

THE STATE OF THE ARTS OF ORANGE COUNTY

ARTS & ECONOMIC PROSPERITY 6

(Almost all) photos by Steve Murray @ncsteve



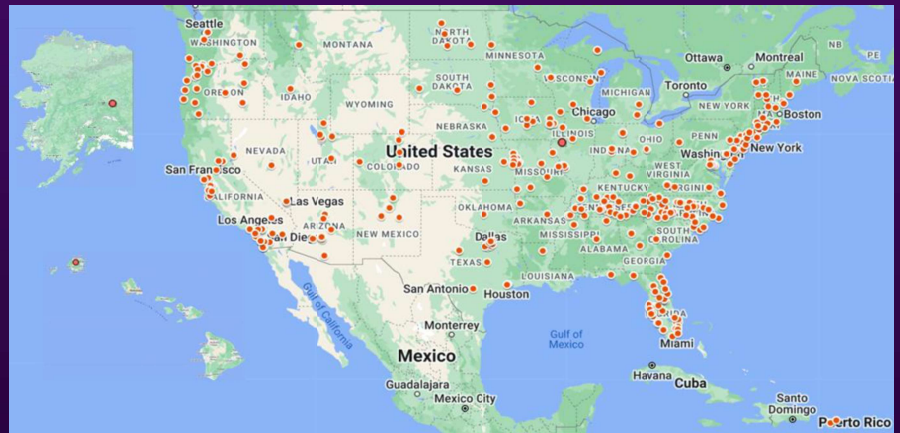
Americans for the Arts



Americans for the Arts

ARTS & ECONOMIC PROSPERITY 6

- ➔ 373 study regions
- ➔ All 50 states + Puerto Rico
- ➔ Local partners: Orange County, towns of Chapel Hill, Carrboro, Hillsborough



AEP6 STUDY PARTNERS



ARTS & **IMPLAN Economic Modeling Tool** ECONOMIC PROSPERITY 6 (Impact Analysis for Planning)

- Widely used, leading economic impact data and analytical software
- Began in 1972
- Utilizes Input-Output Analysis economic modeling technique based on the work of Nobel Prize winner Wassily Leontief
- Examines buy-sell relationships
- Follows the ripple of additional economic activity throughout the economy



STUDY PARTNERS:



ORANGE COUNTY
ARTS COMMISSION

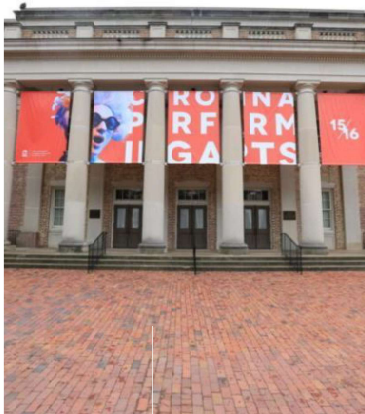


HOW IT WORKS:

Surveys were collected in 2023 for fiscal year 2022

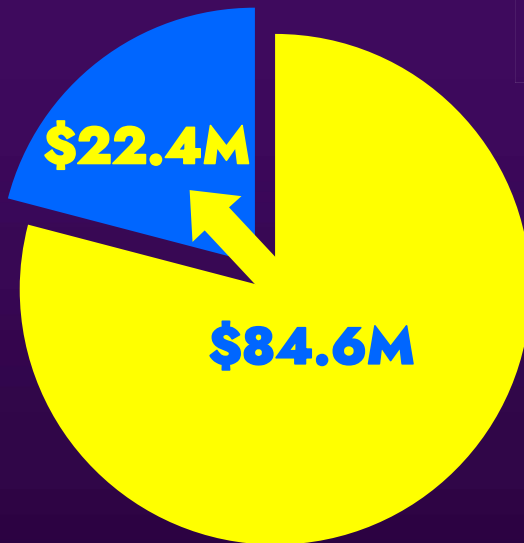
TWO SETS OF DATA:

- 1 103 NONPROFIT Organization Surveys (64% participation rate)
- 2 1,096 Audience Surveys



TOTAL ANNUAL SPENDING

\$107M

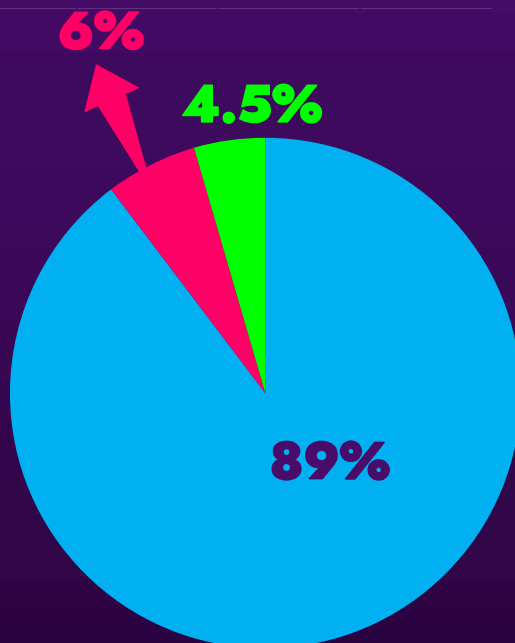


■ Organizational Spending: \$84.6M

■ Audience Spending: \$22.4M

ARTS & CULTURE NONPROFIT SPENDING

\$84.6M



■ Chapel Hill: \$75.7M

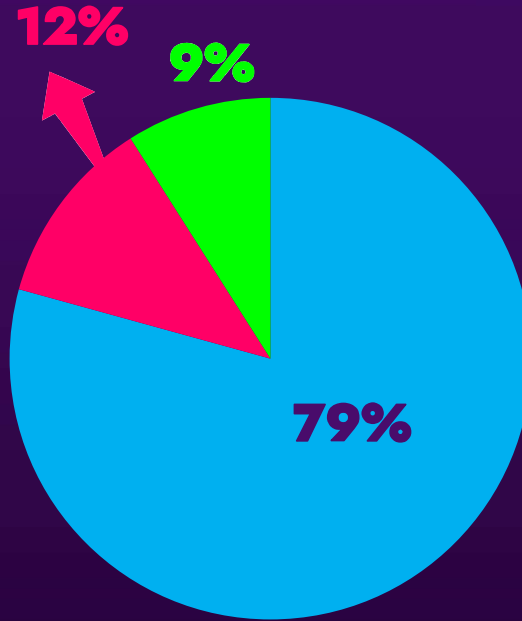
■ Hillsborough: \$4.9M

■ Carrboro: \$3.8M



ARTS AUDIENCE SPENDING

\$22.3M



■ Chapel Hill: \$17.6M

■ Hillsborough: \$2.6M

■ Carrboro: \$2M

ARTS AUDIENCE SPENDING

\$24.65 AVERAGE PER PERSON

(excluding cost of admission)

\$19.61
per person



Orange Co. Residents

\$32.60
per person



Non-residents

\$38.46
per person

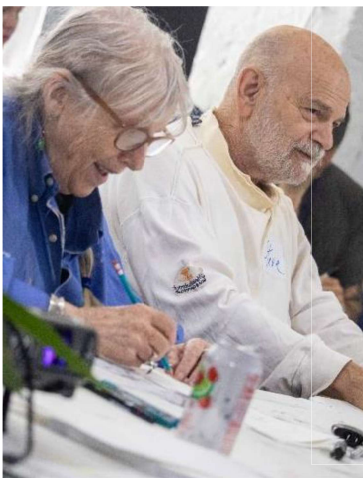
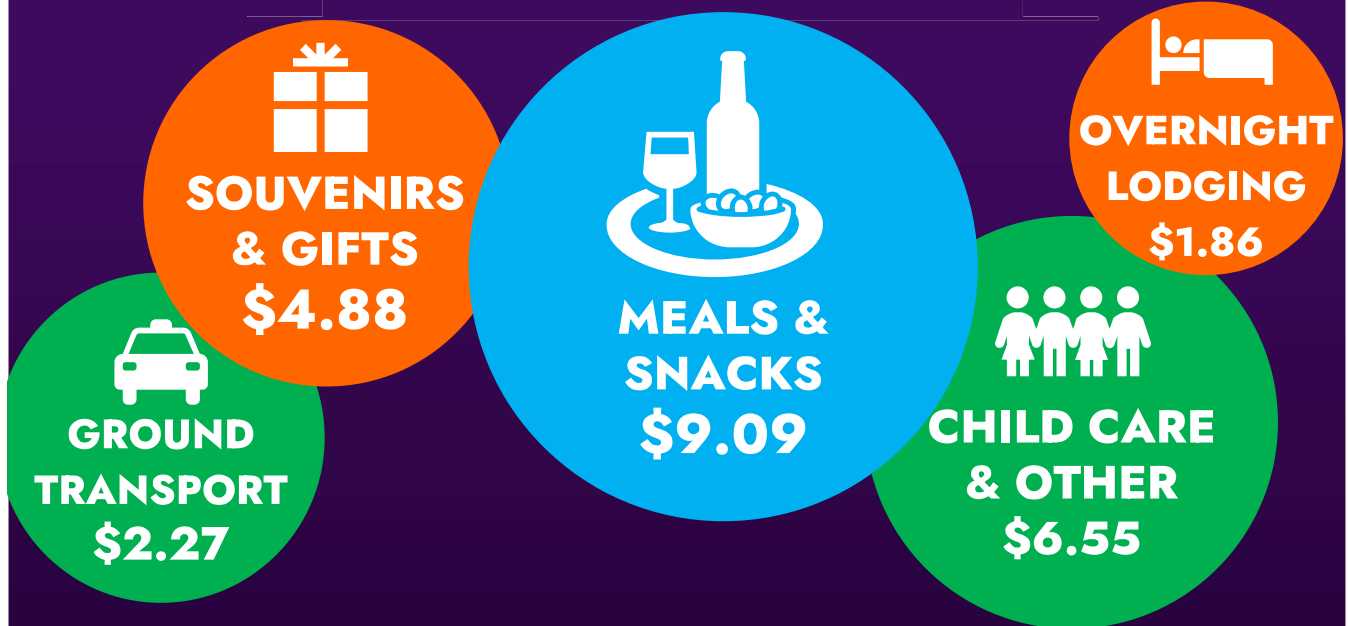


National Average

ARTS AUDIENCE SPENDING

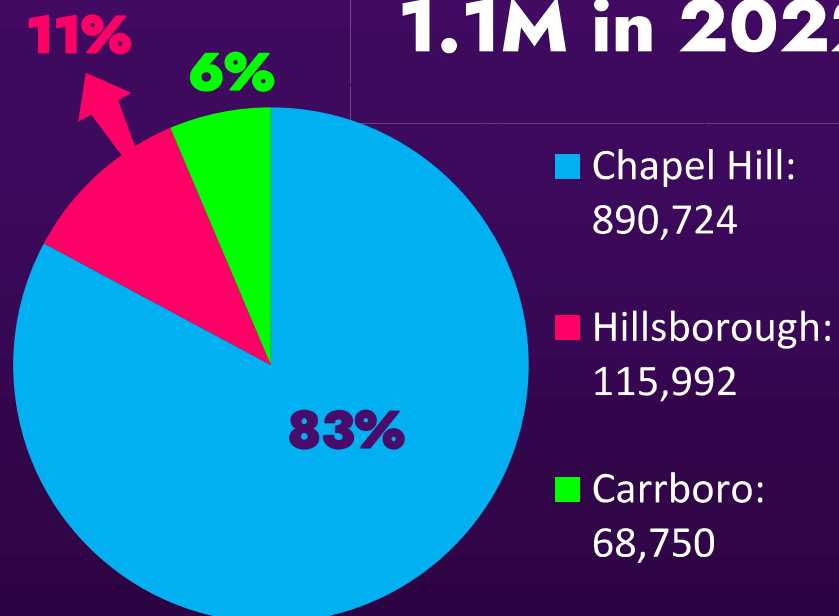
AREAS OF SPENDING

(BIPOC orgs similar to all orgs)



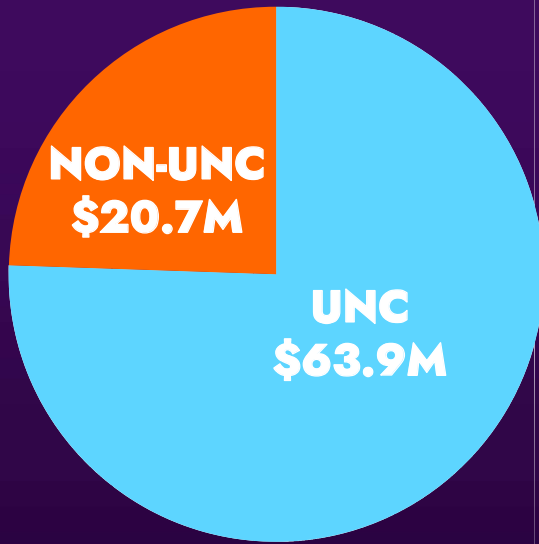
ANNUAL ARTS ATTENDEES

1.1M in 2022

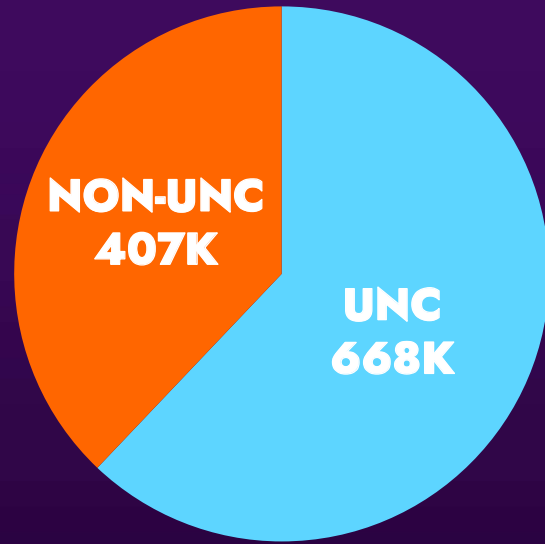


THE UNC FACTOR

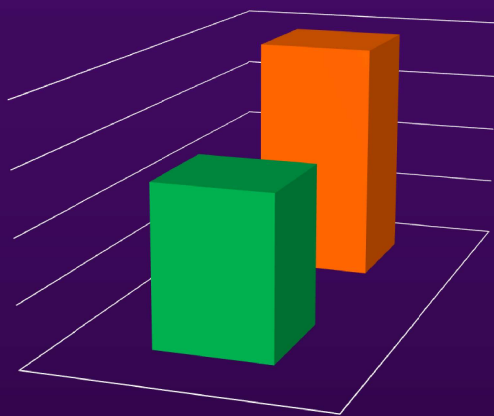
ORGANIZATIONAL EXPENDITURES



AUDIENCE ATTENDANCE



ARTS VS. SPORTS PATRON SPENDING



■ Sports* ■ Arts

2022

Arts Patrons

\$78.4B

2023

Sports Patrons

\$52.2B

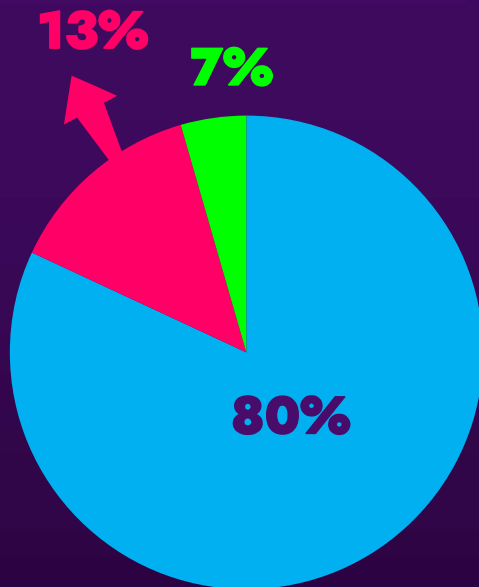
**ARTS PATRONS
50% HIGHER SPENDING**

*Source: Sports Tourism Research Institute *State of the Industry Report, 2023*



LOCAL, STATE, & FEDERAL TAX REVENUE

\$15.8M



■ Chapel Hill: \$12.7M

■ Hillsborough: \$2.1M

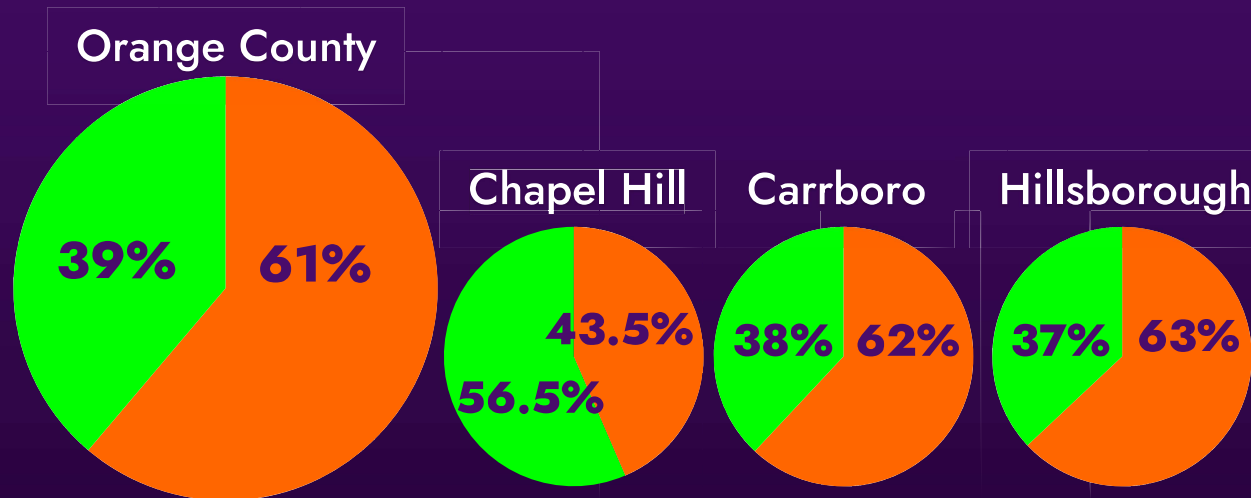
■ Carrboro: \$70k

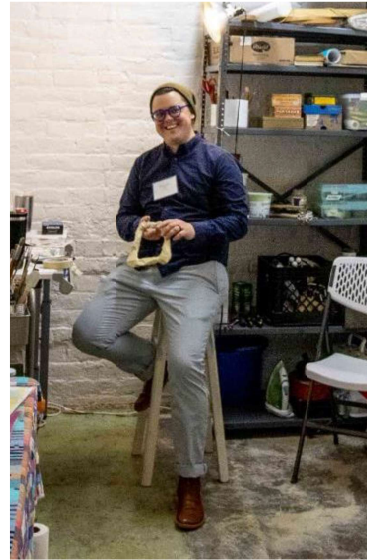
ARTS & TOURISM

AUDIENCES:

NON-RESIDENTS vs.

ORANGE COUNTY RESIDENTS





ARTS & EMPLOYMENT

ORANGE COUNTY:

\$71.2M
Resident
Household
Income

2,192
Fulltime
Equivalent
Jobs

ARTS & EMPLOYMENT

A PERFORMANCE AT MEMORIAL HALL...



ARTS JOBS

Performers
CPA Staff
Ushers
Box office staff

Sound Techs
Lighting Techs
Set builders

NON-ARTS JOBS

Restaurant servers
Parking attendants
Babysitters
Traffic control officers
Transportation providers

ARTS & EMPLOYMENT

WHAT DEFINES AN ARTIST?

Actors
Animators
Architects
Art directors
Arts educators
Audio/video technicians
Choreographers
Composers
Costumers
Crafters
Curators
Dancers
Designers
Directors

Editors
Fabricators
Fashion designers
Film and video editors
Floral designers
Graphic Designers
Landscape Designers
Lighting Technicians
Interior designers
Illustrators
Jewelers
Metal workers
Muralists
Musicians

Painters
Photographers
Poets
Producers
Sculptors
Set designers
Singers
Sound technicians
Videographers
Woodworkers
Writers

(just to name a few...)

ARTS & EMPLOYMENT

WHAT IS THE CREATIVE ECONOMY?

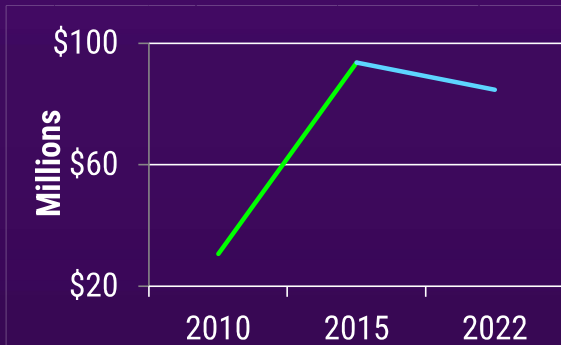
Arts/Humanities Councils
Arts Advocacy Agencies
Arts Centers
Arts Education
Arts Foundations
Artist Management
Arts Research Institutes
Arts Schools
Arts Services
Bands and Ensembles
Botanical Gardens/
Arboreta
Community Events

Cultural Awareness
Dance
Fairs and Festivals
Film and Video
Folk Arts
Historical Organizations
Historical Societies
Libraries
Media/Communications
Movie Theaters
Museums
Music
Opera

Printing and Publishing
Professional Arts
Associations
Radio
Singing/Choral Groups
Symphony Orchestras
Technical Assistance
Television
Theatre
Visual Arts
Zoos and Aquariums

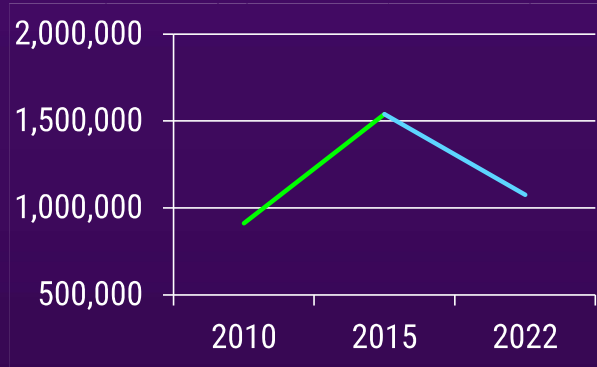
AEPIV vs. AEP5 vs. AEP6

ORGANIZATIONAL EXPENDITURES



2010 – 2015:
206% INCREASE
2015 – 2022:
10% DECREASE

ATTENDEES



2010 – 2015:
69% INCREASE
2015 – 2022:
30% DECREASE

THE IMPACT OF COVID-19

TOP 3 STEEPEST DECLINING INDUSTRIES, 2020*

- Performing arts presenters
- Oil drilling/exploration
- Air transportation

**U.S. Bureau of Economic Analysis*

2020 JOB LOSSES**

5 TIMES WORSE than the average of nonprofit industry.

63% of artists experienced unemployment

95% of artists lost creative income

***Johns Hopkins University*

AUDIENCE RETURN RATE

2/3 - 3/4 pre-pandemic numbers, as of 2023

HOW DO WE COMPARE?

HILLSBOROUGH

Participating regions with population less than 15k

NAME	POPULATION	ORG. SPENDING	AUDIENCE SPENDING	TOTAL IMPACT
Falls Church, VA	14,617	\$6.9M	\$10.3M	\$17.2M
Sedona, AZ	10,339	\$5.8M	\$7.6M	\$13.4M
Hillsborough, NC	7,115	\$4.9M	\$2.6M	\$7.6M
Florence, OR	10,060	\$2.2M	\$4.9M	\$7.2M
Jamestown, ND	14,930	\$1.9M	\$4.2M	\$6.1M
Harney County, OR	7,267	\$346k	\$3.4M	\$3.7M
Tyrrell County, NC	4,095	\$1.9M	\$977k	\$2.9M
Yankton, SD	14,573	\$167k	\$1.8M	\$2M
Monmouth, OR	10,282	\$164k	\$210k	\$375k

HOW DO WE COMPARE?

CARRBORO

Top 11 of 20 regions, population 15-25k

NAME	POPULATION	ORG. SPENDING	AUDIENCE SPENDING	TOTAL IMPACT
Laguna Beach, CA	22,991	\$48.9M	\$39.3M	\$88.2M
Coronado, CA	21,390	\$13.8M	\$25.3M	\$39.1M
Paducah, KY	24,865	\$21.3M	\$14.8M	\$36.1M
Pendleton, OR	16,733	\$7.7M	\$6.9M	\$14.6M
Waterville, ME	16,558	\$9.6M	\$3.8M	\$13.5M
Coralville, IA	21,103	\$2.5M	\$7.6M	\$10.1M
Rutland County, VT	15,398	\$3.9M	\$5.3M	\$9.2M
Elkton, MD	15,653	\$4M	\$4.3M	\$8.3M
Brookings, SD	24,108	\$2.7M	\$4.8M	\$7.5M
Eastern Oregon	16,259	\$4.4M	\$2.5M	\$7M
Carrboro, NC	21,230	\$3.8M	\$2M	\$5.8M

HOW DO WE COMPARE?

CHAPEL HILL

Top 10 of 34 regions, population 50-70k

NAME	POPULATION	ORG. SPENDING	AUDIENCE SPENDING	TOTAL IMPACT
Chapel Hill, NC	60,998	\$75.7M	\$17.6M	\$93.3M
Portland, ME	66,125	\$58.2M	\$27.7M	\$85.9M
Dubuque, IA	59,667	\$40.5M	\$29.8M	\$70.4M
Walton County, FL	74,071	\$8.6M	\$48.6M	\$57.2M
Ocala, FL	60,786	\$15.9M	\$37.3M	\$53.2M
Santa Cruz, CA	64,608	\$30M	\$8M	\$38M
Kaua'i, HI	73,298	\$6.9M	\$30.8M	\$37.8M
Walnut Creek, CA	69,825	\$20.5M	\$15.5M	\$36M
rand Junction, CO	63,597	\$15.2m	\$13.2M	\$28.4M
Encinitas, CA	62,904	\$12.5M	\$15.4M	\$27.9M

HOW DO WE COMPARE?

ORANGE COUNTY

Top 12 of 61 regions, population 100-200k

NAME	POPULATION	ORG. SPENDING	AUDIENCE SPENDING	TOTAL IMPACT
Kansas City, MO	153,014	\$394M	\$116M	\$510,560,436
Fort Lauderdale, FL	181,818	\$103M	\$186M	\$289M
West Palm Beach, FL	111,955	\$117M	\$97.5M	\$214M
Providence, RI	179,883	\$89M	\$118M	\$207M
New Haven, CT	130,331	\$118M	\$25M	\$143M
Sioux Falls, SD	192,517	\$26M	\$100M	\$126M
Clearwater, FL	115,159	\$52M	\$74M	\$126M
Eugene, OR	172,622	\$90M	\$34M	\$124M
Savannah, GA	145,403	\$35M	\$85M	\$120.5M
Boulder, CO	105,673	\$53.5M	\$62M	\$115M
Alexandria, VA	159,428	\$56M	\$56M	\$111.5M
Orange County, NC	148,476	\$85M	\$22M	\$107M

HOW DO WE COMPARE?

ORANGE COUNTY

Top 10 participating counties in North Carolina

NAME	POPULATION	ORG. SPENDING	AUDIENCE SPENDING	TOTAL IMPACT
Wake County	1,129,410	\$192M	\$351M	\$543M
Mecklenburg County	1,110,356	\$217M	\$235M	\$453M
Guilford County	537,174	\$106M	\$133M	\$240M
Durham County	321,488	\$148M	\$843M	\$233M
Forsyth County	382,295	\$101M	\$948M	\$196M
Orange County	148,476	\$85M	\$22M	\$107M
New Hanover County	234,473	\$19M	\$56M	\$75.5M
Cumberland County	335,509	\$44M	\$28M	\$72M
Catawba County	159,551	\$12M	\$41.5M	\$53.5M
Buncombe County	261,191	\$25M	\$26M	\$51M



CHALLENGES OF THE ARTS COMMUNITY

What does a healthy creative economy look like?



CHALLENGES OF THE ARTS COMMUNITY

SPACE TO CREATE (PUBLIC)

✓ Lots of options

(ARTISTS)

✗ Limited options

- Home studios
- Eno Arts Mill
- ArtsCenter

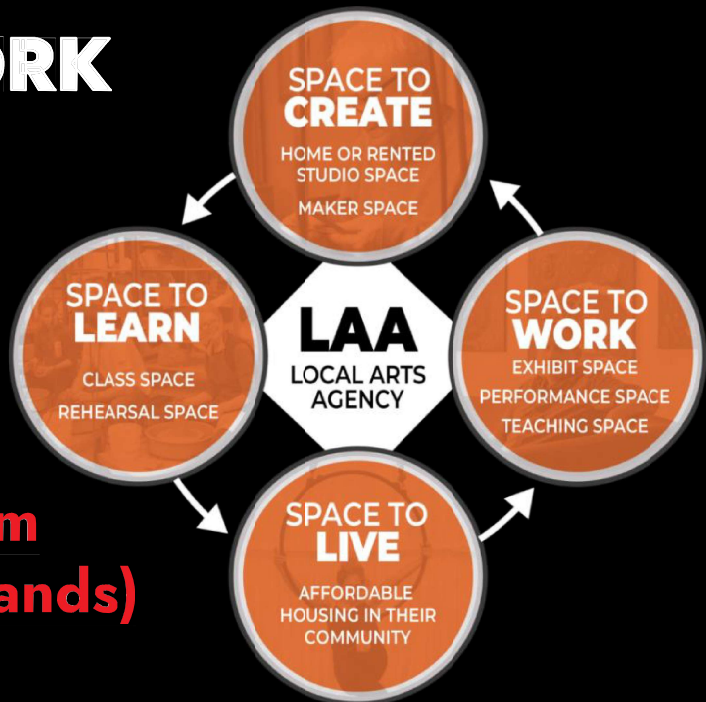


CHALLENGES OF THE ARTS COMMUNITY

SPACE TO WORK (ARTISTS)

Varies by town, generally:

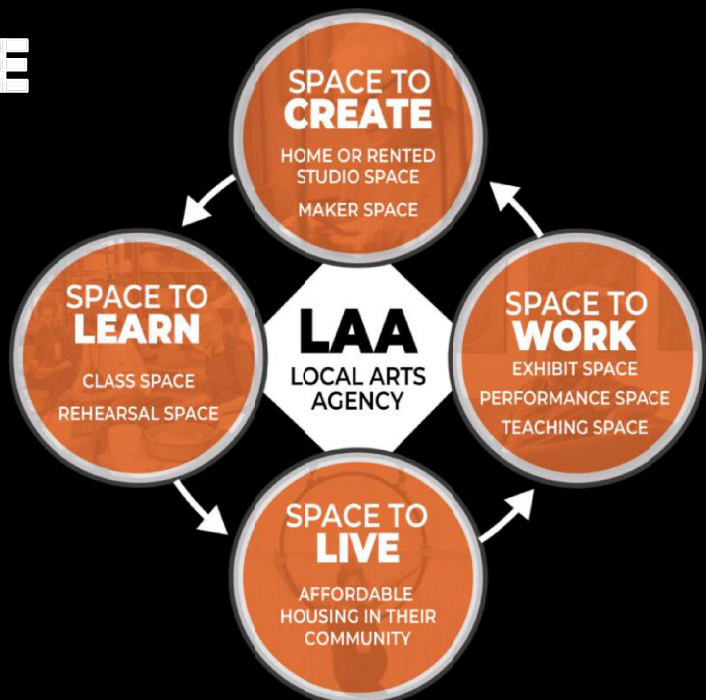
- ✗ Spaces to show/sell work
- ✗ Spaces to perform (other than live bands)
- ✗ Space to teach



CHALLENGES OF THE ARTS COMMUNITY

SPACE TO LIVE (ARTISTS)

- ✗ Creatives are moving out of Orange County due to cost of living



CHALLENGES OF THE ARTS COMMUNITY

SPACE TO LEARN (PUBLIC)

✓ Lots of options

(ARTISTS)

✗ Limited options

- Eno Arts Mill
- ArtsCenter
- Churches



SUPPORTING THE ARTS

SUPPORT & RETAIN OUR CREATIVES

- Pay a living wage
- Involve in community planning (affordable housing, placemaking, sustainability, etc.)
- Support the agencies employing artists



SUPPORTING THE ARTS

SUPPORT & PRESERVE OUR ARTS AGENCIES

- Private support is decreasing nationally
- **Public support is more important now than ever**
- Increased support for arts agencies = increased local spending



SUPPORTING THE ARTS

SUPPORT INITIATIVES THAT ENHANCE OUR COMMUNITY

- Creative spaces
- Artist-led initiatives
- Events & festivals
- Creative small businesses



RAFFLE FOR THE ARTS



2024 Jeep® Wrangler 4-Door Sport S
8-Speed Automatic Transmission
Sky One-Touch® Power-Top



Tickets \$50 | Drawing Friday, December 20
A maximum of 2,500 tickets sold
Sales support arts programming throughout Orange County



#DuckingForTheArts
ArtsOrange.org/Jeep





ORANGE COUNTY
ARTS COMMISSION
ORANGE COUNTY
ARTS ALLIANCE

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- @OCNCarts on Facebook, LinkedIn, Instagram