and museums accounting for almost $6 million.

Per Capita Data for Mississippi Creative Industries

Among the 2,483 creative industries in Mississippi, the largest per capita sector group is film and media, with 2.8 establishments per 10,000 residents. The second largest is visual arts and crafts with 1.8 establishments for every 10,000 residents, followed by design with 1.7, literary and publishing with 1.4, performing arts with 0.5, and heritage and museums with 0.2.

Table MS-1

Creative Industries Establishments in Mississippi – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	505	1.7
Film and Media	828	2.8
Heritage and Museums	54	0.2
Literary and Publishing	418	1.4
Performing Arts	141	0.5
Visual Arts and Crafts	537	1.8
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN MISSISSIPPI	**2,483**	**8.5**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

The film and media sector group is also the largest based on per capita employment, with 37.5 workers for every 10,000 residents of the state, followed by literary and publishing with 30.5, design with 14.4, visual arts and crafts with 13.0, performing arts with 7.9, and heritage and museums with 0.8 people employed per 10,000 Mississippians.

Table MS-2

Creative Industries Employment in Mississippi – Per 10,000 Residents	Employment	Employment Per 10,000
Design	4,210	14.4
Film and Media	10,942	37.5
Heritage and Museums	230	0.8
Literary and Publishing	8,889	30.5
Performing Arts	2,297	7.9
Visual Arts and Crafts	3,806	13.0
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN MISSISSIPPI	**30,374**	**104.1**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

Based on compensation, the literary and publishing sector group has the highest per capita figures with $753,485 per 10,000 residents in the state, followed closely by film and media with $746,574, and design with $504,874. The remaining sector groups are visual arts and crafts with $176,235, performing arts with $141,514, and heritage and museums with $4,293 in payroll and self-employed earnings per 10,000 Mississippi residents.

Table MS-3

Creative Industries Compensation in Mississippi – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$147,362,000	$504,874
Film and Media	$217,909,000	$746,574
Heritage and Museum	$1,253,000	$4,293
Literary and Publishing	$219,926,000	$753,485
Performing Arts	$41,305,000	$141,514
Visual Arts and Crafts	$51,483,000	$176,385
TOTAL CREATIVE INDUSTRIES COMPENSATION IN MISSISSIPPI	**$679,238,000**	**$2,327,126**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

The total creative industries annual revenue per 10,000 residents in Mississippi is more than $7 million. The largest sector groups are film and media with $2.9 million in revenue for every 10,000 residents, literary and-publishing with $2.3 million, design with $1.1 million, visual arts and crafts with $348,000, performing arts with $342,000, and heritage and museums with almost $20,000 in annual revenues per 10,000 residents of Mississippi.

Table MS-4

Creative Industries Revenue in Mississippi – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$337,329,000	$1,155,717
Film and Media	$857,099,000	$2,936,492
Heritage and Museums	$5,786,000	$19,823
Literary and Publishing	$694,154,000	$2,378,229
Performing Arts	$99,697,000	$341,570
Visual Arts and Crafts	$101,443,000	$347,552
TOTAL CREATIVE INDUSTRIES REVENUE IN MISSISSIPPI	**$2,095,508,000**	**$7,179,385**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

Top Ten Creative Industry Sectors for Mississippi

The largest creative industry sector based on number of establishments in Mississippi is the design sector of florists with 246 establishments. A number of film and media sectors make the top ten list, including radio, television, and other electronics stores; video tape and disc rental; and radio stations. Several literary and publishing sectors make the list as well, with newspaper publishers, book stores, and commercial lithographic printing. The other design sector in the top ten is architectural services. Two visual arts and crafts sectors also make the list – jewelry stores, and photography studios.

Table MS-5

Mississippi - Top Ten Creative Industry Sectors by Number of Establishments	
Florists	246
Radio, Television, and Other Electronics Stores	221
Jewelry Stores	210
Video Tape and Disc Rental	176
Photography Studios, Portrait	146
Architectural Services	118
Radio Stations	114
Newspaper Publishers	107
Book Stores	95
Commercial Lithographic Printing	77

Data Source: 2007 Economic Census, U. S. Census Bureau

Based on the number employed, including the self-employed, the largest creative industries sector in Mississippi is newspaper publishers. Additional literary and publishing sectors included in the list of top ten creative industries employment sectors are independent writers, commercial lithographic printing, and book stores. Film and media sectors making the list are cable and other program distribution; radio, television, and other electronics stores; and video tape and disc rental. The sole design sector on the top ten employment list is florists. The visual arts and crafts sectors among the top creative industries sectors by employment are jewelry stores, and photography studios.

Table MS-6

Mississippi - Top Ten Creative Industry Sectors by Total Employment	
Newspaper Publishers	2,600
Cable and Other Program Distribution	2,500
Radio, Television, and Other Electronics Stores	1,943
Independent Writers	1,679
Commercial Lithographic Printing	1,601
Florists	1,269
Jewelry Stores	1,238
Video Tape and Disc Rental	1,229
Book Stores	1,085
Photography Studios, Portrait	1,010

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Several of the top creative industry sectors based on employee compensation and self-employed earnings in Mississippi are from the literary and publishing sector group, including newspaper publishers, commercial lithographic printing, and independent writers. There are several sectors among the top ten based on compensation from the design sector as well, including architectural services, florists, and specialized design services. The remaining sectors making up the top ten creative industries based on employee compensation are from film and media, including advertising agencies; radio, television, and other electronics stores; television broadcasting; and radio stations.

Table MS-7

Mississippi - Top Ten Creative Industry Sectors by Employee Compensation	
Newspaper Publishers	$75,066,000
Commercial Lithographic Printing	$66,240,000
Architectural Services	$64,882,000
Advertising Agencies	$47,625,000
Radio, Television, and Other Electronics Stores	$44,348,000
Television Broadcasting	$35,336,000
Independent Writers	$27,791,000
Radio Stations	$24,747,000
Florists	$24,185,000
Specialized Design Services	$22,032,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on annual revenue, the top ten creative industries sectors in Mississippi include five from film and media – radio, television, and other electronics stores; television broadcasting; advertising agencies; radio stations; and video tape and disc rental. The top ten also includes three sectors from literary and publishing, including newspaper publishers; commercial lithographic printing; and book stores and news dealers. Two sectors from design complete the top ten sectors based on annual revenue, with architectural services, and florists making the list.

Table MS-8

Mississippi - Top Ten Creative Industry Sectors by Annual Revenue	
Radio, Television, and Other Electronics Stores	$346,917,000
Newspaper Publishers	$238,067,000
Commercial Lithographic Printing	$206,944,000
Architectural Services	$147,753,000
Book Stores and News Dealers	$128,553,000
Television Broadcasting	$127,464,000
Advertising Agencies	$101,550,000
Florists	$72,302,000
Radio Stations	$63,409,000
Video Tape and Disc Rental	$55,354,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Mississippi Creative Industries to All Mississippi Industries

The 2,483 creative industries establishments in Mississippi represent 4.3% of all industry establishments in the state.

Table MS-9

Comparison of Mississippi Creative Industries to Total Industries	
Category	**Establishments**
Mississippi Creative Industries Totals	2,483
% of Mississippi Total Industries	4.3%
Mississippi Total Industries	57,233

Source: 2007 Economic Census, U.S. Census Bureau

With 30,374 employed in the creative industries in Mississippi, including 8,603 self-employed, the creative industries represent 2.8% of all employment in the state. The creative industries also represent 4.7% of all self-employed in Mississippi.

Table MS-10

Comparison of Mississippi Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Mississippi Creative Industries Totals	21,771	8,603	30,374
% of Mississippi Total Industries	2.4%	4.7%	2.8%
Mississippi Total Industries	891,957	181,811	1,073,768

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total annual payroll including earnings by the self-employed from the creative industries in Mississippi is more than $679 million, representing 1.9% of all compensation in the state. The almost $232 million earned by the self-employed in the creative industries in the state represents 3.0% of all self-employment revenues in Mississippi.

Table MS-11

Comparison of Mississippi Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
Mississippi Creative Industries Totals	$447,526,000	$231,712,000	$679,238,000
% of Mississippi Total Industries	1.6%	3.0%	1.9%
Mississippi Total Industries	$27,532,161,000	$7,750,876,000	$35,283,037,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total revenues earned in the creative industries in Mississippi total more than $2 billion, representing 1.2% of revenues earned by all industries in the state.

Table MS-12

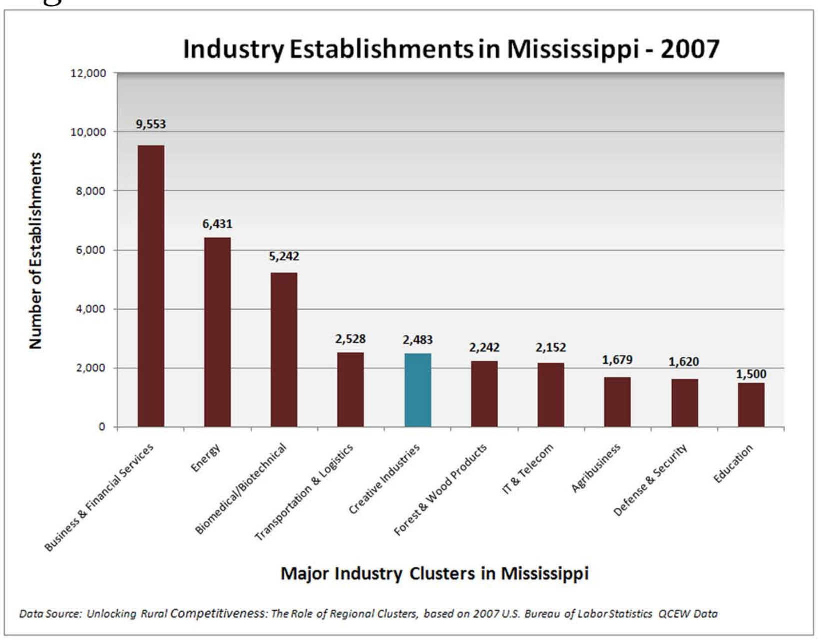
Comparison of Mississippi Creative Industries to Total Industries			
Category	**Establishment Revenues**	**Self-Employment Revenues**	**Total Revenues**
Mississippi Creative Industries Totals	$1,863,796,000	$231,712,000	$2,095,508,000
% of Mississippi Total Industries	1.1%	3.0%	1.2%
Mississippi Total Industries	$173,301,181,000	$7,750,876,000	$181,052,057,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Mississippi Creative Industries to Other Mississippi Industry Clusters

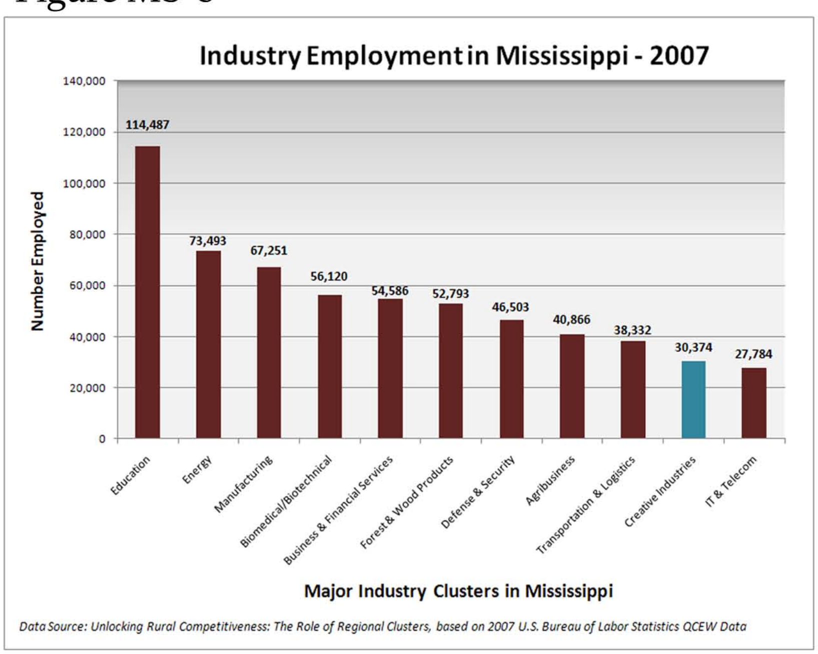
Looking at the number of creative industries establishments in Mississippi and comparing them to other industry clusters in the state, the creative industries are the fifth-largest sector in the state, with more establishments than forest and wood products, information technology and telecommunications, agribusiness, defense and security, and education. This total number of establishments for the creative industries does not include the self-employed.

Figure MS-5



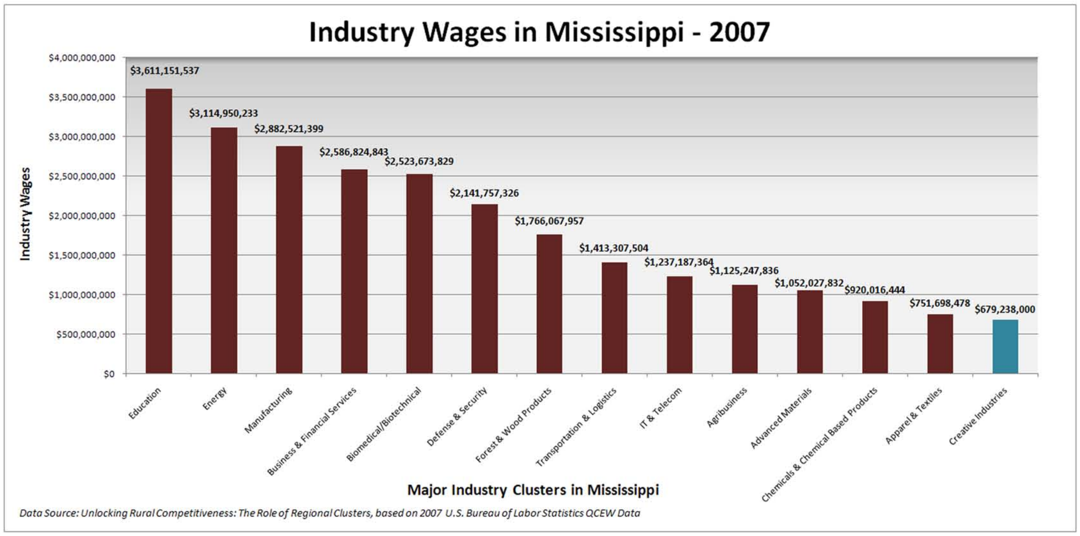
Based on employment, the 30,374 people working in the creative industries in Mississippi represent the tenth largest industry cluster in the state, larger than information technology and telecommunications.

Figure MS-6



The creative industries in Mississippi pay almost $680 million in wages each year, ranking the industry sector fourteenth in total payroll among all industry sectors in the state. However, it is likely that the actual total wages and the ranking of wages for the creative industries cluster in Mississippi are much higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for the payroll category in 39 separate creative industries sectors means that the total represented below is a significant undercount for the creative industries cluster in the state.

Figure MS-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Mississippi

There are 739 nonprofit arts, culture, and humanities organizations in Mississippi, representing 0.6% of all organizations of that type in the U.S. and 4.3% of those organizations in the South Arts region. Among the registered organizations, 229 organizations from Mississippi had annual revenues above $25,000 and therefore filed IRS form 990, representing 0.5% of the U.S. total and 3.4% of the South Arts region total.

Table MS-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Mississippi	739	0.60%	229	0.50%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

Those nonprofit arts, culture, and humanities organizations in Mississippi which filed form 990 reported a total of more than $67 million in revenue, representing 0.2% of the U.S. total and 1.9% of the South Arts region total. In addition, those same organizations reported more than $159 million in assets, representing 0.1% of the national total and 1.7% of the South Arts Region total.

Table MS-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Mississippi	$67,459,721	0.20%	$159,437,641	0.10%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

North Carolina

Creative Industries Profile

North Carolina – Creative Industries Profile

Like the people of North Carolina, the arts and culture of the state is spread to every city, town, and hamlet throughout its vast geography, from mountains, to piedmont, to coastal plains, to coast. From the progressive town of Asheville with the Asheville Art Museum, the Fine Art Theatre, Asheville Community Theatre, the Thomas Wolfe Historic Home, the Southern Highland Craft Guild, and the North Carolina Arboretum, to some of the world's best instruction in the arts at the John C. Campbell Folk School in Brasstown, the Penland School of Crafts, and the North Carolina School of the Arts in Winston-Salem; from the creative coastal city of Wilmington with the Cucalorus Film Festival, Alban Elved Dance Company, and Cameron Art Museum, to the Queen City of Charlotte with the Mint Museum of Art, the Charlotte Symphony Orchestra, and the Blumenthal Center for the Performing Arts; from the capital city of Raleigh with the North Carolina Museum of Art, the North Carolina Symphony, the Opera Company of North Carolina, Carolina Ballet, and the J.C. Raulston Arboretum, to the diverse cultures of the university towns of Chapel Hill, Durham, Winston-Salem, and Greensboro, North Carolina is rich with the arts and culture. The Tar Heel State has been home to some of the best writers, musicians, and performers of our time, as well. Writers Maya Angelou, Thomas Wolfe, Carl Sandberg, O. Henry, Clyde Edgerton, and Kaye Gibbons have all called North Carolina home. Notable musicians from North Carolina include John Coltrane, Roberta Flack, Thelonious Monk, Earl Scruggs, Doc Watson, and James Taylor. Notable actors Ava Gardner and Andy Griffith are also from North Carolina.

While the arts and culture are important for community building, tourism, education, and quality of life in the state, they also serve as the foundational base for North Carolina's creative economy.

The creative industries in North Carolina represent 11,529 businesses, employing a total of 164,000 people, who earn annual wages totaling more than $5.5 billion, and generate almost $17.7 billion in annual revenue. These figures represent 5.4% of the state's businesses, 4.1% of the state's employment, 3.6% of all wages earned, and 2.5% of all business revenue.

The nonprofit arts, culture, and humanities organizations in North Carolina are at the core of the state's creative industries. Of the 2,737 registered arts and culture nonprofits in the state, 1,161 of those filed form 990, reporting more than $733 million in annual revenue and almost $1.6 billion in assets.

The creative industries that fall within the film and media sector and the literary and publishing sector make up the largest percentage of the state's creative economy. The film and media sector is led by software publishers, cable and other program distribution, advertising agencies, television broadcasting, video tape and disc rental, and radio, television, and other electronics stores. Meanwhile, the leading industries within the literary and publishing sector include commercial lithographic printing, newspaper publishers, periodical publishers, and independent writers. Other leading sectors include jewelry stores, architectural services, graphic design services, florists, photography studios, interior design, other specialized design services, and other pressed and blown glass and glassware manufacturing.

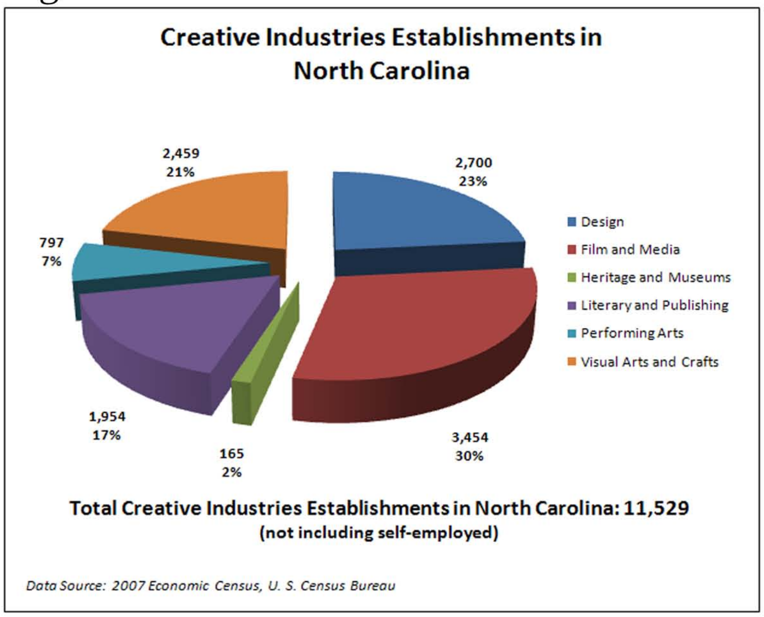
The information in the following pages presents the creative economy data for North Carolina in more detail with appropriate documentation.

"Like the people of North Carolina, the arts and culture are spread to every city, town, and hamlet throughout the state's vast geography, from mountains, to piedmont, to coastal plains, to coast."

Creative Industries in North Carolina – By the Numbers

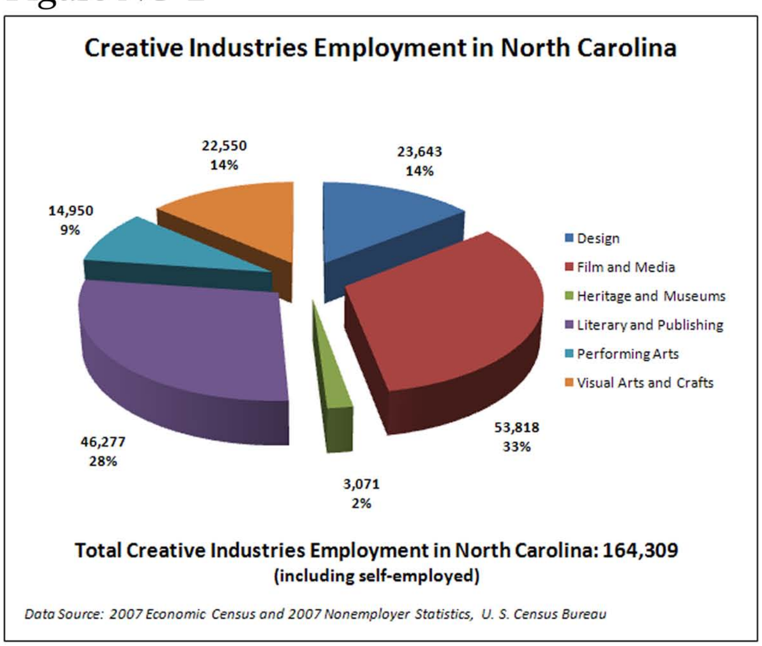
There are a total of 11,529 creative industries establishments in the state of North Carolina. The total includes 3,454 film and media establishments, 2,459 visual arts and crafts establishments, 2,700 design establishments, 1,954 literary and publishing establishments, 797 performing arts establishments, and 165 heritage and museums establishments.

Figure NC-1



The creative industries employ 164,309 people in the state of North Carolina, including the self-employed. The total employment numbers include 53,818 from film and media, 46,277 from literary and publishing, 23,643 from design, 22,550 from visual arts and crafts, 14,950 from performing arts, and 3,071 from heritage and museums.

Figure NC-2



Those working in the North Carolina creative industries earn more than $5.5 billion each year, including earnings from the self-employed. A full 40% of that total is earned in the film and media segment with total payroll and earnings representing almost $2.2 billion. The next two largest segments based on employee compensationare the literary and publishing sector group with payroll totaling almost $1.4 billion and the design sector group with payroll at almost $1 billion. The remaining segments are visual arts and crafts at $548 million, performing arts at $320 million, and heritage and museums at almost $69 million.

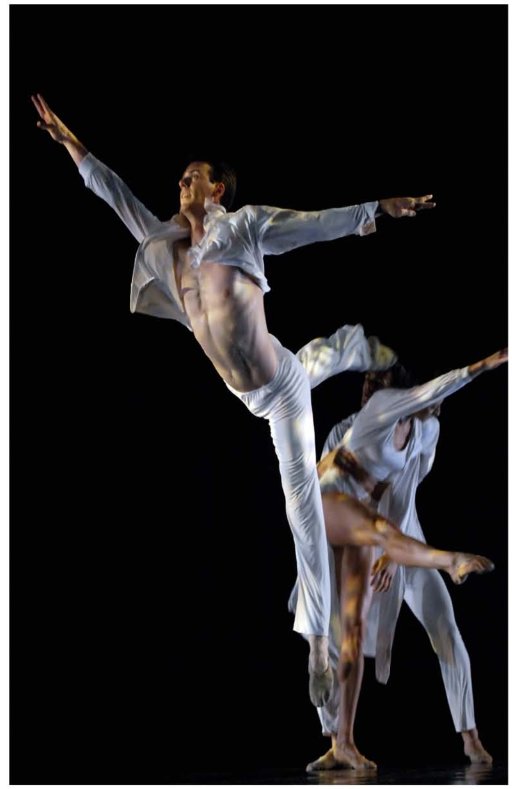
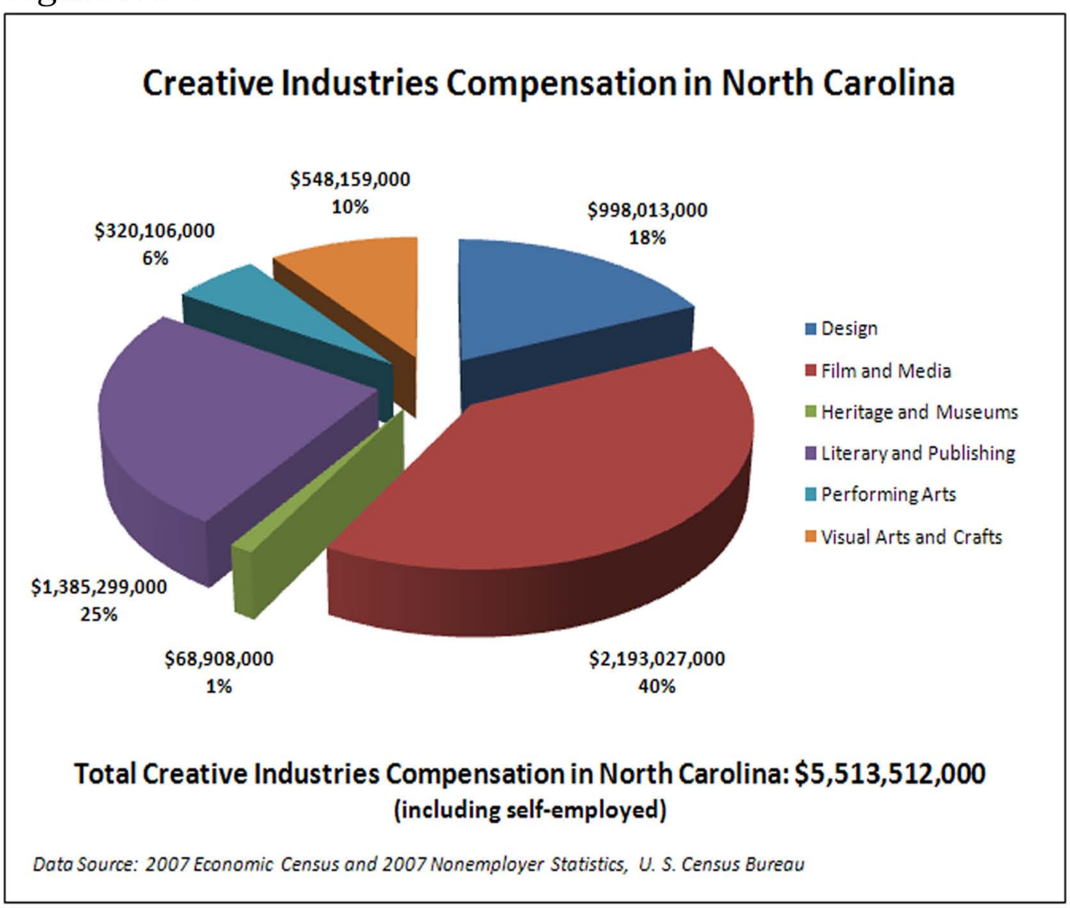
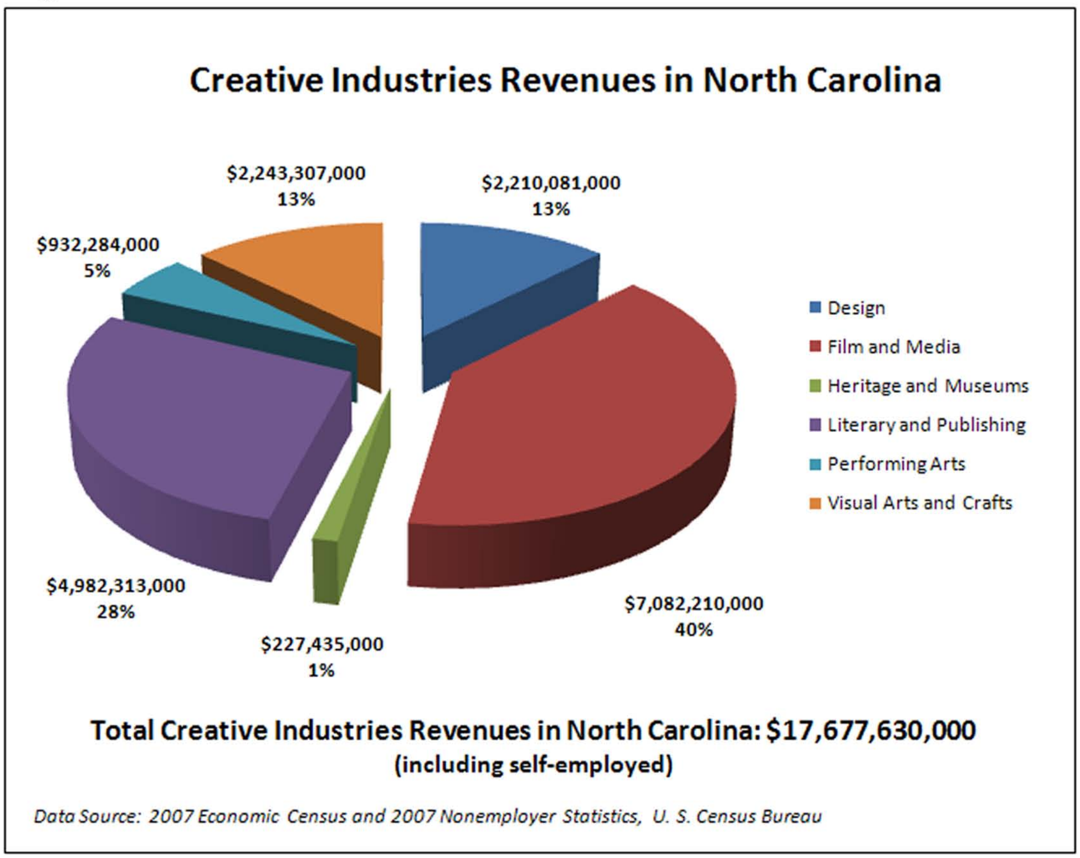


Figure NC-3



Total revenues for the creative industries in North Carolina are almost \$17.7 billion. Again, the sectors of the film and media segment represent 40% of the total with more than \$7 billion in annual revenues, followed by literary and publishing with almost \$5 billion in revenues. The next largest sectors are visual arts and crafts and design, each with a little more than \$2.2 billion in revenues. The performing arts represent \$930 million in revenue, and the heritage and museums sector group represents almost \$230 million in annual revenues.

Figure NC-4



Per Capita Data for North Carolina Creative Industries

There are 12.7 creative industries establishments for every 10,000 residents in North Carolina. The largest segment among the creative industries in North Carolina based on number of establishments per capita is film and media with 3.8 per 10,000 residents, followed by design with 3.0, visual arts and crafts with 2.7, literary and publishing with 2.2, performing arts with 0.9, and heritage and museums with 0.2.

Table NC-1

Creative Industries Establishments in North Carolina – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	2,700	3.0
Film and Media	3,454	3.8
Heritage and Museums	165	0.2
Literary and Publishing	1,954	2.2
Performing Arts	797	0.9
Visual Arts and Crafts	2,459	2.7
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN NORTH CAROLINA	**11,529**	**12.7**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

The creative industries in North Carolina generate 181.3 jobs for every 10,000 residents in the state. The total includes 59.4 employed in film and media, 51.1 working in literary and publishing, 26.1 in design, 24.9 in visual arts and crafts, 16.5 in the performing arts, and 3.4 in heritage and museums.

Table NC-2

Creative Industries Employment in North Carolina – Per 10,000 Residents	Employment	Employment Per 10,000
Design	23,643	26.1
Film and Media	53,818	59.4
Heritage and Museums	3,071	3.4
Literary and Publishing	46,277	51.1
Performing Arts	14,950	16.5
Visual Arts and Crafts	22,550	24.9
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN NORTH CAROLINA	**164,309**	**181.3**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 2,918,785 from the Economic Census.

For every 10,000 people in the state of North Carolina, those employed in the creative industries earn more than $6 million through workers' wages and earnings by the self-employed. More than 80% of that total is represented by the top three sectors – more than $2.4 million earned for every 10,000 residents in film and media, more than $1.5 million earned in literary and publishing, and more than $1.1 million earned in design. The remaining figures include almost $605,000 earned in visual arts and crafts, more than $353,000 earned in the performing arts, and more than $76,000 earned in heritage and museums.

Table NC-3

Creative Industries Compensation in North Carolina – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$998,013,000	$1,101,434
Film and Media	$2,193,027,000	$2,420,284
Heritage and Museums	$68,908,000	$76,049
Literary and Publishing	$1,385,299,000	$1,528,853
Performing Arts	$320,106,000	$353,278
Visual Arts and Crafts	$548,159,000	$604,963
TOTAL CREATIVE INDUSTRIES COMPENSATION IN NORTH CAROLINA	**$5,513,512,000**	**$6,084,861**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 9,061,032 from the Economic Census.

The total annual revenue for the creative industries in North Carolina is $17.7 billion. That breaks down to more than $19.5 million for every 10,000 people in the state. The largest sector group is film and media with $7.8 million per 10,000 residents, followed by literary and publishing with $5.5 million. The visual arts and crafts, and design sector groups each represent $2.4 million in revenue for every 10,000 North Carolinians. The performing arts represent about $1 million, and heritage and museums bring in $251,000 in revenue per 10,000 residents.

Table NC-4

Creative Industries Revenue in North Carolina – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$2,210,081,000	$2,439,105
Film and Media	$7,082,210,000	$7,816,119
Heritage and Museums	$227,435,000	$251,003
Literary and Publishing	$4,982,313,000	$5,498,615
Performing Arts	$932,284,000	$1,028,894
Visual Arts and Crafts	$2,243,307,000	$2,475,774
TOTAL CREATIVE INDUSTRIES REVENUE IN NORTH CAROLINA	**$17,677,630,000**	**$19,509,511**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 9,061,032 from the Economic Census.

Top Ten Creative Industry Sectors for North Carolina

Based on the number of establishments, the largest creative industries sectors for visual arts and crafts in North Carolina are jewelry stores, and photography studios. Among the film and media segment, the largest sectors are radio, television, and other electronics stores; video tape and disc rental; and advertising agencies. Several design sectors are included in the top ten – architectural services, florists, graphic design services, and interior design services. The only literary and publishing sector in the top ten by number of establishments is commercial lithographic printing.

Table NC-5

North Carolina - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	820
Radio, Television, and Other Electronics Stores	813
Architectural Services	679
Florists	609
Video Tape and Disc Rental	532
Photography Studios, Portrait	468
Graphic Design Services	438
Interior Design Services	391
Advertising Agencies	370
Commercial Lithographic Printing	368

Data Source: 2007 Economic Census, U. S. Census Bureau

Three of the largest creative industries sectors in North Carolina by total employment are from the literary and publishing sector – independent writers, newspaper publishers, and commercial lithographic printing. The film and media sector is also well represented with software publishers; radio, television, and other electronics stores; advertising agencies; and cable and other program distribution. Design sectors included in the top ten by total employment are architectural services, and specialized design services. The sole visual arts and crafts category in the top ten by employment is jewelry stores.

Table NC-6

North Carolina - Top Ten Creative Industry Sectors by Total Employment	
Independent Writers	9,567
Newspaper Publishers	9,514
Software Publishers	9,403
Radio, Television, and Other Electronics Stores	8,874
Commercial Lithographic Printing	8,242
Advertising Agencies	5,963
Jewelry Stores	5,896
Architectural Services	5,766
Specialized Design Services	5,295
Cable and Other Program Distribution	5,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on employee compensation in North Carolina, the largest sectors from film and media include software publishers; advertising agencies; radio, television, and other electronics stores; and television broadcasting. Design sectors in the top ten by employee compensation includearchitectural services, and specialized design services. The top ten for employee compensation also includes three sectors from literary and publishing – commercial lithographic printing, newspaper publishers, and independent writers. The jewelry stores sector is also included from the visual arts and crafts sector.

Table NC-7

North Carolina - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$937,558,000
Architectural Services	$352,969,000
Commercial Lithographic Printing	$329,002,000
Newspaper Publishers	$324,782,000
Advertising Agencies	$311,504,000
Specialized Design Services	$258,358,000
Radio, Television, and Other Electronics Stores	$177,966,000
Television Broadcasting	$153,604,000
Independent Writers	$152,554,000
Jewelry Stores	$137,563,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The film and media sectors are also among the largest creative industries sectors in North Carolina based on annual revenues, including software publishers; radio, television, and other electronics stores; advertising agencies; and television broadcasting. Literary and publishing sectors in the top ten based on revenues include commercial lithographic printing, newspaper publishers, and periodical publishers. Two sectors from visual arts and crafts are in the top ten – jewelry stores; and other pressed and blown glass and glassware manufacturing. One sector from design is represented – architectural services.

Table NC-8

North Carolina - Top Ten Creative Industry Sectors by Annual Revenue	
Software Publishers	$2,654,837,000
Radio, Television, and Other Electronics Stores	$1,705,337,000
Commercial Lithographic Printing	$1,295,086,000
Newspaper Publishers	$988,943,000
Architectural Services	$853,342,000
Jewelry Stores	$723,622,000
Advertising Agencies	$591,214,000
Television Broadcasting	$539,272,000
Periodical Publishers	$473,517,000
Other Pressed and Blown Glass and Glassware Manufacturing	$466,842,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of North Carolina Creative Industries to All North Carolina Industries

The 11,529 creative industries establishments in North Carolina represent 5.4% of all industries in the state.

Table NC-9

Comparison of North Carolina Creative Industries to Total Industries	
Category	**Establishments**
North Carolina Creative Industries Totals	11,529
% of North Carolina Total Industries	5.4%
North Carolina Total Industries	214,379

Source: 2007 Economic Census, U.S. Census Bureau

The creative industries employ 164,309 people, representing 4.1% of employment in all industries in North Carolina. This total includes 45,696 people who are self-employed, representing 7.2% of all self-employed in the state.

Table NC-10

Comparison of North Carolina Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
North Carolina Creative Industries Totals	118,613	45,696	164,309
% of North Carolina Total Industries	3.5%	7.2%	4.1%
North Carolina Total Industries	3,393,311	637,130	4,030,441

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total compensation for the creative industries in North Carolina is more than $5.5 billion, representing 3.6% of all payroll and self-employed earnings in the state. The total includes more than $1.2 billion in self-employment revenues, representing 4.4% of all self-employment revenues in the state.

Table NC-11

Comparison of North Carolina Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
North Carolina Creative Industries Totals	$4,309,823,000	$1,203,689,000	$5,513,512,000
% of North Carolina Total Industries	3.5%	4.4%	3.6%
North Carolina Total Industries	$124,269,903,000	$27,223,358,000	$151,493,261,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total revenues for the creative industries in North Carolina are almost $17.6 billion, representing 2.5% of all industry revenues in the state.

Table NC-12

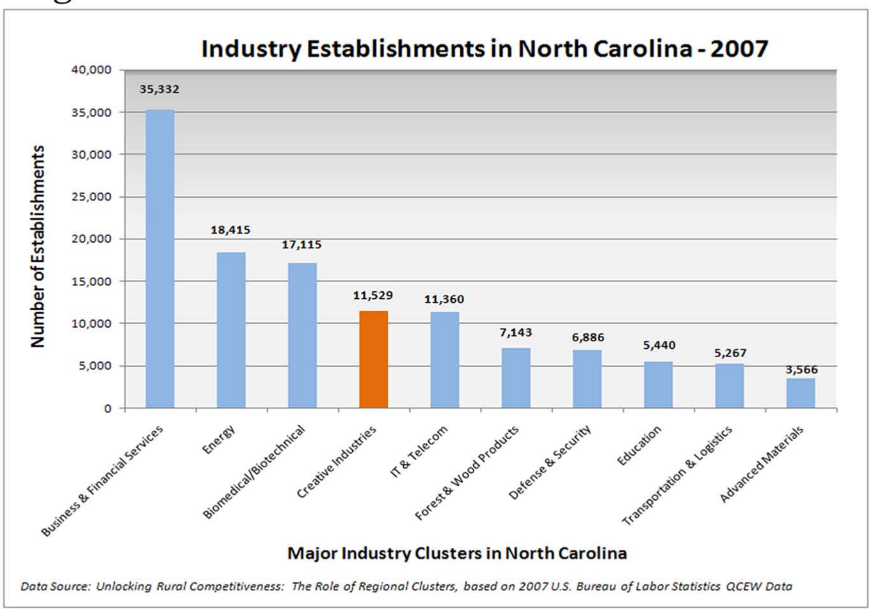
Comparison of North Carolina Creative Industries to Total Industries			
Category	**Establishment Revenues**	**Self-Employment Revenues**	**Total Revenues**
North Carolina Creative Industries Totals	$16,473,941,000	$1,203,689,000	$17,677,630,000
% of North Carolina Total Industries	2.5%	4.4%	2.5%
North Carolina Total Industries	$670,966,528,000	$27,223,358,000	$698,189,886,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of North Carolina Creative Industries to Other North Carolina Industry Clusters

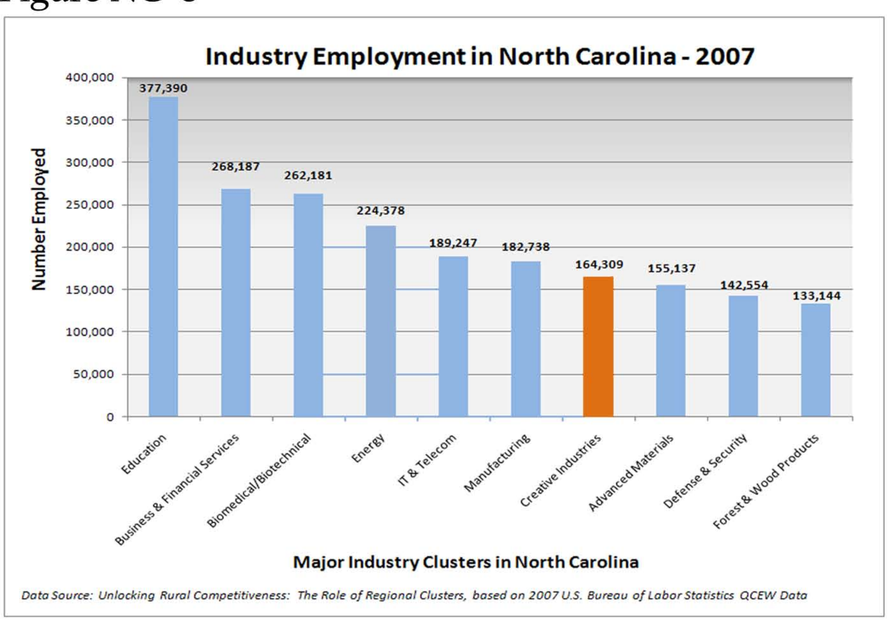
The creative industries in North Carolina number 11,529 establishments, making them the fourth largest industry cluster in the state, larger than information technology and telecommunications, forest and wood products, defense and security, education, transportation and logistics, and advanced materials. This total number of establishments for the creative industries does not include the self-employed.

Figure NC-5



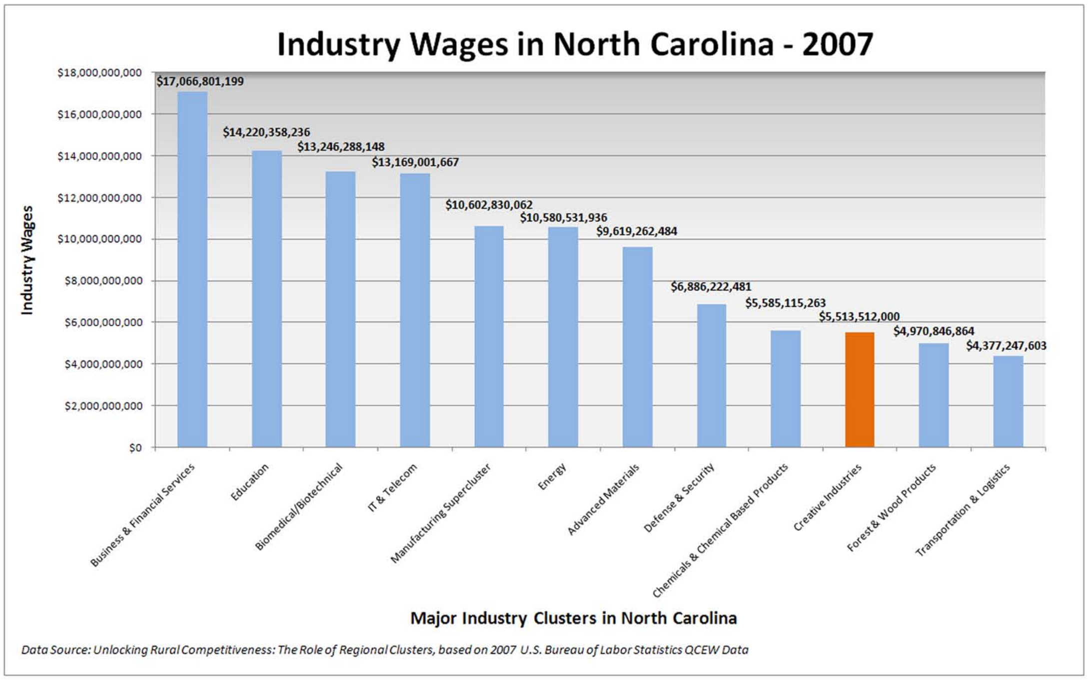
The creative industries in North Carolina employ 164,309 people. That means the industry cluster is the seventh largest in the state by total employment, larger than advanced materials, defense and security, and forest and wood products.

Figure NC-6



North Carolina's creative industries pay more than $5.5 billion in wages each year, ranking the industry cluster tenth in total payroll among all industry clusters in the state, larger than forest and wood products, and transportation and logistics. However, it is likely that the actual total wages and the ranking of wages for the creative industries cluster in North Carolina are higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for the payroll category in 18 separate creative industries sectors means that the total represented below is an undercount for the creative industries cluster in the state.

Figure NC-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in North Carolina

There are 2,737 registered nonprofit arts, culture, and humanities organizations in North Carolina, representing 2.4% of the national total and 16.0% of the South Arts region total. Of those, 1,161 organizations had annual revenues above $25,000 and therefore filed form 990, representing 2.4% of the national total and 17.5% of the South Arts region total.

Table NC-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
North Carolina	2,737	2.40%	1,161	2.40%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

Those nonprofit arts, culture, and humanities organizations that filed form 990 in North Carolina in 2007 reported total revenues of more than $733 million, representing 1.7% of the U.S. total and 20.4% of the South Arts region total. Those same organizations reported almost $1.6 billion in assets, representing 1.3% of the U.S. total and 16.9% of the South Arts region total.

Table NC-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
North Carolina	$733,282,042	1.70%	$1,588,599,559	1.30%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

South Carolina

Creative Industries Profile

South Carolina – Creative Industries Profile

When you mention South Carolina, the cities that most people think of include Charleston, Columbia, and Greenville. And some of the strongest identifiers for those cities are the arts, culture, history, and architecture. From Spoleto and the historic homes in Charleston, to the arts and culture renaissance and the new Peace Center for the Performing Arts in Greenville, to the renovation of the old Fox Theatre by the Nickelodeon Theatre and the Columbia Museum of Art in Columbia, the arts play an essential role in establishing the image of cities and towns of South Carolina. Even more than that, the arts create a tourism magnet, build communities, improve quality of life, provide amenities that help recruit and keep businesses, contribute to a holistic education for students, and represent the nonprofit, educational, and self-employed base of the creative economy.

The creative economy of South Carolina is significant. The creative industries alone represent more than 4,800 businesses, with 68,000 employees, earning $1.6 billion each year in wages, and generating almost $6 billion in revenue. This includes more than 6,300 independent artists, writers, and performers earning more than $90 million annually. These numbers also include a nonprofit arts, culture, and humanities sector which generates a minimum of $190 million in revenue each year and controls at least $480 million in assets. The creative industries in total represent 4.8% of establishments, 3.7% of employees, 3.3% of payroll, and 2.0% of revenue generated by all industries in South Carolina.

At the core of South Carolina's creative industries are the nonprofit arts, culture, and humanities organizations that provide support, leadership, education, training, community access, and advancement for the field. The registered nonprofit arts, culture, and humanities organizations which filed form 990 represent $191 million in annual revenue and have assets totaling more than $480 million.

The creative industries in South Carolina are led by the film and media sectors, with $815 million in annual payroll and $2.4 billion in annual revenues. The leading industries within the film and media sectors include software publishers, cable and other program distribution, advertising agencies, radio, television, and other electronics stores, and television broadcasting. In addition, the state is home to a sizable literary and publishing sector, with $488 million in annual payroll and $1.5 billion in annual revenues. The leading industries within the literary and publishing sector are newspaper publishers, commercial lithographic printing, independent writers, and book stores. Other leading industry sectors include jewelry stores, architectural services, photography manufacturing and wholesalers, and specialized design services.

The information in the following pages presents the creative economy data for South Carolina in more detail with appropriate documentation.

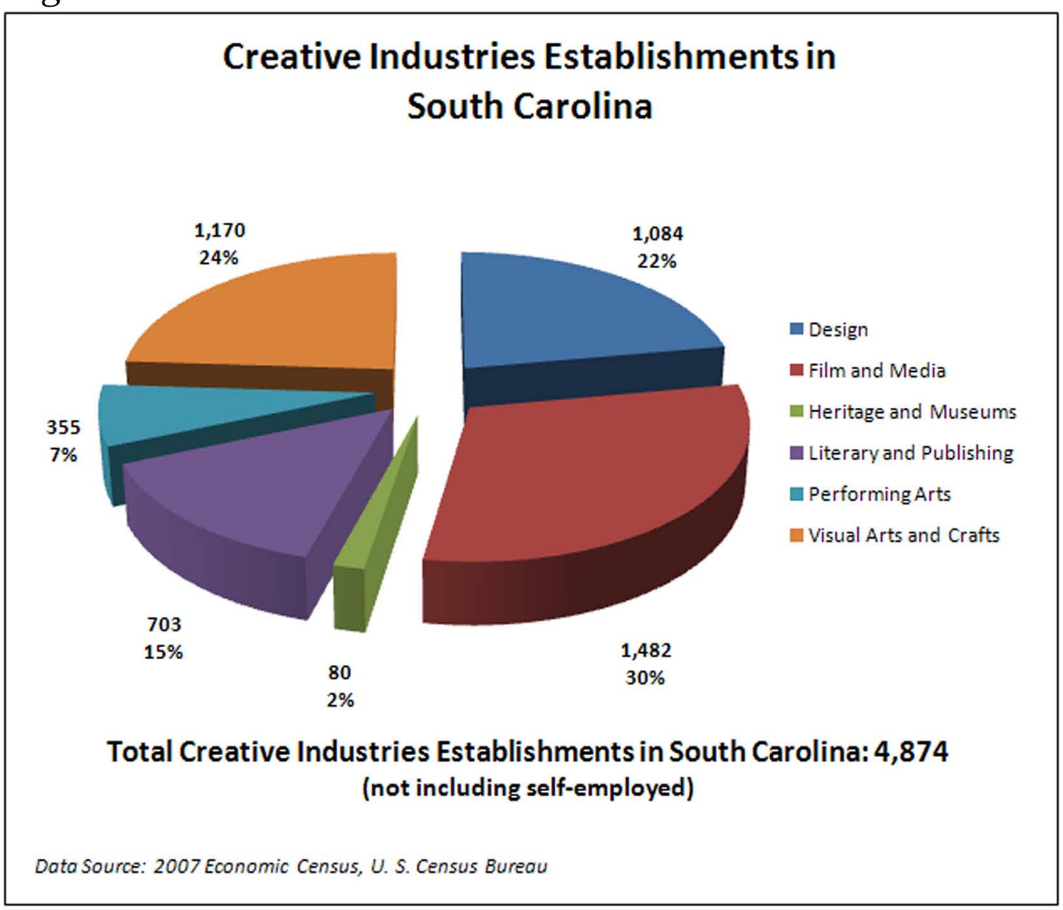
"At the core of South Carolina's creative industries are the nonprofit arts, culture, and humanities organizations that provide support, leadership, education, training, community access, and advancement for the field."

Creative Industries in South Carolina – By the Numbers

In the state of South Carolina, there are 4,874 creative industries establishments, including 1,482 in film and media, 1,170 in visual arts and crafts, 1,084 in design, and 703 in literary and publishing industries.

The largest creative economy sectors in the state based on number of establishments include jewelry stores, radio, television, and other electronics stores, florists, architectural services, video tape and disc rental, photography studios, interior design services, advertising agencies, book stores, and fine arts schools.

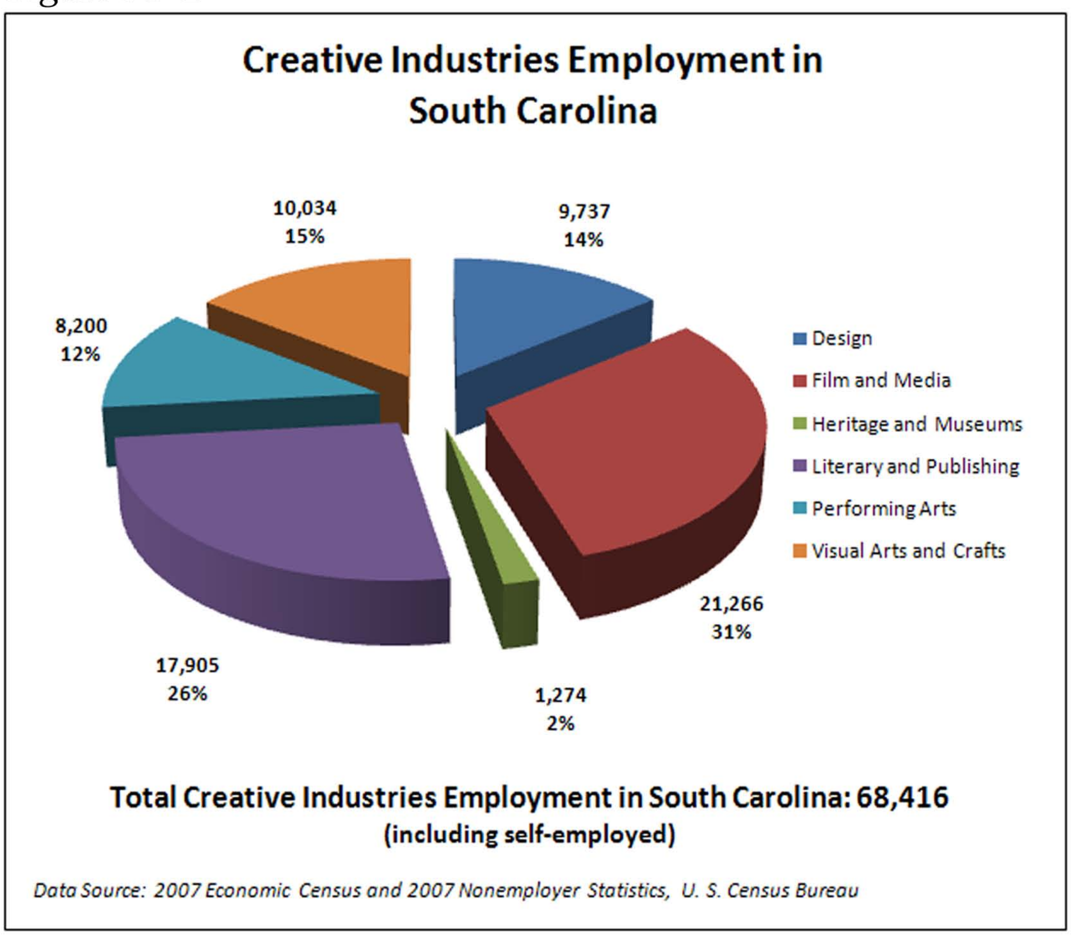
Figure SC-1



The creative industries employ a total of 68,416 people in South Carolina. The largest employer is the film and media sector with 21,266 employees, followed by literary and publishing with 17,905, visual arts and crafts with 10,034, design with 9,737, and performing arts with 8,200.

While literary and publishing is the fourth-largest creative industries sector based on the number of establishments, it is the second-largest sector based on employment. This is due in part to a large number of people employed in the state in the sectors of newspaper publishers, commercial lithographic printing, book stores, and screen printing. The largest employers in film and media are radio, television, and other electronics stores, cable and other program distribution, software publishers, video tape and disc rental, radio stations, television broadcasting, motion picture theaters, and advertising agencies.

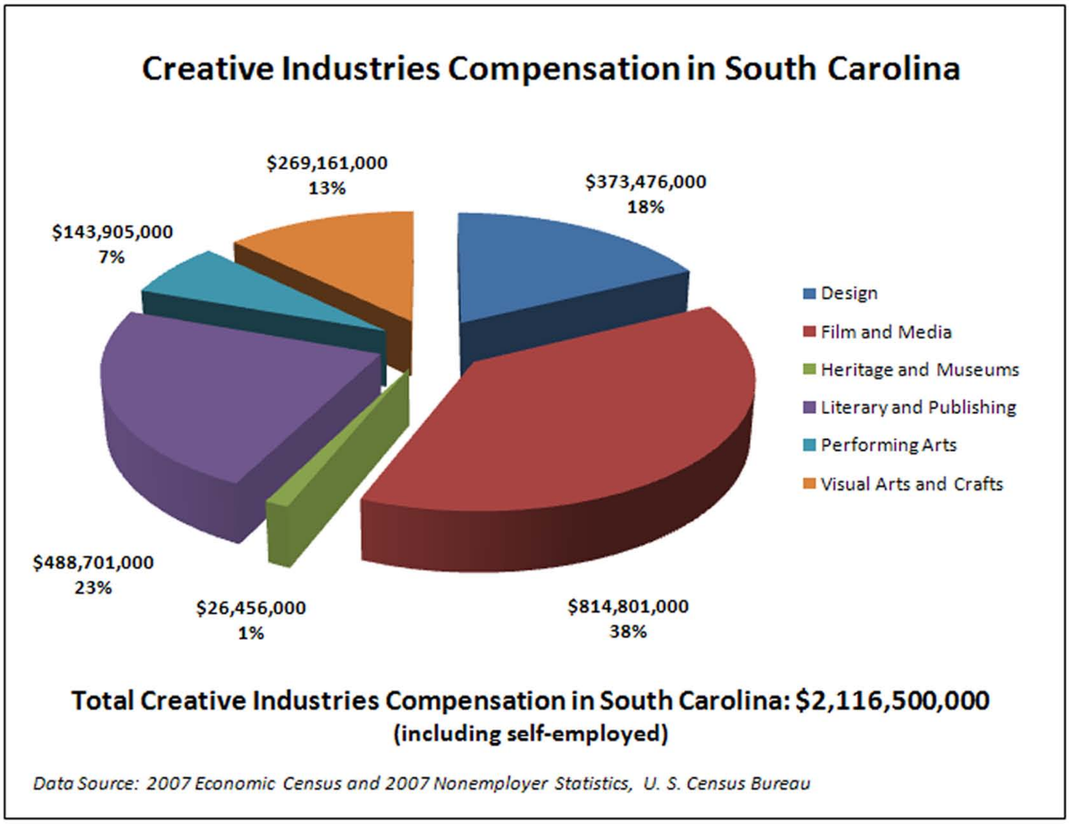
Figure SC-2



Creative industries wages in South Carolina total more than $2 billion annually, including earnings by the self-employed. Based on total wages, the largest sector in the state is film and media, with a total of almost $815 million in wages for 2007. On average, employees in the film and media sector are paid a higher wage than other sectors in the state. The design sector pays the second-highest wages on average.

The largest specific sectors based on total wages are software publishers, newspaper publishers, cable and other program distribution, architectural services, advertising agencies, and commercial lithographic printing.

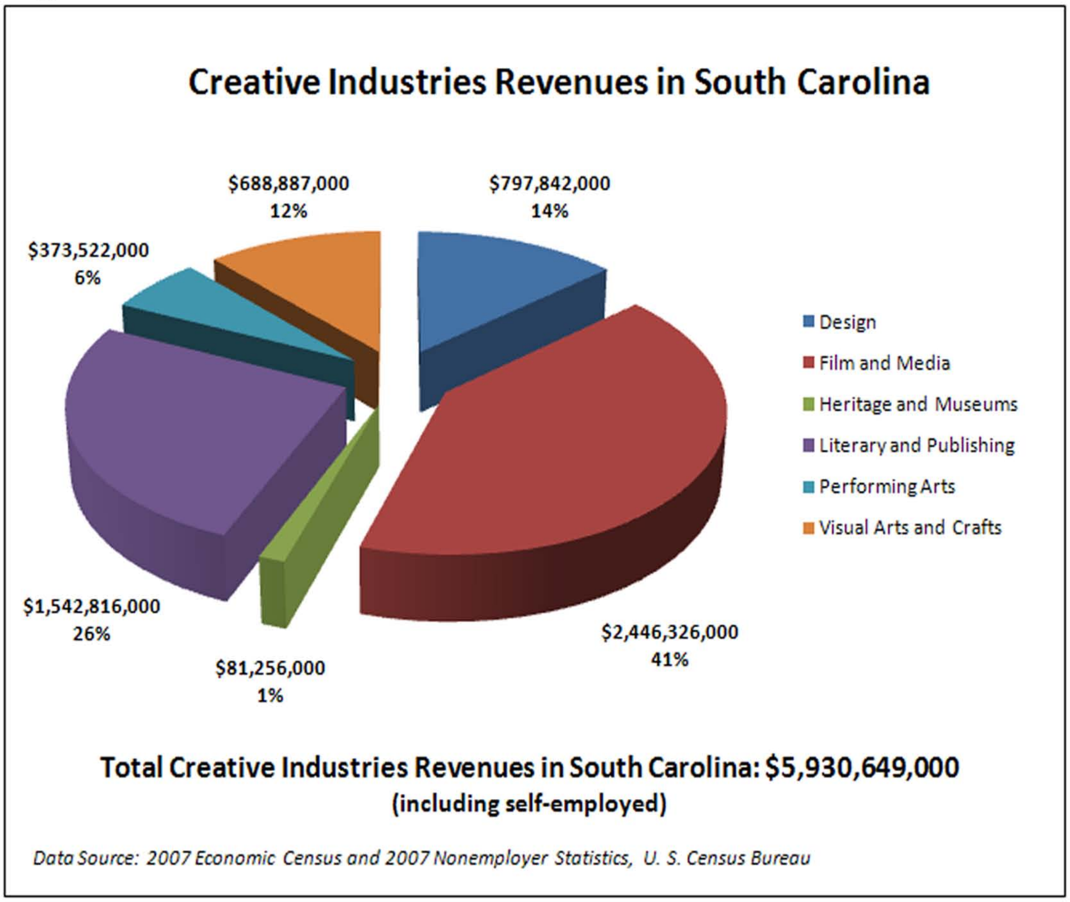
Figure SC-3



The creative industries earned revenues totaling almost $6 billion in 2007. Again, the highest revenues were earned in the film and media sector with $2.4 billion, followed by literary and publishing with $1.5 billion. Those sectors are followed by design with $798 million and visual arts and crafts with $688 million.

Based on total revenues, the largest single sector among South Carolina creative industries is radio, television, and other electronics stores with more than $915 million in revenue for the year. That sector is followed by newspaper publishers with $497 million, software publishers with $451 million, commercial lithographic printing with $360 million, architectural services with $339 million, and jewelry stores with $313 million in revenue.

Figure SC-4



Per Capita Data for South Carolina Creative Industries

Among the creative industries, South Carolina has 11.1 establishments per 10,000 residents, including 3.4 film and media establishments, 2.7 visual arts and crafts establishments, 2.5 design establishments, and 1.6 literary and publishing establishments.

Table SC-1

Creative Industries Establishments in South Carolina – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	1,084	2.5
Film and Media	1,482	3.4
Heritage and Museums	80	0.2
Literary and Publishing	703	1.6
Performing Arts	355	0.8
Visual Arts and Crafts	1,170	2.7
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN SOUTH CAROLINA	4,874	11.1

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,407,709 from the Economic Census.

The creative industries in South Carolina employ 155.2 people per 10,000 residents. The total includes 48.2 employed in film and media, 40.6 in literary and publishing, 22.8 in visual arts and crafts, 22.1 in design, and 18.6 in performing arts.

Table SC-2

Creative Industries Employment in South Carolina – Per 10,000 Residents	Employment	Employment Per 10,000
Design	9,737	22.1
Film and Media	21,266	48.2
Heritage and Museum	1,274	2.9
Literary and Publishing	17,905	40.6
Performing Arts	8,200	18.6
Visual Arts and Crafts	10,034	22.8
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN SOUTH CAROLINA	68,416	155.2

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

The creative industries compensation for every 10,000 residents in South Carolina is $4,801,814. This total is comprised of compensation of $1.8 million in film and media, $1.1 million in literary and publishing, $847,000 indesign, $611,000 in visual arts and crafts, $326,000 in the performing arts, and $60,000 in the heritage and museum sectors.

Table SC-3

Creative Industries Compensation in South Carolina – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$373,476,000	$847,325
Film and Media	$814,801,000	$1,848,582
Heritage and Museums	$26,456,000	$60,022
Literary and Publishing	$488,701,000	$1,108,742
Performing Arts	$143,905,000	$326,485
Visual Arts and Crafts	$269,161,000	$610,660
TOTAL CREATIVE INDUSTRIES COMPENSATION IN SOUTH CAROLINA	**$2,116,500,000**	**$4,801,814**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

For every 10,000 residents, the South Carolina creative industries generate $13,455,174 in revenue. This total includes $5.5 million generated by film and media, $3.5 million by literary and publishing, $1.8 million by design, $1.6 million by visual arts and crafts, $847,000 by performing arts, and $184,000 by the heritage and museum sectors.

Table SC-4

Creative Industries Revenue in South Carolina – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$797,842,000	$1,810,106
Film and Media	$2,446,326,000	$5,550,108
Heritage and Museums	$81,256,000	$184,350
Literary and Publishing	$1,542,816,000	$3,500,267
Performing Arts	$373,522,000	$847,429
Visual Arts and Crafts	$688,887,000	$1,562,914
TOTAL CREATIVE INDUSTRIES REVENUE IN SOUTH CAROLINA	**$5,930,649,000**	**$13,455,174**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,241,474 from the Economic Census.

Top Ten Creative Industry Sectors for South Carolina

Based on number of establishments, the largest creative industry sectors in South Carolina are jewelry stores; radio, television, and other electronics stores; florists; architectural services; and video tape and disc rental.

Table SC-5

South Carolina - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	435
Radio, Television, and Other Electronics Stores	423
Florists	298
Architectural Services	297
Video Tape and Disc Rental	240
Photography Studios, Portrait	223
Interior Design Services	193
Advertising Agencies	166
Book Stores	147
Fine Arts Schools	140

Data Source: 2007 Economic Census, U. S. Census Bureau

When looking at total employment, the largest South Carolina creative industry sectors are newspaper publishers; radio, television, and other electronics stores; independent writers; cable and other program distribution; and independent performers.

Table SC-6

South Carolina - Top Ten Creative Industry Sectors by Total Employment	
Newspaper Publishers	4,637
Radio, Television, and Other Electronics Stores	4,187
Independent Writers	3,240
Cable and Other Program Distribution	3,214
Independent Performers	3,107
Jewelry Stores	2,834
Commercial Lithographic Printing	2,596
Advertising Agencies	2,482
Architectural Services	2,318
Software Publishers	2,255

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Employee compensation among creative industry sectors in South Carolina is topped by software publishers, followed by newspaper publishers; cable and other program distribution; architectural services; advertising agencies; and commercial lithographic printing.

Table SC-7

South Carolina - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$201,493,000
Newspaper Publishers	$159,281,000
Cable and Other Program Distribution	$148,207,000
Architectural Services	$142,730,000
Advertising Agencies	$127,317,000
Commercial Lithographic Printing	$108,262,000
Radio, Television, and Other Electronics Stores	$89,457,000
Specialized Design Services	$68,887,000
Jewelry Stores	$68,269,000
Photographic Film, Paper, Plate, and Chemical Manufacturing	$64,494,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Finally, the top South Carolina creative industry sectors by annual revenue are radio, television, and other electronics stores; newspaper publishers; software publishers; commercial lithographic printing; and architectural services.

Table SC-8

South Carolina - Top Ten Creative Industry Sectors by Annual Revenue	
Radio, Television, and Other Electronics Stores	$915,539,000
Newspaper Publishers	$496,806,000
Software Publishers	$450,867,000
Commercial Lithographic Printing	$360,943,000
Architectural Services	$339,307,000
Jewelry Stores	$313,346,000
Advertising Agencies	$273,738,000
Book Stores	$226,164,000
Television Broadcasting	$213,117,000
Photographic Equipment and Supplies Merchant Wholesalers	$136,256,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of South Carolina Creative Industries to All South Carolina Industries

Based on data from the 2007 Economic Census, there are 4,874 South Carolina creative industries establishments, representing 4.8% of all industry establishments in the state.

Table SC-9

Comparison of South Carolina Creative Industries to Total Industries	
Category	Establishments
South Carolina Creative Industries Totals	4,874
% of South Carolina Total Industries	4.8%
South Carolina Total Industries	101,619

Source: 2007 Economic Census, U.S. Census Bureau

Total employment for the South Carolina creative industries is 68,416, including 19,264 self-employed. The creative industries represent 3.7% of all employment in the state. The self-employed in the creative industries represent 6.8% of all self-employed in the state.

Table SC-10

Comparison of South Carolina Creative Industries to Total Industries			
Category	Employment in Establishments	Self-Employment	Total Employment
South Carolina Creative Industries Totals	49,152	19,264	68,416
% of South Carolina Total Industries	3.2%	6.8%	3.7%
South Carolina Total Industries	1,554,701	284,644	1,839,345

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Total wages for creative industries workers in South Carolina were more than $2 billion in 2007, representing 3.3% of all wages in the state. Earnings by the self-employed in the creative industries totaled more than $500 million or more than 4.1% of all wages in the state. Self-employed wages also represent 24% of all creative industries wages in the state.

Table SC-11

Comparison of South Carolina Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
South Carolina Creative Industries Totals	$1,602,382,000	$514,118,000	$2,116,500,000
% of South Carolina Total Industries	3.1%	4.1%	3.3%
South Carolina Total Industries	$51,279,018,000	$12,585,075,000	$63,864,093,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Total creative industries revenues in South Carolina for 2007 were almost $6 billion, representing 2% of revenues generated by all industries in the state.

Table SC-12

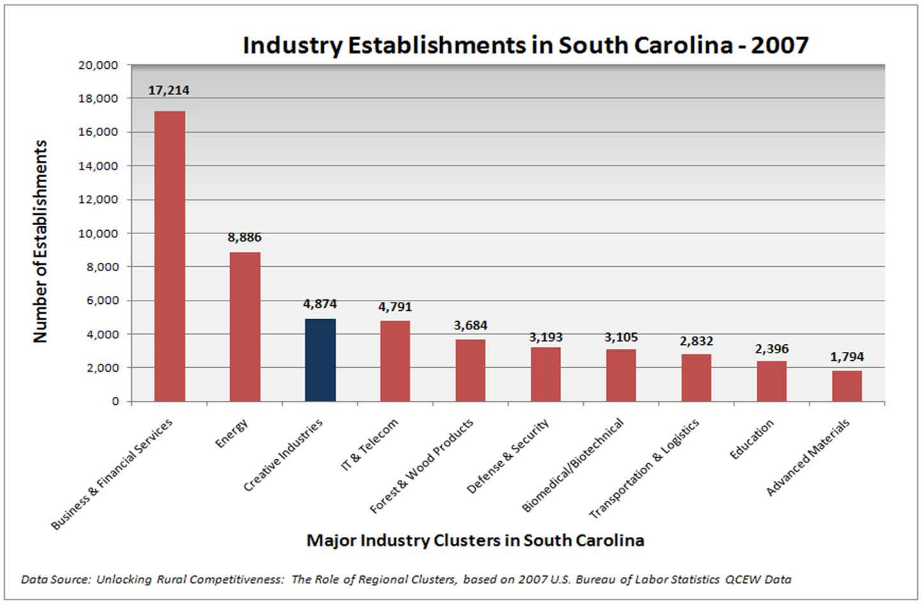
Comparison of South Carolina Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
South Carolina Creative Industries Totals	$1,602,382,000	$514,118,000	$2,116,500,000
% of South Carolina Total Industries	3.1%	4.1%	3.3%
South Carolina Total Industries	$51,279,018,000	$12,585,075,000	$63,864,093,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of South Carolina Creative Industries to Other South Carolina Industry Clusters

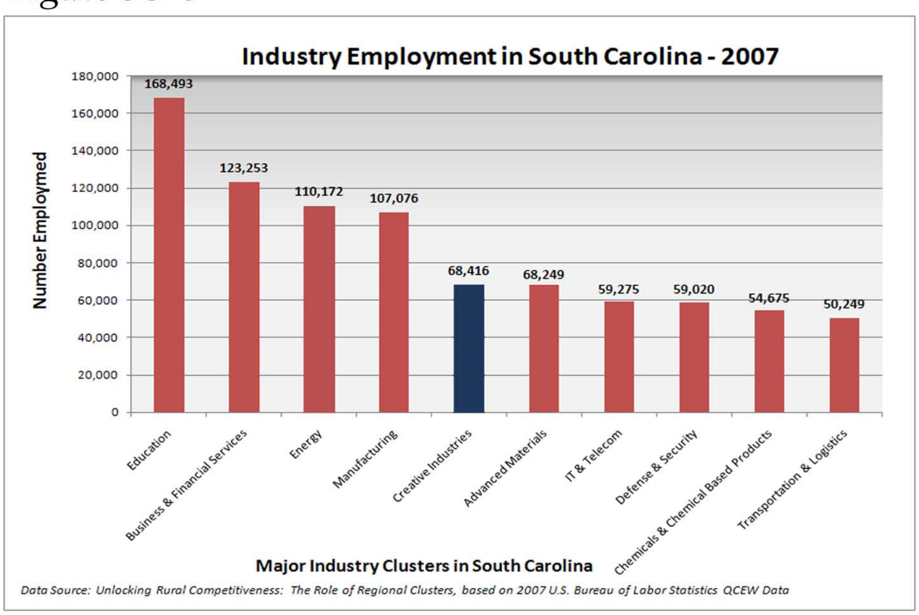
With 4,874 establishments, the creative industries are the third largest industry cluster in South Carolina – larger than information technology and telecommunications, forest and wood products, defense and security, biomedical and biotechnical, transportation and logistics, and education. This total number of establishments for the creative industries does not include the self-employed.

Figure SC-5



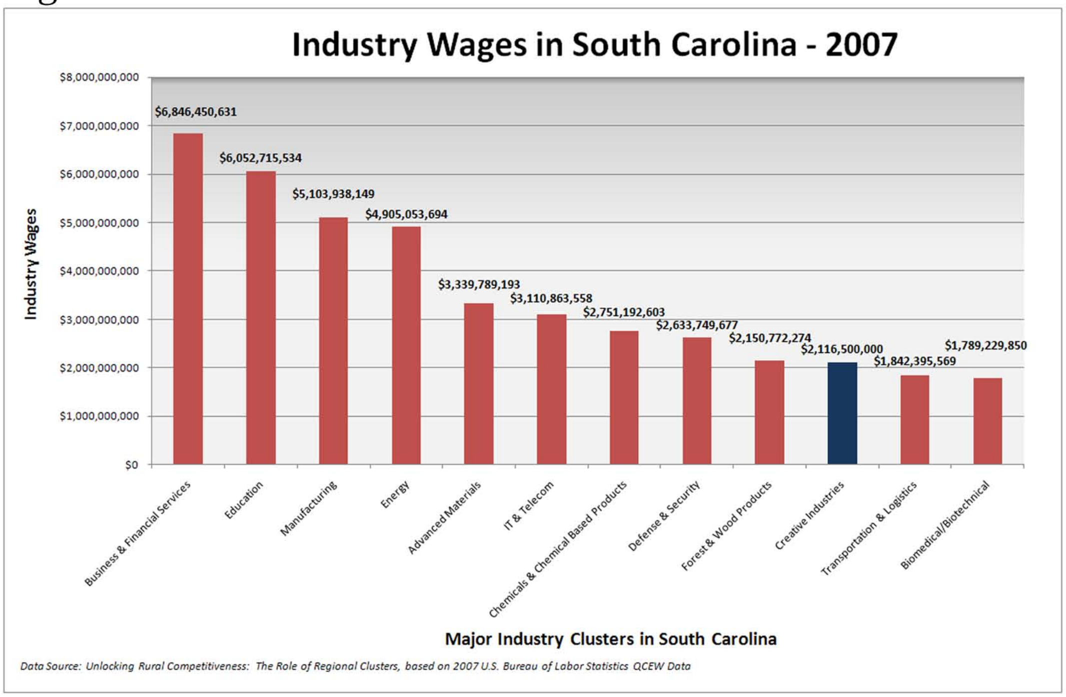
The creative industries employ the fifth-largest number of people with 68,416 employees, including the self-employed. This makes the creative industries employment base larger than advanced materials, information-technology and telecommunications, defense and security, chemical based products, and transportation and logistics industry clusters.

Figure SC-6



Based on available data, the creative industries represent at least the tenth largest industry cluster in South Carolina based on payroll, larger than transportation and logistics, and biomedical and biotechnical industry clusters. However, it is likely that the actual total and the ranking of the creative industries cluster for South Carolina is much higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll in 22 separate creative industries sectors means that the total represented below is a major undercount for South Carolina.

Figure SC-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in South Carolina

There were 1,203 registered arts, culture, and humanities nonprofits in South Carolina in 2007, including 448 organizations that had annual revenues above $25,000 and therefore filed IRS form 990, which represents 37% of the registered arts, culture, and humanities organizations in the state. The arts, culture, and humanities registered nonprofits in South Carolina represent 1% of the national total and 7% of the South Arts region total. The number filing form 990 in South Carolina represents 0.9% of the national total and 6.7% of all arts, culture, and humanities nonprofits filing form 990 in the South Arts region.

Table SC-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
South Carolina	1,203	1.00%	448	0.90%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The arts, culture, and humanities non-profit organizations filing form 990 in South Carolina reported almost $191 million in revenue for 2007 and more than $480 million in assets. The revenue figures for South Carolina represent 0.4% of the national total and 5.3% of the South Arts region total. The total assets of South Carolina's arts, culture, and humanities nonprofit organizations represent 0.4% of the national total and 5.1% of the total for the South Arts region.

Table SC-14

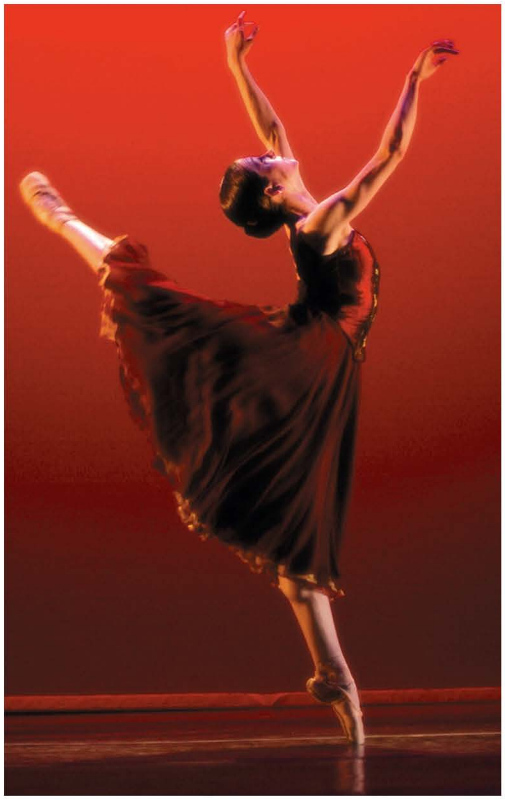
Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
South Carolina	$190,855,319	0.40%	$480,343,817	0.40%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Tennessee

Creative Industries Profile

Tennessee – Creative Industries Profile



Think of Tennessee culture and the first thing that comes to mind is music. Whether it's the unofficial capital of country music in Nashville, the unofficial capital of blues music in Memphis, or the unofficial birthplace of rock and roll memorialized at Elvis Presley's Graceland. The state's culture is synonymous with and wrapped up in music. The same goes for the state's creative industries, many of which are connected in some way with the music industry – whether through independent performers, music publishers, musical groups and artists, periodical publishers, or video producers. Tennessee is home to one of the largest music festivals in the country, Bonnaroo. The state also boasts major tourist destinations with a music focus such as The Grand Ole Opry, the Ryman Auditorium, the Country Music Hall of Fame and Museum, and Dollywood. Tennessee ranks highest in the South Arts region in per capita establishments, per capita employment, per capita wages, and per capita revenue for the performing arts. The music industry in the state is pervasive.

But the performing arts industry sector isn't even the largest of the creative industries sectors in Tennessee.

Even larger is the Tennessee literary and publishing sector, with a major presence by the sectors of commercial lithographic printing, independent writers, newspaper publishers, periodical publishers, and book, newspaper, and periodical wholesalers. In addition to being a major center for the music industry, Nashville is also a large hub for the publishing industry, especially among publishers of religious material.

Also larger than the performing arts industry sector in Tennessee is the film and media sector, with major contributions to the state's economy from cable programming and distribution, television broadcasting, radio broadcasting, video tape and disc rental, motion picture theaters, advertising agencies, and radio, television, and other electronics stores. The state is known for major film festivals such as Indie Memphis and the Nashville Film Festival, and The Belcourt Theatre, one of the best art house film venues in the U.S. Some of the biggest film and television stars have resided in Tennessee, including as Dixie Carter, Morgan Freeman, Quentin Tarantino, Reese Witherspoon, Robert Downey, Jr., Samuel L. Jackson, and Oprah Winfrey.

Tennessee also has a significant reputation for the visual arts and crafts, with institutions such as The Parthenon, the Frist Center for the Visual Arts, the Hunter Museum of American

Art, the Arrowmont School of Arts and Crafts, and the 4 Bridges Arts Festival. Some of the major visual arts industries include blown glass and glassware manufacturing, jewelry stores, photography studios, art good merchants, fine arts schools and photofinishing laboratories. The state is also home to more than 1,300 independent artists.

Based on the category breakdown of Tennessee's 7,941 creative industries establishments, the state has a balanced creative industries presence between literary and publishing, visual arts and crafts, film and media, performing arts, and design. Tennessee's creative industries represent about 6.1% of all industry establishments in the state. They also employ 134,509 people in Tennessee or 4.8% of all employment in the state, including 37, 947 who are self-employed or 8.3% of all self-employed. Wages earned by workers in the creative industries totaled more than $4.9 billion in 2007, at least 4.6% of all wages. Annual revenues for creative industries in Tennessee totaled almost $17 billion in 2007, or at least 3.4% of all industry revenue earned in the state.

Tennessee is home to a robust network of nonprofit arts, culture, and humanities organizations with 1,687 registered in the state and serving as the foundation for the creative industries of the state. Of those organizations, 655 filed form 990 in 2007 and reported total revenues of almost $345 million and more than $1 billion in assets.

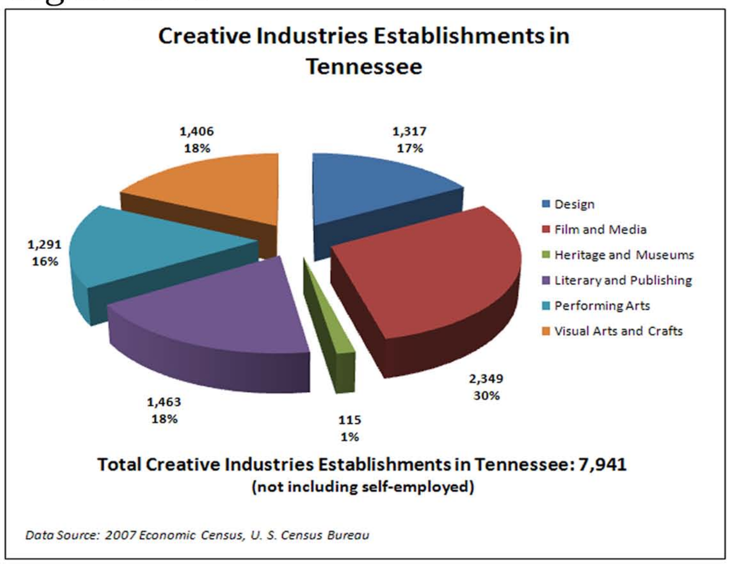
The information in the following pages presents the creative economy data for Tennessee in more detail with appropriate documentation.

"There are 7,941 creative industries establishments in Tennessee. As an industry cluster, this represents the fourth largest in the state – greater than information technology and telecommunications, transportation and logistics, defense and security, forest and wood products, manufacturing, and advanced materials."

Creative Industries in Tennessee – By the Numbers

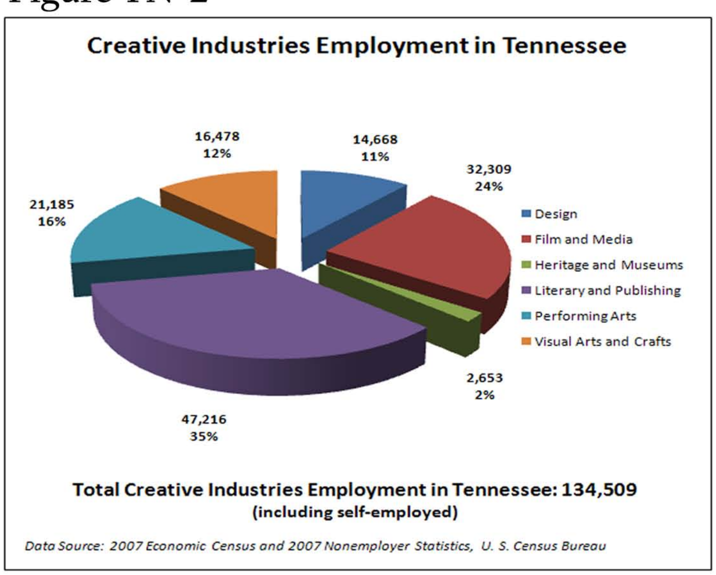
Based on the category breakdown of Tennessee's 7,941 creative industries establishments, the state has a balanced creative industries presence between literary and publishing, visual arts and crafts, film and media, performing arts, and design. The total includes 2,349 film and media establishments, 1,463 in literary and media, 1,406 in visual arts and crafts, 1,317 in design, 1,291 in performing arts, and 115 in heritage and museums.

Figure TN-1



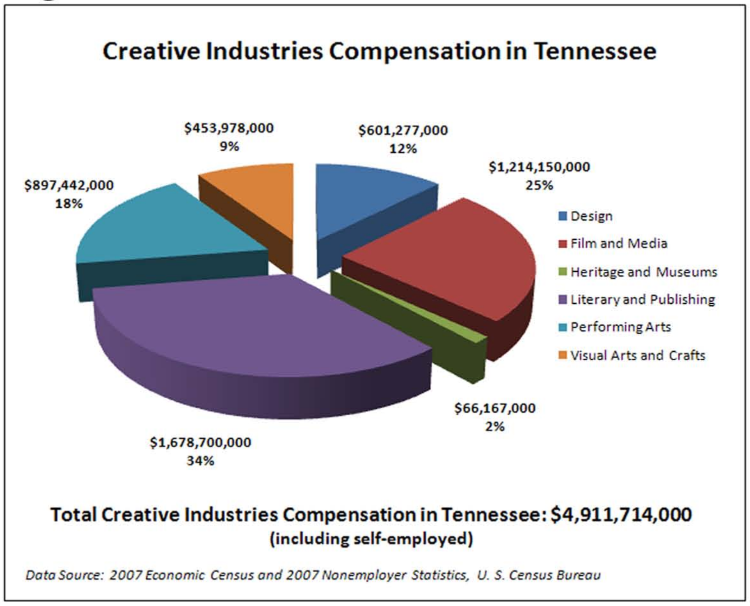
The creative industries employ 134,509 people in Tennessee, including 37,947 who are self-employed. Among the creative industry sector categories, the largest in Tennessee is literary and publishing with 47,216 employed, followed by film and media with 32,309. The next largest segment is the performing arts with 21,185 employed, followed by the visual arts and crafts with 16,478, design with 14,668, and heritage and museums with 2,653 employees.

Figure TN-2



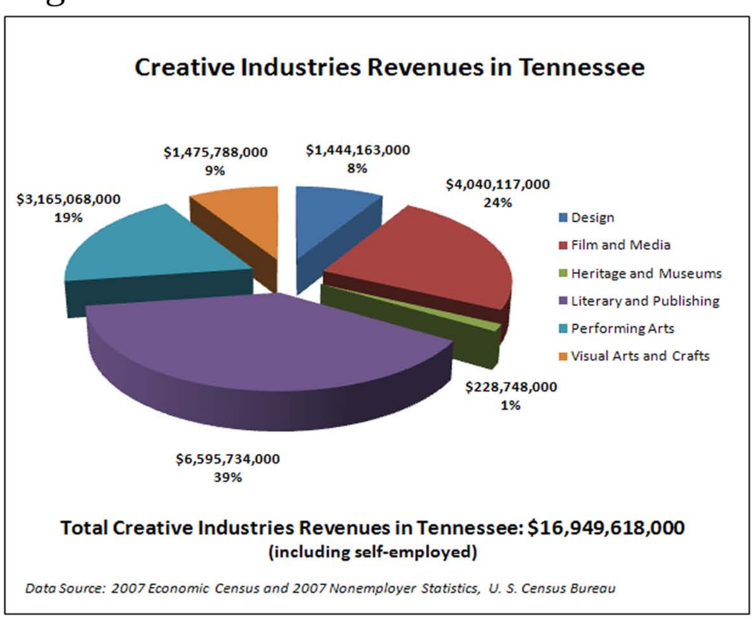
Wages earned by workers in the creative industries totaled more than $4.9 billion in 2007. The largest share of that total came from the literary and publishing sector with $1.7 billion paid in wages and earned by the self-employed. That is followed by film and media with more than $1.2 billion, the performing arts with $897 million, design with $601 million, visual arts and crafts with $454 million, and heritage and museums with $66 million in wages.

Figure TN-3



Annual revenues for creative industries in Tennessee totaled almost $17 billion in 2007, including almost $6.6 billion from literary and publishing, $4 billion from film and media, and $3.2 billion from the performing arts. Establishments and the self-employed in the state also generated $1.5 billion from the visual arts and crafts, $1.4 billion from design, and $229 million from the heritage and museums sectors.

Figure TN-4



Per Capita Data for Tennessee Creative Industries

Based on per capita figures for number of establishments, the film and media sector is the largest among the creative industries in Tennessee with 3.8 establishments for every 10,000 residents. It's followed by literary and publishing with 2.4, visual arts and crafts with 2.3, design and performing arts, each with 2.1, and heritage and museums with 0.2 establishments for every 10,000 residents.

Table TN-1

Creative Industries Establishments in Tennessee – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	1,317	2.1
Film and Media	2,349	3.8
Heritage and Museums	115	0.2
Literary and Publishing	1,463	2.4
Performing Arts	1,291	2.1
Visual Arts and Crafts	1,406	2.3
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN TENNESSEE	**7,941**	**12.9**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 6,156,719 from the Economic Census.

When considering employment numbers, the literary and publishing sector is the largest among the creative industries in Tennessee with 76.7 people either employed or self-employed for every 10,000 residents in the state. The next largest is film and media with 52.5, followed by the performing arts with 34.4, visual arts and crafts with 26.8, design with 23.8, and heritage and museums with 4.3 people employed or self-employed for every 10,000 residents.

Table TN-2

Creative Industries Employment in Tennessee – Per 10,000 Residents	Employment	Employment Per 10,000
Design	14,668	23.8
Film and Media	32,309	52.5
Heritage and Museums	2,653	4.3
Literary and Publishing	47,216	76.7
Performing Arts	21,185	34.4
Visual Arts and Crafts	16,478	26.8
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN TENNESSEE	**134,509**	**218.5**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 6,156,719 from the Economic Census.

Looking at wages paid to employees and income earned by the self-employed, the literary and publishing sector is the largest among the creative industries in Tennessee with $2.7 million in compensation per 10,000 residents. It is followed by the film and media sector with almost $2.0 million earned in wages for every 10,000 residents, the performing arts with $1.5 million, design with $977,000, visual arts and crafts with $737,000, and heritage and museums with $107,000 in wages for every 10,000 residents in the state.

Table TN-3

Creative Industries Compensation in Tennessee – Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design	$601,277,000	$976,619
Film and Media	$1,214,150,000	$1,972,073
Heritage and Museums	$66,167,000	$107,471
Literary and Publishing	$1,678,700,000	$2,726,615
Performing Arts	$897,442,000	$1,457,663
Visual Arts and Crafts	$453,978,000	$737,370
TOTAL CREATIVE INDUSTRIES COMPENSATION IN TENNESSEE	**$4,911,714,000**	**$7,977,811**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 6,156,719 from the Economic Census.

If considering annual revenue, the literary and publishing sector remains the largest among the creative industries in Tennessee with $10.7 million in revenue earned for every 10,000 residents, followed by film and media with $6.6 million, and the performing arts with $5.1 million. The remaining sectors are visual arts and crafts with $2.4 million, design with $2.3 million, and heritage and museums with $372,000 in revenue earned per 10,000 Tennessee residents.

Table TN-4

Creative Industries Revenue in Tennessee – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$1,444,163,000	$2,345,670
Film and Media	$4,040,117,000	$6,562,127
Heritage and Museums	$228,748,000	$371,542
Literary and Publishing	$6,595,734,000	$10,713,066
Performing Arts	$3,165,068,000	$5,140,836
Visual Arts and Crafts	$1,475,788,000	$2,397,036
TOTAL CREATIVE INDUSTRIES REVENUE IN TENNESSEE	**$16,949,618,000**	**$27,530,277**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Payroll only. Including self-employed. Using 2007 population estimate of 6,156,719 from the Economic Census.

Top Ten Creative Industry Sectors for Tennessee

Based on the number of establishments located in the state, the largest creative industry sector in Tennessee is radio, television, and other electronics stores, followed by jewelry stores; florists; video tape and disc rental; musical groups and artists; photography studios; commercial lithographic printing; architectural services; advertising agencies; and book stores.

Table TN-5

TENNESSEE - Top Ten Creative Industry Sectors by Number of Establishments	
Radio, Television, and Other Electronics Stores	541
Jewelry Stores	481
Florists	453
Video Tape and Disc Rental	398
Musical Groups and Artists	346
Photography Studios, Portrait	330
Commercial Lithographic Printing	310
Architectural Services	299
Advertising Agencies	223
Book Stores	217

Data Source: 2007 Economic Census, U. S. Census Bureau

When looking at employment levels, including the self-employed, the largest single sector among the creative industries in Tennessee is independent writers with 10,622. The next largest sector is commercial lithographic printing with 8,676, followed by newspaper publishers; radio, television, and other electronics stores; photography studios; independent performers; advertising agencies; cable and other program distribution; architectural services; and jewelry stores.

Table TN-6

Tennessee - Top Ten Creative Industry Sectors by Total Employment	
Independent Writers	10,622
Commercial Lithographic Printing	8,676
Newspaper Publishers	6,795
Radio, Television, and Other Electronics Stores	5,235
Photography Studios, Portrait	4,434
Independent Performers	4,412
Advertising Agencies	4,317
Cable and Other Program Distribution	3,777
Architectural Services	3,600
Jewelry Stores	3,514

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Tennessee has a number of large creative industry sectors based on total employee wages and revenue earned by the self-employed. The category is led by commercial lithographic printing with more than $362 million in wages, followed by independent writers with almost $347 million. Those sectors are followed by architectural services; advertising agencies; musical groups and artists; newspaper publishers; periodical publishers; cable and other program distribution; independent performers; and radio, television, and other electronic stores.

Table TN-7

Tennessee - Top Ten Creative Industry Sectors by Employee Compensation	
Commercial Lithographic Printing	$362,438,000
Independent Writers	$346,713,000
Architectural Services	$257,392,000
Advertising Agencies	$232,604,000
Musical Groups and Artists	$226,758,000
Newspaper Publishers	$224,339,000
Periodical Publishers	$172,741,000
Cable and Other Program Distribution	$147,065,000
Independent Performers	$144,019,000
Radio, Television, and Other Electronics Stores	$128,244,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Tennessee also has a number of large creative industry sectors based on annual revenue. The sectors are led by book, periodical, and newspaper merchant wholesalers at $1.6 billion, commercial lithographic printing at $1.3 billion, and radio, television, and other electronics stores at almost $1.1 billion in annual revenue. Those leading sectors are followed by music publishers; newspaper publishers; broadcasting; musical groups and artists; architectural services; jewelry stores; and independent writers.

Table TN-8

Tennessee - Top Ten Creative Industry Sectors by Annual Revenue	
Book, Periodical, and Newspaper Merchant Wholesalers	$1,645,573,000
Commercial Lithographic Printing	$1,336,557,000
Radio, Television, and Other Electronics Stores	$1,077,087,000
Music Publishers	$795,710,000
Newspaper Publishers	$739,588,000
Broadcasting	$710,542,000
Musical Groups and Artists	$710,516,000
Architectural Services	$574,030,000
Jewelry Stores	$435,141,000
Independent Writers	$420,593,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Tennessee Creative Industries to All Tennessee Industries

Taking into account the number of establishments, the 7,941 creative industries businesses in Tennessee represent 6.1% of all industry establishments in the state.

Table TN-9

Comparison of Tennessee Creative Industries to Total Industries	
Category	**Establishments**
Tennessee Creative Industries Totals	7,941
% of Tennessee Total Industries	6.1%
Tennessee Total Industries	129,880

Source: 2007 Economic Census, U.S. Census Bureau

When looking at the number employed and self-employed in the creative industries, the sector represents 134,509 or 4.8% of all employment in the state, including 37,947 self-employed or 8.3% of all self-employed in Tennessee.

Table TN-10

Comparison of Tennessee Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Tennessee Creative Industries Totals	96,562	37,947	134,509
% of Tennessee Total Industries	4.1%	8.3%	4.8%
Tennessee Total Industries	2,343,487	454,819	2,798,306

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The total wages for employees and revenue earned by the self-employed in the creative industries in Tennessee is more than $4.9 billion. This total represents 4.6% of the wages paid by all industries in Tennessee. The total also includes more than $1.3 billion earned by the self-employed in the creative industries, representing 6.3% of all revenue earned by the self-employed in the state.

Table TN-11

Comparison of Tennessee Creative Industries to Total Industries			
Category	**Annual Payroll**	**Self-Employment Revenues**	**Total Compensation**
Tennessee Creative Industries Totals	$3,586,229,000	$1,325,485,000	$4,911,714,000
% of Tennessee Total Industries	4.2%	6.3%	4.6%
Tennessee Total Industries	$84,680,475,000	$20,959,668,000	$105,640,143,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The revenue total for all creative industries in Tennessee in 2007 was almost $17 billion, or 3.4% of the revenue earned by all industries in the state.

Table TN-12

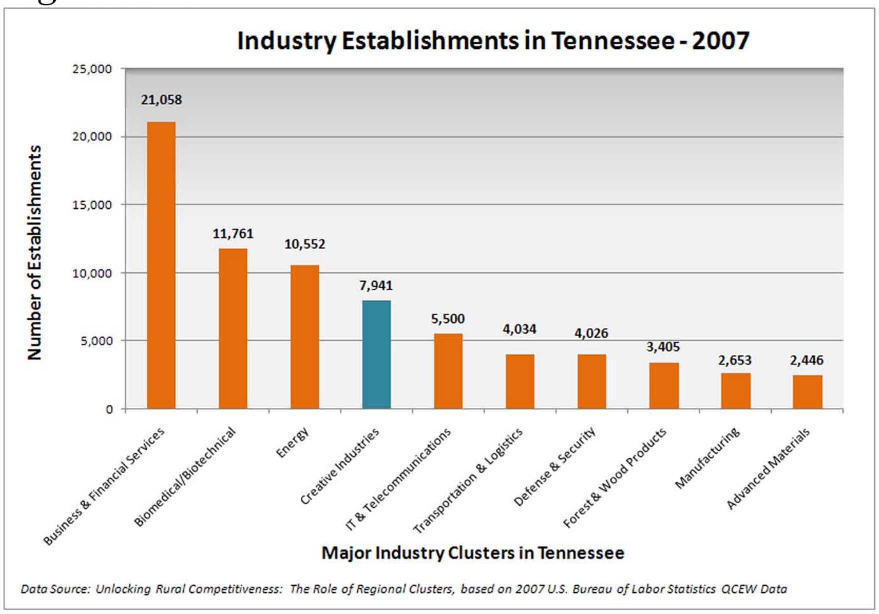
Comparison of Tennessee Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Tennessee Creative Industries Totals	$15,624,133,000	$1,325,485,000	$16,949,618,000
% of Tennessee Total Industries	3.3%	6.3%	3.4%
Tennessee Total Industries	$476,732,271,000	$20,959,668,000	$497,691,939,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Comparison of Tennessee Creative Industries to Other Tennessee Industry Clusters

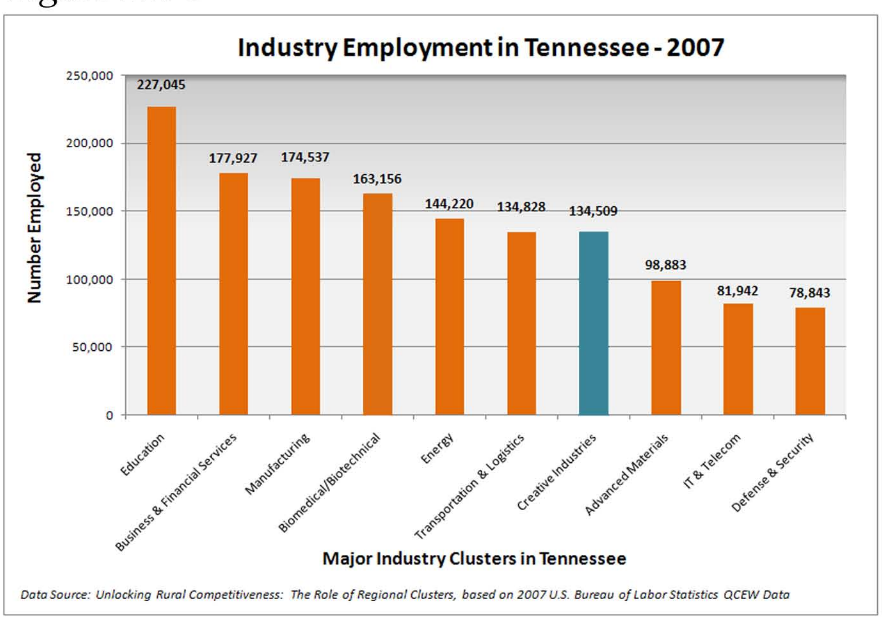
There are 7,941 creative industries establishments in Tennessee. As an industry cluster, this represents the fourth largest in the state – greater than information technology and telecommunications, transportation and logistics, defense and security, forest and wood products, manufacturing, and advanced materials. This total number of establishments for the creative industries does not include the self-employed.

Figure TN-5



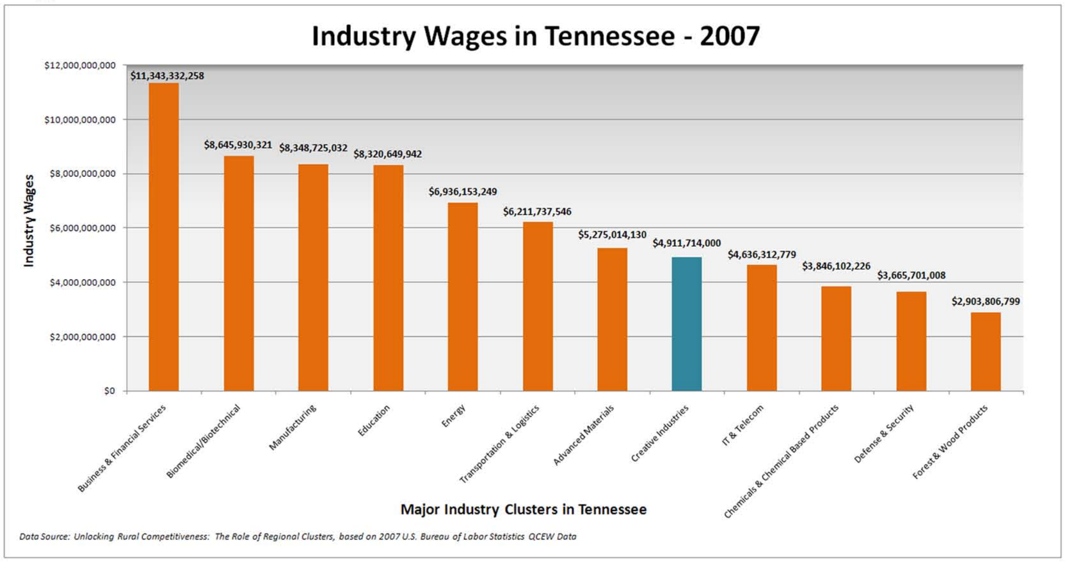
The number of employed and self-employed working in the creative industries in Tennessee is 134,509, representing the seventh-largest industry cluster in the state. Based on employment, the creative industries are larger than the industry clusters of advanced materials, information technology and telecommunications, and defense and security in Tennessee.

Figure TN-6



Based on available data, the creative industries represent at least the eighth largest industry cluster in Tennessee based on payroll, larger than information technology and telecommunications, chemicals and chemical based products, defense and security, and forest and wood products. However, it is likely that the actual total and the ranking of the creative industries cluster for Tennessee is much higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll in 16 separate creative industries sectors means that the total represented below is a major undercount for Tennessee.

Figure TN-7



Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Tennessee

Tennessee is home to 1,687 registered nonprofit organizations in the arts, culture, and humanities, representing 1.5% of the national total and 9.8% of the South Arts region total. Of those, 655 organizations had annual revenues above $25,000 and therefore filed form 990 in 2007.

Table TN-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Tennessee	1,687	1.50%	655	1.40%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The nonprofit arts, culture, and humanities organizations in Tennessee that filed form 990 reported total revenues of almost $345 million, or 0.8% of the national total and 9.6% of the South Arts region total. In addition, those same organizations reported more than $1 billion in assets, representing 0.9% of the national total and 10.1% of the South Arts region total.

Table TN-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Tennessee	$344,923,931	0.80%	$1,031,824,765	0.90%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Conclusion

As is evident from this study, the creative industries are a major component of state and local economies throughout the South. Creative businesses representing film and media, literary and publishing, design, visual arts and crafts, the performing arts, and heritage and museums are prevalent throughout every state in the region. The creative industries have an enormous impact on the number of businesses, number of employees, annual payroll, and annual revenues throughout the economy of the South, and they represent one of the largest industry clusters in the region.

Even though the creative industries are a significant and growing segment of the region's economy, there is a lack of attention paid to the creative economy in the South. This is evident from the absence of a focus on the creative industries and the creative workforce at the state and regional level, and the continuing decrease in funding for the primary government departments that interact with those engaged in the creative industries, namely state arts agencies.

While the general scope of this study is the creative economy, this is much broader than the range of nonprofit arts organizations with which state arts agencies interact directly and where state arts funds have their most direct impact. It should be noted, however, that numerous studies have demonstrated the mutually beneficial interaction of for-profit businesses and non-profit organizations. In fact, industry clusters in a specific creative industry often find their foundation and initial strength in the groundworklaid by a strong community network and nonprofit base that allows the for-profit sector within that creative industry to thrive. This is where the study of industry clusters has been immensely important. [11]

Other studies have demonstrated the value of the interaction of individual artists with multiple sectors of the creative economy – including the commercial, nonprofit, and government sectors. For instance, as self-employed contractors, individual artists work on a freelance basis with numerous types of businesses, organizations, and government agencies for a wide variety of creative jobs.[12]

The goal of state and local governments and regional collaborations should be to maximize the presence and economic impact of the creative industries on the region, including establishments, revenue, employment, and payroll. This can be achieved through a number of policies and approaches at the regional, state and local levels.

Policy recommendations for government agencies, chambers of commerce, economic development agencies, and funders include:

- Matching education and workforce development policies with the needs of the creative industries
- Including the creative industries in discussions and policy considerations related to supporting and expanding existing industries
- Including creative industries entrepreneurs in policy development related to entrepreneurism and new industries
- Acknowledging the nonprofit arts, culture, and humanities industry as an essential component of the creative industries, with unique

characteristics which allow those organizations to help communities prosper, put creative people to work, attract tourism revenue, assist with rural development, attract businesses, provide a competitive advantage, and enhance community identity.[4]

- Supporting policies and funding levels that will allow local arts agencies and state arts agencies to be more effective partners, giving them the opportunity to maximize their impact on the creative economy and nonprofit arts, humanities, and cultural organizations in their respective communities and states
- Funding continuing research on the creative economy for localities, states, and the region.

While the final product of this study is a sizable report, the information contained herein raises as many questions as answers. There is still much research to be done. The South Arts research agenda for the region's creative economy includes:

- Mining Bureau of Labor Statistics data to illuminate the size and scope of the creative workforce in the South
- Looking at historical data from the 1997 and 2002 Economic Census to create a picture of trends for the creative industries and specific sectors in the region
- Expanding on this research to include a broader picture of the creative industries by adding data from the culinary arts, historic preservation, fashion, arts education, and government arts agencies and facilities
- Creating a more extensive report on the nonprofit arts, culture, and humanities organizations in the region
- Conducting creative economy research for metropolitan regions within the South
- Exploring creative economy industry clusters and their interaction with other economic sectors
- Studying artists as entrepreneurs
- Examining changes in the creative industries related to the present technology revolution.

As we work to pull our households, businesses, cities, counties, states, the region, and the nation out of the Great Recession, the creative industries will be an important part of the solution to our economic woes. A growth industry with massive numbers of establishments, employees, payroll, and revenues, the creative industries are at the forefront of innovation and invention which drives much of our economic growth. As a region, with our states working in partnership with one another and region-wide organizations, we need to take note of this and work to help the creative industries meet the full potential of their economic impact in the South.

Appendix 1

Source Data and Research Methodology

This study draws on data from mainly two sources, as well as a couple of supplementary sources.

The data on the creative economy for each state and for the region in aggregate is from the 2007 Economic Census conducted by the U.S. Census Bureau. Additional data for the self-employed is from the 2007 Non-Employer Statistics, also published by the U.S. Census Bureau. These sources are also from where the statewide and regional totals for all economic activity derive.

Data on registered nonprofit organizations in the arts, culture, and humanities is from the 2007 figures released by the National Center for Charitable Statistics. In addition, data for industry cluster comparisons is from "Unlocking Rural Competitiveness: The Role of Regional Clusters," based on 2007 U.S. Bureau of Labor Statistics QCEW Data.

For the Economic Census data, we have collected and analyzed statistics from four categories: number of establishments, number of employees, annual wages, and annual revenue. The data has been retrieved for the industry sectors defined as part of the creative industries (see Appendix 2) for all nine states in the South Arts region – Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee. The data is presented and analyzed in several sections, including a regional overview and individual state profiles. Within each section, the data is presented in aggregate, by state, and divided into six major sector groups – design, film and media, heritage and museums, literary and publishing, performing arts, and visual arts and crafts. In addition, some data is divided into specific industry sectors to present a picture of the top creative industries in each state. Finally, additional data is provided on the nonprofit arts industry for the South and each state based on information provided by the National Center for Charitable Statistics, including number of registered nonprofit organizations, number of organizations filing IRS form 990, annual revenue for organizations filing form 990, and assets for organizations filing form 990.

This study builds on and draws from the methodology established is several previous studies, including *The Creative Economy: A New Definition* published by New England Foundation for the Arts and *The State of Colorado's Creative Economy* published by the Alliance for Creative Advantage, a partnership between Regional Technology Strategies and Mt. Auburn Associates. Other studies referenced include *Creative Economy: The Arts Industry in North Carolina*, *Louisiana: Where Culture Means Business*, and *Creativity in the Natural State: Growing Arkansas' Creative Economy*.

The division of creative industries into the six major sectors of design, film and media, heritage and museums, literature and publishing, performing arts, and visual arts and crafts, borrows from the conceptualization established in *The State of Colorado's Creative Economy*.

In the process of deciding which industry sectors to include and exclude, we looked at a number of existing studies, beginning with *The Creative Economy: A New Definition*, studies from the states of North Carolina, Louisiana, Mississippi, Arkansas, and Colorado, as well as the

National Arts Index 2009 published by Americans for the Arts. We also consulted with Stuart Rosenfeld and Jenna Bryant at Regional Technology Strategies in an effort to hone our data and clarify our reasoning for including and excluding numbers from certain industry sectors.

Despite our best efforts to be comprehensive and thorough, the total value of the creative industries is still underestimated in this study. The U.S. Census Bureau frequently implements data suppression in an effort to maintain the confidentiality of information that they receive from individual firms. So, for instance, while there are 58 establishments in the cable and other program distribution industry sector in Alabama, employing at least 2,500 people, the annual payroll and revenue figures for that sector are suppressed and are not available to be included in our totals for the state. In states where there are fewer firms in a specific sector, such as Mississippi and Alabama, the suppression of data results in a significant undercount, especially for annual wages and annual revenue. For the sectors where data suppression is applied, the number of establishments represents a figure that is the actual total, while the number of employees has been estimated using ranges provided by the Census Bureau. In this case, we used the lowest number provided in that range.

In addition, there is an undercount for many retail categories such as book stores. The Census numbers only include data for books sold at the retail level through firms categorized strictly as book stores. This data does not include, therefore, revenue from book sales at the retail level through firms categorized as department stores, grocery stores, or other types of merchants that sell books. The same applies to categories such as news dealers and newsstands; radio, television, and other electronics stores; musical instruments and supplies stores; prerecorded tape, compact disc, and record stores; camera and photographic supplies stores; jewelry stores; and sewing, needlework, and piece goods stores. Data for these sectors only includes employment figures, wages, and revenue from stores specializing in these artistic, cultural, or creative goods. The data in this study does not include establishments, employees, wages, or revenue from larger department or other stores that may also sell these goods.

On the other hand, there are a few sectors where the data presented may slightly overestimate the numbers that are relevant only to the creative industries due to the way the data is collected, organized, and presented by the Census Bureau. Those sectors include promoters of performing arts, sports, and similar events with facilities; promoters of arts, sports, and similar events without facilities; and agents and managers for artists, athletes, entertainers, and other public figures. While probably not one hundred percent of these figures represent the creative industries, it is estimated that the majority of the data in these sectors is related to the creative industries and therefore these numbers are included.

Two sectors that are included among the creative industries about which there has been some debate are software publishers, and internet publishing and broadcasting. There is a very strong argument for including data from both of these sectors among the creative industries. For internet publishing and broadcasting, this sector basically represents those firms that distribute the written word, recorded sound, or video using the internet. The production and distribution of the written word, recorded sound, and video clearly falls within the definition of the creative industries, even if the newest distribution method is through a computer interface.

The software publishers sector includes firms that design, develop and publish software, or publish only. This includes activities such as documentation, design of the software packaging, technical writing for instruction manuals, printing of the packaging and instruction manuals, as well as support. However, this sector does not include reselling packaged software, providing access to software for clients from a central host site, designing software to meet the needs of specific users, or mass duplication of software. Because the software publishers sector as defined by the Census Bureau is largely comprised of the design and publishing aspects of producing software, then it reasonably falls within the definition of the creative industries.

Finally, to further emphasize the extent of the undercount represented in this data, the Economic Census information only includes figures from for-profit and non-profit firms. This data does not include any dollars from federal, state, or local governments that may be invested in the arts, culture, or creativity. This omission especially affects the numbers in the sector group for heritage and museums, as all national, state, and local historical sites, museums, and monuments owned and managed by government entities are excluded from this data. In addition, this means that figures from the National Endowment for the Arts, National Endowment for the Humanities, the Institute of Museum and Library Services, state arts councils and commissions, local arts councils that operate under the auspices of city or county government, as well as municipally-owned cultural facilities are excluded from the data presented in this study.

So, small over-counts may exist within a handful of sectors where the data is not broken down into specific categories which will allow researchers to isolate the numbers relevant only to the creative industries. However, the sectors which are undercounted due to the absence of government sector data, as well as the retail sales data that would fall within the creative industries but which is attributed to other, unrelated sectors, more than offsets the numbers that may be included in rare over-counts. Therefore, the data presented in this study represents conservative estimates of the creative industries in the South Arts region and each of its nine states.

In addition, due to the difficulty of pulling data out of the Economic Census for sectors such as culinary arts, historic preservation, and arts education (except for fine arts schools), those numbers and sectors are excluded from this study as well.

Appendix 2

North American Industrial Classification System (NAICS) Codes	
NAICS Codes	**Design Sectors**
332323	Ornamental and Architectural Metal Work Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
453110	Florists
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
NAICS Codes	**Film & Media Sectors**
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
42399042	Prerecorded video tapes merchant wholesalers
443112	Radio, Television, and Other Electronics Stores
511210	Software Publishers
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
517510	Cable and Other Program Distribution
5191301	Internet Publishing and Broadcasting (replaces 516110)
532230	Video Tape and Disc Rental
541810	Advertising Agencies
541820	Public Relations Agencies
541830	Media Buying Agencies
541840	Media Representatives
541850	Display Advertising
541860	Direct Mail Advertising
541890	Other Services Related to Advertising

NAICS Codes	Heritage & Museums Sectors
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
NAICS Codes	**Literary & Publishing Sectors**
323110	Commercial Lithographic Printing
323111	Commercial Gravure Printing
323112	Commercial Flexographic Printing
323113	Commercial Screen Printing
323115	Digital Printing
323117	Books Printing
323119	Other Commercial Printing
323121	Tradebinding and Related Work
323122	Prepress Services
424920	Book, Periodical, and Newspaper Merchant Wholesalers
451211	Book Stores
451212	News Dealers and Newsstands
511110	Newspaper Publishers
511120	Periodical Publishers
511130	Book Publishers
511191	Greeting Card Publishers
511199	All Other Publishers
519110	News Syndicates
519120	Libraries and Archives
711510	Independent Writers (%)
NAICS Codes	**Performing Arts Sectors**
339992	Musical Instrument Manufacturing
4239901	Musical Instruments and Supplies Merchant Wholesalers
42399041	CDs, audio tapes, and records merchant wholesalers
451140	Musical Instrument and Supplies Stores
451220	Prerecorded Tape, Compact Disc, and Record Stores
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711190	Other Performing Arts Companies
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
711510	Independent Performers (%)
7139901	Dance Halls

NAICS Codes	Visual Arts & Crafts Sectors
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing
327212	Other Pressed and Blown Glass and Glassware Manufacturing
339911	Jewelry (except Costume) Manufacturing
339912	Silverware and Hollowware Manufacturing
339913	Jewelers' Material and Lapidary Work Manufacturing
339914	Costume Jewelry and Novelty Manufacturing
339942	Lead Pencil and Art Good Manufacturing
423410	Photographic Equipment and Supplies Merchant Wholesalers
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
4249901	Art goods merchant wholesalers
443130	Camera and Photographic Supplies Stores
448310	Jewelry Stores
451130	Sewing, Needlework, and Piece Goods Stores
453920	Art Dealers
541921	Photography Studios, Portrait
541922	Commercial Photography
611610	Fine Arts Schools
711510	Independent Artists (%)
812921	Photofinishing Laboratories (except One-Hour)

Appendix 3

National Center for Charitable Statistics	
Organization Types - Arts, Culture, and the Humanities	**Code**
Alliances & Advocacy	A01
Management & Technical Assistance	A02
Professional Societies & Associations	A03
Research Institutes & Public Policy Analysis	A05
Single Organization Support	A11
Fund Raising & Fund Distribution	A12
Support N.E.C.	A19
Arts & Culture	A20
Cultural & Ethnic Awareness	A23
Folk Arts	A24
Arts Education	A25
Arts & Humanities Councils & Agencies	A26
Community Celebrations	A27
Media & Communications	A30
Film & Video	A31
Television	A32
Printing & Publishing	A33
Radio	A34
Visual Arts	A40
Museums	A50
Art Museums	A51
Children's Museums	A52
Folk Arts Museums	A53
History Museums	A54
Natural History & Natural Science Museums	A56
Science & Technology Museums	A57
Performing Arts	A60
Performing Arts Centers	A61
Dance	A62
Ballet	A63
Theater	A65
Music	A68
Symphony Orchestras	A69
Opera	A6A
Singing & Choral Groups	A6B
Bands & Ensembles	A6C
Performing Arts Schools	A6E
Humanities	A70
Historical Organizations	A80
Historical Societies & Historic Preservation	A82
Commemorative Events	A84
Arts Services	A90
Arts, Culture & Humanities N.E.C.	A99

Photo Credits

Alabama

pg 75: The Alabama Symphony in concert
pg 76: The BAMA Theatre of Tuscaloosa
pg 83: The Princess Theatre of Decatur
pg: 84: Children learning about a painting from a docent at the Mobile Museum of Art
pg 85: Panoply Festival of the Arts in Huntsville
All photos provided by the Alabama State Council on the Arts

Florida

pg 89: Sunfest in West Palm Beach
pg 90: The Pensacola Symphony in concert
All photos provided by the Florida Division of Cultural Affairs

Georgia

pg 101: The High Museum of Art in Atlanta
pg 102: The Fox Theatre in Atlanta
All photos by Emily Hayes, South Arts Intern

Kentucky

pg 114: Ballet Kentucky
pg 115: Brook White, glassblower
All photos provided by the Kentucky Arts Council

Louisiana

pg 126: New Orleans Preservation Hall
pg 128: New Orleans Jazz Festival
pg 132: a display of creole dishes
All photos provided by the Louisiana Division of the Arts

Front Cover

State of Tennessee Tourist Development

pg 23: CNN Center in Atlanta; photo by Emily Hayes, South Arts Intern

Back Cover

Princess Theatre, Decatur, Alabama; Dan Dry (Kentucky); Emily Hayes (Georgia); Jed DeKalb/ State of Tennessee Tourist Development

Mississippi

pg 140: Dianne Walton, Mississippi Arts Commission
pg 141: Mississippi Symphony performing at The Cedars in Jackson
pg 144: Chef Robert St. John teaching at Viking
pg 145: Musician in Jackson, photo by Natalie Maynor
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North Carolina

pg 154: Potter Ben Owen, photo by Cedric Chatterly
pg 155: Welders, photo by John C. Campbell Folk School
pg 158: American Dance Festival, Durham, NC
pg 159: Weaver, photo by John C. Campbell Folk School
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South Carolina

pg 168: Spartanburg artist Jim Creal producing lithographs
pg 169: Charleston Ballet Theatre's performance of "The Nutcracker"
pg 171: Spoleto Festival USA fills Charleston's theatres, churches and outdoor spaces.
pg 172: Cheraw, birthplace of famed jazz musician Dizzy Gillespie and home to the South Carolina Jazz Festival.
All photos provided by the South Carolina Arts Commission

Tennessee

pg 183: Tennessee Arts Commission
pg 184: Dancer, Ballet Memphis
pg 192: Tennessee Arts Commission
pg 193: Tennessee Arts Commission
All photos provided by Tennessee Arts Commission

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[9]The creative industries data for payroll and total revenues represents a significant undercount due to data suppression in the Economic Census. Data suppression is implemented to maintain the anonymity of data and protect the statistics filed by individual firms from being revealed to their competition and the public.

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About South Arts

Founded in 1975 as the Southern Federation of State Arts Agencies, and later known as the Southern Arts Federation, South Arts serves a constituency of nine states in the American South – Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee.

Located in Atlanta, Georgia, the 12-employee nonprofit organization provides a broad portfolio of programs and services for arts organizations in the region. The flagship South Arts programs include:

- The South Arts Fund which provides presenting and touring grants to arts organizations located throughout the nine-state region
- The Performing Arts Exchange, an annual conference that brings together touring artists and presenters from throughout the eastern half of the United States for industry meetings, professional development, a performing arts marketplace, and live showcases
- ArtsReady, a new service that helps arts organizations from throughout the nation develop crisis response and emergency preparedness plans
- Southern Circuit, a program which takes independent filmmakers and their films to screening venues located throughout the South
- Southern Visions and Tradition/Innovation, touring exhibit programs that take work by southern artists to galleries and museums throughout the South
- Dance Touring Initiative, which builds audiences for contemporary dance in new communities
- Folklorists in the South, a professional development program for folklorists in the region

Several new program areas are also articulated in the recently updated South Arts strategic plan, including research, artist fellowships, arts education, and international cultural engagement.

Funded by the National Endowment for the Arts, member states, foundations, businesses, and individuals, South Arts works to build a better South through the arts.

Mission

South Arts strengthens the South through advancing excellence in the arts, connecting the arts to key state and national policies, and nurturing a vibrant quality of life.

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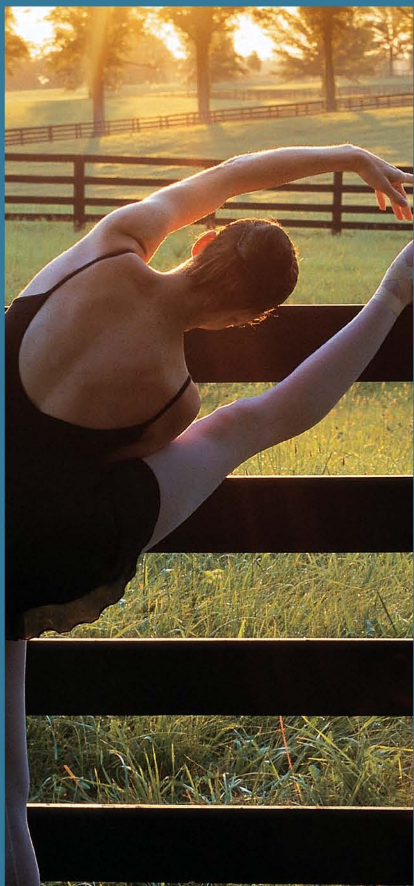
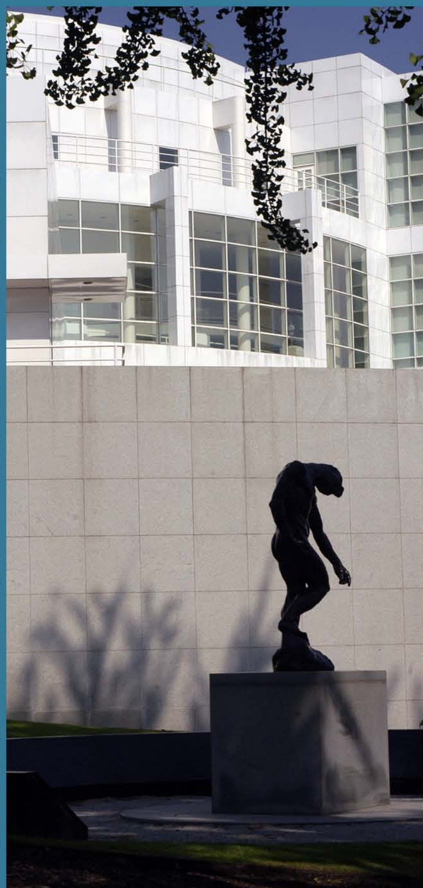


SOUTH ARTS
1800 Peachtree St. NW
Suite 808
Atlanta, Georgia 30309
404.874.7244
www.southarts.org