



ARTS &

The Economic Impact of Nonprofit
Arts and Culture Organizations
and Their Audiences

ECONOMIC PROSPERITY ^{IV}

in THE STATE OF MINNESOTA



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

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Table of Contents

The Arts Mean Business	1
By Robert L. Lynch, President and CEO, Americans for the Arts	
The Economic Impact of the Nonprofit Arts and Culture Industry in the State of Minnesota	3
Defining Economic Impact.....	3
Economic Impact of the ENTIRE Nonprofit Arts and Culture Industry.....	4
Direct and Indirect Economic Impact: How a Dollar is Re-Spent in the Economy	4
Economic Impact of Spending by Nonprofit Arts and Culture ORGANIZATIONS	6
An Economic Impact Beyond Dollars: Volunteerism.....	7
The Value of In-Kind Contributions to Arts Organizations	7
Economic Impact of Spending by Nonprofit Arts and Culture AUDIENCES	8
Out-of-Region Cultural Attendees Spend More (<i>i.e.</i> , Intrastate)	8
Minnesota’s Out-of-State Cultural Attendees (<i>i.e.</i> , Interstate).....	10
Cultural Events Attract New Dollars and Retain Local Dollars.....	10
Conclusion	13
<i>Arts & Economic Prosperity IV</i> Calculator	15
Economic Impact per \$100,000 of Spending by Nonprofit Arts and Culture ORGANIZATIONS.....	15
Economic Impact per \$100,000 of Spending by Nonprofit Arts and Culture AUDIENCES.....	16
Making Comparisons with Similar Study Regions	17
About This Study	19
Frequently Used Terms.....	23
Frequently Asked Questions	23
The Economic Impact of the Arts in Minnesota: A Regional Perspective	27
Acknowledgments.....	30



Creative Minnesota

The Health and Impacts of the Nonprofit Arts and Culture Sector in Minnesota

By Sheila Smith, Executive Director of Minnesota Citizens for the Arts

This economic impact study was commissioned as part of a larger effort called *Creative Minnesota*.

We have known for a long time that the arts and culture are important to Minnesota. They enhance our quality of life, bring diverse communities together, and make our state a magnet for jobs and businesses. However, we have not had enough data to *measure* the impact of the arts and culture on an ongoing basis.

Now we can quantify that, in addition to its stages and museums, the nonprofit arts and culture sector is also a substantial industry in the State of Minnesota generating **\$1.2 billion in total economic impact annually**.

As the most comprehensive report ever done of the creative sector, *Creative Minnesota* is a new effort to fill the gaps in available information about Minnesota's cultural field and to improve our understanding of its importance to our quality of life and economy. It kicks off a new centralized, concentrated and long term endeavor to collect and report data on the creative sector every two years for analysis, education and advocacy.

Our first *Creative Minnesota* report is a snapshot of the health and impacts of nonprofit arts and culture organizations in 2013 and looks at their spending and their audiences as well as other indicators of the sector's health and impact on the economy.

The rest of *Creative Minnesota* and other research about Minnesota's arts community can be found at: creativemn.org.

The report leverages new in-depth research made possible because of Minnesota's participation in the Cultural Data Project (culturaldata.org).

The benefits of the arts and culture are not limited to our metropolitan areas. *Creative Minnesota* shows **substantial economic impact from the arts and culture in every corner of the state**, from the Arrowhead to the plains of Southwest Minnesota and from the Red River Valley to the river lands of the Southeast. The other eleven regional and statewide reports similar to this one can be found at **creativemn.org**.

Creative Minnesota was developed by a collaborative of arts and culture funders in partnership with **Minnesota Citizens for the Arts (MCA)**. The *Creative Minnesota* team includes: Minnesota Citizens for the Arts, **the McKnight Foundation**, the **Minnesota State Arts Board**, the **Forum of Regional Arts Councils of Minnesota**, **Target**, the **Bush Foundation**, **Mardag Foundation**, and **Jerome Foundation** with in-kind support from the **Minnesota Historical Society** and others.

We hope that arts advocates, legislators, local governments and others will use these reports to find new ways to improve their lives and local economies with the arts and culture.

The Arts Mean Business

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

America's artists and arts organizations live and work in every community from coast-to-coast—fueling creativity, beautifying our cities, and improving our quality of life. In my travels across the country, business and government leaders often talk to me about the challenges of funding the arts amid shrinking resources and alongside other pressing needs. They worry about jobs and the economy. Is their region a magnet for attracting and retaining a skilled and innovative workforce? How well are they competing in the high-stakes race to attract new businesses? The findings from *Arts & Economic Prosperity IV* send a clear and welcome message: leaders who care about community and economic vitality can feel good about choosing to invest in the arts.

Arts & Economic Prosperity IV is our fourth study of the nonprofit arts and culture industry's impact on the economy. The most comprehensive study of its kind ever conducted, it features customized findings on 182 study regions representing all 50 states and the District of Columbia as well as estimates of economic impact nationally. Despite the economic headwinds that our country faced in 2010, the results are impressive. Nationally, the industry generated \$135.2 billion in total economic activity—\$61.1 billion by the nation's nonprofit arts and culture organizations in addition to \$74.1 billion in event-related expenditures by their audiences. This economic activity supports 4.1 million full-time jobs. Our industry also generates \$22.3 billion in revenue to local, state, and federal governments every year—a yield well beyond their collective \$4 billion in arts allocations.

Arts and culture organizations are resilient and entrepreneurial businesses. They employ people locally, purchase goods and services from within the community, and market and promote their regions. Arts organizations are rooted locally; these are jobs that cannot be shipped overseas. Like most industries, the Great Recession left a measurable financial impact on the arts—erasing the gains made during the pre-recession years, and leaving 2010 expenditures three percent behind their 2005 levels. The biggest effect of the recession was on attendance and audience spending. Inevitably, as people lost jobs and worried about losing their houses, arts attendance—like attendance to sports events and leisure travel—waned as well. Yet, even in a down economy, some communities saw an increase in their arts spending and employment. As the economy rebounds, the arts are well poised for growth. They are already producing new and exciting work—performances and exhibitions and festivals that entertain, inspire, and attract audiences.

Arts & Economic Prosperity IV shows that arts and culture organizations leverage additional event-related spending by their audiences that pumps revenue into the local economy. When patrons attend an arts event they may pay for parking, eat dinner at a restaurant, shop in local retail stores, and have dessert on the way home. Based on the 151,802 audience-intercept surveys conducted for this study, the typical arts attendee spends \$24.60 per person, per event, beyond the cost of admission.

Communities that draw cultural tourists experience an additional boost of economic activity. Tourism industry research has repeatedly demonstrated that arts tourists stay longer and spend more than the average traveler. *Arts & Economic Prosperity IV* reflects those findings: 32 percent of attendees live outside the county in which the arts event took place, and their event-related spending is more than twice that of their local counterparts (nonlocal: \$39.96 vs. local: \$17.42). The message is clear: a vibrant arts community not only keeps residents and their discretionary spending close to home, it also attracts visitors who spend money and help local businesses thrive.

Arts & Economic Prosperity IV demonstrates that America's arts industry is not only resilient in times of economic uncertainty, but also a key component to our nation's economic recovery and future prosperity. Business and elected leaders need not feel that a choice must be made between arts funding and economic prosperity. This study proves that they can choose both. Nationally, as well as locally, **the arts mean business.**

"The economic impacts of the arts in Minnesota are very important; their contributions to the quality of people's lives are priceless. Arts organizations are strongly supported throughout Minnesota, and they help make successful communities. Their continuing growth and vitality will be critical to our state's economic and social well-being."

- Minnesota Governor **Mark Dayton**

“Like other entrepreneurs and small business owners, artists add significant economic and creative value across the entire state. Backed by hard data, *Creative Minnesota* reveals important truths about how our state’s artists and arts and culture organizations are making dynamic contributions to our economic vitality and to our high quality of life.”

- **Kate Wolford**, President,
The McKnight Foundation

The Economic Impact of the Nonprofit Arts and Culture Industry in the State of Minnesota

Arts & Economic Prosperity IV provides compelling new evidence that the nonprofit arts and culture are a significant industry in the State of Minnesota—one that generates \$1.2 billion in total economic activity. This spending—\$696.1 million by nonprofit arts and culture organizations and an additional \$500.8 million in event-related spending by their audiences—supports 33,381 full-time equivalent jobs, generates \$827.2 million in household income to local residents, and delivers \$127.2 million in local and state government revenue. This economic impact study sends a strong signal that when we support the arts, we not only enhance our quality of life, but we also invest in the State of Minnesota’s economic well-being.

In 2012, Americans for the Arts published *Arts & Economic Prosperity IV*, the most comprehensive study of its kind ever conducted. It documented the economic impact of the nonprofit arts and culture sector in 139 cities and counties, 31 multi-city or multi-county regions, 10 states, and two individual arts districts—representing all 50 U.S. states and the District of Columbia. The diverse study regions ranged in population (1,600 to four million) and type (rural to large urban). Project economists customized input-output models to calculate specific and reliable findings for each study region. This study focused solely on the economic impact of nonprofit arts and culture organizations and event-related spending by their audiences. Spending by individual artists and the for-profit arts and culture sector were excluded.

This report presents the findings of a new study to evaluate the economic impact of the nonprofit arts and culture industry in the State of Minnesota. The methodology used is identical to the national study methodology, providing the ability to compare the results with those of the national study participants.

Defining Economic Impact

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

(1) Full-Time Equivalent (FTE) Jobs describes the total amount of labor employed. Economists measure FTE jobs, not the total number of employees, because it is a more accurate measure that accounts for part-time employment.

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

Revenue to (3) Local and (4) State Government includes revenue from local and state taxes (e.g., income, property, sales, and lodging) as well as funds from license fees, utility fees, filing fees, and other similar sources.

Economic Impact of the ENTIRE Nonprofit Arts and Culture Industry (Combined Spending by Both Organizations and Their Audiences) in the State of Minnesota

During fiscal year 2013, aggregate nonprofit sector spending by both the State of Minnesota’s nonprofit arts and culture organizations and their audiences totaled \$1.2 billion. The table below demonstrates the total economic impact of this spending.

TABLE 1:
TOTAL Economic Impact of the Nonprofit Arts and Culture Industry in the State of Minnesota
(Spending by Nonprofit Arts and Culture Organizations and Their Audiences)

	State of Minnesota	Median of other statewide study participants
Direct Expenditures	\$1,196,851,482	\$354,779,009
Full-Time Equivalent Jobs	33,381	12,394
Resident Household Income	\$827,151,000	\$310,197,000
Local Government Revenue	\$26,603,000	\$17,080,500
State Government Revenue	\$100,605,000	\$23,771,000

Direct and Indirect Economic Impact: How a Dollar is Re-spent in the Economy

Arts & Economic Prosperity IV uses a sophisticated economic analysis called input-output analysis to measure economic impact. It is a system of mathematical equations that combines statistical methods and economic theory. Input-output analysis enables economists to track how many times a dollar is “re-spent” within the local economy, and the economic impact generated by each round of spending. How can a dollar be re-spent? Consider the following example:

A theater company in the State of Minnesota purchases several gallons of paint from a local hardware store for \$200. The hardware store then uses a portion of the \$200 to pay the sales clerk; the sales clerk re-spends some of the money at a grocery store; the grocery store uses some to pay its cashier; the cashier spends some on rent; and so on ...

Thus, the initial expenditure by the theater company was followed by four additional rounds of local spending (by the hardware store, the sales clerk, the grocery store, and the cashier).

- The economic impact of the theater company’s initial \$200 expenditure is the direct economic impact.
- The economic impacts of the subsequent rounds of local spending are the indirect impacts.
- Eventually, the \$200 dollars will “leak out” of the local economy (i.e., be spent non-locally) and cease to have a local economic impact. In this example, if the theater company purchased the paint from a non-local hardware store there would be no local economic impact. Since the hardware store is located in the State of Minnesota, the dollars remain within the local economy and create at least one more round of local spending by the hardware company.
- The total impact is the sum of the direct impact plus all indirect impacts. **This report provides the total impact.**

A dollar “ripples” very different through each community, which is why a customized input-output model was created for the State of Minnesota.

“Many, if not most Minnesotans value the statewide scope and local and national significance of the arts in Minnesota. What is less discussed is the economic impact of the arts. Annually, nearly 20 million people (including many visitors to our state) attend arts performances and events here. That relationship directly helps employ well over 30,000 people while directly creating related opportunities for things like hundreds of thousands of dollars in restaurant sales. In addition to inspiring and entertaining, the arts are also one of the most important contributors to Minnesota’s continued post-recession economic growth.”

- Minnesota State Senator **Richard Cohen**
Chair of the Senate Finance Committee
and Subcommittee on Legacy

“As a past and current chair of the Legacy Committee in the Minnesota House of Representatives it has been my pleasure to witness the impact of appropriations from Legacy Amendment funding on our economy. In Greater Minnesota our libraries and historical societies have certainly benefited. But in a larger sense money for the arts has spurred local projects throughout central and southwestern Minnesota. Certainly there have been immediate economic results, but long term I see even more significant impact. I'm aware of restoration of historic buildings that are intended to eventually become local art centers. We have just touched the surface of the legacy amendment’s future possibilities for economic growth.”

- Minnesota State Representative **Dean Urdahl**,
Chair of the House Legacy Committee

Economic Impact of Spending by Nonprofit Arts and Culture ORGANIZATIONS in the State of Minnesota

Nonprofit arts and culture organizations are active contributors to their business community. They are employers, producers, and consumers. They are members of the Chamber of Commerce as well as key partners in the marketing and promotion of their cities, regions, and states. Spending by nonprofit arts and culture organizations totaled \$696.1 million in the State of Minnesota during fiscal year 2013. This spending is far-reaching: organizations pay employees, purchase supplies, contract for services, and acquire assets within their community. These actions, in turn, support jobs, create household income, and generate revenue to the local and state governments.

The State of Minnesota’s nonprofit arts and culture organizations provide rewarding employment for more than just administrators, artists, curators, choreographers, and musicians. They also employ financial staff, facility managers, and salespeople. In addition, the spending by these organizations directly supports a wide array of other occupations spanning many industries (e.g., printing, event planning, legal, construction, and accounting).

Data were collected from 1,269 eligible nonprofit arts and culture organizations in the State of Minnesota, including detailed budget information about more than 40 expenditure categories for fiscal year 2013 (e.g., labor, payments to local and nonlocal artists, operations, administration, programming, facilities, and capital expenditures/asset acquisition). The following tables demonstrates the total economic impacts of their aggregate spending.

	State of Minnesota	Median of other statewide study participants
Direct Expenditures	\$696,091,653	\$221,745,998
Full-Time Equivalent Jobs	23,834	9,224
Resident Household Income	\$560,065,000	\$217,373,500
Local Government Revenue	\$11,695,000	\$10,706,500
State Government Revenue	\$58,295,000	\$13,341,500

An Economic Impact Beyond Dollars: Volunteerism

While arts volunteers may not have an economic impact as defined in this study, they clearly have an enormous impact by helping the State of Minnesota’s nonprofit arts and culture organizations function as a viable industry. *Arts & Economic Prosperity IV* reveals a significant contribution to nonprofit arts and culture organizations as a result of volunteerism. During 2013, a total of 62,378 volunteers donated a total of 2,710,369 hours to the State of Minnesota’s 1,269 participating nonprofit arts and culture organizations. This represents a donation of time with an estimated aggregate value of \$61,118,821 (Independent Sector estimates the dollar value of the average 2013 volunteer hour to be \$22.55).

The 1,269 participating organizations reported an average of 49.2 volunteers per organization, who volunteered an average of 43.5 hours each—resulting in an average of approximately 2,140 hours of unpaid labor contributed to each organization.

The Value of In-Kind Contributions to Arts Organizations

The participating organizations were asked about the sources and value of their in-kind support. In-kind contributions are non-cash donations such as materials (e.g., office supplies from a local retailer), facilities (e.g., rent), and services (e.g., printing costs from a local printer). The 1,269 participating nonprofit arts and culture organizations in the State of Minnesota reported that they received in-kind contributions with an aggregate value of \$9,554,961 during fiscal year 2013. These contributions are typically received from a variety of sources that can include corporations, individuals, local and state arts organizations, and government agencies.

“I see investment in art as a win-win for my City. This past year, at a series of “Community Voices” events, my citizens expressed interest in more art in our community. It’s a quality of life issue for them. The double-win for my city is that art is also an economic development driver. It is my goal to make art an integral part of Moorhead’s growth and plans to move forward. This study will help connect the dots between development and art.”

-Del Rae Williams, Mayor of the City of Moorhead

Economic Impact of Spending by Nonprofit Arts and Culture AUDIENCES in the State of Minnesota

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

To measure the impact of nonprofit arts and culture audiences in the State of Minnesota, data were collected from 3,410 event attendees during 2014. Researchers used an audience-intercept methodology, a standard technique in which patrons complete a written survey about their event-related spending while attending the event. In the State of Minnesota, arts attendees spent an overall average of \$20.48 per person, per event as a direct result of their attendance to a cultural activity (e.g., performance, event, or exhibit). Local businesses that cater to arts and culture audiences reap the rewards of this economic activity.

The 1,269 participating nonprofit arts and culture organizations reported that the aggregate attendance to their events was 18.9 million during 2013. These attendees spent an estimated total of \$500.8 million as a direct result of attending the arts events, excluding the cost of event admission. The following table demonstrates the total impacts of this spending.

TABLE 3:
TOTAL Economic Impact of Spending by Nonprofit Arts and Culture AUDIENCES
in the State of Minnesota (excluding the cost of event admission¹)

	State of Minnesota	Median of other statewide study participants
Direct Expenditures	\$500,759,829	\$136,854,468
Full-Time Equivalent Jobs	9,547	3,170
Resident Household Income	\$267,086,000	\$72,371,500
Local Government Revenue	\$14,908,000	\$5,583,000
State Government Revenue	\$42,310,000	\$9,342,000

Out-of-Region Cultural Attendees Spend More (*i.e.*, Intrastate)

The 3,410 audience survey respondents were asked to provide the ZIP code of their primary residence, enabling researchers to determine which attendees were “local” attendees (*i.e.*, live within the Minnesota arts region in which the cultural event they are attending took place) and which were “non-local” attendees (*i.e.*, live outside that Minnesota arts region). In the State of Minnesota, researchers estimate that 84.2 percent of the 18.9 million

nonprofit arts attendees were local attendees and 15.8 percent were non-local attendees. Non-local attendees spend an average of 80 percent more per person than local attendees (\$32.15 vs. \$17.83) as a result of their attendance to cultural events. As would be expected from a traveler, higher spending was typically found in the categories of lodging, meals, and transportation. When a community attracts cultural tourists, it harnesses significant economic rewards.

TABLE 4:
Most Minnesota Cultural Attendees are Residents of the Local Region

	LOCAL Attendees (i.e., live <u>within</u> the region)	NON-LOCAL Attendees (i.e., live <u>outside</u> the region)	All State of Minnesota Cultural Attendees
Total Attendance to Cultural Events	15,916,734	2,986,999	18,903,733
Percent of All Cultural Attendees	84.2%	15.8%	100%

TABLE 5:
**Event-Related Spending by Arts and Culture Event Attendees Totaled \$500.8 million
in the State of Minnesota (excluding the cost of event admission)**

	LOCAL ATTENDEES			NON-LOCAL ATTENDEES			ALL ATTENDEES
	Event Attendance	Per Person Average	Audience Spending by Locals	Event Attendance	Per Person Average	Audience Spending by Non-Locals	TOTAL AUDIENCE SPENDING
Northwest Minnesota	26,329	\$13.86	\$364,921	5,082	\$22.18	\$112,720	\$477,641
North Central Minnesota	55,660	\$20.42	\$1,136,577	12,797	\$23.35	\$298,810	\$1,435,387
The Arrowhead Region	583,848	\$19.85	\$11,589,384	189,356	\$44.96	\$8,513,446	\$20,102,830
The Lake Region	182,643	\$13.43	\$2,452,896	24,795	\$35.73	\$885,925	\$3,338,821
The Brainerd Lakes Region	74,420	\$8.93	\$664,570	17,128	\$12.87	\$220,437	\$885,007
Southwest Minnesota	86,221	\$16.60	\$1,431,269	31,716	\$31.05	\$984,782	\$2,416,051
East Central Minnesota	134,213	\$15.11	\$2,027,958	88,859	\$43.85	\$3,896,467	\$5,924,425
Central Minnesota	262,011	\$20.85	\$5,462,930	91,134	\$23.82	\$2,170,811	\$7,633,741
South Central Minnesota	267,825	\$15.49	\$4,148,610	90,906	\$33.20	\$3,018,081	\$7,166,691
Southeastern Minnesota	578,529	\$9.77	\$5,652,229	145,584	\$22.21	\$3,233,421	\$8,885,650
Seven-County Metro Area	13,665,035	\$25.82	\$352,831,204	2,289,642	\$39.16	\$89,662,381	\$442,493,585
State of Minnesota	15,916,734	\$17.83²	\$387,762,548	2,986,999	\$32.15²	\$112,997,281	\$500,759,829

Minnesota’s Out-of-State Cultural Attendees (*i.e.*, Interstate)

Researchers also analyzed the 3,410 audience surveys to determine the characteristics of the cultural attendees who traveled to Minnesota from another state or country (*i.e.*, out-of-state cultural visitors). In the State of Minnesota, 94.1 percent of the 18.9 million nonprofit arts attendees are residents of Minnesota, and 5.9 percent are non-residents of Minnesota. Similar to the local vs. non-local attendee analysis, non-residents of Minnesota spend an average of 85 percent more per person than local attendees (\$36.20 vs. \$19.57) as a result of their attendance to cultural events

TABLE 6:
Average Per Person Cultural Event-Related Spending by Minnesota Residents vs. Non-Minnesota Residents
 (excluding the cost of event admission)

	Minnesota Residents	Non-Minnesota Residents	All State of Minnesota Cultural Attendees
Refreshments/Snacks During Event	\$2.35	\$3.23	\$2.39
Meals Before/After Event	\$7.77	\$10.19	\$7.90
Souvenirs and Gifts	\$3.77	\$5.08	\$3.84
Clothing and Accessories	\$0.89	\$1.22	\$0.91
Ground Transportation	\$2.86	\$4.26	\$2.94
Event-Related Child Care	\$0.31	\$0.53	\$0.32
Overnight Lodging (<i>one night only</i>)	\$1.26	\$10.68	\$1.78
Other	\$0.36	\$1.01	\$0.40
Total Per Person Spending	\$19.57	\$36.20	\$20.48

Cultural Events Attract New Dollars and Retain Local Dollars

The State of Minnesota’s nonprofit arts and culture sector provides attractions that draw visitors to the state. In fact, 60.0 percent of non-resident survey respondents reported that the primary reason for their trip was “specifically to attend this arts/cultural event.”

In addition, 10.8 percent of the State of Minnesota’s non-resident survey respondents reported that they will spend at least one night away from home in the Minnesota as a direct result of attending the cultural event. Non-resident attendees who stay overnight in paid lodging spend an average of \$176.15 per person as a result of their attendance—significantly more than the overall per person average of \$36.20 for all non-resident attendees to events in the State of Minnesota.

Finally, the audience survey respondents were asked, “If this event were not happening, would you have traveled to another community to attend a similar cultural experience?”

- 44.7 percent of the State of Minnesota’s local cultural attendees report that *they would have traveled to a different community in order to attend a similar cultural experience.*
- 45.6 percent of Minnesota’s non-local cultural attendees report *the same.*

These figures demonstrate the economic impact of the nonprofit arts and culture in the purest sense. If a community does not provide a variety of artistic and cultural experiences, it will fail to attract the new dollars of cultural tourists. It will also lose the discretionary spending of its local residents who will travel elsewhere to experience the arts.

“This study helps us to better understand the full impact of the arts on our regional and state economies. When someone buys a ticket to an arts event in Detroit Lakes, Alexandria or Fergus Falls, they are also having dinner in a local restaurant, shopping in local stores, and buying gas for the trip home. Many of our communities are adding the arts to their community enrichment plans, knowing that including the arts will increase their economic, cultural and educational assets, making the quality of life better for everyone.”

– **Maxine Adams**, Executive Director, Lakes Region Arts Council

Many Cultural Attendees are Artists, Too!

- 53.1 percent of the State of Minnesota’s arts attendees report that they actively participate in the creation of the arts (e.g., sing in a choir, play an instrument, act in a community play, paint or draw).

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

² The statewide totals are calculated by summing the customized totals for each of Minnesota’s 11 unique arts regions. The total, therefore, does not equal the sum of the statewide average per person event-related expenditures for locals and non-locals multiplied by the statewide total attendance by locals and non-locals, respectively.

"Disney has a rich legacy in animation, film and storytelling, so naturally we consider the arts to be an essential part of our business, as well as an essential element of our communities. We have seen how the arts not only enrich American life, but also support millions of jobs across the country, generate billions of dollars in economic impact, and help drive the family-vacation industry. By investing in the arts, we plant seeds for the future and make our communities better places to live."

— Meg Crofton, President
Walt Disney World Parks & Resorts Operations, U.S. and France

Conclusion

The nonprofit arts and culture are a \$1.2 billion industry in the State of Minnesota—one that supports 33,381 full-time equivalent jobs and generates \$127.2 million in local and state government revenue. Nonprofit arts and culture organizations, which spend \$696.1 million annually, leverage \$500.8 million in additional spending by arts and culture audiences—spending that pumps vital revenue into local restaurants, hotels, retail stores, parking garages, and other businesses. By demonstrating that investing in the arts and culture yields economic benefits, *Arts & Economic Prosperity IV* lays to rest a common misconception: that communities support the arts and culture at the expense of local economic development. In fact, they are investing in an industry that supports jobs, generates government revenue, and is a cornerstone of tourism. This report shows conclusively that **the arts mean business in the State of Minnesota!**

“The arts have substantial sway in bringing top talent to communities. Artistic and creative movements make communities more energetic, diverse and attractive and are key to recruiting and retaining the best and the brightest workers. By emphasizing a community’s culture and through the use of the arts, a community can develop their sense of place; making them a unique and vibrant place to live, work and play, and thus driving economic development.”

- **Richard Baker**, Mille Lacs County Community Development Coordinator

The Arts & Economic Prosperity IV Calculator

To make it easier to compare the economic impacts of different organizations within the State of Minnesota, the project researchers calculated the economic impact per \$100,000 of direct spending by nonprofit arts and culture organizations and their audiences.

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

For every \$100,000 in direct spending by a nonprofit arts and culture organization in the State of Minnesota, there was the following total economic impact.

TABLE 7:
Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Culture Organizations in the State of Minnesota

	State of Minnesota	Median of other statewide study participants
Full-Time Equivalent Jobs	3.42	3.62
Resident Household Income	\$80,459	\$88,670
Local Government Revenue	\$1,680	\$3,683
State Government Revenue	\$8,375	\$5,514

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

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

1. Determine the amount spent by the nonprofit arts and culture organization;
2. Divide the total expenditure by 100,000; and
3. Multiply that figure by the FTE employment ratio per \$100,000 for the State of Minnesota.

Thus, \$250,000 divided by 100,000 equals 2.5; 2.5 times 3.42 (from the top row of data on Table 7 above) equals a total of 8.6 full-time equivalent jobs supported (both directly and indirectly) within the State of Minnesota by that nonprofit arts and culture organization. Using the same procedure, the estimate can be calculated for resident household income and local and state government revenue.

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

The economic impact of event-related spending by arts audiences can also be derived for individual or groups of nonprofit arts and culture organizations and events in the State of Minnesota.

The first step is to determine the total estimated event-related spending by arts and culture event attendees (excluding the cost of admission). To derive this figure, multiply the average per person event-related expenditure in the State of Minnesota by the total event attendance. The ratios of economic impact per \$100,000 in direct spending can then be used to determine the total economic impact of the total estimated audience spending.

TABLE 8:
Average Per Person Cultural Event-Related Spending by All Arts and Culture Event Attendees in the State of Minnesota (excluding the cost of event admission)

	State of Minnesota	Median of other statewide study participants
Refreshments/Snacks During Event	\$2.39	\$2.58
Meals Before/After Event	\$7.90	\$8.92
Souvenirs and Gifts	\$3.84	\$2.49
Clothing and Accessories	\$0.91	\$0.97
Ground Transportation	\$2.94	\$2.32
Event-Related Child Care	\$0.32	\$0.31
Overnight Lodging (<i>one night only</i>)	\$1.78	\$2.48
Other	\$0.40	\$1.02
Total Per Person Spending	\$20.48	\$22.71

TABLE 9:
Ratios of Economic Impact Per \$100,000 of Direct Spending by Nonprofit Arts and Culture Audiences in the State of Minnesota

	State of Minnesota	Median of other statewide study participants
Full-Time Equivalent Jobs	1.91	2.67
Resident Household Income	\$53,336	\$63,913
Local Government Revenue	\$2,977	\$4,929
State Government Revenue	\$8,449	\$6,901

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

An administrator wants to determine the total economic impact of the 25,000 total attendees to his/her organization's nonprofit arts and culture events on full-time equivalent (FTE) employment in the State of Minnesota. The administrator would:

1. Determine the total estimated audience spending by multiplying the average per person expenditure for the State of Minnesota by the total attendance to nonprofit arts and culture events;
2. Divide the resulting total estimated audience spending by 100,000; and
3. Multiply that figure by the FTE employment ratio per \$100,000 for the State of Minnesota.

Thus, 25,000 times \$20.48 (from the bottom row of data on Table 8 on the preceding page) equals \$512,000; \$512,000 divided by 100,000 equals 5.12; 5.12 times 1.91 (from the top row of data on Table 9 on the preceding page) equals a total of 9.8 full-time equivalent jobs supported (both directly and indirectly) within the State of Minnesota by that nonprofit arts and culture organization. Using the same procedure, the estimate can be calculated for resident household income and local and state government revenue.

Making Comparisons with Similar Study Regions

For the purpose of this research project, the geographic region being studied is defined as the State of Minnesota. According to the most recent data available from the United States Census Bureau, the population of the State of Minnesota was estimated to be 5,420,380 during 2013. For comparison purposes, more than 300 pages of detailed data tables containing the study results for all 182 study regions that participated in the 2012 *Arts & Economic Prosperity IV* national study can be found in Appendix B of the National Statistical Report. The data tables are stratified by population, making it easy to compare the findings for the State of Minnesota to the findings for similarly populated study regions (as well as any other participating study regions that are considered valid comparison cohorts).

All of the national study publications are available both by download (free) and hardcopy (for purchase) at www.AmericansForTheArts.org/EconomicImpact.

"The success of my family's business depends on finding and cultivating a creative and innovative workforce. I have witnessed firsthand the power of the arts in building these business skills. When we participate personally in the arts, we strengthen our 'creativity muscles,' which makes us not just a better ceramicist or chorus member, but a more creative worker—better able to identify challenges and innovative business solutions. This is one reason why the arts remain an important part of my personal and corporate philanthropy."

— Christopher Forbes, Vice Chairman, Forbes, Inc.

About This Study

The *Arts & Economic Prosperity IV* study was conducted by Americans for the Arts to document the economic impact of the nonprofit arts and culture industry in 182 communities and regions (139 cities and counties, 31 multi-city or multi-county regions, and 10 states, and two individual arts districts)—representing all 50 U.S. states and the District of Columbia.

The diverse communities range in population (1,600 to four million) and type (rural to urban). The study focuses solely on nonprofit arts and culture organizations and their audiences. Public arts councils and public presenting facilities/institutions are included, as are select programs embedded within another organization (that have their own budget and play a substantial role in the cultural life of the community). The study excludes spending by individual artists and the for-profit arts and entertainment sector (e.g., Broadway or the motion picture industry). Detailed expenditure data were collected from 9,721 arts and culture organizations and 151,802 of their attendees. The project economists, from the Georgia Institute of Technology, customized input-output analysis models for each study region to provide specific and reliable economic impact data about their nonprofit arts and culture industry, specifically full-time equivalent jobs, household income, and local and state government revenue.

The 182 Local, Regional, and Statewide Study Partners

Americans for the Arts published a Call for Participants in 2010 seeking communities interested in participating in the *Arts & Economic Prosperity IV* study. Of the more than 200 potential partners that expressed interest, 182 agreed to participate and complete four participation criteria: (1) identify and code the universe of nonprofit arts and culture organizations in their study region; (2) assist researchers with the collection of detailed financial

and attendance data from those organizations; (3) conduct audience-intercept surveys at cultural events; and (4) pay a modest cost-sharing fee (no community was refused participation for an inability to pay).

Minnesota Citizens for the Arts contracted with Americans for the Arts to conduct a separate economic impact analysis focused solely on the nonprofit arts and culture industry in the State of Minnesota. The methodology used is identical to the national study methodology, making it possible to compare the results for the State of Minnesota with those of the national study participants.

Surveys of ORGANIZATIONS

Each of the 182 study regions attempted to identify its comprehensive universe of nonprofit arts and culture organizations using the Urban Institute’s National Taxonomy of Exempt Entity (NTEE) coding system as a guideline. The NTEE system—developed by the National Center for Charitable Statistics at the Urban Institute—is a definitive classification system for nonprofit organizations recognized as tax exempt by the Internal Revenue Code. This system divides the entire universe of nonprofit organizations into 10 Major categories, including “Arts, Culture, and Humanities.” The Urban Institute reports that 113,000 nonprofit arts and culture organizations were registered with the IRS in 2010, up from 94,450 in 2005.

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

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

In addition, the study partners were encouraged to include other types of eligible organizations if they play a substantial role in the cultural life of the

community or if their primary purpose is to promote participation in, appreciation for, and understanding of the visual, performing, folk, and media arts. These include government-owned or government-operated cultural facilities and institutions, municipal arts agencies and councils, private community arts organizations, unincorporated arts groups, living collections (such as zoos, aquariums, and botanical gardens), university presenters, and arts programs that are embedded under the umbrella of a non-arts organization or facility (such as a community center or church). In short, if it displays the characteristics of a nonprofit arts and culture organization, it is included. For-profit businesses and individual artists were excluded from this study.

Nationally, detailed information was collected from 9,721 eligible organizations about their fiscal year 2010 expenditures in more than 40 expenditure categories (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition) as well as about their event attendance, in-kind contributions, and volunteerism. Responding organizations had budgets ranging from a low of \$0 to a high of \$239.7 million. Response rates for the 182 communities averaged 43.2 percent and ranged from 5.3 percent to 100 percent. It is important to note that each study region’s results are based solely on the actual survey data collected. No estimates have been made to account for non-respondents. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.

In the State of Minnesota, 1,269 of the approximately 4,779 total potentially eligible nonprofit arts and culture organizations identified by Minnesota Citizens for the Arts participated in this study—an overall participation rate of 27 percent. The Minnesota Cultural Data Project (CDP) was the primary source of information about the universe of eligible organizations. The CDP data were supplemented using both data collected through

a proprietary web-based survey process as well as grant application data. The most recently-available financial and attendance data were used for each of the 1,269 participating organizations in this analysis. In most cases, the most recently-available data are from fiscal year 2013 (the organization's fiscal year that ended between January 1 and December 31, 2013). In some cases, however, data were used from fiscal year 2012 or earlier.

Surveys of AUDIENCES

Audience-intercept surveying, a common and accepted research method, was conducted in all 182 of the study regions to measure event-related spending by nonprofit arts and culture audiences. Patrons were asked to complete a short survey while attending an event. Nationally, a total of 151,802 valid and usable attendees completed the survey for an average of 834 surveys per study region. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging. Data were collected throughout 2011 (to guard against seasonal spikes or drop-offs in attendance) as well as at a broad range of both paid and free events (a night at the opera will typically yield more spending than a weekend children's theater production or a free community music festival, for example). The survey respondents provided information about the entire party with whom they were attending the event. With an overall average travel party size of 2.69 people, these data actually represent the spending patterns of more than 408,000 attendees.

A total of 3,410 valid audience-intercept surveys were collected from attendees to arts and culture performances, events, and exhibits that took place in the State of Minnesota during 2014.

Economic Analysis

A common theory of community growth is that an area must export goods and services if it is to

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

The Input-Output Process

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

To complete the analysis for the State of Minnesota, project economists customized an input-output model based on the local dollar flow between 533 finely detailed industries within each of Minnesota's 11 unique arts regions. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance) and local tax data (sales taxes, property taxes, and miscellaneous local

option taxes), as well as the survey data from the responding nonprofit arts and culture organizations and their audiences. The findings for the 11 arts regions were then aggregated to calculate the statewide estimates.

The input-output model is based on a table of 533 finely detailed industries showing local sales and purchases. The local and state economy of each community is researched so the table can be customized for each community. The basic purchase patterns for local industries are derived from a similar table for the U.S. economy for 2007 (the latest detailed data available from the U.S. Department of Commerce). The table is first reduced to reflect the unique size and industry mix of the local economy, based on data from County Business Patterns and the Regional Economic Information System of the U.S. Department of Commerce. It is then adjusted so that only transactions with local businesses are recorded in the inter-industry part of the table. This technique compares supply and demand and estimates the additional imports or exports required to make total supply equal total demand. The resulting table shows the detailed sales and purchase patterns of the local industries. The 533-industry table is then aggregated to reflect the general activities of 32 industries plus local households, creating a total of 33 industries. To trace changes in the economy, each column is converted to show the direct requirements per dollar of gross output for each sector. This direct-requirements table represents the “recipe” for producing the output of each industry.

The economic impact findings were computed using what is called an “iterative” procedure. This process uses the sum of a power series to approximate the solution to the economic model. This is what it looks like in matrix algebra:

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

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

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

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

Frequently Used Terms

This section provides a glossary of economic impact terminology.

Cultural Tourism

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

Direct Economic Impact

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

Direct Expenditures

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

Econometrics

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

Econometrician

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

Full-Time Equivalent (FTE) Jobs

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

Indirect Economic Impact

Each time a dollar changes hands, there is a measurable economic impact. When people and businesses receive money, they re-spend much of that money locally. Indirect impact measures the effect of this re-spending on jobs, household income, and revenue to local and state government. It is often referred to as secondary spending or the dollars “rippling” through a community. When funds are eventually spent non-locally, they are considered to have “leaked” out of the community and therefore cease to have a local economic impact. Indirect impact includes the impact of all rounds of spending (except for the initial expenditure) until the dollars have completely “leaked out” of the local economy.

Input-Output Analysis

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

Leakage

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

Multiplier (often called Economic Activity Multiplier)

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

Resident Household Income (often called Personal Income)

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

Revenue to Local and State Government

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

Frequently Asked Questions

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

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

Local partners attempted to identify their universe of nonprofit arts and culture organizations using the Urban Institute’s National Taxonomy of Exempt Entity (NTEE) codes as a guideline. Eligible organizations included those whose primary purpose is to promote appreciation for and understanding of the visual, performing, folk, and media arts. Public arts councils, public presenting facilities or institutions, and embedded organizations that have their own budget also were included if they play a substantial role in the cultural life of the community. For-profit businesses and individual artists are excluded from this study.

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

An input-output analysis model was customized for each of the participating communities and regions to determine the local economic impact their nonprofit arts and culture organizations and arts audiences. Americans for the Arts, which conducted the research, worked with highly regarded economists to design the input-output model used for this study.

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

In addition to detailed expenditure data provided by the surveyed organizations, extensive wage, labor, tax, and commerce data were collected from local, state, and federal governments for use in the input-output model.

Why doesn’t this study use a multiplier?

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

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

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

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

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

Will my local legislators believe these results?

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

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

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

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

The Economic Impact of the Arts in Minnesota: A Regional Perspective

This project included the completion of customized economic impact studies for each of Minnesota’s 11 unique arts regions, in addition to producing this final report on the aggregate statewide findings. Each of the regional studies utilized the same methodology, requiring the collection of accurate local expenditure and attendance data as well as the development of an economic input-output model for each region using local, state, and federal tax and commerce information.

This statewide study demonstrates that the nonprofit arts and culture are a \$1.2 billion industry in Minnesota. Nonprofit arts and culture organizations spend \$696.1 million annually, while cultural audiences account for an additional \$500.8 million in event-related spending. Together, spending by arts and culture organizations and their audiences support more than 33,000 full-time equivalent jobs in Minnesota and generate more than \$127 million in government revenue for the State of Minnesota

and its local communities. This section of the report provides summary data for each of Minnesota’s 11 unique arts regions, and demonstrates how those regional findings were aggregated for the purpose of calculating the overall statewide findings. Copies of the statewide report and the 11 customized regional reports, along with accompanying materials, are available for download from Minnesota Citizens for the Arts’ website (www.mncitizensforthearts.org) and creativemn.org.

TABLE 12:
Total Economic Impact of Minnesota’s Nonprofit Arts Industry—CULTURAL AUDIENCES ONLY
(Regional Breakdown)

Region	Total Audience Expenditures	Full-Time Equivalent Jobs	Resident Household Income	Local Government Revenue	State Government Revenue
Northwest Minnesota	\$477,641	9	\$203,000	\$8,000	\$41,000
North Central Minnesota	\$1,435,387	25	\$593,000	\$21,000	\$115,000
The Arrowhead Region	\$20,102,830	422	\$10,712,000	\$501,000	\$1,767,000
The Lake Region	\$3,338,821	64	\$1,618,000	\$54,000	\$269,000
The Brainerd Lakes Region	\$885,007	20	\$465,000	\$16,000	\$76,000
Southwest Minnesota	\$2,416,051	52	\$1,236,000	\$49,000	\$194,000
East Central Minnesota	\$5,924,425	84	\$1,970,000	\$85,000	\$478,000
Central Minnesota	\$7,633,741	167	\$4,215,000	\$172,000	\$637,000
South Central Minnesota	\$7,166,691	146	\$3,586,000	\$162,000	\$586,000
Southeastern Minnesota	\$8,885,650	174	\$4,043,000	\$154,000	\$746,000
Seven-County Metro Area	\$442,493,585	8,384	\$238,445,000	\$13,686,000	\$37,401,000
State of Minnesota	\$500,759,829	9,547	\$267,086,000	\$14,908,000	\$42,310,000

TABLE 13:
Average Per Person (PP) Event-Related Expenditures by Minnesota’s Cultural Attendees
 (excluding the cost of event admission)

	LOCAL ³ ATTENDEES			NON-LOCAL ³ ATTENDEES			ALL ATTENDEES
	Percentage of Attendees	Per Person Average	Audience Spending by Locals	Percentage of Attendees	Per Person Average	Audience Spending by Non-Locals	Overall Per Person Average
Northwest Minnesota	83.8%	\$13.86	\$364,921	16.2%	\$22.18	\$112,720	\$15.01
North Central Minnesota	81.3%	\$20.42	\$1,136,577	18.7%	\$23.35	\$298,810	\$20.87
The Arrowhead Region	75.5%	\$19.85	\$11,589,384	24.5%	\$44.96	\$8,513,446	\$23.99
The Lake Region	88.0%	\$13.43	\$2,452,896	12.0%	\$35.73	\$885,925	\$16.39
The Brainerd Lakes Region	81.3%	\$8.93	\$664,570	18.7%	\$12.87	\$220,437	\$9.62
Southwest Minnesota	73.1%	\$16.60	\$1,431,269	26.9%	\$31.05	\$984,782	\$19.77
East Central Minnesota	60.2%	\$15.11	\$2,027,958	39.8%	\$43.85	\$3,896,467	\$25.68
Central Minnesota	74.2%	\$20.85	\$5,462,930	25.8%	\$23.82	\$2,170,811	\$21.52
South Central Minnesota	74.7%	\$15.49	\$4,148,610	25.3%	\$33.20	\$3,018,081	\$19.71
Southeastern Minnesota	79.9%	\$9.77	\$5,652,229	20.1%	\$22.21	\$3,233,421	\$12.05
Seven-County Metro Area	85.6%	\$25.82	\$352,831,204	14.4%	\$39.16	\$89,662,381	\$27.58
Statewide Totals			\$387,762,548			\$112,997,281	
Statewide Averages	81.5%	\$17.83		18.5%	\$32.15		\$20.48
Minnesota Citizens⁴	94.1%	\$19.57		5.9%	\$36.20		\$20.48

³ For the purposes of this study, “Local” attendees are defined as cultural attendees who live within the Minnesota arts region where the cultural activity (e.g., performance, event, or exhibit) took place; “Non-Local” attendees live outside that arts region.

⁴

Regarding Minnesota residency—based on the random sample of 3,410 audience-intercept surveys that were collected and analyzed for this study—researchers estimate that 94.1 percent of Minnesota’s total cultural attendees are residents of the State of Minnesota; the remaining 5.9 percent travel to Minnesota from another state or country.

"Many businesses support the arts across the country because they intuitively understand that the arts matter, so it is great to get the facts and a clearer understanding of the links between the arts and economic prosperity."

— Stephen Jordan, Executive Director
Business Civic Leadership Center
U.S. Chamber of Commerce

Acknowledgments

Minnesota Citizens for the Arts, the *Creative Minnesota* team, and Americans for the Arts express their gratitude to the many people and organizations who made *Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the State of Minnesota* possible and assisted in its coordination and production.

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Lakes Region Arts Council: Maxine Adams
Five Wings Arts Council: Mark Turner
Southwest Minnesota Arts Council: Greta Murray
East Central Regional Arts Council: Mary Minnick-Daniels
Central Minnesota Arts Board: Leslie LeCuyer
Prairie Lakes Regional Arts Council: Brenda Flintrop
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- **Minnesota Historical Society:**
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Special thanks to the John D. and Catherine T. MacArthur Foundation and The Ruth Lilly Fund of Americans for the Arts for their financial support of the national implementation of the *Arts & Economic Prosperity IV* study.

Thanks also to the Cultural Data Project (CDP), a collaborative project of the Greater Philadelphia Cultural Alliance, The Greater Pittsburgh Arts Council, Pennsylvania Council on the Arts, The Pew Charitable Trusts, The William Penn Foundation, and The Heinz Endowments (in each participating state, including Minnesota, the CDP is also the result of a collaborative partnership of public and private funders and advocacy agencies). The CDP was created to strengthen arts and culture by documenting and disseminating information on the arts and culture sector. CDP data were used in the economic impact analysis for all study regions located in Arizona, California, Illinois, Maryland, Massachusetts, Michigan, Minnesota, New York, Ohio, Pennsylvania, and Rhode Island. For more information about the Cultural Data Project, visit www.culturaldata.org.

The State of Minnesota's Participating Nonprofit Arts and Culture Organizations

This study could not have been completed without the cooperation of the 1,269 nonprofit arts and culture organizations in the State of Minnesota, listed below, that provided detailed financial and event attendance information about their organization.

REGION 1—NORTHWEST MINNESOTA

Ada Chamber of Commerce; City of Roseau Scandinavian Festival; Crookston Civic Music League; Fertile Community Club; Fosston Library Arts Center; Friends of Lake Bronson State Park; Heritage Foundation; Kittson County Historical Society; l'Association des Francais du Nord; Middle River Community Club; Middle River Community Theater; Norman County Historical Society; North Country Fiddle and Dance; Northwest Minnesota Arts Council; Palmville Press & Publishing; Polish National Alliance Lodge 3060; Roseau Area Arts Association; Roseau County Historical Society; Sand Hill Settlement Historical Society; Sons of Norway Snorre Lodge #70; Stephen Arts Council; Summer Arts Stages; Thief River Falls Community Arts Council; Twin Forks Chorus; Valley Crossing Arts Council; and Warroad Summer Theatre.

REGION 2—NORTH CENTRAL MINNESOTA

Belle Thalia Creative Arts Space; Beltrami County Historical Society; Bemidji Area Community Band; Bemidji Chorale; Bemidji Community Theater; Bemidji First City of Arts Studio Cruise; Bemidji Sculpture Walk; Bemidji Symphony Orchestra; Bemidji Woodcarving Club; Blackduck Community Education; Blank Canvas Gallery and Education Center; City of Blackduck; City of Park Rapids; Clearbrook-Gonvick Summer Recreation; Clearwater County Historical Society; Depot Preservation Alliance; Headwaters School of Music & the Arts; Heartland Concert Association; Hope House; Jackpine Writers' Bloc; Lady Slipper Scenic Byway; Lake of the Woods Art Guild; Lake of the Woods County Historical Society; Loon Opera Company; Mahnomen County Historical Society; Mask and Rose Women's Theater Collective; Nemeth Art Center; North Beltrami Heritage Center; Northern Artist Association; Northern Exposure to Lifelong Learning; Northern Light Opera Company; Northwoods Writers Group; Park Rapids Area Community Band; Park Rapids Lakes Area Arts Council; Paul Bunyan Playhouse; Pequana Playhouse; Red Bridge Film Festival; Region 2 Arts Council and Watermark Art Center.

REGION 3—THE ARROWHEAD REGION

Aitkin Community Education; Aitkin County Historical Society; American Indian Community Housing Organization (Gimaajii Mino Bimaadizimin); Arrowhead Chorale; Arrowhead Regional Arts Council; Art 'Round Town; Arts on Superior; Aurora City Band; Bayfront Reggae; Bois Forte Tribal Government; Borealis Chorale and Orchestra; Calosia Township Historical Society; Calumet Public Library; Carlton County Historical Society; City of Bigfork; City of Duluth; City of Grand Rapids; Cloquet Public Library; Common Language; Cook Chamber of Commerce; Cook County Community Radio Corporation; Cook County Historical Society Museum; Cotton Civic Club; County Seat Theater Company; Crescendo Youth Orchestra; Dorothy Molter Foundation and Museum; Duluth Art Institute; Duluth Ballet; Duluth Children's Museum; Duluth Festival Opera; Duluth Fiber Handcrafters Guild; Duluth Superior Symphony Association; Duluth-Superior Area Educational Television Corporation; East Range Choral Society; Edge

of the Wilderness Community; Ely Greenstone Public Art; Ely Winter Festival; Ely-Winton Historical Society; Empty bowls; Ernest C. Oberholtzer Foundation; Friends of B'nai Abraham; of the Finland Community; Good Harbor Hill Players; Grand Marais Arts; Grand Marais Playhouse; Gunflint Trail Historical Society; Hibbing Historical Society; Hovland Arts Festival; Icebox Radio Theater; Ironworld Development Corporation; Itasca Orchestra and Strings Program; Jaques Art Center; Koochiching County Historical Society; Lake Superior Chamber Orchestra; Lake Superior Marine Museum Association; Lake Superior Sustainable Farming Association; Lake Superior Suzuki Talent Program; Lake Superior Youth Chorus; Laurentian Arts and Culture Alliance; Lyric Opera of the North; MacRostie Art Center; Magic Smelt Puppet Troupe; Matinee Musicale; Mesabi Symphony Orchestra; Milwaukee Road Heritage Center & Museum; Minnesota Discovery Center; Minnesota Museum of Mining; Minnesota State Old Time Fiddle Championships; Moose Lake Area Historical Society; Nordic Center; North House Folk School; North Shore Music Association; North Star Foundation of the Mesaba Range; Northern Bedrock Conservation Corps; Northern Lake County Arts Board; Northern Lakes Arts Association; Northern Lights Music Festival; Northshore Chamber Society; Northwoods Friends of the Arts; Poetry Harbor; Prove Gallery; Rainy Lake Community Orchestra; Range Artists Association; Range Center; Reif Arts Council; Ressler Dance!; Saint Louis County Historical Society; Schroeder Area Historical Society; Sisu Heritage; Sky Blue Jazz Ensemble; Sons of Norway; Sound Unseen International Duluth; Sugarloaf Cove Nature Center; Tamarack Dance Association; The College of Saint Scholastica; The Creativity Tank; The Duluth Playhouse; The Ely Artwalk; Three Bridges International Chamber Music Festival; Tweed Museum of Art; Two Harbors Heritage Days; Voices of Reason; William M. Kelley High School; Wise Fool Shakespeare; and WTIP North Shore Community Radio.

REGION 4—THE LAKE REGION

Alexandria Area Arts Association; Ann Bickle Heritage House; Art of the Lakes Association; Becker County Historical Society; Boys and Girls Club of White Earth; Brush & Palette Club; Central Square Inc; City of Alexandria; City of Fergus Falls; City of New York Mills; Concordia College Cultural Events; Evansville Arts Coalition; Fargo-Moorhead Chamber Chorale; Fergus Falls Center For The Arts; Fergus Falls Concert Association; Fergus Falls Senior Citizens Program; Friends of History Museum of East Otter Tail County; Gooseberry Park Players; Grant County Historical Society; Henning Landmark Center Inc.; Heritage Education Commission; Historic Holmes Theatre; Historical and Cultural Society of Clay County; Kaddatz Galleries; Lake Region Arts Council; Lake Region Writers Network; Lakes Chamber Music Society; Minnesota State Community & Technical College; Minnesota State University Moorhead; Minnesota's Historic Northwest; New Rivers Press; New York Mills Arts Retreat; Nordic Arts Alliance; Nordic Culture Clubs; Otter Tail County; Pope Art; Pope County Historical Society; Prairie Renaissance Cultural Alliance; Probstfield Farm Living History Foundation; Prospect House Museum; Rourke Art Gallery Museum; Springboard for the Arts (Fergus Falls Office); Starbuck Depot and Museums; Stevens County Historical Society; Terrace Mill Foundation; The Minnesota Lakes Maritime Society; The Prospect House Museum; The Straw Hat Players; Theatre L'Homme Dieu; and Wilkin County Historical Society.

REGION 5—THE BRAINERD LAKES REGION (FIVE WINGS)

4-H Performing Arts Project Development Committee; Cass County Historical Society; Central Lakes College Theatre; Central Minnesota Boys Choir; Crossing Arts Alliance; Crow Wing County Historical Society; Cuyuna Iron Range Heritage Network; Dreams United/Sueños Unidos; Five Wings Arts Council; Great River Arts; Green Island Preserve; Heartland Symphony Orchestra; Heritage Group North; Lakes Area Music Festival; Lamplighter Community Theatre; LEAP; Legacy Chorale of Greater Minnesota; Little Falls Arts & Crafts Fair; Long Prairie Area Chamber of Commerce; Long Prairie Chamber Orchestra;

Longville Lakes Arts Alliance; Madhatters Community Theatre Inc.; Minnesota Folklore Theater; Minnesota Military Museum; Morrison County Historical Society; Motley's Two Rivers Music Fest; Music in the Park; Northwoods Arts Council; Screen Porch Productions; St. Francis Music Center; Staples Area Men's Chorus; Staples Area Women's Chorus; Staples Historical Society; Staples Motley Area Arts Council; Todd County Historical Society; USA Community Chorus; and Whitefish Area Tourism Association.

REGION 6/8—SOUTHWEST MINNESOTA

Appleton 52 Wing Restoration Committee; Big Stone Arts Council; Blue Mound Area Theatre; Buffalo Ridge Chorale; Business Arts & Recreation Center; Chippewa County Historical Society; City of Belview; City of Glencoe; City of Granite Falls; City of Litchfield; City of Madison; City of Minnesota; City of Pipestone; City of Walnut Grove (Laura Ingalls Wilder Pageant); Clean Up The River Environment; Cottonwood County Historical Society; Council for Arts and Humanities Rock County; Crow River Area Youth Orchestra; Crow River Singers; Cultural Awareness Organization; Dakota Wicohan; Danube Historical Society; Dassel Area Historical Society; Friends of the Auditorium; Friends of the Orchestra; Granite Area Arts Council; Granite Falls Historical Society (Andrew J. Volstead House Museum); Greater Litchfield Opera House Association; Greater Milan Initiative; Green Earth Players; Historic Hutchinson; Historic Worthington; Hutchinson Center for the Arts; Hutchinson Theatre Company; Kaleidoscope an Artists' Gallery; Kandiyohi County Historical Society; Lac qui Parle County Historical Society; Litchfield Community Theatre; Litchfield Opera House; Marshall Area Fine Arts Council; Marshall Area Stage Company; Meander Art Crawl; Meeker County Historical Society; Milan Village Arts School; Murray County Historical Society; New London Music Festival; Normandale Community College; Norway Lake Lutheran Historical Association; Pipestone County Historical Society; Prairie Arts Chorale; Prairie Arts Continuum; Prairie Dance Alliance of Southwest Minnesota; Prairie Wind Folk Music and Bluegrass; Redwood County Historical Society; Renville County Historical Society and Museum; Renville County West Area Friends of the Arts; Rhythm of the River; RiverSong Music Festival; Rock County Fine Arts; Southwest Minnesota Arts Council; Spellbound Theatricals Theater Laboratory; Swift County Historical Society; The Calumet Players; Upper Minnesota River Valley Regional Development Commission; Willmar Area Arts Council; Willmar Area Symphonic Orchestra; Willmar Community Theatre; Winsted Arts Council; Worthington Area Symphony Orchestra; and Yellow Medicine County Historical Society.

REGION 7E—EAST CENTRAL MINNESOTA

Audubon Center of the North Woods; Braham Pie Day; Cambridge Center for the Arts; Center City Opera Company; City of Milaca; City of Onamia; Depot Studios; East Central Minnesota Chorale; East Central Regional Arts Council; Elim Oasis Adult Day Health Center; Franconia Sculpture Park; Isanti County Historical Society; Kanabec County Art Association; Kanabec History Center; Milaca Area Historical Society; Milaca Fine Arts Council; Mora CAPP-Comprehensive Arts Planning Program; Mora Vasaloppet; Northern Exposures Photography Club; Old School Arts Center; Onamia Area Friends of the Library; Onamia Community Education; Paradise Community Theatre; Performing Arts Committee District 911 Community Education; Pine City Arts Council; Pine Center for the Arts; Princeton Area Visionary Committee; St Croix Valley Potters Tour; We R Able; and Wyoming Area Creative Arts Community.

REGION 7W—CENTRAL MINNESOTA

Buffalo Community Orchestra; Buffalo Community Theater; Central MN Arts Board; Chamber Music Society of St. Cloud; City of Elk River; City of Otsego; City of St. Cloud; Kokato Historical Society; Cold Spring Area Maennerchor; College of St. Benedict (Fine Arts

Programming); Command Performance Choirs; Dassel-Cokato Arts Association; Delano Area Council for Arts and Culture; Elk River Area Arts Alliance; Elk River Community Theatre; General Federated Women's Club; Granite City Folk Society; Great Northern Theatre Company; Great River Chorale; Great River Educational Arts Theatre; Hands Across the World; Kimball Community Education; Lake Sylvia Flute Institute; Land of Lakes Choirboys of Minnesota; Millstream Arts Festival; Minnesota Center Chorale; Minnesota Dance Ensemble; Monticello Strings; Mother of Mercy Campus of Care; Munsinger Clemens Botanical Society; Paramount Arts Resource Trust Inc.; Paynesville Community Theater; Pioneer Place Theatre Company; Saint Cloud Downtown Council; Saint John's Abbey & University; Sauk Centre Area Historical Society; Sherburne County Historical Society; Sinclair Lewis Foundation; St. Cloud Downtown Alliance Foundation; St. Cloud Municipal Band; St. Cloud Symphony Orchestra; St. John's University (Fine Arts Programming); Stearns History Museum; The Saint Cloud Area All Star Jazz Band; The Saint John's Boys' Choir; Two Rivers Community Theatre; United Arts of Central Minnesota; Visual Arts Minnesota; Wirth Center for the Performing Arts; Wright County Historical Society; wRight Ringers Community Handbell Ensemble; Youth Chorale of Central Minnesota; and Youth Theatre Workshop.

REGION 9—SOUTH CENTRAL MINNESOTA (PRAIRIE LAKES)

4 Playwrights Project; American Guild of Organists; Arlington Town and Country Days; Arts and Heritage Center of Montgomery; Arts Center of Saint Peter; Arts 'N More Festival, Amboy; Blue Earth County Historical Society; Blue Earth Town and Country Players; Blue Earth Valley Concert Association; Boy In Blue Civil War Memorial; Brown County Historical Society; Children's Museum of Southern Minnesota; Christkindlmarkt; City Center Partnership - CityArt Program; City of Arlington; City of Janesville; City of Mankato; City of New Richland; City of New Ulm; City of Waseca; CityArt Sculpture Walk; Community And Seniors Together; Dance Conservatory of Southern Minnesota; Fairmont Opera House; Farming of Yesteryear; Good Thunder Reading Series; Govenaires Drum Bugle Corps; Gustavus Adolphus College and Lutheran Church Archives; Healthy Communities/Healthy Youth of Brown County; Henderson Chamber of Commerce; Henderson Sauerkraut Days; Highland Summer Theatre; History Fest; Humanities are Vital to Education (H.A.V.E.); Lake Crystal Area Community Band; Le Sueur County Historical Society; Le Sueur-Henderson Community Education; Madelia Area Chamber of Commerce; Mankato Mdwakanton Association; Mankato Area 77 Lancers Marching Band Parent Association; Mankato Area Arts Council; Mankato Area Community Band; Mankato Area Community Education; Mankato Area Youth Symphony Orchestra; Mankato Ballet Company; Mankato Community Education; Mankato Figure Skating Club; Mankato Symphony Orchestra Association Inc.; Martin County Preservation Association; Merely Players Community Theatre; MHIS; Minnesota Over 60 Band; Minnesota Shorts Play Festival; Minnesota Valley Chorale; Minnesota Valley Chorus Sweet Adelines; Minnesota Valley Music Teachers Association; Musicorum; New Ulm Actors Community Theatre (NUACT); New Ulm Civil War Commemoration; New Ulm Retail Development Corporation; New Ulm Suzuki School of Music; Nicollet County Historical Society; Performance Series MSU Mankato; Prairie Lakes Regional Arts Council; Project GEM; Rock Bend Folk Festival; Saint James Theater and Arts Association; Saint Peter Ambassadors; Saint Thomas Oratory Irish Fest; Sakatah Arts Experience; Sibley County Historical Museum; Sleepy Eye Area Historical Society; Sleepy Eye Community Education; Springfield Area Historical Society; St. Peter Choral Society; The Concord Singers; The Fairmont Opera House; The Govenaires Drum and Bugle Corps; The Grand Center for Arts and Culture; The Mankato Children's Chorus; Twin Rivers Council for the Arts; Wanda Gag House Association; Waseca Arts Council; Waseca Chamber of Commerce; Waseca Classic; Waseca County Historical Society; Winnebago Area Musical Players; and Young Writers & Artists Conference.

REGION 10—SOUTHEASTERN MINNESOTA

Albert Lea Art Center; Anderson Center for Interdisciplinary Studies; Austin Area Art Center; Austin Area Commission for the Arts; Austin Artist Series; Austin Community Band; Austin Community Charitable Fund; Austin Symphony Orchestra; Big Island Rendezvous and Festival; Bluff Country Studio Art Tour; Brave Community Theatre; Bridge Chamber Music Festival; Cambodian Association of Rochester Minnesota; Cannon Valley Youth Orchestra; Carleton College; Cello an American Experience; Chatfield Brass Band; Chatfield Center for the Arts; Children's Dance Theatre; Choral Arts Ensemble of Rochester; City of Faribault; City of Harmony Arts Board; City of Hokah; City of Northfield; City of Red Wing; City of Rochester Music Dept./Riverside Concerts; City of Wabasha; City of Winona; Commonweal Theatre Company; Cultural Diversity Network of Owatonna; District One Hospital; Dodge County Historical Society; Dover Eyota Music Association; Dreamery Rural Arts Initiative; Eagle Bluff Environmental Learning Center; Faribault Art Center Inc.; Fillmore County Historical Society; Folk Forum; Freeborn County Historical Society; Friends of St. Rose; Friends of the Houston Nature Center; Frontier Legends Entertainment; Frozen River Film Festival; Goodhue County Historical Society; Great River Shakespeare Festival; Hambone Music Festival; Home and Community Options; Honors Choirs of SE MN; I Cantanti Chamber Choirs; Jefferson Township; LaCrescent Area Historical Society; Lake City Historical Society; Lanesboro Arts Center; Lanesboro Community Theatre; Lockwood Theater Company; Mantorville Art Guild; Matchbox Children's Theatre; Minnesota Conservatory for the Arts; Minnesota Marine Art Museum; Minnesota State Public School Orphanage Museum; Mower County Historical Society; National Eagle Center; Northfield Arts Guild; Northfield Historical Society; Northfield Senior Center; Northfield Youth Choirs; Northland Words; Norwegian-American Historical Association; Olmsted County Historical Society; Olmsted Medical Center; Owatonna Arts Council; Performance Center at Saint Mary's University of Minnesota; Peterson Station Museum; Picaresque II; Preston Historical Society; Project FINE; Red Dragonfly Press; Red Wing Arts Association; Rice County Historical Society; Rochester Aria Group; Rochester Art Center; Rochester Arts Council; Rochester Chamber Music Society; Rochester Civic Theatre; Rochester Community and Technical College; Rochester Dance Company; Rochester International Film Group; Rochester Irish Fest; Rochester Male Chorus; Rochester MN Writing Group; Rochester Music Guild; Rochester Repertory Theatre; Rochester Symphony Orchestra & Chorale; Rosie Belle Performing Arts Theatre; Rural America Arts Partnership; Rushford Area Historical Society; Rushford-Peterson Schools; Saint Charles Community Education; Saint Mary's University of Minnesota (Minnesota Conservatory for the Arts); SEED Performance Art; Sing Out Loud; SoundStrings; Southeast Minnesota Bluegrass Association; Southeastern Minnesota Arts Council; Southeastern Minnesota Suzuki Association; Southeastern Minnesota Youth Orchestras SEMYO; Spring Valley Historical Society; Steele County Historical Society; T. B. Sheldon Memorial Theatre; The Merlin Players; Theatre du Mississippi; University of Minnesota (Houston County); Valley Grove Preservation Society; Wabasha County Historical Society; Winona Area Barbershoppers; Winona Brass Band; Winona County Historical Society; Winona Symphony Orchestra Association; Winona-Dakota Unity Alliance; Wits' End Theatre; Words Players Theatre; and Zumbrota Area Arts Council.

REGION 11—THE SEVEN-COUNTY METRO AREA

1006 Summit Avenue Society; 20% Theatre Company Twin Cities; 4 Community Theatre; 9x22 Dance/lab; Actors Theater of Minnesota; Adieu Summer Concert; AdopSource MN Transracial Film Festival; After Five Women's Vocal Ensemble; Afton Historical Society and Museum; Afton Historical Society Press; Alan Berks and Company; Al-Bahira Middle Eastern Dance Theater; Alive & Kickin; Allegro Choral Academy; Altered Esthetics; Alzheimer's Poetry Project Minnesota (APP-MN); American Association of Woodturners; American

Composers Forum; American Craft Council; American Swedish Institute; American Poijat Finish Brass Band; Amherst H. Wilder Foundation; Ananya Dance Theatre; Anca Saxophone Quartet; Angel Foundation; Angelica Cantanti Youth Choirs; Anoka County Domestic Violence Council; Anoka County Historical Society; Arcata Press dba Saint Paul Almanac; Art and All that Jazz Inc.; Art Department Bethel University; Art of This Gallery; Art Shanty Projects; Artful Nook; ArtCulture; Artist Arsenal MN; Artist to Artist; ArtOrg; ArtReach St. Croix; Arts in Action; Arts Midwest; ArtSage; Artspace Projects; ArtStart; Ascension Place; Ashland Productions; Asian Media Access; Association of Minnesota Public Educational Radio Stations; Autoptic Festival; Bach Society of Minnesota; Bakken Museum; Bakken Trio; Balkanicus Ensemble; Ballet Minnesota; Ballet of the Dolls; Ballet Works Inc dba James Sewell Ballet; Banfill-Locke Center for the Arts; Barbara Schneider Foundation; BareBones Productions; Batucada Do Norte; Bedlam Theatre; Bell Museum of Natural History; Bells of the Lakes; Bengali Association of Minnesota; Bike Commuter Project; Black Dirt Theater; Black Label Movement; Black Storytellers Alliance; Blaine Parks and Recreation; Bloomington Chorale; Bloomington Symphony Orchestra; Bloomington Theatre and Art Center; Blossoms of the Orient; BodyCartography Project; Brazen Theatre; Breanna's Gift; Brooklyn Community Band; Brooklyn Historical Society; Burnsville Visual Arts Society; Bush Foundation; Byzantine Choral Festival; Calliope Women's Chorus; Candid Theater Co; Cantus; Caponi Art Park; Capri Big Band; Capri Theater; Carlyle Brown & Company; Carondelet Village; Carpenter St. Croix Valley Nature Center (aka Thomas E and Edna D Carpenter Foundation); Carver County Historical Society; Cathedral Heritage Foundation; Ce Tempocalli; Cedar Cultural Center; Cedar Lake Park Preservation and Development Association dba Cedar Lake Park Association; Center for Hmong Arts and Talent; Center for Hmong Studies; Center for International Education; Central Public Schools; Centre Stage Theatre and the Arts; Centro; Chain Reaction Theatre Project; Chamber Music Lakeville; Chamber Music Society of Minnesota; Chameleon Theatre Circle; Chaska Valley Family Theatre; Chaske Cikala Wacipi; Cherry Spoon Collective; Chicago Avenue Fire Arts Center; Children's Theatre Company; Chinese American Association of Minnesota Chinese Dance Theater; Christopher Watson Dance Company; Circus of the Star; Cities' Classical Dance Ensemble; City of Brooklyn Park; City of Carver; City of Eagan Parks and Recreation; City of Eden Prairie; City of Edina; City of Excelsior; City of Forest Lake; City of Hastings; City of Maplewood; City of Minneapolis; City of Saint Paul; City of Stillwater; Civic Orchestra of Minneapolis; Cleveland Neighborhood Association; CLIMB Theatre; Coffee House Press; Collage; Come Square Dance; Community Stabilization Project; ComMUSICation; Como Park Zoo and Conservatory; COMPAS; Contempo Physical Dance; Contemporary Dance Arts; Continental Ballet Company; Copper Street Brass Quintet; courageous heARTS; Creatives for Causes (Art Buddies); Crew 88 Youth Performing Group; Cross Community Players; Crossroads Panorama - Youth Education Through the Arts; Cultural Society of Filipino-Americans; Curio Dance (Drop the Mic); Czech Area Concertina Club; Dakota Center for the Arts (dba Eagan Art Festival); Dakota City Heritage Village; Dakota County Historical Society; Dakota Fine Arts Consortium; Dakota Foundation for Jazz Education; Dakota Valley Symphony; Dance Revels Moving History; Dangerous Productions; Dans Askina Turkish Dance Ensemble; Deborah Elias Danza Espanola; Depot Coffee House; Discovery Arts Council; Dist. 108 Community Education; District 7 Planning Council; Diverse Emerging Music Organization; Drama Interaction; Dream Songs Project; Duniya Drum & Dance; Eagan Historical Society; Eagan Men's Chorus; East Metro Symphony Orchestra; East Side Arts Council; Eastern Carver County Schools Community Education; Eclectic Edge Ensemble; Eclectic Ensemble; Eden Prairie Art Center; Eden Prairie Historical Society; Edge of the Big Woods Art Wander; EDIT; Eighth Air Force Historical Society - Minnesota Chapter; Emerge Community Development; Encore Wind Ensemble; Ensemble 61; Ethnic Dance Theatre; Excelsior-Lake Minnetonka Historical Society; Exultate; FamilyMeans; Film Society of Minneapolis St. Paul; Fine Arts Series of Saint Paul College; Firefighter's Hall and Museum; FLYING FOOT FORUM; Flying Forms; Foci / Minnesota Center for Glass Arts; Fools

Productions; Footprints Collective; Forecast Public Art; Forest Lake Park Board; Forum of Regional Arts Councils of Minnesota; Foundation for the Exhibition of Photography; Frank Theatre; Frederic Chopin Society; Free Arts Minnesota; Freedom Jazz Festival; Fridley City Band; Fridley Community Theatre; Fridley Historical Society; Friends of Christ Church Lutheran; Friends of Swede Hollow; Friends of the Hopkins Center for the Arts; Friends of the Immigration History Research Center; Friends of the Minnesota Sinfonia; FTF Works; Gammelgarden Museum; Gateway Mural Project; Germanic-American Institute; Girl Friday Productions; Global Site Performance; Goldstein Museum of Design (Regents of the University of Minnesota); Gosso; Grand Symphonic Winds; Grassroots Culture; Graywolf Press; Great Lakes Shipwreck Preservation Society; Great Northern Union Chorus; Greater Twin Cities Youth Symphonies; Green T Productions; Gremlin Theatre; Guthrie Theater; HAND in HAND Productions; Harmonic Relief; Harmony Theatre Company and School; Heart of the Earth d/b/a American Indian Movement Interpretive Center; Hennepin Artists of Robbin Gallery; Hennepin Health Foundation; Hennepin History Museum; Hennepin Theatre Trust; Highpoint Center for Printmaking; Historic Saint Paul; History Theatre; Hmong Cultural Center; Hollywood Studio of Dance; Honeywell Concert Band; Hope Community; Hope Theatre Company; Hopewell Music Cooperative - North; Hopkins Center for the Arts; Hot Summer Jazz Festival; HPAAC (Hastings Prescott Area Arts Council); HUGE Improv Theater; IFP Minnesota; Illusion Theater & School Inc.; In Progress; In the Heart of the Beast Puppet & Mask Theatre; Independent School District 197 Community Education; Indian Music Society of Minnesota; Indonesian Performing Arts Association of Minnesota dba Sumunar; Interact Center for the Visual and Performing Arts; Intermedia Arts of Minnesota; International Festival of Burnsville; International Friendship Through the Performing Arts; International Institute of Minnesota; Inverted Arts; Iny Asian Dance Theater; Iraqi & American Reconciliation Project; Iraqi Art Project; Irondale Band Boosters; IZUN/MIZAN: A Film and Dialogue Series; J.J. Hill Reference Library; Japan America Society of Minnesota; Jawaahir Dance Company; Jazz at Studio Z; JazzMN; Jerome Foundation; Jewish Historical Society of the Upper Midwest; Jungle Theater; Juxtaposition Inc.; Ka Joog; Kairos Alive!; Kantorei; Katha Dance Theatre; Katherine E. Nash Gallery; KBEM-FM; Keane Sense of Rhythm; Kenwood Symphony Orchestra; Kinship of Rivers; Kulture Klub Collaborative; Ladyslipper Ensemble; Lake Harriet Spiritual Community; Lakeshore Players; Lakeville Area Arts Center; Lakeville Area Historical Society; Learning Through Music Consulting Group; Lee Carlson Center for Mental Health and Well-Being; Leonardo's Basement; Les Jolies Petites School of Dance; Lidia Productions; Light Grey Art Lab; Linden Hills Chamber Orchestra; Lipa Slovak Folk Dancers; Live Action Set; Loft Literary Center; Los Alegres Bailadores; Loudmouth Collective; low tech/high joy collaborative; Lowertown Local; Lundstrum Center for the Performing Arts; Lutheran Music Program; Lyndale Neighborhood Association; Lyra Baroque Orchestra; Lyric Arts Company of Anoka; Macalester College; MacPhail Center for Music; Mad King Thomas; Maggie Bergeron & Company; Maggie's Farm Free-Range Theater; Magic Circle Ensemble; Magic Lantern Puppet Theater; Mallard Island Arts; MaMa mOsAiC; Maple Grove Arts Center; Maplewood Area Historical Society; Marcy Arts Partnership; Marine Restoration Society; Maritime Heritage Minnesota; Masquers Theatre Company; Mathew Janczewski's ARENA DANCES; McNally Smith College of Music Foundation; Megan Mayer's Soft Fences; Mendota Mdwakanton Dakota Community; Mentoring Peace Through Art Inc; Merrill Community Arts Center; Metropolitan Regional Arts Council; Metropolitan Symphony Orchestral Association; Midtown Global Music Festival; Midway Contemporary Art; Midwest Art Conservation Center; MIGIZI Communications; Milkweed Editions; Mill City Summer Opera; Mindekirken Foundation; Minhua Chorus; Minneapolis College of Art and Design; Minneapolis Guitar Quartet Association; Minneapolis Jewish Film Festival; Minneapolis Pops Orchestra Association; Minneapolis Society of Fine Arts; Minneapolis Southside Singers; Minneapolis Telecommunications Network; Minnesota African American Museum and Cultural Center; Minnesota Air National Guard Historical Foundation; Minnesota Annual Conference United Methodist

Church Archive; Minnesota Association for Children's Mental Health; Minnesota Association of Community Theatres; Minnesota Association of Songwriters; Minnesota Bluegrass & Old-Time Music Association Inc; Minnesota Boychoir; Minnesota Brass; Minnesota Center for Book Arts; Minnesota Children's Museum; Minnesota Chinese Dance Theater; Minnesota Chinese Opera; Minnesota Chorale; Minnesota Citizens for the Arts; Minnesota Coalition for Battered Women; Minnesota Council on Foundations; Minnesota Creative Arts and Aging Network; Minnesota Dance Theatre & the Dance Institute; Minnesota Fringe Festival; Minnesota Genealogical Society; Minnesota Guitar Society; Minnesota Historical Society; Minnesota Humanities Center; Minnesota Jewish Theatre Company; Minnesota Landmarks; Minnesota Museum of American Art; Minnesota Music Coalition; Minnesota Music Educators Association; Minnesota Opera; Minnesota Orchestral Association; Minnesota Prison Writing Workshop; Minnesota Productions; Minnesota Public Radio; Minnesota Section of the American Society of Civil Engineers; Minnesota Short Play Club; Minnesota Shubert Center for Dance and Music; Minnesota State Arts Board; Minnesota State Band; Minnesota State Fair Foundation; Minnesota State Fiddlers Association; Minnesota Symphonic Winds; Minnesota Theater Alliance; Minnesota Valley Men's Chorale; Minnesota Veterinary Historical Museum; Minnesota Youth Symphonies; Minnetonka Center for the Arts; Misplaced Music; Mississippi Valley Orchestra; Mixed Blood Theatre; Mixed Precipitation; Mizna; MN Administrators of Special Education; Morris Park Singers; Motionpoems; Mounds View Community Theatre; Municipal Building Commission; Museum of Russian Art; Music Association of Minnetonka; Music in the Heart of Victory; Music Saint Croix; Musikgarten of Anoka; Native American Community Development Institute-All My Relations Arts; Nautilus Music-Theater; Necessary Differences; New Arab American Theatre Works; New Franklin Cultural Center; New Prague Arts Council; New Prague Czech Singers; Nightpath Theatre Company; Nimbus Theatre; Nordic Heritage Club of Carver County; North Artists' Studio Crawl; North Metro Performing Arts Series (Spring Lake Park Schools Community Education); North Star Chorus; North Star Museum of Boy-Girl Scouting; North Suburban Chorus; Northeast Minneapolis Arts Association; Northeast Youth and Family Services; Northern Clay Center; Northern Intercultural Spiritual Experiences; Northern Lights MN; Northrop Auditorium (University of Minnesota); Northside Arts Collective; Norway House; NWA History Centre; Obsidian Arts; Office of the Minnesota Secretary of State (Civil War Commemoration Task Force); Off-Leash Area: Contemporary Performance Works; Old Arizona Collaborative; Old Highland Neighborhood Association; One Voice Mixed Chorus; Open Book; Open Eye Figure Theatre; Oratorio Society of Minnesota; Ordway Center for the Performing Arts; Origin(s) Project; O'Shaughnessy at St. Catherine University; Out Twin Cities Film Festival; OverExposure; Paint on the Water Hip Hop Festival; Pan Asian Arts Alliance; Pangea World Theater; Park Square Theatre Company; Partizan Theater; Patrick's Cabaret; Penumbra Theatre Company; People Incorporated; The Peoples Cook; Performance Lab; Photography at the Center; Phyllis Wheatley Community Center; Pillsbury House Theatre; Playwrights' Center; Plymouth Fine Arts Council; Pond Dakota Heritage Society; Powderhorn Park Neighborhood Association; Prairie Creek Community School; Preservation Alliance of MN (PAM); Prior Lake Players; Public Art Saint Paul; Public Theater of Minnesota; PuppetTellers; Quatrefoil Library; Ragamala Dance; Rain Taxi; Rainbow Rumpus; Ramsey County Historical Society; Raw Sugar; Reach for Resources; Red Bird Chapbooks; Red Eye Collaboration; Red Fountain; Redeemer Music Arts Academy; RenegadeEnsemble; Revolver; Rhythmically Speaking; Richfield Historical Society; Rimon: The Minnesota Jewish Arts Council; River City Theatre Company; River Valley Band; River Valley Theatre Company; Riverside Winds; Rock Star Supply Co.; Rose Ensemble; Rosemount Area Arts Council; Rosetown Playhouse; Roseville Parks and Recreation; Roseville String Ensemble; Rosy Simas Dance; Russian Cultural Center "Russian Soul"; Saint Croix Jazz Orchestra; Saint Paul Artist Collective; Saint Paul Chamber Orchestra; Saint Paul City Ballet; Saint Paul Domestic Abuse Intervention Project; Saint Paul Festival and Heritage Foundation; Saint Paul Foundation; Saint Paul Neighborhood Network; Saint Paul Postal Band; Saint

Stephen's Human Services; Sally Rousse Unlimited; Sample Night Live!; Sandbox Theatre; Savage Arts Council; Savage Umbrella; Schubert Club; Science Museum of Minnesota; Scott County Historical Society; Selby Ave JazzFest; Serrand Epp dba The Moving Company; Seward Neighborhood Group; She Rock She Rock; Sholom Community Alliance; Silverwood Park - A Center for Nature Inspired Art; The Singers-Minnesota Choral Artists; Sister City International (Columbia Heights); The Sisters Boil; Skewed Visions; Skylark Opera; Soap Factory; Somali Artifact & Cultural Museum of Minnesota; Soo Visual Arts Center; Sounds of Hope; South Metro Chorale; South Sixteenth Hijinks; Southern Theater; Southside Family Nurturing Center; Spirit in the House!; Springboard for the Arts (Main Headquarters); Square Lake Film and Music Festival; Saint Croix Valley Chamber Chorale; Saint Anthony Village Historical Society; Saint Barnabas Center for the Arts; Saint Louis Park Friends of the Arts; Saint Paul Conservatory of Music; Saint Paul Vocal Forum; Stages Theatre Company; Stagewright Unlimited; SteppingStone Theatre; Stevens Square Community Organization; StoryBlend; Strange Capers; Stuart Pimsler Dance & Theater; Studio 206; SunsetGun Productions; Swandive Theatre; Swedish Genealogical Society of Minnesota; Tango Teacher Cooperative (Tango Camp Minnesota); Tapestry Folkdance Center; Teatro del Pueblo; Ten Thousand Things Theater; Textile Center; The Archie and Phoebe Mae Givens Foundation dba Givens Foundation for African American Literature; Theater Latte Da; Theater Mu; Theater Or; Theatre in the Round Players; Theatre Novi Most; Theatre of Fools; Theatre Pro Rata; Theatre Unbound; TheColu.mn; Thomas-Dale District 7 Planning Council; Threads Dance Project; Three Rivers Park District; Thursday Musical; TigerLion Arts; TU Dance; TuckUnder Projects; TVbyGIRLS; Twin Cities Carifest; Twin Cities Chinese Dance Center; Twin Cities Civil War Roundtable; Twin Cities Community Gospel Choir; Twin Cities Film Fest; Twin Cities Gay Men's Chorus; Twin Cities Housing Development Corp.; Twin Cities Jazz Workshops; Twin Cities Labor Chorus; Twin Cities Musicians Union; Twin Cities Polish Festival; Twin Cities Scandinavian Family Festival; Twin Cities Show Chorus; Twin Cities Women's Choir; Twin Cities World Refugee Day; Twin Cities Youth Chorale; Twin City Model Railroad Museum; Two Chairs Telling; Two Rivers Chorale; Universal Dance Ministry; Unseen Ghost Brigade; Unvending; Upstream Arts; Urban Arts Academy; Urban Spectrum Theatre Company; Valley Friendship Club; Vecchione/Erdahl Duo; Vega Productions; Velvet Tones; Veterans Book Project; Veterans in the Arts; VocalEssence; VSA Minnesota; Waconia Community Education; Walker Art Center; Walker West Music Academy; Walking Shadow Theatre Company; WAMSO - Minnesota Orchestra Volunteer Association; Washington County 4-H Federation; Washington County Historical Society; Watertown Area Historical Society; Watertown Film Festival; Watertown-Mayer Community Education; Wayzata Historical Society; Weavers Guild of Minnesota; Weisman Art Museum (University of Minnesota); West Bank Business Association; West Bank School of Music; West Side Theater Project; Westonka Community Education; White Bear Center for the Arts; White Bear Lake Area Historical Society; Wildwood Artist Series; Wisdom Dances; Workhaus Playwrights Collective; Works; Yellow Tree Theatre; Young Artists Initiative; Young Dance; Youth In Jazz; Youth Performance Company; YouthCARE; zAmya Theater Project; Zeitgeist; Zenon Dance Company and School; and Zorongo Flamenco.

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Additionally, this study could not have been completed without the cooperation of the 3,410 arts and culture audience members who generously took the time to complete the audience-intercept survey while attending a performance, event, or exhibit within the State of Minnesota.

"One of the keys to building and sustaining communities and promoting high quality economic development is support and funding of the arts. We have witnessed, in some states, decreased support of the arts which is counterproductive and a major step backward. We need to emphasize that potential employers look at enrichment of lives as well as schools, hospitals, libraries, and other essential services for the communities in which they want to locate. We need to continue—and increase—our support for the arts. In today's competitive marketplace, it has never been truer that supporting the arts means business."

— Senator Steve Morris
President, National Conference of State Legislatures

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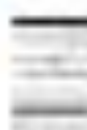
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