

creative



THE IMPACT OF MINNESOTA'S
ARTISTS, CREATIVE WORKERS
AND NONPROFIT ARTS AND
CULTURE ORGANIZATIONS

2017

INDEX

- PAGE 2 Section I: Artists and Creative Workers Are Everywhere
- PAGE 7 Section II: Economic Impact Survey of Artists and Creative Workers
- PAGE 16 Section III: What Artists Give to Communities and What Artists Need to Succeed
- PAGE 23 Section IV: Public Opinion Polling About the Arts and Participation
- PAGE 26 Section V: Update of Economic Impact of Nonprofit Arts and Culture Organizations
- Page 33 Section VI: Sources, Definitions and Methodology
- PAGE 36 Section VII: Acknowledgments



INTRODUCTION

MINNESOTA'S ARTISTS GIVE OUR STATE A COMPETITIVE ADVANTAGE

Creative Minnesota 2017 shows that supporting artists and arts activity is a pathway to solving problems and achieving the goals of our communities. **We also hope to empower artists to advocate for themselves.** We have found that there is an artist on every block and that they are already contributing to the health of our economy and are already working to improve their communities. **Our artists give Minnesota a competitive edge.**

Creative Minnesota 2017 is our second biennial report intended 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. This project is a 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, released in 2015, was a snapshot of the health and impacts of nonprofit arts and culture organizations, which looked at their spending and

their audiences, as well as other indicators of the sector's health and impact on the economy. Both statewide and regional in scope, it leveraged new in-depth research made possible by Minnesota's participation in the Cultural Data Profile (culturaldata.org) with DataArts. It was followed by 17 local studies that showed substantial economic impact from the nonprofit 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.

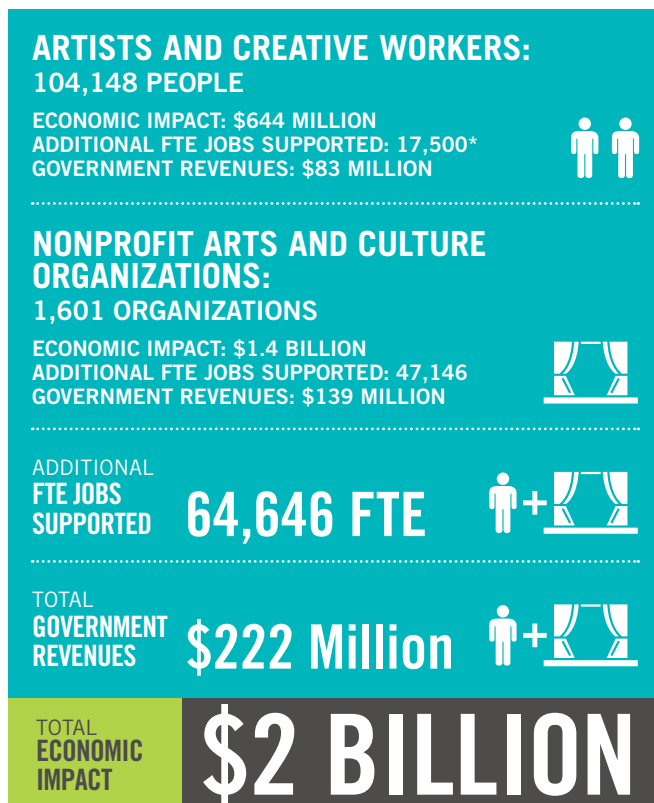
(see page 32 for a summary)

SUMMARY

This study updates the 2015 Creative Minnesota report and adds additional in-depth analysis of the economic lives of Minnesota's artists and what they need to build a career and a life in the arts. It combines both new, original research and Minnesota-unique data from other national studies.

Minnesotans are more highly engaged in and supportive of the arts and culture than other Americans. Minnesota is repeatedly shown to have a more robust arts and culture economy than states with which we compete. The arts and culture are one of our state's strengths compared to the rest of the Midwest and the rest of the country, and we should do more to capitalize on it to support creative workers and draw more creative people.

We found over 100,000 people working in artistic occupations in every corner of the state and over \$2 billion in total economic impact from artists, creative workers and nonprofit arts and culture organizations and their audiences:



*Additional FTE jobs supported = Full-Time Equivalent labor employed in Minnesota that is supported by the spending of artists and creative workers, or by organizations and their audiences.

TO MAKE A LIVING AND A LIFE IN THE ARTS, THE MOST URGENT NEEDS FOR MINNESOTA'S ARTISTS INCLUDE:

SPACE TO WORK

Artists desire spaces and tools of their own in order to do their work – but not in solitude.

CONNECT

Artists have strong interest in opportunities to form connections and serve communities.

AUDIENCE

Artists desire to reach wider audiences and markets.

LEARN

Artists embrace and are seeking more learning experiences; experienced artists would like to pass on their skills; younger artists are looking for mentors.

EARN

Artists remain ambitious about developing paying audiences and generating income from their work, but their identities as artists and the non-monetary value they derive from their practice are strong regardless of earnings.

REGIONAL REPORTS

We should note that Minnesota's 11 Regional Arts Councils (RACs) work with the Minnesota State Arts Board to provide services, training and grants designed to meet the unique needs of each region in the state. Each RAC serves between five and eighteen Minnesota counties, and so when we refer to regional data it follows the borders of these regions. While some regional data is included in this report, much more data on each region can be found at CreativeMN.org.

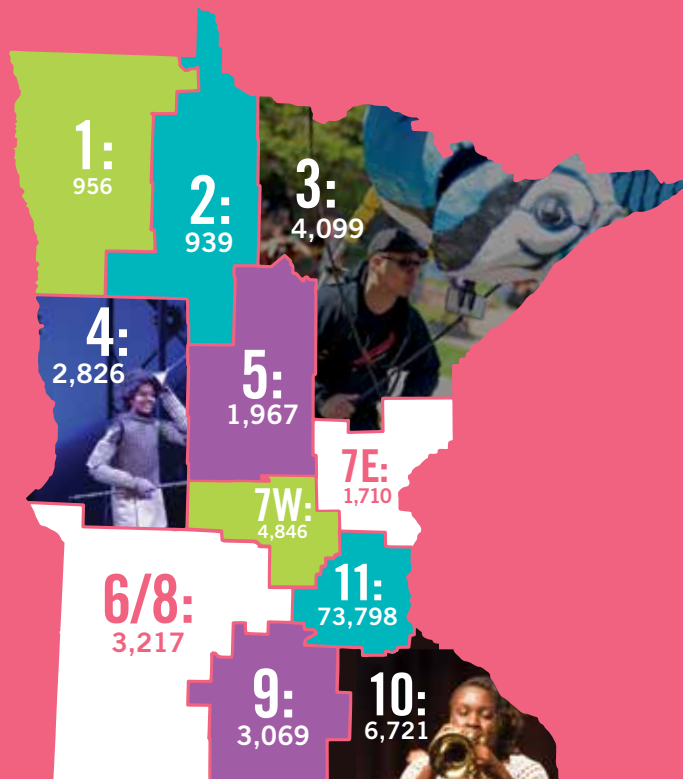
ARTISTS THEMSELVES ARE A NATURAL RESOURCE.

We envision that arts advocates, legislators, local government officials and arts and cultural organizations will use this report to find new ways to improve their lives and economies with arts and culture. **Find more at: CreativeMN.org**

Creative Minnesota was developed by a collaborative of arts and culture supporting organizations 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, Jerome Foundation, Mardag Foundation, Springboard for the Arts and the Bush Foundation, with in-kind support from the Minnesota Historical Society, City of Minneapolis and others.

ARTISTS AND CREATIVE WORKERS ARE EVERYWHERE

TOTAL CREATIVE JOBS PER REGION⁽¹⁾



WHO ARE CREATIVE WORKERS?

Architects • landscape architects • curators • librarians • art directors • craft artists • fine artists including painters, sculptors and illustrators • multimedia artists and animators • commercial and industrial designers • fashion, floral, graphic and interior designers • set and exhibition designers • actors, producers and directors • dancers, choreographers, music directors and composers • musicians and singers • radio and television announcers and public relations specialists • editors, technical writers, writers and authors • media and communications workers • audio and video equipment technicians • broadcast technicians • sound engineering technicians • photographers, camera operators, television, video and motion picture • film and video editors • media and communication equipment workers • theatrical and performance makeup artists • directors of religious activities and education (for example, choir directors) • musical instrument repairers and tuners • merchandise displays and window trimmers • advertising and promotions managers • public relations and fundraising managers • agents and business managers of artists and performers



41 OCCUPATIONS IN TOTAL

CREATIVE OCCUPATIONS WITH THE GREATEST NUMBER OF JOBS⁽¹⁾

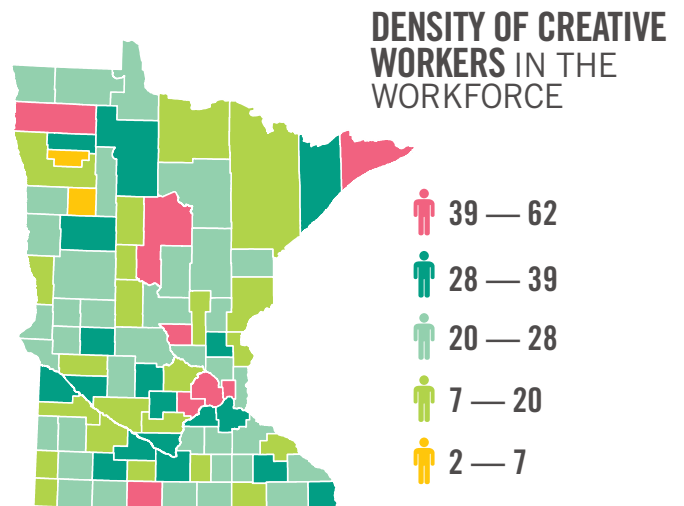


MINNESOTA IS HOME TO AN ASTONISHING 104,148 ARTISTS AND CREATIVE WORKERS

AND THEY MAKE THEIR HOMES IN EVERY COUNTY

It's no surprise that the highest density of creative workers is in the Twin Cities metro area, but it's important to know that there are many other thriving arts communities across the state where creative workers are also essential members of the local economy. For example, Cook, Carver, Martin, Benton, Cass and Marshall counties also have a high density of creative workers in their workforce.

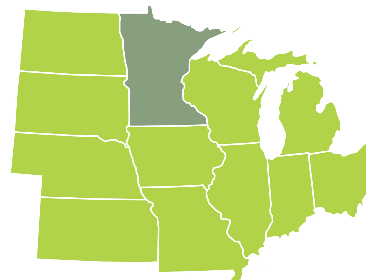
These maps do not include all creative workers – just those employed full or part-time by others or self-employed in creative occupations. They do not include students, retired or hobbyist artists.⁽¹⁾



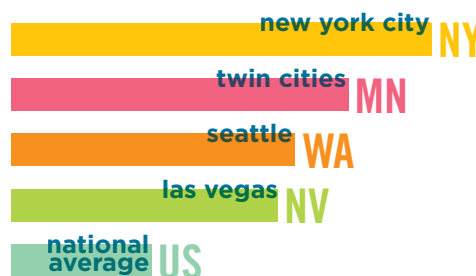
Creative Economy Workers per 1,000 Employed Residents

HIGH CONCENTRATION OF ARTISTS

A recent National Endowment for the Arts study⁽²⁾ found that Minnesota has the **highest concentration of artists in the Midwest**, higher than all surrounding states including Illinois. Minnesota has 1.5 times the national average for artists as a percentage of the workforce.



The Twin Cities is second only to New York City for percentage of the workforce employed in theater companies. NYC has 3 times the national average, the **Mpls/St. Paul MSA has 2.4 times the national average**, followed by Seattle at 2 times, and Las Vegas at 1.9 times.⁽²⁾





85% OF ARTS DEGREE GRADUATES RATE THE TWIN CITIES AS A “GOOD” OR “VERY GOOD” PLACE TO BE AN ARTIST⁽³⁾

The Strategic National Arts Alumni Project (SNAAP) conducted national surveys on behalf of participating colleges and universities to learn about the lives and careers of their arts graduates. 286 schools participated nationwide and 92,113 arts alumni completed the survey nationally in 2011-2013. Participating Minnesota schools included the College of Visual Arts, Minneapolis College of Art and Design, St. Cloud State University, St. Olaf College and University of Minnesota-Twin Cities.

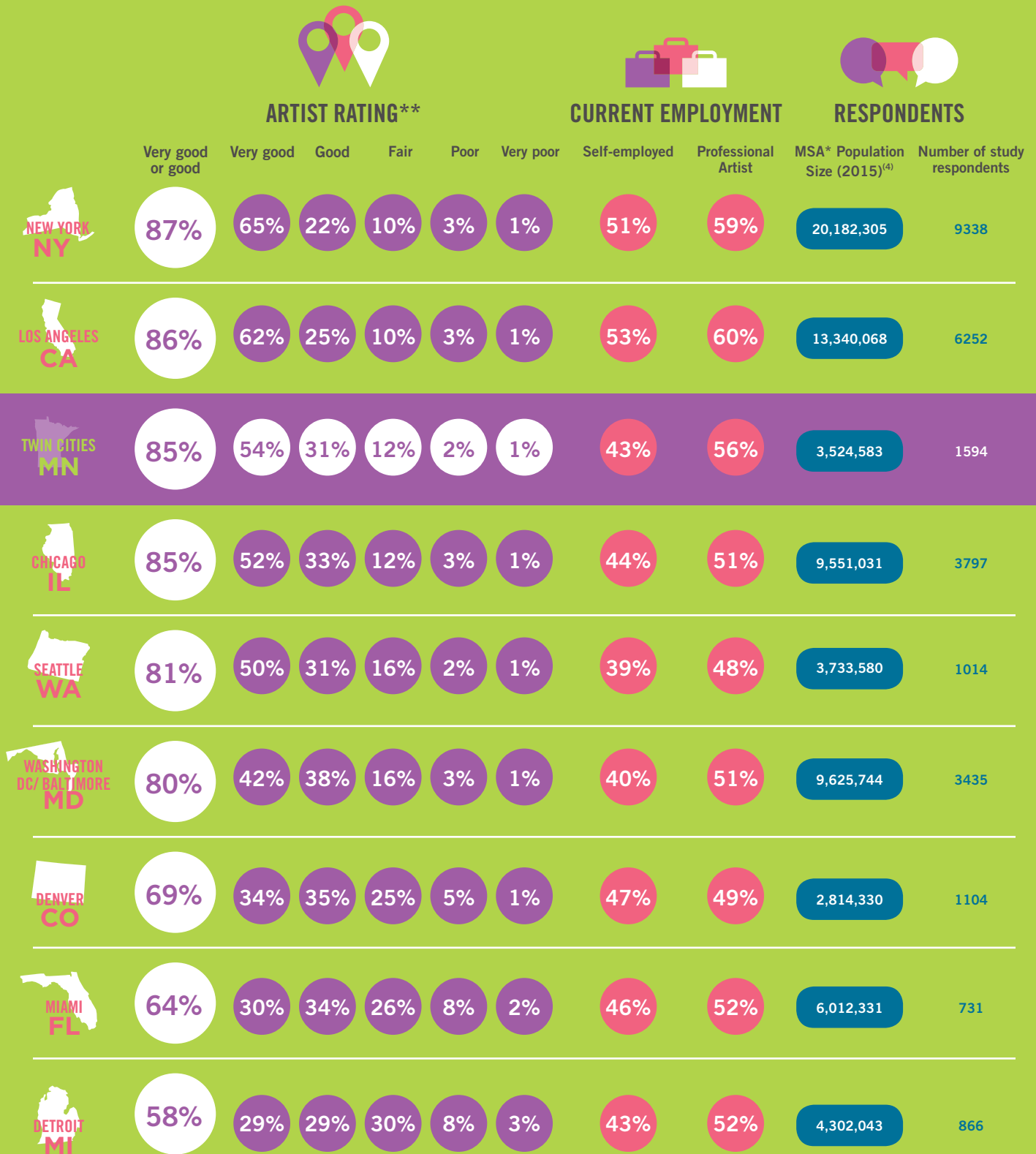
The Twin Cities rated significantly higher than other cities of comparable population size around the country as a good place to be an artist. When combined, the percentage of artists responding that the Twin Cities are “Good” or “Very Good” is nearly as high as New York and Los Angeles and tied with Chicago, a much larger city. The Twin Cities also had the highest rating in the Midwest, as well as one of the highest level of respondents reporting themselves to be professional artists.



I can't imagine a more fulfilling place to be an artist. Minnesota is not only committed to artists creating work, it is committed to showcasing that work, being patrons of that work and cultivating spaces to better understand the artistic process. Art is a part of the cultural fabric and expression of this state - you can't get that everywhere.”

- Tish Jones, Founder and Executive Director
TruArtSpeaks

IS WHERE YOU LIVE A GOOD PLACE TO BE AN ARTIST?



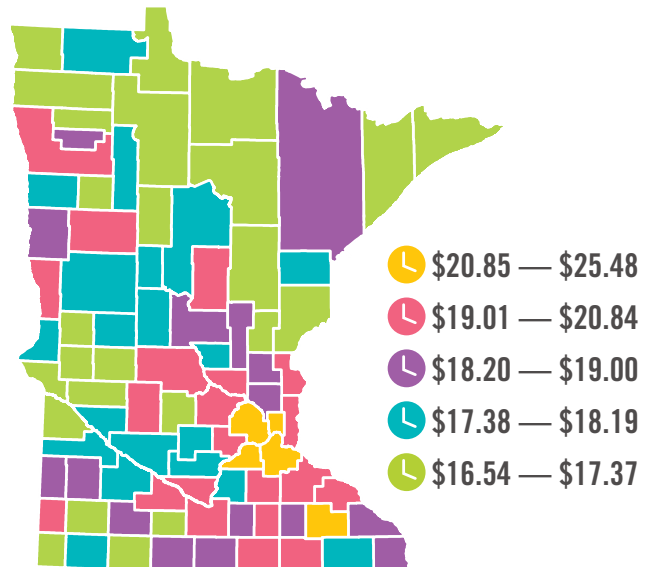
*Metropolitan Statistical Area

**How current artists rate this area as a place to pursue their artistic careers. "Art" and "artist" refer to a range of creative activity, including performance, design, architecture, creative writing, music composition, choreography, film, illustration and fine art. Strategic National Alumni project, Indiana University Bloomington: snaap.indiana.edu/snaapshot/#location.

AVERAGE HOURLY WAGES FOR CREATIVE ECONOMY WORKERS⁽¹⁾



AVERAGE HOURLY WAGES FOR CREATIVE ECONOMY WORKERS, 2014



ALL CREATIVE INDUSTRIES IN MINNESOTA

CREATIVE INDUSTRIES WITH THE GREATEST EARNINGS⁽¹⁾



2014 ALL CREATIVE INDUSTRIES TOTAL INDUSTRY EARNINGS⁽¹⁾

(Sales generated by all creative industries. Includes both for-profit and nonprofit industries.)

\$7.8 BILLION

ECONOMIC IMPACT SURVEY OF ARTISTS AND CREATIVE WORKERS

Artists and creative workers have a big impact on our economy.

Minnesota's artists and creative workers have a large and growing impact on our state's economy. Both through direct spending and through founding and running creative businesses, they are a core part of the economic vitality of our state.

This section is based on Creative Minnesota's 2016 survey of over **2,139 self identified artists in Minnesota, whether or not they are making their living as artists⁽¹⁾**. The survey results include full and part-time workers as well as students, retired and hobbyist artists unless otherwise noted.

Nearly 200 organizational partners worked together to promote the survey, which was done with the assistance of Americans for the Arts. We'd also like to thank the responding artists who made this research possible.

CHANGES OVER TIME

This survey benefited from over twice the response rate of a similar previous study in 2007 called "Artists Count." The existence of the previous study allows us to look at some changes in the artist population over time.

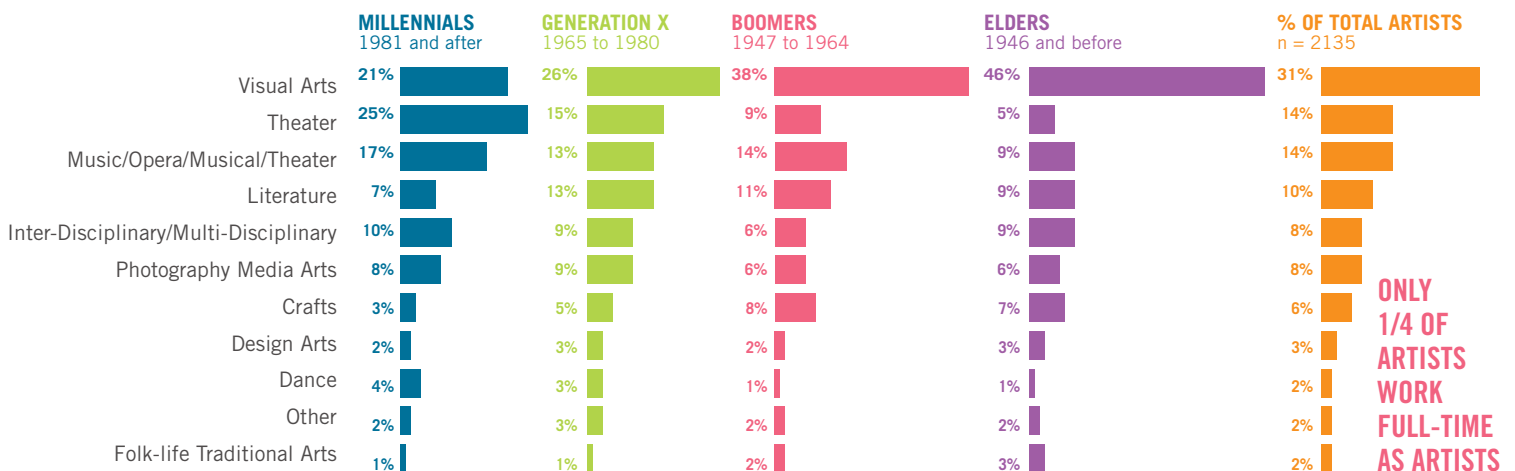
The most significant change is in how we count artists and creative workers in Minnesota. In 2007, we counted 19,676 artists for whom we had contact information for the study. In 2016, we count 104,148 artists and creative workers using "Artists and Arts Workers in the United States" data from the Quarterly U.S. Census of Employment and Wages.



The second largest change over time was finding a dramatic increase in artists with health insurance, with the uninsured rate dropping from 14 percent to 5 percent between 2007 and 2016.

THE GENERATIONS ARE CHANGING

Visual arts is the most commonly practiced discipline, followed by theater, but people from different generations practice different disciplines.



^{*}Some respondents did not answer the question, so the totals do not equal 100%. Baby Boomers were over-represented compared to their percentage of the Minnesota population by 5%, and Elders were under-represented by 5%. Millennials were under-represented by 2% and Generation X were over-represented by 3%.⁽³⁾



THE ECONOMIC IMPACT OF ARTISTS⁽¹⁾

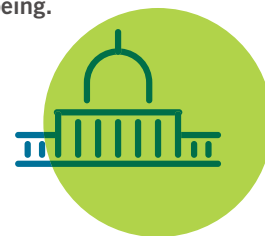
Separate from our previous study of the economic impact of nonprofit arts and culture organizations (see Section V), with this survey of artists we now have compelling new evidence that **individual artists and creative workers also comprise a significant industry** in Minnesota—one that generates **\$644 million** in direct statewide economic activity and supports more than **17,533 additional full-time jobs**.

THE IMPACT OF ARTIST SPENDING

Artistic spending by Minnesota's 104,148 full-time and part-time artists and creative workers has a far reaching impact. Artists buy supplies, contract for services and more. These

actions, in turn, support jobs, create income and generate government revenue. This economic impact study sends a strong signal that when we support Minnesota's creative workers, **we not only enhance our quality of life, but also invest in Minnesota's economic well-being.**

GOVERNMENT REVENUE GENERATED BY ARTIST SPENDING



LOCAL
GOVERNMENT
REVENUE
GENERATED

\$18 MILLION +

STATE
GOVERNMENT
REVENUE
GENERATED

\$65 MILLION

Government revenues includes sales, income and property taxes as well as license, utility and filing fees, etc.

TOTAL
GOVERNMENT
REVENUES

\$83 MILLION

TOTAL ARTISTIC
EXPENDITURES
MADE IN MN

\$644 MILLION

FULL-TIME EQUIVALENT
JOBS SUPPORTED BY
ARTIST SPENDING

17,553



RESIDENT HOUSEHOLD
INCOME GENERATED

\$494 MILLION

Resident household income includes wages and salaries paid to MN residents that in turn is spent on rent, food and other living expenses.

ARTIST SPENDING IMPACTS LOCAL ECONOMY⁽¹⁾

Not surprisingly, the average annual artistic spending by full-time artists is more than twice the average of part-time artists. For all artists “supplies” was the largest expense, followed by car/truck expenses, uncategorized expenses and travel. Uniquely, full-time artists also reported high expenses on contract labor and depreciation.

AVERAGE ANNUAL ARTISTIC EXPENDITURES				FULL-TIME ARTISTS/ CREATIVE WORKERS	PART-TIME ARTISTS/ CREATIVE WORKERS	ALL MN ARTISTS/ CREATIVE WORKERS	
				\$12,588	\$4,699	\$6,116	
CATEGORY OF ARTISTIC EXPENSE	FULL-TIME ARTISTS/ CREATIVE WORKERS	PART-TIME ARTISTS/ CREATIVE WORKERS	ALL MN ARTISTS/ CREATIVE WORKERS	CATEGORY OF ARTISTIC EXPENSE	FULL-TIME ARTISTS/ CREATIVE WORKERS	PART-TIME ARTISTS/ CREATIVE WORKERS	ALL MN ARTISTS/ CREATIVE WORKERS
SUPPLIES	\$2,702	\$1,058	\$1,372	COMMISSIONS/FEES	\$293	\$180	\$165
OTHER ARTISTIC EXPENSES	\$1,606	\$650	\$813	TAXES/LICENSES	\$180	\$72	\$98
CAR/TRUCK EXPENSES	\$1,531	\$574	\$754	UTILITIES	\$167	\$44	\$73
CONTRACT LABOR	\$825	\$180	\$298	ENTERTAINMENT	\$157	\$67	\$81
TRAVEL	\$760	\$323	\$382	MAINTENANCE	\$153	\$33	\$64
DEPRECIATION	\$720	\$276	\$355	NON-HEALTH INSURANCE	\$139	\$26	\$51
WAGES	\$702	\$205	\$309	MORTGAGE INTEREST	\$50	\$19	\$23
ADVERTISING	\$575	\$219	\$279	DEPLETION	\$33	\$0	\$9
PROFESSIONAL SERVICES	\$550	\$224	\$276	RENT/LEASE (VEHICLE)	\$29	\$15	\$16
OFFICE EXPENSES	\$535	\$228	\$278	OTHER INTEREST	\$27	\$5	\$13
BUSINESS USE OF HOME	\$444	\$191	\$231	EMPLOYEE BENEFITS	\$7	\$2	\$2
RENT/LEASE (OTHER)	\$403	\$109	\$174	PENSION/PROFIT SHARING	\$0	\$0	\$0

*All MN Artists/Creative Workers Includes Hobbyists, Students and Retired

11% OF ARTISTS ARE EMPLOYERS

About 1 in 10 artists support a paid position and/or engage volunteers. Full-time artists employ other people at a higher rate than part-time artists and hobby artists. A quarter of full-time artists (27 percent) hire at least one paid position, and about 1 in 10 (12 percent) engage volunteers.

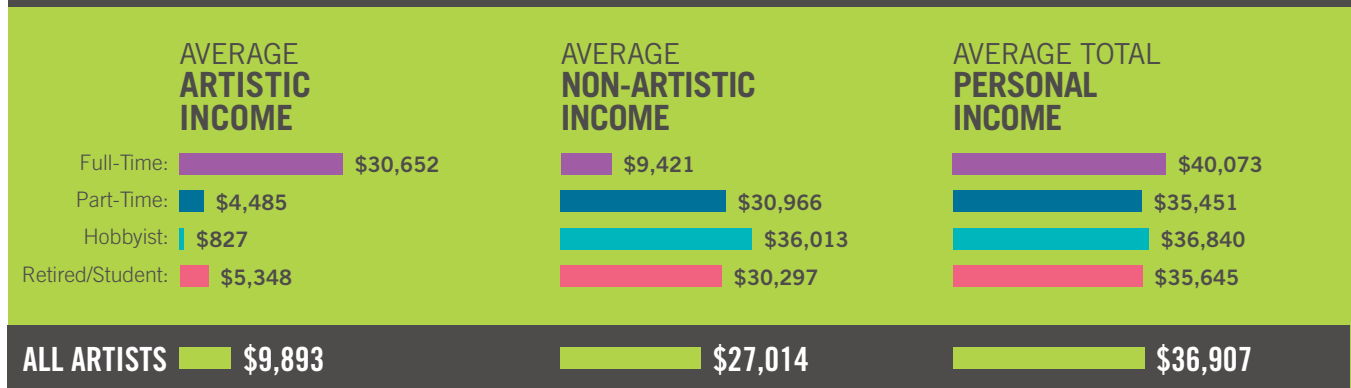
“NOT INCLUDING YOURSELF, HOW MANY PEOPLE DO YOU EMPLOY DIRECTLY IN THE CREATION, PRODUCTION OR DELIVERY OF YOUR ARTISTIC WORK?”

- 7% HIRES AT LEAST ONE PAID EMPLOYEE/STAFF/CONTRACTOR
- 4% ENGAGES AT LEAST ONE UNPAID PERSON (e.g., volunteer, unpaid intern, unpaid apprentice)
- 4% BOTH PAID AND UNPAID
- 85% NONE

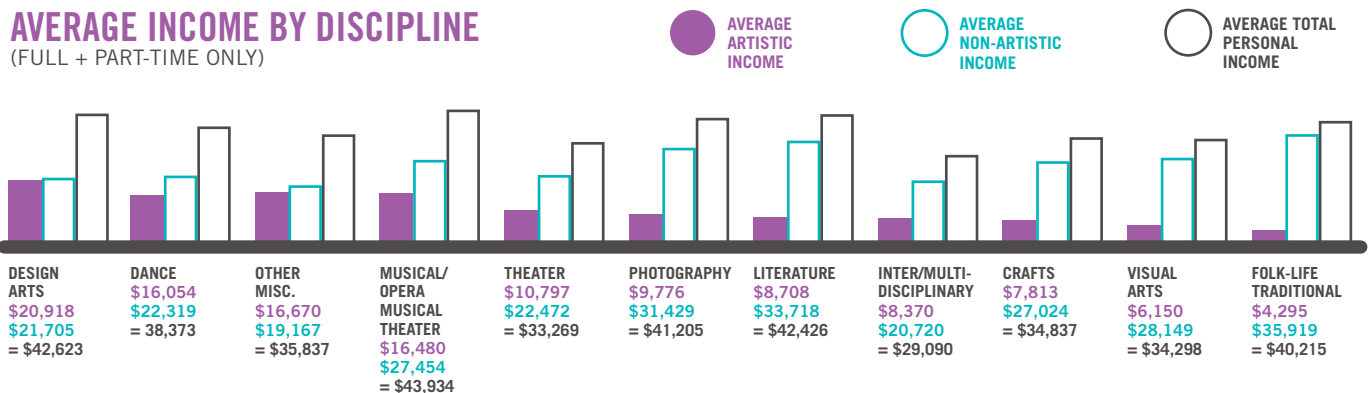
SELF-REPORTED ARTISTIC INCOME⁽¹⁾

Together, Minnesota's full-time and part-time individual artists and creative workers collected **\$1.4 billion** in artistic income during 2015. This represents **40 percent** of their total personal income of **\$3.8 billion** from all sources. Survey respondents reported a statewide average income of **\$9,893** from their art per artist/creative worker during 2015.

FULL-TIME ARTISTS MAKE, ON AVERAGE, MORE FROM THEIR ART AND MORE OVERALL, THAN PART-TIME ARTISTS

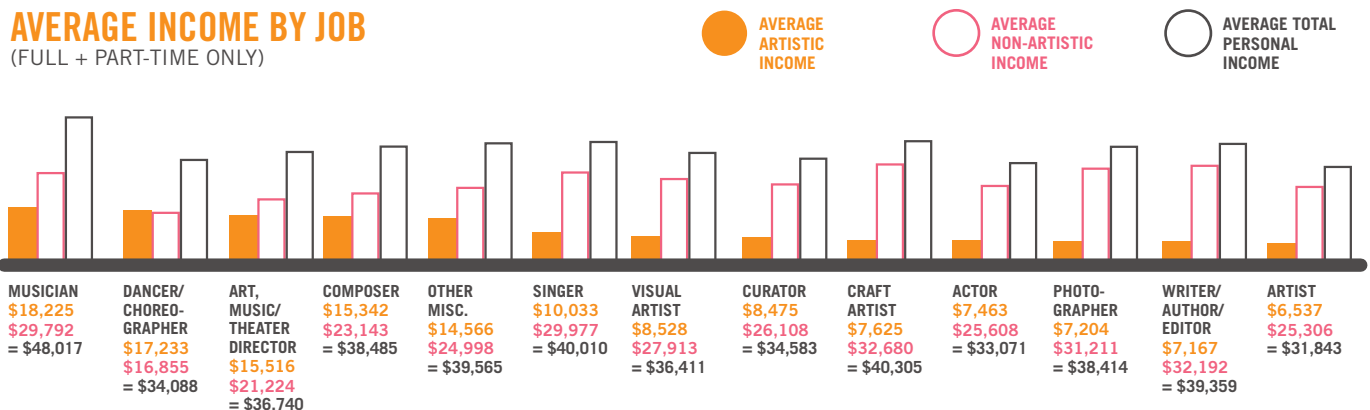


AVERAGE INCOME BY DISCIPLINE (FULL + PART-TIME ONLY)



ALL DISCIPLINES **\$9,893 + \$27,014 = \$36,907**

AVERAGE INCOME BY JOB (FULL + PART-TIME ONLY)



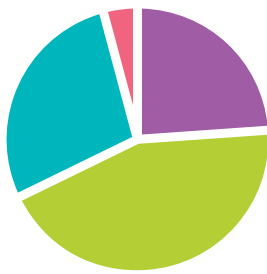
ALL JOBS **\$9,893 + \$27,014 = \$36,907**



ROOM FOR IMPROVEMENT⁽¹⁾

WOMEN LESS LIKELY TO SAY THEY ARE FULL-TIME ARTISTS AND BOTH WOMEN AND ARTISTS OF COLOR MAKE LESS FROM THEIR ART

Two-thirds of survey respondents identified as female, one third as male, and two percent as “other” or did not respond. Men are more likely to identify as “full-time” artists compared to women, as has been reported in other studies nationally.⁽²⁾



1412 RESPONSES
WOMEN ARTISTS
 24% FULL-TIME ARTIST
 44% PART-TIME ARTIST
 28% HOBBY ARTIST
 4% STUDENT/RETIRED/OTHER



688 RESPONSES
MEN ARTISTS
 31% FULL-TIME ARTIST
 44% PART-TIME ARTIST
 20% HOBBY ARTIST
 5% STUDENT/RETIRED/OTHER



28 RESPONSES
OTHER
 25% FULL-TIME ARTIST
 54% PART-TIME ARTIST
 18% HOBBY ARTIST
 4% STUDENT/RETIRED/OTHER

		AVERAGE ARTISTIC INCOME	AVERAGE NON-ARTISTIC INCOME	AVERAGE TOTAL PERSONAL INCOME
WOMEN MAKE LESS FROM THEIR ART	WOMEN ARTISTS	\$7,782	\$21,159	\$32,941
	MEN ARTISTS	\$14,198	\$30,968	\$45,166
ARTISTS OF COLOR MAKE LESS FROM THEIR ART	ARTISTS OF COLOR	\$8,608	\$21,697	\$30,304
	WHITE ARTISTS	\$10,397	\$28,022	\$38,419
ALL ARTISTS		\$9,893	\$27,014	\$36,907

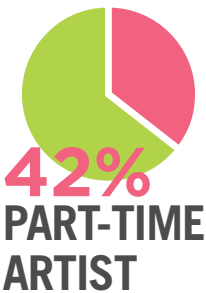
NOTE: The survey asked artists to identify their race and ethnicity in an open text box. 82% gave a response that could be classified as “white,” 10% as a “person of color” and 7% as “other” which matches the demographics of Minnesota’s workforce overall.⁽⁴⁾



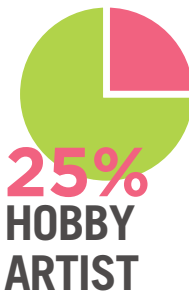
ONLY ONE-FOURTH OF ARTISTS WORK ON THEIR ART FULL-TIME



SUPPORTED ENTIRELY THROUGH THEIR CREATIVE WORK



PARTIALLY SUPPORTED THROUGH THEIR CREATIVE WORK



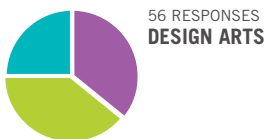
NO INCOME FROM THEIR CREATIVE WORK



STUDENT OR RETIRED

Note: The majority of "other responses" said they were either retired or a student.

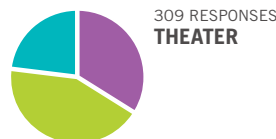
CREATIVE WORKERS IN DESIGN, THEATER AND MUSIC ARE MORE LIKELY TO WORK FULL-TIME AS ARTISTS



36% FULL-TIME ARTIST
39% PART-TIME ARTIST
25% HOBBY/STUDENT/RETIRED/OTHER ARTIST



35% FULL-TIME ARTIST
41% PART-TIME ARTIST
24% HOBBY/STUDENT/RETIRED/OTHER ARTIST



34% FULL-TIME ARTIST
43% PART-TIME ARTIST
23% HOBBY/STUDENT/RETIRED/OTHER ARTIST



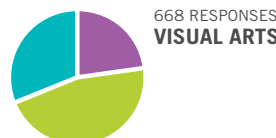
28% FULL-TIME ARTIST
42% PART-TIME ARTIST
30% HOBBY/STUDENT/RETIRED/OTHER ARTIST



25% FULL-TIME ARTIST
49% PART-TIME ARTIST
26% HOBBY/STUDENT/RETIRED/OTHER ARTIST



23% FULL-TIME ARTIST
33% PART-TIME ARTIST
44% HOBBY/STUDENT/RETIRED/OTHER ARTIST



23% FULL-TIME ARTIST
46% PART-TIME ARTIST
31% HOBBY/STUDENT/RETIRED/OTHER ARTIST



22% FULL-TIME ARTIST
43% PART-TIME ARTIST
35% HOBBY/STUDENT/RETIRED/OTHER ARTIST

CREATIVE WORKERS IN LITERATURE HAD THE HIGHEST LEVEL OF PART-TIME ARTISTIC WORK AT 57 PERCENT



15% FULL-TIME ARTIST
57% PART-TIME ARTIST
28% HOBBY/STUDENT/RETIRED/OTHER ARTIST



9% FULL-TIME ARTIST
37% PART-TIME ARTIST
54% HOBBY/STUDENT/RETIRED/OTHER ARTIST

ARTIST ACCESS TO HEALTH INSURANCE

HEALTH INSURANCE COVERAGE HAS RISEN DRAMATICALLY AMONG ARTISTS AND CREATIVE WORKERS SINCE THE PASSAGE OF THE AFFORDABLE CARE ACT

The most dramatic change from our previous survey is that 95 percent of 2016 survey respondents reported having health insurance.

In our 2007 study we found 14 percent of artists were uninsured. The uninsured rate has dropped dramatically, most likely because of the Affordable Care Act (also known as Obamacare), passed by Congress in 2009. Most frequently, artists currently have insurance through an individual plan, which would be expected from a population that is more likely to own and run a small business. This has jumped up to 42 percent from 28 percent in 2007.

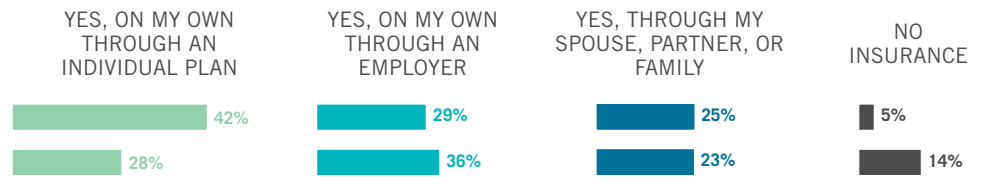
WHILE WE REJOICE THAT RATE OF THE UNINSURED AMONG ARTISTS HAS DROPPED, AFFORDABILITY IS STILL AN ISSUE.

“ In the past, artists (because of factors like self-employment and variable/low incomes) were twice as likely as the general population to be uninsured. The Affordable Care Act brought the uninsured rate for artists closer to the national average - about five percent. That's the good news. But we also know, through our work with artists getting health insurance and through national reporting and research, that the cost of premiums and deductibles and considerable system navigation challenges are still discouraging people from using or getting insurance, meaning that the **number of artists (and others) who are underinsured and therefore not able to access healthcare remains high. In order to make access to healthcare truly available to everyone, there needs to be a concerted effort around controlling costs and making the system more clear and accessible.**”

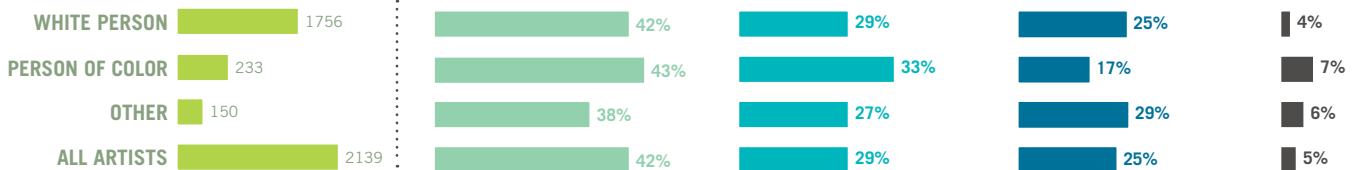
- Laura Zabel, Executive Director
Springboard for the Arts



“DO YOU HAVE HEALTH INSURANCE?”



2017



Note that for this section percentages may add up to more than 100 because participants could select more than one option.



ARTISTS OF COLOR ARE MORE LIKELY TO BE UNINSURED

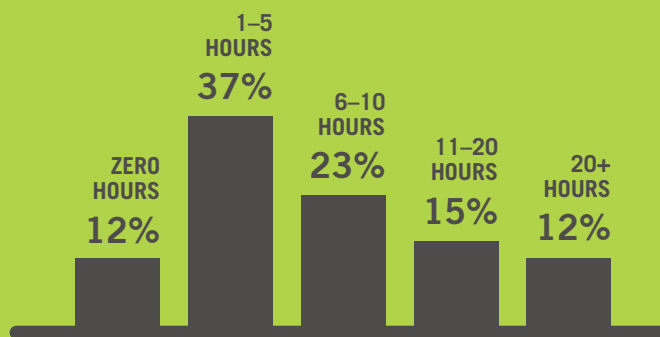
Artists of color in Minnesota are more likely to be uninsured than white artists. Artists of color are more likely than white artists to have insurance through an employer, but less likely to be insured through their spouse or another family member.



ARTISTS VOLUNTEER MUCH MORE THAN OTHER MINNESOTANS OR EVEN OTHER AMERICANS⁽⁵⁾

88% MINNESOTA ARTISTS **35%** ALL MINNESOTANS **25%** ALL AMERICANS

Compared to the responses to our 2007 survey, artists are reporting even more volunteer hours donated than ten years ago. The flip side of the great willingness of artists to volunteer for their communities is that others often take advantage of that good will by not offering adequate compensation for their work.



“Artists make many generous contributions to our communities and they deserve to be valued and compensated for their time and expertise like any other professionals.”

– Arleta Little, Arts Program Officer
The McKnight Foundation

OTHER DEMOGRAPHICS OF MINNESOTA'S ARTIST WORKFORCE⁽⁶⁾

Minnesota's artist workforce is more likely to be college educated and less likely to be foreign-born or a person with a disability than the rest of the state's workforce:

DISABILITY
HAVE AT LEAST 1 DISABILITY



EDUCATION
COLLEGE EDUCATION OR HIGHER



NATIVITY
FOREIGN-BORN



POVERTY STATUS
LIVE BELOW POVERTY LINE



STATEWIDE ARTIST WORKFORCE

STATEWIDE TOTAL WORKFORCE

Note: Artist workforce refers to residents who identified an art profession as their most recent and primary source of income.

ARTIST RETIREMENT PLANS

OVER 20% OF OUR MOST SENIOR ARTISTS HAVE NO RETIREMENT PLAN

Thirty-two percent of individual artists in Minnesota have no formal retirement plans. This is a slight improvement from our 2007 results.



YES ON MY OWN THROUGH AN INDIVIDUAL PLAN



YES ON MY OWN THROUGH AN EMPLOYER



YES THROUGH MY SPOUSE, PARTNER, OR FAMILY



NONE



536 RESPONSES
MILLENNIALS
1981 AND AFTER

- 19%
- 30%
- 6%
- 50%



593 RESPONSES
GENERATION X
1965 TO 1980

- 29%
- 39%
- 11%
- 30%



833 RESPONSES
BABY BOOMERS
1947 TO 1964

- 41%
- 34%
- 15%
- 23%



174 RESPONSES
ELDER
1946 AND BEFORE

- 49%
- 28%
- 12%
- 20%

FULL-TIME ARTISTS ARE MOST LIKELY TO HAVE NO RETIREMENT PLAN



559 RESPONSES
FULL-TIME ARTIST

- 40%
- 22%
- 11%
- 36%



942 RESPONSES
PART-TIME ARTIST

- 30%
- 35%
- 10%
- 35%



539 RESPONSES
HOBBY ARTIST

- 28%
- 47%
- 14%
- 22%



98 RESPONSES
STUDENT/RETIREE/OTHER

- 41%
- 24%
- 14%
- 30%

ARTISTS OF COLOR ARE MOST LIKELY TO HAVE NO RETIREMENT PLAN



1756 RESPONSES
WHITE ARTIST

- 34%
- 35%
- 12%
- 30%



233 RESPONSES
ARTISTS OF COLOR

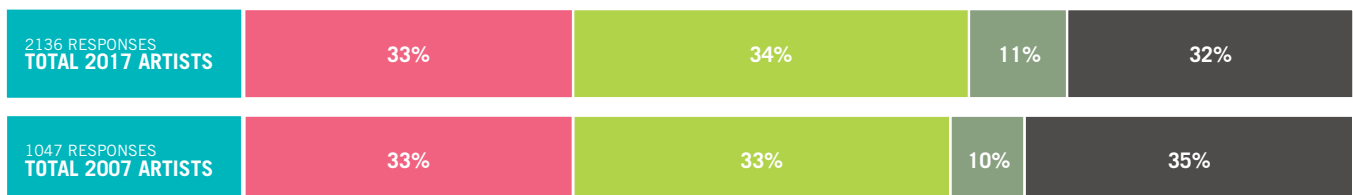
- 24%
- 33%
- 8%
- 42%



150 RESPONSES
OTHER

- 34%
- 27%
- 12%
- 40%

CHANGE OVER TIME: SLIGHTLY MORE ARTISTS HAVE A RETIREMENT PLAN



Note: This section's percentages may add up to more than 100% because participants could select more than one option.

WHAT ARTISTS GIVE TO COMMUNITIES AND WHAT ARTISTS NEED TO SUCCEED

This report takes a look at the structure, condition and needs of Minnesota's artist ecosystem.

To understand the cultural, social and economic impact artists have on the state, we need to examine:

- Where artists live and work
- The many ways artists contribute to our communities
- What Minnesota's artists need to thrive

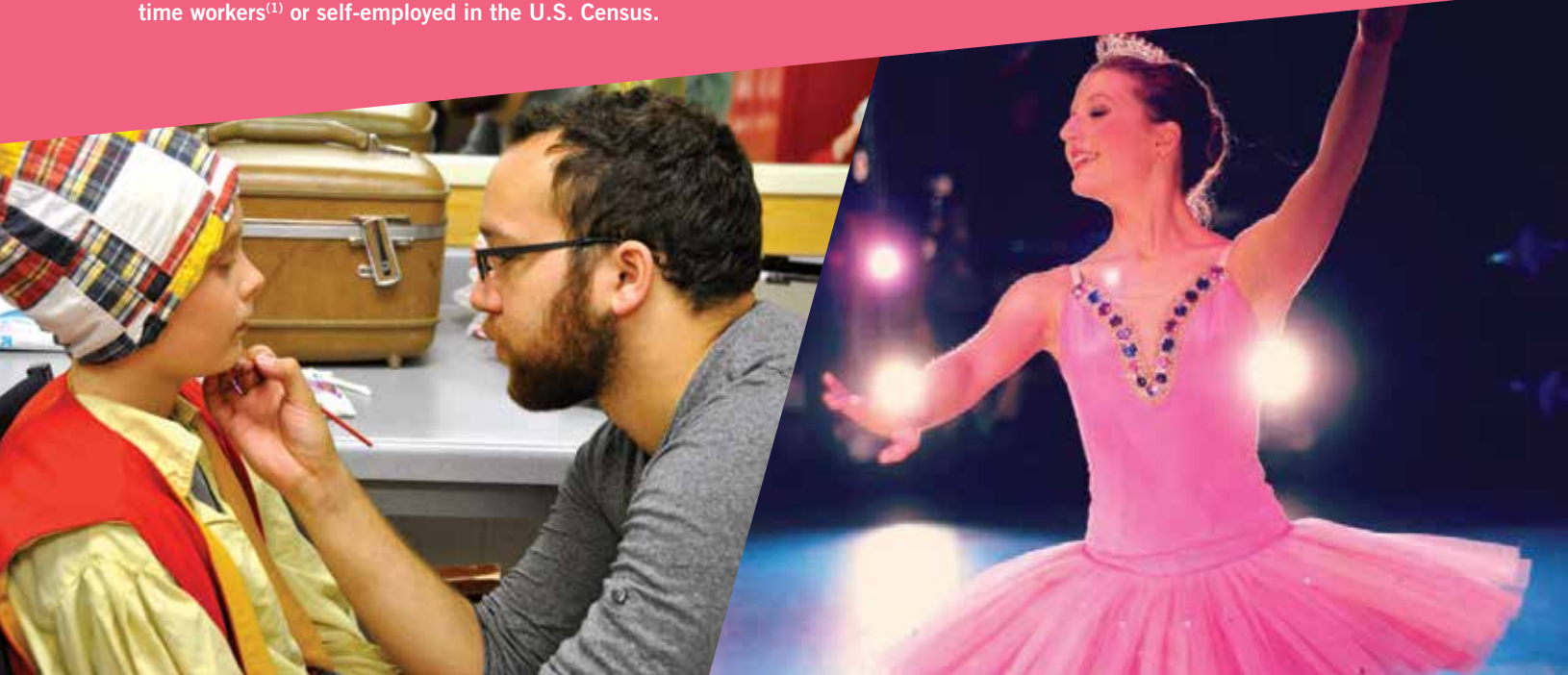
Our report is informed by three core assumptions about the cultural ecosystem in Minnesota:

- The arts sector is a network of artists, formal and informal arts organizations, audiences, funders and others who depend upon each other to succeed
- The sector's creative fuel comes from the community of artists working within it
- The sector's overall health depends upon the health of the artist community

WHERE (AND WHO) ARE THE ARTISTS?

We have established that Minnesota is an artist-rich state. It's important to note, though, that the 104,000 artists and creative workers documented in Section I only represent those who show up on the economic radar screen as full- or part-time workers⁽¹⁾ or self-employed in the U.S. Census.

This brings up an often posed but never adequately answered question, namely, who is an artist? Section II of this report has taken a "yes, and" approach to that issue by asking artists to self-identify. There, we broadly define "artists" along a continuum from the hobbyist, to the part-time practitioner, to the full-time professional.



DENSITY

However you define them, Minnesota's artists and creative workers are not evenly distributed across the state.

Like most workers, artists tend to live in places that have the creative infrastructure they depend on to make and share their work. These include: fellow artist collaborators, audiences and customers, employment opportunities, access to training and facilities and much more. Naturally, these support systems are more likely to reach a critical mass in areas with greater population density. This is why the **Twin Cities is home to 71 percent of the state's artists and creative workers** that we've identified. It's important to note, though, that **over 30,000 artists have established themselves in communities outside of the metro area.** This is likely to be in part because the state's Regional Arts Council system has provided critical services and significant funding (from the Legacy Arts and Cultural Heritage Fund and other sources) to artists and arts organizations in small and midsized communities across the state for decades. Several other arts funders, such as the Mcknight, Bush and Jerome Foundations, have also supported artists across the state.

This has made it possible for even more artists to thrive in places like St. Cloud, Rochester and Bemidji, which have particularly high concentrations of artists and creative workers.

These high-density "artist clusters"⁽²⁾ can be a powerful stimulant for community development.⁽²⁾ The City of Minneapolis has compiled data on creative workers by location as a part of the *Minneapolis Creative Index*.⁽³⁾ That data shows that **the seven Minneapolis zip codes⁽⁴⁾ that hug the east and west banks of the Mississippi River are home to 50 percent of the total arts workers counted in the city.** Further west, 32 percent of the counted artists live in the seven zip codes that surround Minneapolis' Chain of Lakes. Locally dense artist communities like these can be a powerful asset. There are similar creative clusters throughout the state, such as Grand Marais on the North Shore of Lake Superior and Lanesboro in Southeastern Minnesota. These organic creator enclaves, a result of the work of many individuals, present municipal and regional planners and policy makers with even more opportunities for leveraging these creative resources in ways that can make a significant economic and social impact.

HOW DO ARTISTS CONTRIBUTE TO OUR COMMUNITIES?

Artists are often viewed through the lens of their work products—the painting, the book, the play and the song.

But when artists are asked to share what drives them they describe a practice driven by a passion to create with a much broader range of intentions.

THIS LIST OF WORDS CULLED FROM ARTISTS INTERVIEWS IS AN INTERESTING WAY TO BEGIN EXPLORING WHAT ARTISTS BRING TO OUR COMMUNITIES.

Some, like **entertain, decorate, educate and design,** likely fit many people's perception of the roles that artists can play in our society. Other words derived from the realms of medicine, politics and religion remind us that for most of human history (and pre-history) artists have had a much more expansive job description that included essential functions like, **healer, historian, mediator and spiritual leader.**



WHILE THE ECONOMIC IMPACT OF THE CULTURAL ECONOMY IS CLEAR, THERE ARE MANY OTHER WAYS THAT ARTISTS HAVE A POSITIVE IMPACT ON THEIR COMMUNITIES:

ARTISTS ARE ENTERPRISING

Much of the data in this report highlights the impact that artists and creative workers have on the state's economic life. It's significant that we can point to the \$644 million that artists contribute to the state's economy. It's also important to recognize that these artists produce the work that inspires and fuels the rest of the state's \$2 billion cultural ecosystem. As such, artists are the beating heart of a robust and growing creative Minnesota economy. This inventive spirit has also manifested in thousands of creative workers who are operating as arts entrepreneurs. Just like any small business they buy materials, hire workers, make and sell products and services and pay taxes. The numbers add up and are impressive, but there is more. Given the generative nature of the creative industries, these micro-enterprises also constitute a self-perpetuating incubator for future ventures—new enterprises that will ultimately manifest as locally developed, non-polluting, renewable community assets.

ARTISTS BUILD SOCIAL CAPITAL

We all know that art can be inspirational and provocative. But, interestingly, new research also shows that the presence of artists and small arts organizations brings other benefits in less obvious ways. Earlier, creative clusters were described as a potentially potent community building resource. Research shows that neighborhoods with very dense, highly interactive networks of artists and arts organizations produce specific benefits for those communities.⁽⁵⁾ These benefits include poverty reduction, population retention and growth and increased civic participation. The power of creative clusters derives, in part, from the dynamic social networks they create, particularly among active cultural participants. In her article *How Art and Culture Happen In New York*, urban planning researcher Elizabeth Currid says these creative connections also stimulate art making, stating that “cultural producers ... tend to cross-fertilize, collaborating to create goods and services, review each other's productions, and establish new careers.”⁽⁶⁾ This cultural synergy effects public life as well, in that the presence of cultural resources produces high levels of “cross-participation” in neighborhoods that stimulates residents' involvement in other civic activities.

ARTISTS MAKE A DIFFERENCE

In addition to being creative entrepreneurs, Minnesota's artists are deeply involved in community building and placemaking.

In small urban neighborhoods and rural communities, it's not uncommon to find an actor on the local planning committee, a photographer documenting a neighborhood streetscape or a local composer leading the community choir. This happens because, contrary to the stereotype, artists, by and large, are not loners, and tend to be highly involved in civic life⁽⁷⁾. In recent years, artists in increasing numbers have been exploring new ways to apply their creative capacities as community leaders. This impulse is emerging at a time when investments in “creative placemaking” are on the rise across the country.

However, in Minnesota, this is not a new thing. Over the past two decades the state has established itself as a national leader in the growing, arts-based community development movement. The work of community-committed arts organizations such as Intermedia Arts, Juxtaposition Arts, Pangea World Theater, Pillsbury House + Theater, and Springboard for the Arts have established Minnesota as a center for professional development, program innovation and research in support of artists working to help build healthier, more productive and equitable communities. Along with partners like the Local Initiatives Support Corporation, Hope Community, Pillsbury United Communities and the South West Minnesota Housing Partnership, these organizations have helped establish a network of cross-sector creative leaders that are tackling critical issues in education, community development, public safety, healthcare, housing, transportation, racial justice and human services across the state.

ARTISTS OPEN NEW DOORS

We live in an age of increasing uncertainty where the unforeseen and unpredictable have become the new status quo. Put another way, life is becoming less symphonic and a lot and more like jazz. Many civic leaders have argued meeting the challenges of the “age of uncertainty” will require strengthening the creative thinking and adaptive learning capacities of our future citizens, our institutions and the systems that connect them.⁽⁸⁾

In Minnesota this way of thinking has found receptive partners in city governments and local nonprofits, where they are integrating artists into their everyday work with the aim of stimulating new ideas and innovation. It has also manifested through the thousands of artists who are teaching in the state's schools. Less conspicuous, but no less important, are the artists whose work bears witness to both the remarkable and the troubling aspects of everyday life. Some people think these are unusual roles for artists. But they are not. Artists have been helping us make sense and meaning in the world for thousands of years—listening and synthesizing, telling our stories, exploring the mysteries and articulating our dreams. As we take stock of artists' contributions, it's important to remember this has always been their number one job.

WHAT DO ARTISTS NEED TO THRIVE?

Artists, like everyone else, need to make a living wage, but we have found that they are often asked to, and often do, work as volunteers or for less than a living wage.

Small or large, successful businesses are defined by their ability to attract capital, produce products, grow markets and ultimately generate profits. Money both fuels the work and defines a successful outcome.

THE IMPETUS FOR ART MAKING

Research shows that artists have a very wide range of motivations for their art making.^{(9) (10)} Here are some key motivational forces that artists say sustain them in their creative endeavors.

Given that the artist ecosystem is not particularly lucrative for many artists, what drives them is clearly a more complicated matter. According to a recent Minnesota State Arts Board “Artists Thrive” survey, artists’ descriptions of what they need to make a living and a life in the arts include both material and social considerations.

THE CREATIVE PROCESS IS THE DRIVING FORCE OF ARTISTS’ WORK. WHILE ARTISTS’ DEFINITIONS OF “CREATIVE PROCESS” VARY WIDELY, MOST CONTAIN ASPECTS OF THE FOLLOWING:

INNOVATION

Developing something new from existing materials or patterns

TRANSLATION

Crafting creative ideas into something meaningful to others

SYNTHESIS

Putting unique ideas, concepts, sounds together

EXPLORATION

Discovery through experimentation and invention



AUDIENCES AS A CREATIVE STIMULUS

Not surprisingly, audiences were identified as an important creative spark but more in terms of relationship building (i.e. “engaging,” “making connection with,” “transforming”) than either reward or acclaim.



DISCOVERING NEW IDEAS AND SOLUTIONS

A number of artists cited the thrill of studying and learning about new areas of knowledge such as history, science, spiritual or community issues. Tangentially, freedom was also mentioned as a treasured state of mind associated with unfettered learning and the creative process.



WORKING WITH AND TEACHING OTHERS

Many artists pointed to their work with colleagues as a driving force for their work. Many cited interdisciplinary and cross-sector work as an exciting facet of their careers. Others described teaching and mentoring as an important part of their creative development.

THE ARTIST ECONOMY IN MINNESOTA

Another way to consider the dynamics of the artist ecosystem is to examine the economy that helps sustain it. Many artists correlate the amount and continuity of the time they are paid with the quality of the work they produce. Despite Minnesota’s reputation as a strong “arts community,” a minority of the artists surveyed by Creative Minnesota (24 percent) say they make their living primarily through their art. Thirty-four percent are retired, student or hobby artists, whose motivations are not monetary. From the data on artists’ livelihoods, we can see that most working artists function within a patchwork economy that may include multiple and overlapping elements of the following: *(continued on next page)*

EARNED ARTISTIC INCOME

Sixty-four percent of the artists surveyed say they derive some income from their art making. As a rule, visual artists derive their art-related revenue from sales and commissions, while performers generally receive payment for the time they spend in working on a performance. Many artists who are paid also work numerous unpaid hours and often donate additional time.

OTHER JOBS

One of the most significant parts of the artist economy are those “outside” jobs. Of these, teaching and arts administration are the most prevalent. Many artists describe their teaching as reasonably compatible with their creative efforts. While most indicate they would rather be making their own art, some saw their ancillary employment as a healthy and vital stimulant for their creative work.

PUBLIC AND PRIVATE FUNDING

Most of the state’s cultural funding goes to the state’s arts organizations. As such, their precise impact on artists is indirect and hard to discern, although obviously these organizations employ many artists. Nevertheless, as the principal delivery system for artists’ work and creative development these organizations are a critical part of the artist ecosystem. Creative worker and artist jobs increased across the state as a result of the investments from the Clean Water, Land and Legacy Amendment. In addition to foundation-supported artist fellowships, direct funding for artists also comes from the State Arts Board and the Regional Arts Councils. Some artists also reflected on the “unique” and “generous” nature of Minnesota’s artist-support system.

The Jerome, Bush and McKnight Foundation’s Artist Fellowship programs have granted over \$60 million in fellowships over seven decades to thousands of individual artists in the state. Another historically significant support for Minnesota creators are the many artist service organizations in the state that have provided hundreds of thousands of hours of training and technical assistance in support of artists’ careers over the past four decades. These substantial investments have established Minnesota as a uniquely fertile place for artists to plant roots and build careers and a reputation as an artist magnet.

INFORMAL SUPPORT

A small but important source of support comes from the “creative family” within which there are people who not only share the artist’s passion and commitment but also contribute financially. These partners, spouses, parents, in-laws, collaborators and even investors constitute a hidden aspect of the artist economy.

AN ECOSYSTEM OUT OF BALANCE

This diversity of income sources also points to another theme that emerged from artists’ descriptions of their economic lives. A number of artists indicated that the “stitched-together” nature of their livelihoods made both their art-making and everyday lives fairly unpredictable. The tenuousness of the artist economy is further amplified for artists of color. The 2017 Creative MN survey shows that artists of color are making 18 percent less annually from their artistic pursuits and 22 percent less in total income than their white counterparts. Artists of color are also 43 percent less likely to have health insurance than white artists. Disturbing as these findings are, they are not surprising. These differences correspond with the patterns of inequity experienced by people of color in the overall workforce and by culturally specific arts organizations in the arts sector.⁽¹¹⁾ They also reinforce the perception from artists of color interviewed for the McKnight *Yes and No* report that felt that the infrastructure of white funders, leaders and their affiliations provided a support structure that was not as accessible to them. For many, “thriving” translates as simply having the capacity to produce and present their own work. One artist put it this way: “In order to thrive as an artist, space is an invaluable resource ... space that I have ownership stake in. Owning dirt. That is essential to me thriving right now.”

CREATIVE INFRASTRUCTURE

Arts institutions, service organizations and commercial venues, working interdependently within the cultural sector play multiple roles in artists’ lives. These organizations provide the resources artists depend on for producing and presenting their work. But they have many other functions as well, ranging from hiring and training many artists and testing new creative ideas, to raising funds and cultivating audiences.

WORKSPACE

Most artists need a workspace to invent and design, to fabricate and render, to rehearse and perform. There was agreement across all disciplines that the quality of their work is significantly influenced by the space in which it is created.

PRESENTING AND PRODUCING ORGANIZATIONS

These organizations facilitate the transfer of artwork from creators to interpreters. They also provide the exhibition and presenting spaces that serve as the bridge between artists and local audiences. These venues were also identified as incubators for artistic development.

ARTS SERVICE ORGANIZATIONS

Minnesota’s discipline-specific arts service organizations constitute a unique and important subset of the artist ecosystem. They were not only valued because of their financial

and technical support, but also as an important hub in the creative social networks that artists depend on for feedback, advice, encouragement and referrals.

AUDIENCE

One artist said, “without an audience you are not in the game.” That said, for most of our respondents, arts participation was much more about building relationships than it was “butts in seats.” Many described the need for “dynamic,” “respectful,” even “collaborative” relationships with audiences often referencing their essential role in the completion of the creative process.

SOCIAL AND ENVIRONMENTAL CONDITIONS

Many artists say that this complex web of relationships, resources and conditions is the most stable and resilient part of their support system.

TIME TO WORK

If artists had one thing they could get more of, it is time—time for making work, for practice, for research and most precious of all, time for reflection. As in any profession, time is money, and the ability to have time to make art can be dependent upon financial resources.

OPPORTUNITIES TO LEARN

Access to other artists, mentors and masters was described as an essential component of the lifelong learning that fuels artistic development. Learning from masters and critical input

from colleagues were both mentioned. Artist residencies and universities were often mentioned as offering valuable opportunities for intense learning and exploration.

CRITICAL RESPONSE

Artists want feedback from peers, audiences, mentors and critics so that they can learn and improve their practice.

BALANCE AND PREDICTABILITY

Given all the moving parts, artists’ lives are fairly unpredictable. As such, they place a high value on relationships, resources and time commitments that are regular and dependable.

FAMILY AND FRIENDS

Parents, spouses, partners, children, in-laws, brothers and sisters were recognized for providing everything from help with hanging art and learning lines to financial and moral support. Many artists described this intimate circle as a primary source of creative, financial and moral support.

COLLEAGUES AND PEERS

Beyond the circle of family and friends there is the professional network of colleagues, teachers, technicians and advisors that artists depend on to make and present their work. For each artistic discipline there is a critical mass of technical and creative expertise that defines scope and depth of an artistic discipline in a given place.

WHAT NEXT?

THERE IS NO DOUBT THAT MINNESOTA’S ROBUST ARTIST COMMUNITY HAS MORE THAN NUMBERS GOING FOR IT.

The state’s artists and creative workers are a potent and dynamic civic resource. They drive the creative economy and kindle discovery and invention in the community at large. They are not only an attraction for other creative people, their presence and activity also helps make Minnesota a place people want to call “home.” This report offers a valuable snapshot of this remarkable asset—an ecosystem comprised of creators working individually, and together, as entrepreneurs, as workers, as citizens and community leaders—a creative network with evident strengths, as well as vulnerabilities and inequities.

This study also tells an interesting story. Clearly, Minnesota did not become an artist hot spot by accident. Like its business and civic achievements, Minnesota’s vigorous artist community is a product of the hard work of many people. In the middle of the last century community leaders recognized that for Minnesota to thrive, its creativity needed to be more than a source of entertainment and decoration. They understood that it was a natural resource that when combined with Minnesota’s grit and persistence would create a necessary and powerful community asset. To accomplish this they knew they would have to make significant and sustained public and private investments.



The question now is whether the product of this historic commitment will be taken for granted going forward? Will the insights gained from this report give rise to new ideas for strengthening and sustaining the state’s artist ecosystem in the 21st Century? Given the obvious benefits, that would seem to be both a practical and inspired path to follow.”

- Bill Cleveland
Center for the Arts and Community

STRONGEST NEEDS FOR ALL MINNESOTA ARTISTS: FROM THE MINNESOTA STATE ARTS BOARD “ARTISTS THRIVE” SURVEY⁽¹²⁾



SPACE TO WORK

Artists desire spaces and tools of their own in order to do their work – but not in solitude.



CONNECT

Artists have strong interest in opportunities to form connections and serve communities.



LEARN

Artists embrace and are seeking more learning experiences; experienced artists would like to pass on their skills; younger artists are looking for mentors.



EARN

Artists remain ambitious about developing paying audiences and generating income from their work, but their identities as artists and the non-monetary value they derive from their practice are strong regardless of earnings.



AUDIENCE

Artists desire to reach wider audiences and markets.

STRONGEST NEEDS FOR:

GREATER MINNESOTA ARTISTS

More access to markets and audiences, more reliable access to work spaces and equipment, greater access to fellow artists for peer learning.

METRO ARTISTS

Opportunities to focus on their art, opportunities to share and collaborate with other artists rather than compete.

ARTISTS IDENTIFYING AS PEOPLE OF COLOR

Education for “gatekeepers” and others in the sector about their work, and particularly its cultural context, community respect for the value (both the cost and expertise) of their work, better access to space, technology and materials.

ARTISTS IDENTIFYING AS WHITE

Connection and networking.

EMERGING ARTISTS

Access to markets, adequate work space and equipment, a variety of learning opportunities and professional skills and mentors.

YOUNGER ARTISTS, BORN 1981 OR LATER

Access to space, equipment and materials, peer connections and mentors.

ARTISTS WHO EARN SOME OR MOST INCOME FROM THEIR ART

Opportunities to share their expertise (to be mentors, teachers), access to markets and audiences and to be compensated fairly, access to the space and equipment that they need.



PUBLIC OPINION POLLING ABOUT THE ARTS AND PARTICIPATION

SEVERAL POLLS HAVE SHOWN THAT:

MINNESOTANS ATTEND AND PARTICIPATE
IN THE ARTS TO A HIGHER DEGREE THAN
OTHER AMERICANS



IN THE PAST YEAR, HAVE YOU
OR ANYONE ELSE IN YOUR HOUSEHOLD...

“... attended an arts activity at a theater, auditorium,
concert hall, museum, gallery, or similar location.”

.....
MN⁽¹⁾ 76% YES

ARE YOU INVOLVED IN THE ARTS BY DOING ANY
CREATIVE ACTIVITY IN YOUR EVERYDAY LIFE?

“People are involved in the arts in many ways as part of
their everyday lives, such as singing in a church choir,
woodworking, needlepoint, dancing, going to a play or
a museum, creating music or videos, writing poetry, or
painting.”

.....
MN⁽¹⁾ 63% YES

“... attended an arts event in the last year, like going to
the theater, museum, zoo or a musical performance.”

.....
US⁽²⁾ 68% YES

“... personally involved in artistic activities such as
painting, singing in a choir, making crafts, writing poetry,
or playing music.”

.....
US⁽²⁾ 49% YES

MINNESOTANS PLACE A HIGH VALUE ON CREATIVITY

91% believe that people who create art are contributing
something important to the communities where they live.⁽¹⁾

90% believe that arts and cultural activities help to make
Minnesota an attractive place to live and work.⁽¹⁾

90% agree that creative activities and the arts are
contributing to Minnesota’s quality of life.⁽¹⁾

82% think it’s important to have the opportunity to express
themselves creatively or to experience the creativity of others
every day.⁽³⁾

78% agree that creativity is important to them personally.⁽³⁾

70% agree that the arts and culture are an important
sector of our economy.⁽³⁾

WHAT AMERICANS BELIEVE ABOUT THE ARTS⁽²⁾

“The arts provide meaning to our lives.” Sixty-three percent of Americans believe the arts “lift me up beyond everyday experiences,” 64 percent feel the arts give them “pure pleasure to experience and participate in” and 73 percent say the arts are a “positive experience in a troubled world.”

“We will support candidates who want to increase arts funding.” Americans are more than twice as likely to vote in favor of a candidate who increases arts spending nationally than to vote against them.

“We believe the arts are part of a well-rounded education.” Nine in ten American adults (88 percent) agree that the arts are part of a well-rounded education.

“We believe the arts should be taught in grades K-12.” Ninety percent believe students should receive an education in the arts in elementary school, middle school and high school. Eighty-two percent say the arts should also be taught outside of the classroom in the community.

“The arts unify our communities.” The personal benefits of the arts extend beyond the individual and to the community. Sixty-seven percent of Americans believe “the arts unify our communities regardless of age, race and ethnicity” and 62 percent agree that the arts “helps me understand other cultures better.”

MINNESOTA COMPASS INDICATORS⁽⁴⁾ OF ARTS OPPORTUNITY

Creative Minnesota has partnered with Minnesota artists and arts organizations, including many from diverse and rural communities across the state, to develop a new Arts and Culture Section of Minnesota Compass. (mncompass.org)

This new section will track arts opportunities and participation throughout the state for all Minnesota residents. Minnesota Compass is a social indicators project that measures progress in our state, its seven regions, 87 counties and larger cities. Compass tracks trends in topic areas such as education, economy and workforce, health, housing, public safety and a host of others. Creative Minnesota will continue to include these indicators in future reports.

Our state benefits when all residents have opportunities to attend arts and cultural activities, create and perform the arts, and have arts in our schools. With input from their Arts and Culture Advisory Group, Minnesota Compass selected the following indicators to measure Minnesotans participation in arts and cultural activities.





MINNESOTA'S ARTS ATTENDANCE IS HIGH⁽⁴⁾

More Minnesotans attend arts and culture events than the national average:

PERCENT OF RESIDENTS (18+) WHO ATTENDED A LIVE ART AND CULTURE EVENT IN THE PAST YEAR

PERFORMING ARTS ATTENDANCE

Attended live jazz, Latin, Spanish or salsa, opera, classical musical performance, live musical, live non-musical, other types of live performance and outdoor performing arts festival (excludes school performances).



VISUAL ARTS ATTENDANCE

Visited an art museum, a craft fair or visual arts festival.



HISTORICAL/CULTURE ATTENDANCE

Visited a park or monument for its historical, architectural or design value.



CREATING AND PERFORMING ART⁽⁴⁾

More Minnesotans created or performed than the national average:

PERCENT OF RESIDENTS (18+) WHO CREATED OR PERFORMED ART IN THE LAST YEAR*



**Includes working with pottery, ceramics or jewelry; doing any leatherwork, metalwork or woodwork; doing any weaving, crocheting, quilting, needlepoint, knitting or sewing; playing a musical instrument; doing any acting, performing or practicing dance; performing or practicing singing; creating films or videos as an artistic activity; taking photographs as an artistic activity; creating other visual art, such as paintings, sculpture or graphic designs; doing any creative writing, such as fiction, non-fiction, poetry or plays.*

FAMILIES WHOSE CHILDREN PARTICIPATED IN ARTS EDUCATION AT SCHOOL IN THE PAST YEAR⁽⁴⁾

More Minnesota parents report that their child participated in arts learning in the classroom than the national average:

PERCENT OF PARENTS REPORTING THAT THEIR CHILD WAS TAUGHT ART OR MUSIC IN SCHOOL IN THE PAST YEAR



Note that this comes from a public opinion survey. We hope to have data on actual arts offerings in Minnesota schools for future reports.



These indicators were calculated by Wilder Research as part of the Arts and Culture section at Minnesota Compass and use the National Endowment for the Arts Survey of Public Participation in the Arts, Annual Arts Benchmarking Survey, and U.S. Census 2010-2014 American Community Survey.

UPDATE OF ECONOMIC IMPACT OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS

A robust nonprofit arts and culture economy exists in every county of Minnesota, from the rolling hills of Lanesboro to Grand Marais on Lake Superior's North Shore.

No matter where you live, artists and organizations are nearby offering access to arts, history and culture and injecting energy and color into their local economies.

Our understanding of the economic impact of the nonprofit arts and culture sector in Minnesota has grown. New data was collected from the field for the 2014 fiscal year. The estimated economic impact of nonprofit arts and culture organizations in Minnesota has increased by nearly \$200M since our previous study in 2015,⁽¹⁾ primarily from the addition of over 300 organizations which did not participate in the previous study. In addition to the added economic impact of these new organizations, the economic impact of the organizations that have participated in both studies has increased by 1.25 percent in the last two years.

For a full list of the participating organizations in this year's study, visit creativemn.org.

SPOTLIGHT: MUSEUMS

History/historic preservation	143
Art related museums	13
Humanities	3
Multi/interdisciplinary	8
Other (science, environment, children's, zoo)	14

TOTAL PARTICIPATING MUSEUMS 181

OVERVIEW OF THE FIELD



NONPROFIT AND ARTS ORGANIZATIONS BY DISCIPLINE

PERFORMING ARTS	695
ARTS MULTIPURPOSE	262
HISTORY & HISTORICAL PRESERVATION	232
OTHER*	167
VISUAL ARTS & ARCHITECTURE	156
MEDIA & COMMUNICATIONS	49
LITERARY ARTS	30
HUMANITIES	10

TOTAL ORGANIZATIONS	1601
TOTAL IN 2015 STUDY	1269

* "Other" includes science and children's museums, zoos, and arts and culture programs housed in non-arts nonprofits and local governments.

BY BUDGET SIZE

OVER \$10M	17
\$5-10M	7
\$1-5M	80
\$250K-\$1M	161
\$100K-\$250K	194
\$25K-\$100K	411
UNDER \$25K	731

TOTAL ORGANIZATIONS 1601

IMPACT ON MINNESOTA'S ECONOMY OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS

TOTAL DIRECT EXPENDITURES
BY NONPROFIT ORGANIZATIONS

\$818.5 MILLION

TOTAL ARTS AND CULTURE RELATED SPENDING BY AUDIENCES

\$563.5 MILLION

TOTAL ECONOMIC IMPACT

\$1.4 BILLION

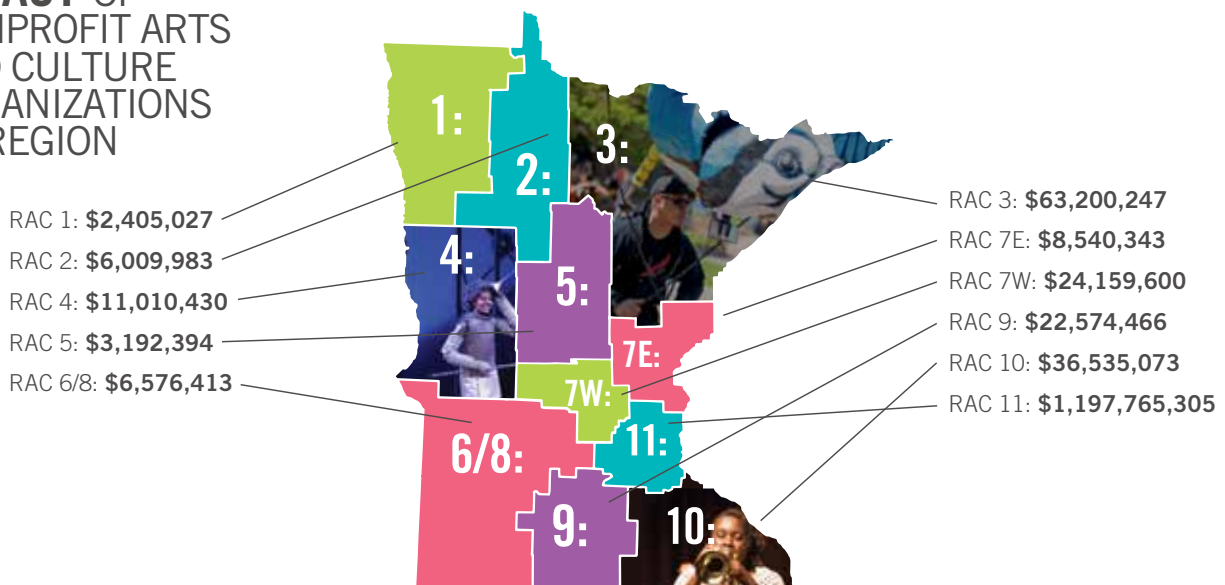
ECONOMIC IMPACT INCREASE
SINCE 2015 STUDY
\$185 MILLION

ADDITIONAL ORGANIZATIONS INCLUDED: **332**

GENRE WITH LARGEST INCREASE IN # OF ORGANIZATIONS:

168
PERFORMING ARTS

TOTAL ECONOMIC IMPACT OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS BY REGION



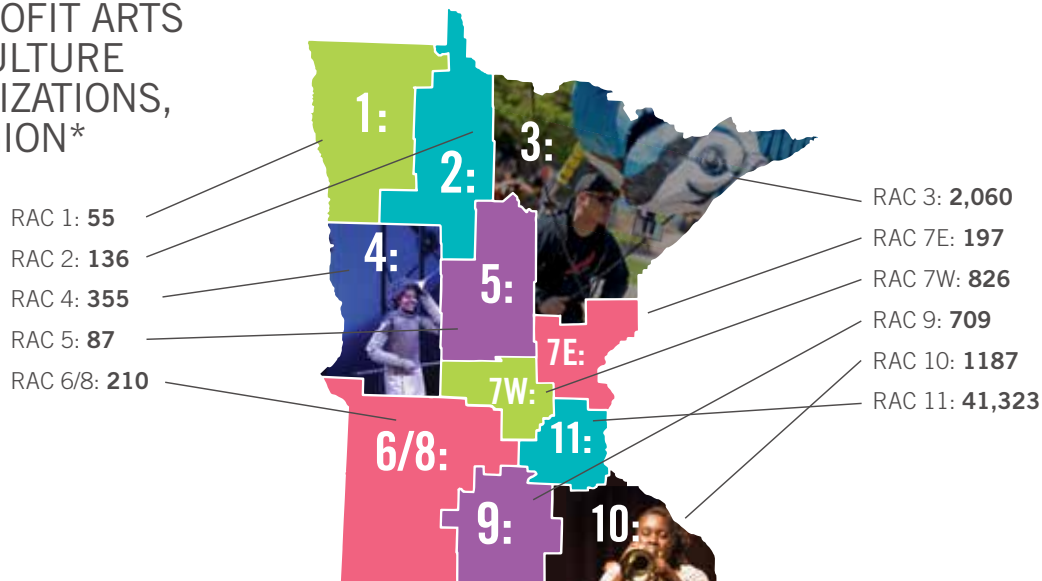


NONPROFIT ARTS AND CULTURE IMPACT ON EMPLOYMENT IN MINNESOTA

“ If the (nonprofit arts and culture) sector were regarded as a single employer, it would be larger than Mayo Clinic (the biggest employer in the state with 41,892 employees), 22 percent larger than the state of Minnesota (with 38,538 employees) and 77 percent larger than Target Corporation (at 26,694 employees).”⁽²⁾

- Arleta Little, Program Officer
McKnight Foundation

TOTAL FTE JOBS SUPPORTED BY NONPROFIT ARTS AND CULTURE ORGANIZATIONS, BY REGION*



STATEWIDE 47,146

*FTE Jobs Supported = Full-Time Equivalent labor employed in Minnesota that is supported by the spending of nonprofit arts and culture organizations and their audiences.



PUBLIC INVESTMENT IN ARTS AND CULTURE IS A CATALYST THAT INCREASES GOVERNMENT REVENUES



NONPROFIT ARTS AND CULTURE ORGANIZATIONS IMPACT ON GOVERNMENT REVENUES

LOCAL GOVERNMENT REVENUES



\$23.2 MILLION

STATE GOVERNMENT REVENUES



\$115.4 MILLION

TOTAL GOVERNMENT REVENUES

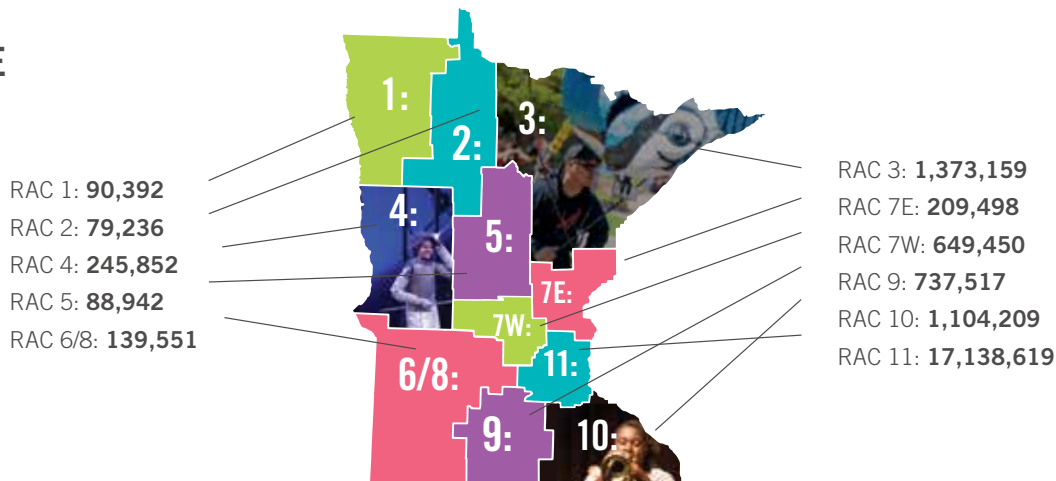
\$138.6 MILLION

RESIDENT HOUSEHOLD INCOME GENERATED BY NONPROFIT ARTS AND CULTURE ORGANIZATIONS

\$1.1 BILLION

LARGE NONPROFIT ARTS AND CULTURE AUDIENCES ARE BEING SERVED IN EVERY CORNER OF THE STATE

TOTAL ATTENDANCE BY REGION



TOTAL ATTENDEES  **21,856,425**

Minnesota's 2015 population is 5.5 million,⁽³⁾ so clearly people are attending multiple times.

THE AVERAGE ATTENDEE SPENDS \$20.48 PER PERSON EXCLUDING THE COST OF THE TICKET.⁽¹⁾

ECONOMIC IMPACT OF AUDIENCES ALONE

\$563.5 MILLION

THIS IS AN INCREASE OF \$63.5M SINCE THE 2015 STUDY.

MILLIONS OF STUDENTS SERVED

STUDENT SCHOOL GROUP VISITS

29,318

OTHER GROUP VISITS

19,714

ATTENDANCE AT CLASSES WORKSHOPS AND READINGS

669,218
All ages

NUMBER OF WORKSHOPS AND READINGS

3,595
All ages

TOTAL STUDENTS SERVED

Children 18 and younger, including student shows. There are 929,230 K-12 students in Minnesota,⁽⁴⁾ so many students are being served multiple times.

3,839,430



MINNESOTA'S ARTS ECONOMY OUTSHINES ALL SURROUNDING STATES AS WELL AS MANY OF OUR COMPETITORS

“ Minnesota has twice the nonprofit arts and culture economy of Wisconsin, even though our two states have about the same population. Minnesota has ten and a half times the arts and culture economy of Kansas, and twelve and a half times the arts economy of South Dakota. If you are a young creative person in the Midwest, you should be packing your bags and moving to Minnesota.”

- Sheila Smith, Executive Director
Minnesota Citizens for the Arts

While not all other states have been studied, Minnesota is repeatedly shown to have a more robust arts and culture economy than states with which we compete.

Minnesota has a higher per capita economic impact from our nonprofit arts and culture organizations than any other state studied by Americans for the Arts as part of Arts and Economic Prosperity IV in 2013.⁽⁵⁾ The arts and culture draw new talent to our state and clearly set Minnesota apart.

STATE most recently available study	ECONOMIC IMPACT 2010 Data	POPULATION 2010 Data	ECONOMIC IMPACT PER CAPITA
SOUTH DAKOTA	\$96,660,370	812,383	\$118.98
DELAWARE	\$142,329,627	885,122	\$160.80
HAWAII	\$159,605,567	1,295,178	\$123.23
NEW HAMPSHIRE	\$114,082,228	1,324,575	\$86.13
NEBRASKA	\$174,389,532	1,796,619	\$97.07
CONNECTICUT	\$652,960,811	3,518,288	\$185.59
WISCONSIN	\$535,168,486	5,654,774	\$94.64
NORTH CAROLINA	\$1,241,874,488	9,380,884	\$132.38
PENNSYLVANIA	\$2,545,382,269	12,604,767	\$201.94
ILLINOIS	\$2,752,725,266	12,910,409	\$213.22
MINNESOTA (2014 DATA)	\$1,381,969,282	5,381,000	\$256.82

CITY AND COUNTY ECONOMIC IMPACT STUDIES FINDINGS⁽⁶⁾



COMMUNITIES ACROSS THE STATE ARE BENEFITING FROM THE ECONOMIC IMPACT OF NONPROFIT ARTS AND CULTURE ORGANIZATIONS

In October 2015, 17 cities and counties joined Creative Minnesota to produce economic impact studies of their local nonprofit arts and culture organizations. Data came from the Creative Minnesota regional studies released February, 2015, in addition to new locally collected data.

The size of the nonprofit arts and culture economy in most cities roughly aligned with the size of the population, however several cities, Grand Rapids, Cook County and Fergus Falls in particular, had a dramatically higher attendance and economic impact than expected. The Cities of Minneapolis and St. Paul, home to Minnesota's largest world class arts and culture organizations such as the Walker Art Center, Ordway Center for Performing Arts and the Minnesota History Center as well as hundreds of mid-sized and small organizations, not surprisingly led in total economic impact. However, a robust arts and culture economy was found in every city studied across the state.

CITY	STUDY AREA RANK IN POPULATION	POPULATION*	TOTAL ECONOMIC IMPACT	RANK IN ECONOMIC IMPACT	ANNUAL NUMBER OF ATTENDEES	RANK IN NUMBER OF ATTENDEES	ECONOMIC IMPACT PER CAPITA	RANK IN ECONOMIC IMPACT PER CAPITA
City of Minneapolis	1	382,578	\$540,679,591	1	7,832,644	1	\$1413	2
City of St. Paul	2	285,068	\$476,872,921	2	7,038,796	2	\$1673	1
Maple Grove and NW Suburbs	3	284,683	\$4,021,808	8	91,367	6	\$14	17
City of Duluth	4	86,265	\$36,026,369	3	835,898	3	\$418	5
City of St Cloud	5	65,842	\$12,434,341	4	327,947	4	\$189	8
County of Chisago	6	53,887	\$2,855,764	10	82,880	8	\$53	13
City of St. Louis Park	7	45,250	\$1,517,141	14	27,363	14	\$34	14
City of Winona	8	27,592	\$4,729,059	6	118,920	5	\$171	9
County of Mille Lacs	9	26,097	\$845,962	16	10,185	16	\$32	15
White Bear Center for the Arts**	10	23,797	\$1,690,026	13	33,000	13	\$71	12
City of Northfield	11	20,007	\$2,171,993	12	71,273	10	\$109	11
City of Red Wing	12	16,459	\$2,228,641	11	41,094	12	\$135	10
City of Fergus Falls	13	13,138	\$2,955,589	9	42,384	11	\$225	7
City of Grand Rapids	14	10,869	\$5,079,985	5	86,381	7	\$467	4
City of Virginia	15	8,712	\$179,998	17	2,478	17	\$21	16
County of Cook	16	5,176	\$4,603,026	7	77,964	9	\$889	3
City of Pine City	17	3,127	\$986,727	15	21,150	15	\$316	6

*2010 Census. **Includes only one organization, so not really comparable to the other local studies. Population listed is for the City of White Bear Lake. Not all cities in Minnesota were studied, only those that opted in to the project. See CreativeMN.org for full studies.

SOURCES, DEFINITIONS AND METHODOLOGY

SECTION 1: ARTISTS AND CREATIVE WORKERS ARE EVERYWHERE

Developed in collaboration with the Center for Urban and Regional Affairs (CURA) at the University of Minnesota. March 2016.

1. Economic Modeling Specialists International. Descriptive names of Industries (NAICS codes) and Occupations (SOC codes) have been truncated. The information includes both for-profit and non-profit industries. Access to this data source provided by the City of Minneapolis Office of Cultural Affairs and the Center for Urban and Regional Affairs (CURA) at the University of Minnesota. Due to rounding some percent values may not equal 100%.

SOC Codes (40) 11-2011,11-2031,13-1011,17-1011,17-1012,21-2021,25-4012,25-4021,27-1011,27-1012,27-1013, 27-1014, 27-1021, 27-1022, 27-1023, 27-1024, 27-1025, 27-1026, 27-1027, 27-2011, 27-2012, 27-2031, 27-2032, 27-2041, 27-2042, 27-3011, 27-3031, 27-3041, 27-3042, 27-3043, 27-3099, 27-4011, 27-4012, 27-4014, 27-4021, 27-4031, 27-4032, 27-4099, 39-5091, 49-9063
NAICS Codes (72) 238150, 323111, 323113, 323117, 323120, 327110, 327212, 332323, 337212, 339910, 339992, 423940, 424920, 443142, 448310, 451130, 451140, 451211, 453110, 453310, 453920, 511110, 511120, 511130, 511191, 511199, 511210, 512110, 512120, 512131, 512191, 512199, 512210, 512220, 512230, 512240, 512290, 515111, 515112, 515120, 515210, 519110, 519120, 519130, 541310, 541320, 541340, 541410, 541420, 541430, 541490, 541810, 541850, 541860, 541890, 541921, 541922, 611610, 711110, 711120, 711130, 711190, 711310, 711320, 711410, 711510, 712110, 712120, 811420, 812921, 812922, 813410

Class of worker: Economic Modeling Specialists International: Extended Proprietors, Non-QCEW employees, QCEW Employees, Self-Employed.

2. "Artists and Arts Workers in the United States" from the Quarterly Census of Employment and Wages (2010)

3. Strategic National Arts Alumni Project (SNAAP). Surveys are conducted on behalf of participating colleges and universities to learn about the lives and careers of their arts graduates. Throughout this study, "art" and "artist" refer to a range of creative activity, including performance, design, architecture, creative writing, music composition, choreography, film, illustration and fine art. 286 schools participated nationwide and 92,113 arts alumni completed the survey nationally 2011-2013. Participating MN Schools included the College of Visual Arts, Minneapolis College of Art and Design, St. Cloud State University, St. Olaf College, University of Minnesota-Twin Cities. For more information about SNAAP: snaap.indiana.edu/snaapshof/.

4. MSA (Metropolitan Statistical Area) Population Data from US Census 2015: <http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>

SECTION II: ECONOMIC IMPACT AND DEMOGRAPHICS OF ARTISTS AND CREATIVE WORKERS

Developed in collaboration with Americans for the Arts' Arts and Economic Prosperity project.

1. The source for this section is an "Artists and Creative Workers Survey" conducted by Minnesota Citizens for the Arts and 194 organizational partners between March 1 and July 31, 2016. The 194 partners compiled a master list of known artists in Minnesota, which was de-duped from 40,000 entries to 28,000 in the final list that was used. A link to an online survey was sent to artists for whom we had an email address. A postcard was mailed to artists for whom we had a mailing address. The link was provided to other artists via Minnesota Citizens for the Arts newsletter and other partner communications to their members. Survey questions were posted and completed online. Only the 2153 completed surveys were included in the analysis, with 2411 incomplete surveys omitted from the final results. Americans for the Arts hosted the survey on its secure server, analyzed the results, and provided the description of methodology that begins below with "Defining Economic Impact."

Studies of this kind don't generally work because artists tend to be reluctant, like most people, to divulge personal financial information. This study was constructed in order to get across that barrier. The lead organizations conducting the study partnered with trusted artists service organizations from across the state that have close relationships with their artists and which urged them to participate. We also used a secure server provided by Americans for the

Arts so that only the economists hired to do the data analysis saw the individual responses. The survey was short to make it more likely that the artists would complete it. Thus the response rate was 7.7 percent, a rate typical of this type of study.

The survey requested detailed information about the artist's 2014 artistic expenditures, as well as information about artistic income, artistic discipline and artists quality of life indicators (the survey instrument is posted on CreativeMN.org). To ease the reporting burden on survey respondents, the expenditure section of the survey mirrored exactly the IRS Schedule C used to report business expenditures.

The economic impact analysis in this report utilizes the survey data collected from full-time and part-time artists/creative workers only, because the universe of 104,148 Minnesota artists and creative workers excludes hobby artists and retired/student artists. An average artistic expenditure was calculated separately for full-time and part-time survey respondents in each of Minnesota's 11 arts regions, and those averages were then multiplied by the universe of artists and creative workers who reside in each region. The regional totals were then summed to calculate the statewide findings.

Total number of Minnesota artists was found through Economic Modeling Specialists International data, as detailed above in the notes for Section I.

DEFINING ECONOMIC IMPACT

Each time a dollar changes hands, there is an economic impact. Direct economic impact is a measure of the economic effect of the initial expenditure within the community. However, when people and businesses receive money, they re-spend much of that money locally. Indirect and induced economic impact measures this re-spending on jobs, household income and local and state government. Consider this example:

When a Minnesota creative worker purchases \$200 of supplies from the local art supplies store, the store owner uses some of the money to pay the sales clerk (that is a direct economic impact). The sales clerk then re-spends some of the money for groceries; the grocery store in turn uses some of the money to pay the cashier; the cashier uses some of the money to pay his utility bill; and so on (these are indirect and induced economic impacts).

Thus, the original \$200 from the artist has been "re-spent" several times. The local expenditures will continue to have an economic impact on Minnesota's economy until the money eventually "leaks out" of the state (i.e., is spent with merchants or individuals located outside Minnesota). The total economic impact is the combination of the direct, indirect and induced impacts.

Using this study's methodology, economic impact is defined as employment, resident household income and government revenue that is supported or generated by the dollars spent in Minnesota by individual artists and creative workers who reside in Minnesota.

- Full-Time Equivalent (FTE) Jobs describes the total amount of labor employed within the State of Minnesota that is supported by the artistic spending of individual artists and creative workers. Economists measure FTE jobs, rather than the total number of employees, because it is a more accurate measure that accounts for both full-time and part-time employment. They include jobs in all industrial sectors that are supported each time the money from the original artistic expenditure is "re-spent" within Minnesota.
- Resident Household Income (also called Personal Income) includes salaries, wages and entrepreneurial income paid to Minnesota residents. It is the money that residents earn and use to pay for food, housing, other living expenses and disposable income. This is the income paid on behalf of the full-time equivalent jobs supported by artistic expenditures.
- Revenue to State and Local Government includes all funds collected by Minnesota's city, county, and state governments, schools, and special districts. It's not exclusively tax revenue (e.g., income tax, sales tax, property tax); it also includes license fees, utility fees, filing fees, etc.

STUDYING ECONOMIC IMPACT USING INPUT-OUTPUT ANALYSIS

To derive the most reliable economic impact data, the study economists used the method of input-output analysis to measure the impact of artistic expenditures by the Minnesota's individual artists and creative workers. This method is a standard procedure for demonstrating the impact of expenditures on communities (and has also been the basis for two Nobel Prize awards in economics). It is well suited for this study because the models can be customized specifically to the unique economic factors of each of Minnesota's 11 arts regions to measure the industry directly as well as indirectly through the additional ancillary commerce that the industry creates. An input-output model is a system of mathematical equations that combines statistical methods and economic theory. It traces how many times a dollar is "re-spent" within the economy of the region of study, and the economic impact of each of those rounds of spending.

The models for each of Minnesota's 11 arts regions were customized by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (e.g., County Business Patterns, Regional Economic Information System, Survey of State and Local Finance), local tax data (sales taxes, property taxes, income tax, other local option taxes, and applicable fees), as well as the survey data collected from the 2,139 responding individual artists and creative workers.

THE INPUT-OUTPUT PROCESS

The input-output model is based on a table of 533 finely detailed industries showing local sales and purchases. The local and state economy of each community is researched so the table can be customized for each community. The basic purchase patterns for local industries are derived from a similar table for the U.S. economy for 2011 (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 (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 in the economy.

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

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

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 individual artists. 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 expenditures by individual artists 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. The same process is also used to show the direct impact on incomes and revenues associated with the column of direct local expenditures.

PARTNERS: Thank you to the 194 Artists and Creative Workers Survey Partner

Organizations: AIGA Minnesota, Alexandria Area Art Assn., American Composers Forum, American Craft Council, American Swedish Institute, Americans for the Arts, Anderson Center for Interdisciplinary Studies, Arrowhead Regional Arts Council, ArtCulture, Artistry, Arts Center of St. Peter, Artspace Projects, ArtStart, Austin Area Commission for the Arts, Bagley Area Arts Collaborative, Banfill-Locke Center for the Arts, Big Stone Arts Council, Black Storytellers Alliance, Blue Earth Valley Concert Association, **Bush Foundation**, Cantus, Carlyle Brown and Co., Central Minnesota Arts Board, Children's Theatre Company, City of Eagan Parks and Recreation, City of Rochester Music Department/Riverside Concerts, Coffee House Press, Commonweal Theatre Co., COMPAS, Corvus North Consulting, Cowles Center, Creative Enterprise Zone, Crossing Borders Studio Art Tour, Curio Dance, Dreamery Rural Arts Initiative, Duluth Art Institute, Eagan Art Festival, East Central Regional Arts Council, East Side Arts Council, Ethnic Dance Theater, Excelsior Art on the Lake, Fired Up, Inc., Five Wings Arts Council, FORECAST Public Artworks, **Forum of Regional Arts Councils of Minnesota**, Franconia Sculpture Park, Frank Theatre, Free Arts Minnesota, Full Circle Theater, Gallery 96 Art Center, Givens Foundation for African American Literature, Grand Marais Art Colony, Graywolf Press, Great River Shakespeare Festival Winona, GREAT Theater, Green T Productions, Guthrie Theater, Hennepin Theatre Trust, Highpoint Center for Printmaking, Historic Holmes Theatre/DLCCC, Hutchinson Center for the Arts, **Ideas that Kick**, IFP Minneapolis-St. Paul, Illusion Theatre and School, In the Heart of the Beast Puppet and Mask Theatre, Intermedia Arts, Ivey Awards, Jackpine Writers, **Jerome Foundation**, Juxtaposition Arts, Katha Dance Theater, Keepers of the Sacred Tradition of Pipemakers, Lake Regional Arts Council, Lakes Area Music Festival, Lake Wobegon® Brass Band, Lanesboro Arts, Loft Literary Center, MacRostie Art Center, MacPhail Center for Music, MaMa MOsAIC, Mankato Area Youth Symphony Orchestra, **Mardag Foundation**, **McKnight Foundation and McKnight Artist Fellowships**, Mentoring Peace Through Art, Metropolitan Regional Arts Council, Metropolitan Symphony Orchestra Association, Million Artist Movement, Milkweed Editions, Minneapolis College of Art and Design, Minneapolis Institute of Arts, **Minnesota Alliance of Community Theaters**, **Minnesota Alliance of Museums**, Minnesota Brass, Minnesota Center for Book Arts, **Minnesota Citizens for the Arts (MCA)**, Minnesota Chinese Opera, Minnesota Conservatory for the Arts, Minnesota Dance Theatre and the Dance Institute, Minnesota Fringe Festival, **Minnesota Jewelry Artists Guild**, **Minnesota Historical Society**, Minnesota Jewish Theatre Company, Minnesota Museum of American Art, **Minnesota Music Coalition**, Minnesota Opera Company, Minnesota Orchestra, **Minnesota Playlist**, Minnesota Quilters, Inc., Minnesota State Arts Board, Minnesota Theater Alliance, Minnetonka Center for the Arts, **mnartists.org**, MN Original – TPT – Twin Cities PBS, Mu Performing Arts, Neighborhood Development Alliance, NEMAA, Northern Clay Center, Northern Light Opera Company, Northern Lights.mn, Northfield Arts Guild, North House Folk School, Northwest Minnesota Regional Arts Council, Obsidian Arts, Oromo Culture Institute/Community of Minnesota, O'Shaughnessy Auditorium/St. Catherine's University, Owatonna Art Center, Paradise Center for the Arts, Paramount Arts Resource Trust, Park Rapids Lakes Area Arts Council, Perspectives, Inc., Pillsbury House Theatre, Playwright's Center, Prairie Lakes Regional Arts Council, Prairie Renaissance Cultural Alliance, Public Art St. Paul, Public Functionary, Ragamala Dance Company, Red Eye Theater, Red Wing Arts Association, Reif Center in Grand Rapids, Region 2 Arts Council, Rochester Art Center, Region Five Development Commission, Rochester Civic Music/Riverside Concerts, Rochester Symphony Orchestra and Chorale, Rock Bend Folk Festival, Rose Ensemble, Rhythmically Speaking, St. Croix Valley Pottery Tour, St. Paul Almanac, St. Paul Art Collective/St. Paul Art Crawl, St. Paul Chamber Orchestra, St. Paul Conservatory of Music, Schubert Club, The Soap Factory, Sol Inspirations, Soo Visual Art Center, Southeastern Minnesota Arts Council, Southwest Minnesota Arts Council, **Springboard for the Arts**, Stages Theatre Co., **Target**, TB Sheldon Theatre, Ten Thousand Things, Textile Center of MN, TruArt Speaks, Tru Ruts Endeavors, The Crossing Arts Alliance, The Film Society of Minneapolis/St. Paul, The Singers – Minnesota Choral Artists, Theatre in the Round Players, Theatre L'Homme Dieu, Twin Cities Actors Equity Association Liaison Committee, Twin Cities Makers, Upstream Arts, Visit Cook County, Visual Arts Minnesota, VocalEssence, Voice of Culture Drum and Dance, Voyagers Art Club, **VSA Minnesota**, Walker Art Center, Walker West Music Academy, West Broadway Business and Area Coalition, White Bear Center for the Arts, Willmar Area Arts Council, Yellow Tree Theatre, Youth Performance Company, Zeitgeist Arts (**Statewide Organizations in Bold**). List as of 5.17.16).

2. Strategic National Arts Alumni Project (SNAAP) *Unequal Canvas: Inequalities in Artistic Training and Careers*, 2013, pages 15-16.
3. Age cohort delineation from the U.S. Census.
4. From Compass sources, see Section IV, #4.
5. Volunteering statistics from VolunteeringinAmerica.com.
6. Other artist demographics from Wilder Research analysis of Integrated Public Use Microdata Series from the U.S. Census Bureau, American Community Survey, 2010-2014 as part of forthcoming Arts and Culture section of Minnesota Compass.

SECTION III. WHAT ARTISTS GIVE TO COMMUNITIES AND WHAT ARTISTS NEED TO SUCCEED

Principally written by Bill Cleveland, Center for the Study of Art and Community.

1. Given that artists have a self-employment rate three times that of the overall US workforce (34% versus 10%) the number of artists in the state could be higher.
2. "Cultivating Natural Cultural Districts," Susan Seifert and Mark Stern, from the University of Pennsylvania's Social Impact of the Arts Project.
3. The Minneapolis Creative Index 2015, City of Minneapolis, MN, 2015. The Cultural Vitality Index used in this report uses state employment data and measures 36 selected occupational categories that are highly correlated with measured skill sets in thinking creatively, originality, and fine arts knowledge as measured by the Employment and Training Administration's "O*NET" occupational network database.
4. "The Minneapolis Creative Index" 2015, page 14.
5. Cultivating Natural Cultural Districts," Susan Seifert and Mark Stern, from the University of Pennsylvania's Social Impact of the Arts Project
6. Currid, E, *How Art and Culture Happen In New York: Implications for Urban Economic Development*, Journal of the American Planning Association, Vol. 73. No. 4, Autumn 2007
7. *Artists Count*, a study conducted by Minnesota Citizens for the Arts in 2007, found that Minnesota artists volunteer and vote at higher levels than the general public both in Minnesota and nationwide. <http://artsmn.org/wp-content/uploads/2015/10/interioronlyfinal.pdf>
8. Heifetz, Ronald A., Grashow, Alexander, and Linsky, Marty. *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World*. Harvard Business Review Press, 2009.
9. Cleveland, W, *What Artists Say: A Study of McKnight Supported Artists*, 2013, Center for the Study of Art & Community
10. Yes, and No: *Conversations about Thriving with Artists of Color from the Twin Cities*, Center for Urban and Regional Affairs, 2015
11. Sidford, H., *Fusing Arts, Culture, and Social Change*, Center for Responsible Philanthropy, 2012, Sidford reports that only 10 percent of arts grants explicitly benefit underserved communities, including lower-income populations, communities of color.
12. Minnesota State Arts Board, "Artists Thrive: A Statewide Needs Assessment," 2015.

SECTION IV. PUBLIC OPINION POLLING ABOUT THE ARTS

1. Minnesota Center for Survey Research, 2014 Minnesota State Survey and 2015 Minnesota State Survey. This annual omnibus survey reaches approximately 800 households per year to complete computer assisted telephone interviews; respondents are randomly selected using a dual frame sample of both landline telephone and cell phone numbers assigned to Minnesota area codes.
2. USA polling data: Americans for the Arts, *Americans Speak Out About the Arts*, 2016.
3. Arts Midwest, *Creating Connection* project. Lake Research Partners designed and administered their online survey October 9-20, 2014. The sample included 400 adults. The sample for the survey was drawn from an online panel. The data were weighed slightly by education, race, age and party identification to reflect the attributes of the actual population. Margin of error +/-4.9%.
4. Minnesota Compass is a social indicators project that measures progress in our state, its seven regions, 87 counties and larger cities. Compass tracks trends in topic areas such as education, economy, and workforce, health housing, public safety, and a host of others. Compass gives everyone in our state—policymakers, business and community leaders, and concerned individuals who live and work here—a common foundation to identify, understand, and act on issues that affect our communities. Minnesota Compass compiled indicators using the following data sources for their Arts and Culture section.

Data Sources:

- The Annual Arts Benchmarking Survey and Survey of Public Participation in the Arts, sponsored by the National Endowment for the Arts, www.arts.gov, and conducted through the Current Population Survey, a program by the U.S. Census Bureau for the Bureau of Labor Statistics. For more information on the survey and questionnaire items, please refer to: <https://www.arts.gov/publications/additional-materials-related-to-2012-sppa>, <http://www.nber.org/data/current-population-survey-data.html>, <http://www2.census.gov/programs-surveys/cps/techdocs/cpsfeb14.pdf>, <https://www.arts.gov/artistic-fields/research-analysis/arts-data-profiles/arts-data-profile-10/background>

- Integrated Public Use Microdata Series from the U.S. Census Bureau, American Community Survey, 2010-2014. Data from these sources are estimates of national population-based surveys. For more information please refer to: <http://www.census.gov/programs-surveys/acs/>.

Data Notes: ACS five-year estimates are based on data collected over five years, and therefore describe average characteristics for that five-year time period.

Art and culture attendance data used the following definitions of visual and performing arts and historical culture:

- Visual art: Visited an art museum, a craft fair or visual arts festival
- Performing art (excludes school performances): Live performances of jazz, Latin, Spanish, or Salsa, opera, classical music, musical play, non-musical play, dance performances (ballet and all other) other types of live performance, outdoor performing arts festival, and other types of live performances, not included above, identified by respondents
- Historical: Visited a park or monument for its historical, architectural or design value

For more information about the data including methodologies or margins of error, please contact mncompass@wilder.org.

SECTION V. UPDATE OF THE ECONOMIC IMPACT OF NONPROFIT ARTS & CULTURE ORGANIZATIONS

This section is based on Creative Minnesota 2017 analysis of newly collected data on the nonprofit arts and culture sector as described below. Go to CreativeMN.org to see the full list of 1601 participating organizations.

WHAT WAS STUDIED?

The Creative Minnesota team identified eligible public and nonprofit organizations that applied for funds to conduct arts and cultural programming, or fit the description of a nonprofit arts and culture organization located in the state of Minnesota in 2014, which included a total of 1601 organizations. For-profit arts organizations and individual artists were excluded. For this update only data on physical address, annual expense budget, and annual audience served at physical events was collected for all participating organizations.

HOW WERE DATA GATHERED?

Multiple sources were used in order to reach the widest possible range of organizations. For all of the data sources other than DataArts' Cultural Data Profiles, data collection was limited to the organization's address, annual expense budget, and attendance at physical events. The numbers cited of participating organizations per data source is after de-duping.

- **435 organizations, 27% of total:** The most detailed data set was compiled from Cultural Data Project profiles from DataArts completed by organizations who were selected grantees of one or more of the sixteen Minnesota arts grant makers (and two national grant makers) who require or accept these profiles from their grantees.

WHAT IS DATA ARTS?

The data used for this report was provided (in part) by DataArts, an organization created to strengthen arts and culture by documenting and disseminating information on the arts and culture sector. Any interpretation of the data is the view of Creative Minnesota, Minnesota Citizens for the Arts and Americans for the Arts and does not reflect the views of DataArts. For more information on DataArts, visit culturaldata.org.

- **762 organizations, 48% of total:** Basic data about 2014 grantees of the Minnesota State Arts Board and Minnesota's eleven Regional Arts Councils was supplied by these funding agencies.
- **176 organizations, 11% of total:** Additional information was collected from organizations participating in the City and County studies conducted by Creative Minnesota in 2015.
- **159 organizations, 10% of total:** Basic data about 2014 Legacy grantees of The Minnesota Historical Society was supplied by this agency.
- **43 organizations, 3% of total:** Data was compiled from direct phoning and emails to large nonprofit arts and culture organizations whose data was not yet collected through the other methods, including science and children's museums and public broadcasting organizations.
- **26 organizations, 2% of total:** The Minnesota Museum Alliance provided data on their members collected in an online survey. This information also included organizations' names, locations, arts and culture-related budgets and audience served.

HOW WAS THE DATA ANALYZED?

Creative Minnesota conducted economic impact studies of the arts and culture sector in the state in 2015. For that project, in depth economic modeling was conducted of the eleven regions of the state and provided to the Creative Minnesota project by Americans for the Arts' Arts and Economic Prosperity studies. That project produced formulas which allow us to determine the economic impact per \$100,000 of nonprofit arts and culture organizational spending, as well as the economic impact per audience attendee. Once the data on the FY2014 budgets and attendance of the 1601 organizations had been collated and de-duped by Minnesota Citizens for the Arts, the total annual expense budgets and total attendees were added up for each region. Using the formulas provided in the 2015 studies, results were found for each region. These figures were added together to find the statewide totals.

LIMITATIONS

Limitations are the conditions or characteristics of a study that constrain how we may interpret the results. All studies have such constraints, and articulate them in order to avoid making claims that are unsupported by data.

Because this study was neither a complete census nor a random sample of the arts and cultural nonprofit sector, these findings may not be representative of the sector as a whole.

Because some findings reported here (particularly those drawn from CDP profiles) were addressed by only a smaller sub-set of respondents, it would be inappropriate to claim these findings reflect the sector as a whole. Rather, that sub-set of findings reflect the responding institutions, and they may suggest an even stronger overall sector that is yet to be fully documented.

The limitations of non-census, non-representative sampling arise in two different ways:

First, the data collected document only those organizations or artists that took part in the study, rather than the sector as a whole. It is thus possible that this study under-reports findings that represent aggregate totals (e.g., total students served, total revenue and expenses).

Second, because the data collected reflect only some organizations or artists, it is impossible to know whether proportional findings (e.g., average spending per audience member, the percentages of public vs. private funding in aggregate, etc.) reflect the sector as a whole. These findings could either over- or under-represent actual overall conditions, and may have differed had other organizations participated in the study.

1. Creative Minnesota: *The Impact and Health of the Nonprofit Arts and Culture Sector*, 2015. CreativeMN.org
2. She is quoting from the Minnesota Department of Employment and Economic Development, 2015, for the number of jobs per employer.
3. U.S. Census for total number of Minnesota residents.
4. Minnesota Department of Education for total number of K-12 students in Minnesota. <http://w20.education.state.mn.us/MDEAnalytics/Summary.jsp>
5. Americans for the Arts: *Arts and Economic Prosperity IV*, 2013 www.AmericansfortheArts.org
6. *Creative Minnesota: City and County Studies 2015* can be found at CreativeMN.org

SECTION VII

ACKNOWLEDGMENTS

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CITY OF MINNEAPOLIS

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