ECONOMIC IMPACT OF THE NON-PROFIT ARTS & SCIENCES IN FLAGSTAFF, AZ
Largest Study Ever Conducted

341 Study Regions in all 50 States, including Flagstaff, Arizona
Focus of the Study

Includes 50 participating organizations
- Non-profit arts, culture, science
- NAU College of Arts & Letters
- Programs within larger non-arts organizations

Does NOT include for-profit arts businesses
- Art galleries and retail arts
- Individual artists
- Orpheum Theater, Pepsi Amphitheater, Greenhouse Productions
- For profit sciences and research-only sciences

< The Wonder Factory
Participating Organizations

The Arboretum at Flagstaff
Northern Arizona Historical Society (Riordan Mansion and Pioneer Museum)
Arizona Natural History Association (Elden Pueblo)
Artists Coalition of Flagstaff
Ballet Folklorico de Colores
Canyon Movement Company
Capoeira Amizade Flagstaff
Center for Indigenous Music & Culture
City of Flagstaff (Public Art Program)
Dry Creek Arts Fellowship
Flagstaff Arts Council
Flagstaff Arts & Leadership Academy
Flagstaff Community Band
Flagstaff Dark Skies Coalition
Flagstaff Festival of Science
Flagstaff Friends of Traditional Music
Flagstaff Light Opera Company
Flagstaff Mountain Film Festival
Flagstaff Shakespeare Festival
Flagstaff Symphony Orchestra
Flagstaff Youth Chorale
Friends of Flagstaff’s Future (Art Workshops)
Friends of the Flagstaff City-Coconino County Public Library

Grand Canyon Guitar Society
Heritage Square Trust
Hozhoni Art Gallery
Human Nature Dance Theatre
KNAU Arizona Public Radio
Literacy Volunteers of Coconino County
Living Traditions Presentations
Lowell Observatory
Masterpiece Art Program
Master Chorale of Flagstaff
Museum of Northern Arizona
Northern Arizona Book Festival
Northern Arizona Celtic Heritage Society
Northern Arizona Pride Association (Pride in the Pines)
Northern Arizona University College of Arts & Letters
Orchestra Northern Arizona
STEM City
Theatrikos Theatre Company
Thin Air Magazine
Turrell Art Foundation
USA Dance Flagstaff Chapter
Weavel Inc. (The Noise)
Willow Bend Environmental Education Center

Bold text = has received City of Flagstaff BBB funds in the past two years
Study Methodology

Fifty Participating Organizations
- Annual Expenditures
- DataArts Cultural Data Project
- Financial Surveys

Audiences at Events & Venues
- 2,748 Audience Intercept Surveys
- 88 Flagstaff Events
- January – December 2016

< Flagstaff Shakespeare Festival
How a Dollar Circulates in the Community

**Input-Output Analysis**
- Devised by Economists at Georgia Tech University
- Resulted in Two Nobel Prizes in Economics
- Customized for Flagstaff’s Unique Economy and Businesses
- Avoided Duplication of Numbers
- Considered Circulation of Dollars
Total Annual Economic Impact

The non-profit Arts & Sciences sector has a $89,796,546 annual impact on Flagstaff's economy.
Organization + Audience Spending

Audiences
$38.1 million

Organizations
$51.7 million

Lowell Observatory >
Return on Investment

$9.1 million annual tax revenue

$4,665,000 in local (city, county) tax revenue
$4,439,000 in state tax revenue

The City of Flagstaff invests about $500,000 per year in non-profit arts and science programs. Coconino County invests about $250,000.
The Arts & Sciences Supports 3,035 FTE Jobs in Flagstaff

Full-Time equivalent (FTE) jobs in all sectors that are supported and exist because of the total economic impact ($90 million) of the non-profit arts and sciences
Audience Spending

$38.1 million annual spending

In the community at restaurants, hotels, retail stores, and more

Does not include ticket or admission fees

Arts audiences are engaged: 93.8% of the locals and 88.1% of the tourists surveyed said they voted in the 2016 election.
Audiences Spend at Local Businesses

Per person per event

Local: $29.41 vs. $23.44 National avg.

Non-local: $86.87 vs. $47.57 National avg.

Canyon Movement Company
Tourist Spending Habits

40.2% of tourists reported spending on overnight accommodations. Spending rises to $133.81/person when spending on overnight accommodations.
Cultural Tourists Add to the Economy

$20,664,375
annual spending by out of town audiences

35.8% of tourists said the event/venue was the primary reason for their trip to Flagstaff

(For these numbers, only one night of lodging expenses is counted toward the audience expenditure, regardless of how many nights these cultural tourists actually stayed in the community. This conservative approach ensures that the audience-spending figures are not inflated by non-arts-related spending.)
French Finale
Flagstaff Symphony Orchestra

April 15, 2016

Total Attendance: 966
Surveys collected: 50
Surveys represent: 82 locals, 19 tourists
Total spent: $5,403
Average: $53.50 per person
Hopi Festival
Museum of Northern Arizona

July 2-3, 2016
Total Attendance: 2,912
Surveys collected: 50
Surveys represent: 31 locals, 97 tourists
Total spent: $15,380
Average: $120.16 per person
## Comparison to Similar Cities

<table>
<thead>
<tr>
<th>Community</th>
<th>Population</th>
<th>Total Impact</th>
<th>Audience Spending</th>
<th>Spending per Tourist</th>
<th>Eligible Orgs Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flagstaff, AZ</td>
<td>71,459</td>
<td>$90 Million</td>
<td>$38 Million</td>
<td>$86.87</td>
<td>90%</td>
</tr>
<tr>
<td>Corvallis, OR</td>
<td>55,000</td>
<td>$72 Million</td>
<td>$44 Million</td>
<td>$37.43</td>
<td>60%</td>
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<tr>
<td>Boulder, CO</td>
<td>97,000</td>
<td>$70 Million</td>
<td>$34 Million</td>
<td>$42.23</td>
<td>33%</td>
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<tr>
<td>Missoula, MT</td>
<td>71,000</td>
<td>$72 Million</td>
<td>$52 Million</td>
<td>$53.45</td>
<td>59%</td>
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<tr>
<td>Duluth, MN</td>
<td>86,000</td>
<td>$36 Million</td>
<td>$22 Million</td>
<td>$44.96</td>
<td>100%</td>
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<tr>
<td>La Crosse, WI</td>
<td>52,000</td>
<td>$33 Million</td>
<td>$20 Million</td>
<td>$27.72</td>
<td>66%</td>
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</table>
## Comparison to 2012 Study

<table>
<thead>
<tr>
<th></th>
<th>2012 Study</th>
<th>2017 Study</th>
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</thead>
<tbody>
<tr>
<td>Total Impact</td>
<td>$73 Million</td>
<td>$90 Million</td>
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<tr>
<td>Audience Spending</td>
<td>$35 Million</td>
<td>$38 Million</td>
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<tr>
<td>Per Tourist Spending</td>
<td>$54.78</td>
<td>$86.87</td>
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<tr>
<td>Jobs Supported (FTE)</td>
<td>2,497</td>
<td>3,035</td>
</tr>
<tr>
<td>Local Tax Revenue</td>
<td>$7.6 Million</td>
<td>$9.1 Million</td>
</tr>
<tr>
<td>Household Income</td>
<td>$56 Million</td>
<td>$68 Million</td>
</tr>
</tbody>
</table>
82% of Americans believe arts & culture are important to local businesses and the economy.

87% of Americans believe arts & culture are important to the quality of life.
73% say the arts are a “positive experience in a troubled world”

64% feel “pure pleasure to experience and participate in [the arts]”

63% believe the arts “lift me up beyond everyday experiences”

Source: Americans for the Arts 2016 survey of 3,120 adults by Ipsos Public Affairs

< Tilt by Dark Sky Aerial
All U.S. Arts Industries (2014)
$730 Billion = 4.2% of GDP

- Retail Trade: 5.8%
- Arts & Culture: 4.2%
- Construction: 3.9%
- Transportation: 2.9%
- Mining: 2.8%
- Travel & Tourism: 2.6%
- Utilities: 1.6%

Source: U.S. Bureau of Economic Analysis
Local Study Partners

Additional support from Theatrikos Theatre Company and Flagstaff Capoiera Amizade
Five Key Takeaways

1. $90 Million Total Annual Impact
2. Supports 3,035 Jobs (FTE)
3. Audiences Spend $38.1 Million
4. Tourists Pump $20.6 Million Into Flagstaff
5. Tourists Spend More in Flagstaff: $86.87 vs. $47.57
Feasibility Study

ArtsMarket, Inc.
September 2017 – April 2018

To explore the possibility of new or expanded cultural facilities

Market Analysis, Focus Groups, Surveys
Community Meetings and Forums

Supported by:
City of Flagstaff BBB Revenues, Coconino County, Kinney Construction Services

Louise Stevens
Flagstaff Art & Science Forum

Don’t Miss This Upcoming Program!

- **Monday, October 2, 1:00-5:00pm**
  - Coconino Center for the Arts
  - A mini-conference for arts, culture, sciences
  - Staff, board members, volunteers, artists, professionals
  - Opening by Mayor Coral Evans
  - Roundtable Discussion moderated by Becky Daggett
  - Break out sessions on marketing and collaborations
  - **FREE – OPEN TO ALL**

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Register online: [FlagArtsCouncil.org](http://www.FlagArtsCouncil.org)
Resources

Flagstaff Arts & Science Study Online
  ◦ Visit FlagArtsCouncil.org
  ◦ Economic Impact Calculator
    ➢ Calculate your organization’s impact

National Study at Americans for the Arts
  ◦ Visit AmericansForTheArts.org
Question & Answer Session

John Tannous, Executive Director, Flagstaff Arts Council

Panel Discussion with:
- **Julie Pastrick** – CEO & President, Greater Flagstaff Chamber of Commerce
- **John Stigmon** – CEO, Economic Collaborative of Northern Arizona (ECoNA)
- **Trace Ward** – Director, Flagstaff Convention & Visitors Bureau
- **Rusty Foley** – Executive Director, Arizona Citizens for the Arts

Moderator: **Elizabeth Vogler** – Deputy Director, Flagstaff Arts Council