Arts Market Study Highlights

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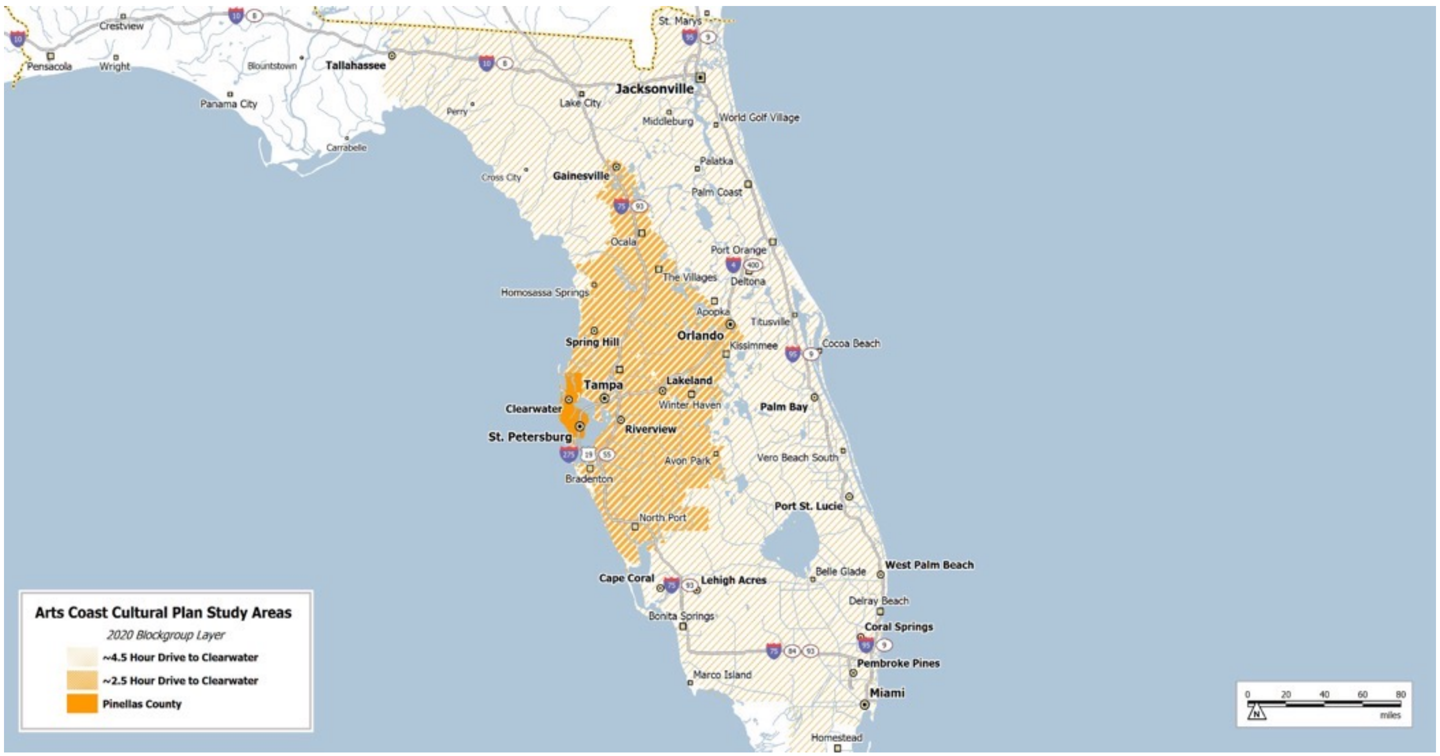
THE ARTS COAST CULTURAL PLAN

INTRODUCTION

The market analysis provides a portrait of the strength, character and location of arts activity among the population in three distinct study areas established for analysis for Current, the Arts Coast Cultural Planning process.

Study Area One is Pinellas County, the analysis of which is most relevant to Creative Pinellas and its constituent organization's efforts to serve and connect with local residents. Study Area Two includes the geographic areas roughly within a 2.5-hour drive from the center of Pinellas County, and Study Area Three extends to the region to within roughly a 4.5- hour drive.



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STUDY PARAMETERS

This research for Current serves as a complement to the Visitor Profile Study conducted annually by Visit St. Pete/Clearwater as well as the recent Arts & Economic Prosperity 6 (AEP6) report produced by Americans for the Arts.

The Visitor Profile Study is conducted in collaboration with 18 county locations representing a mix of art, culture, resort, travel, and beach destinations to create profiles of Pinellas County visitors for the agency's robust tourism marketing and reporting of visitor economic impacts. AEP6 is produced in collaboration with Creative Pinellas and 71 other arts and cultural organizations in Pinellas County and studies exclusively the arts and cultural organizations and their audiences economic and social impacts.

Both of these studies employ intercept surveying that captures data from people as they visit arts and cultural venues.

So as not to duplicate or confuse this study with the efforts in the tourism and economic development sectors, this research is focused on understanding and quantifying the demand for various types of arts and cultural activities useful to informing cultural planning goals and empowering local organizations in their own audience development and marketing efforts.

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KEY FINDINGS AND OBSERVATIONS

Interest in Arts and Cultural Experiences

Interest for arts and cultural experiences is strong throughout the County.

There is strong consumer interest for arts and cultural activity across Pinellas County.

With more than half of the block groups in Pinellas County showing above average (100) indices for the arts, the potential for successful cultural development is abundant in both north and south Pinellas County.

Consumer index scores are influenced by opportunity.

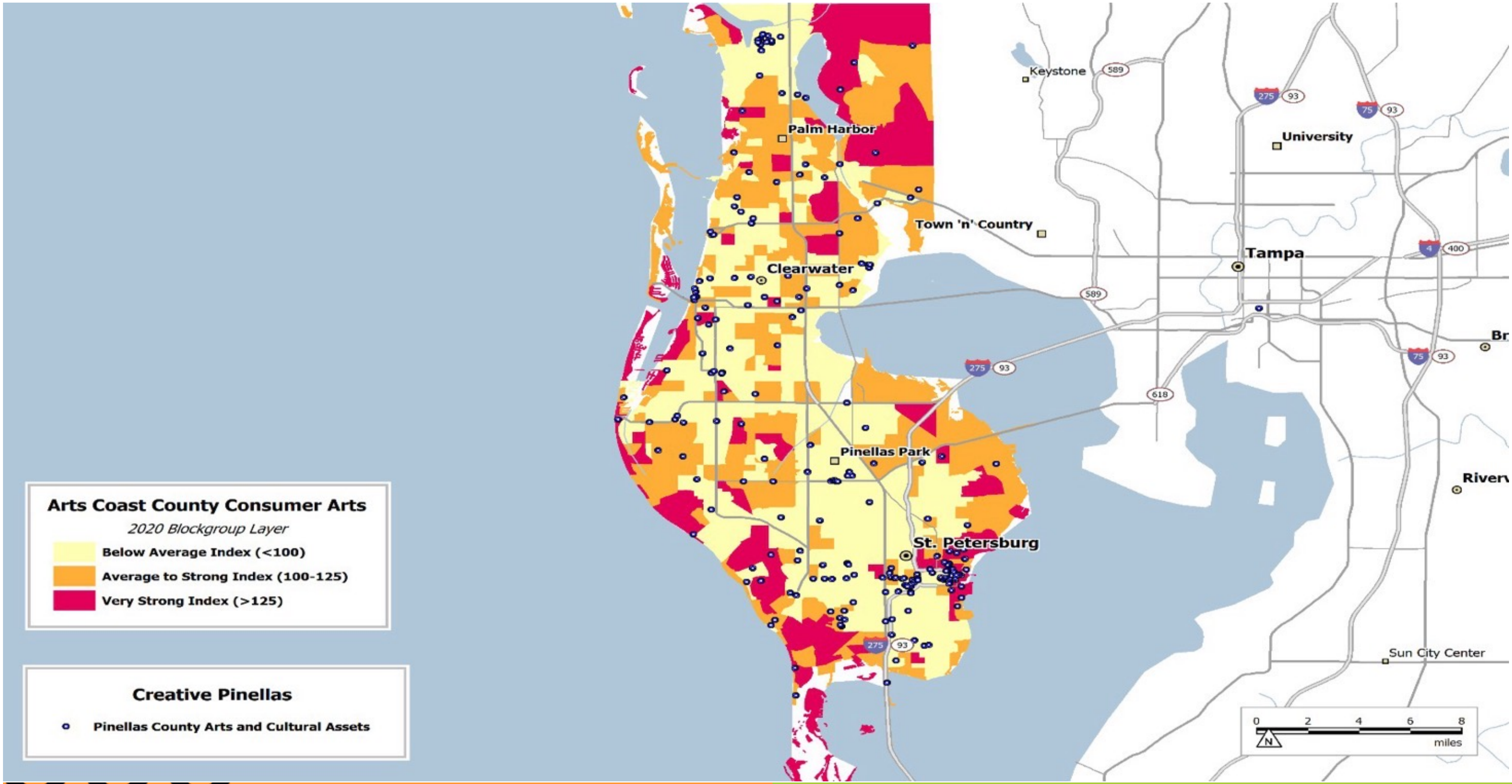
This means that in areas where arts facilities, programs, and activities are plentiful and well-resourced, indexes tend to be higher than in areas where these amenities are lacking or under-resourced. This also shows the areas for growth and opportunity.

The daytrip and regional overnight drive market established for this study is abundant with arts and culture enthusiasts from which to draw visitors. Engagement data identified the variety and abundance of opportunity from major attractions, festivals, and visual arts among the top strengths in the county's cultural sector. There is ample opportunity to grow the performing arts.

KEY FINDINGS AND OBSERVATIONS

Interest in Arts and Cultural Experiences

The map below illustrates the strength of consumer interest for arts and cultural activities in Pinellas County and the location of more than 200 cultural assets (identified with physical addresses).



KEY FINDINGS AND OBSERVATIONS
Interest in Arts and Cultural Experiences

<u>Pinellas County</u>

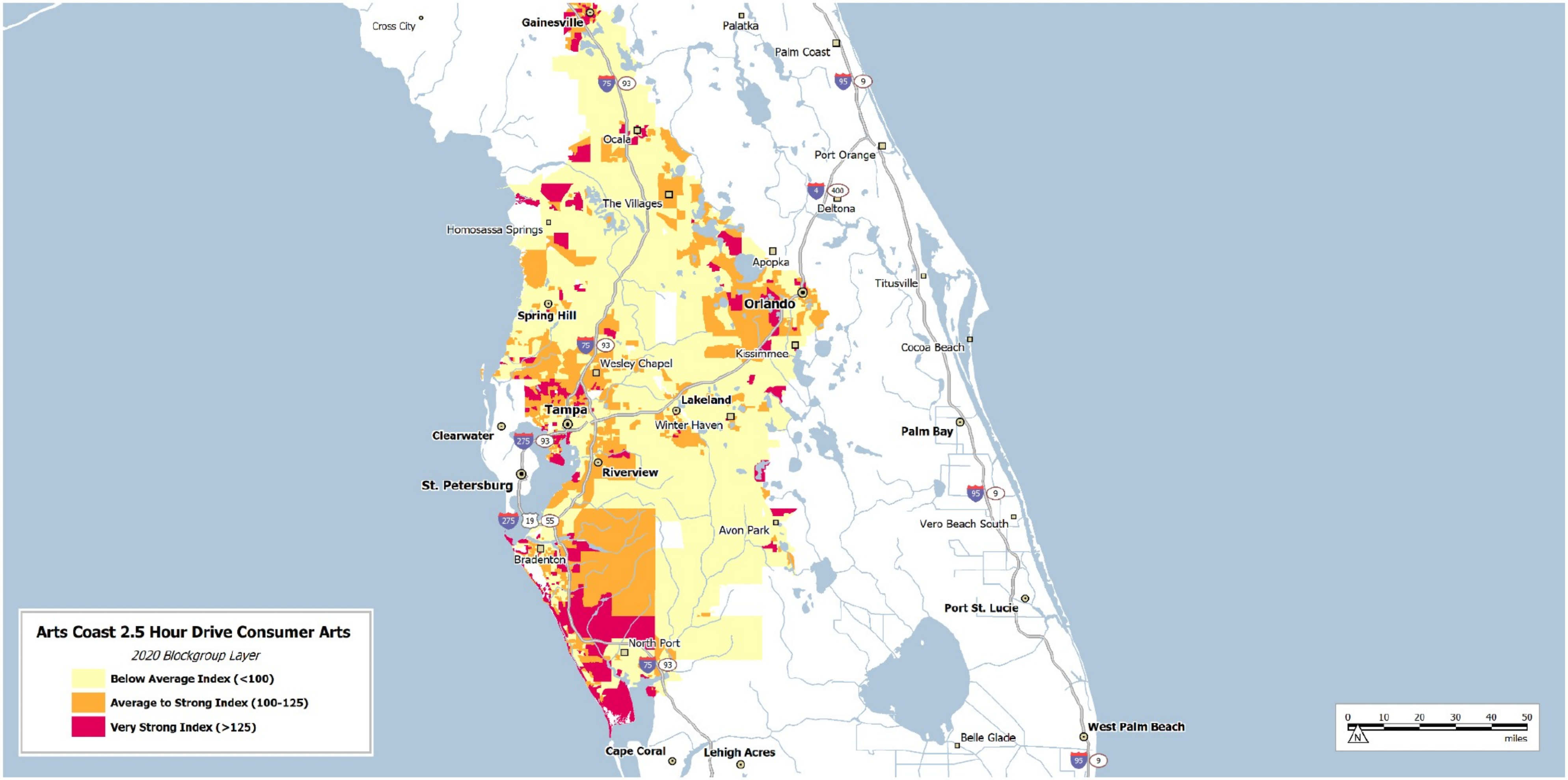
Roughly 13% of households in Pinellas County are in areas that show very strong indexes for consumer arts attendance and visitation compared to a national average of 100.

In the aggregate there are 59,469 households in geographic areas with indexes 25% higher than the national average of 100.

Roughly 32% of households in Pinellas County are in areas that show average to strong indexes for arts attendance and visitation and there are a total of 145,682 households in these areas combined.

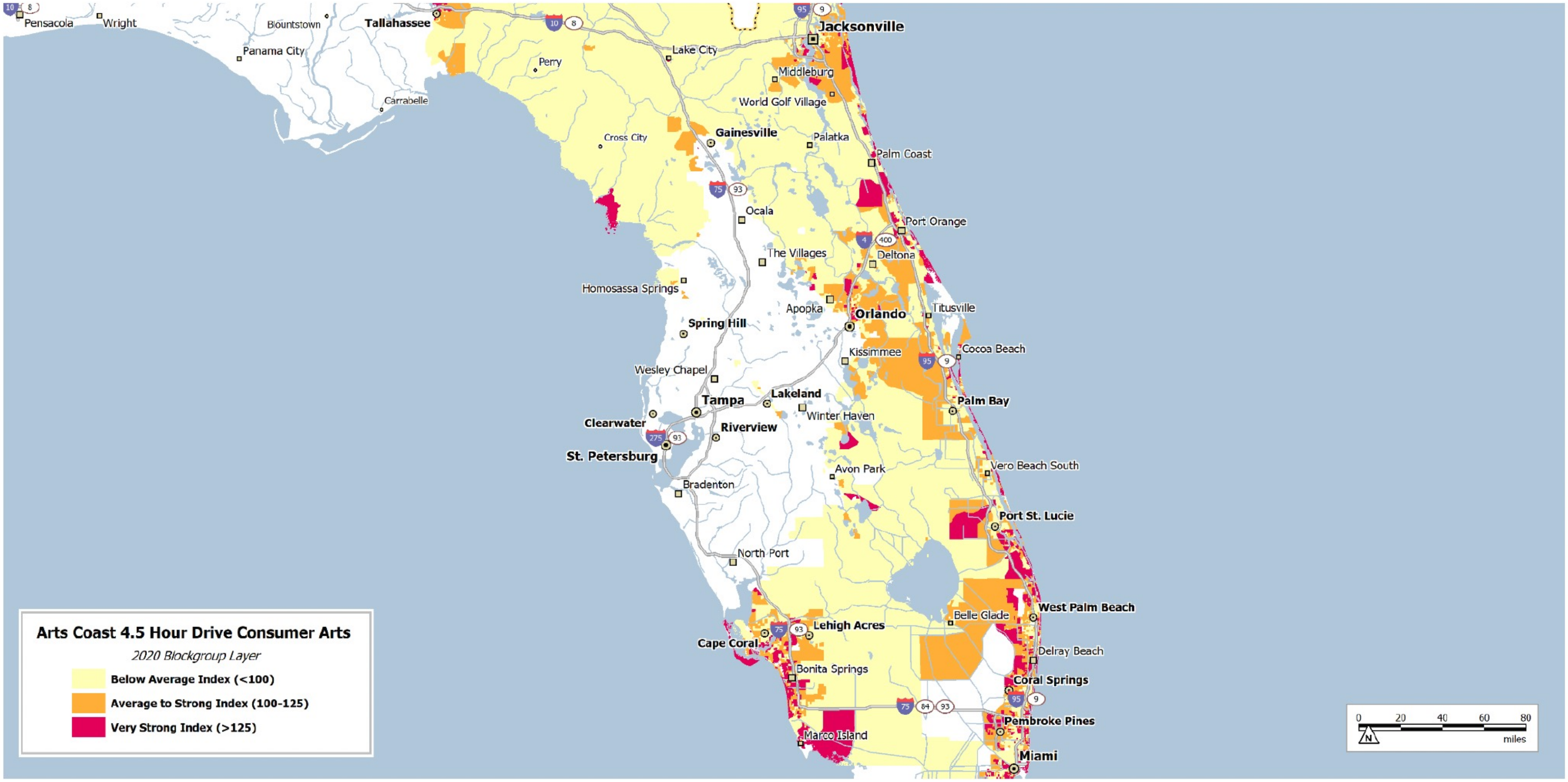
More than half of Pinellas County households (55%) are in areas that show indexes for arts attendance and visitation below a national average. The household count within the areas indexing below a national average is 249,231.

Engagement data suggests that to tap fully into this interest, the arts and culture sector needs to collaborate on countywide communication and marketing initiatives, to address disability community access, to address racial inequities in artist funding, and to find ways to offset the rapidly escalating costs to organizations creating and promoting the supply



Household Counts: 2,633,719

Very Strong Index	305, 255 (12%)
Average to Strong Index:	973,808 (37%)
Below Average Index:	1,354,656 (51%)



Household Counts: 5,198,244

Very Strong Index	739,418 (14%)
Average to Strong Index:	1,823,543 (35%)
Below Average Index:	5,198,244 (51%)

KEY FINDINGS AND OBSERVATIONS

Daytrip and Overnight Markets

The make up of daytrip and regional overnight markets are different.

Daytrip/Potential Overnight Drive Market: This area extends north to Gainesville Roughly 12% of households within a 2.5-hour drive from Clearwater are in areas that show very strong indexes for consumer arts attendance and visitation compared to a national average of 100.

In the aggregate there are more than 300,000 in this area with indexes 25% higher than the national average of 100. Just under one million households in this area show average to strong indexes for arts attendance and visitation, about 32% of the geography.

Regional/Likely Overnight Drive Market: This area extends north to the Georgia border, west to include Tallahassee, and it includes west coast communities south of the Fort Myers to Marco Island, and east coast communities from Jacksonville to Miami.

Roughly 14% of households within a 4.5-hour drive from Clearwater are in areas that show very strong indexes for consumer arts attendance and visitation compared to a national average of 100. In the aggregate there are more than 700,000 in this area with indexes 25% higher than the national average of 100. Just over two million households in this area show average to strong indexes for arts attendance and visitation, about 35% of the geography.

KEY FINDINGS AND OBSERVATIONS

Daytrip and Overnight Markets

<u>Both the daytrip and regional market show strong opportunity for drawing visitors to the county for arts and culture.</u>

Engagement data suggests more effort should be made to connect the arts with beaches and other natural assets, to elevate the professionalism and reputation of the county's arts sector, and to expand connections with hospitality and tourism.

Other stakeholder research underscores the importance of investing in arts and cultural entrepreneurship. Survey results revealed that roughly a third of residents rated arts, cultural, or creative activities in the count as "excellent," and fewer than 30% gave an "excellent" rating to activities in the community in where they live.

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KEY FINDINGS AND OBSERVATIONS

Daytrip and Overnight Markets

Some Lifestyle Groups appear better connected with Arts and Culture than Others.

An analysis of the three market areas produced a segmentation strategy for connecting arts and culture, both to locals and to visitors based on five lifestyle groups, which, like the demand index, are a patchwork throughout Pinellas County and in the two drive markets. The characteristics of these groups differ, and their indexes suggest that some are well connected with arts and culture in Pinellas County already, others are loosely connected and show opportunity for growth, and others need unique strategies for more engagement with and service by the arts and culture sector.

Audience development strategies specific to each lifestyle group may be useful for identifying tactics to support the cultural plan goals.

Recommended is framing these strategies around deepening, broadening, and diversifying audiences, a behavior-based model for building participation in the arts defined by RAND, a nonprofit institution that helps improve policy and decision-making through research and analysis.[1]

Deepen: increasing current participants' levels of involvement
Broaden: attracting more people similar to current participants
Diversify: attracting people different from current participants

Using the MosaicUSA lifestyle segmentation system we analyzed the market through the lens of household characteristics and behavior to help plan implementation identify specific types of consumer lifestyle groups with audience development strategies. Detail and supporting data for this summary including narrative descriptions and key demographics within them are in the full market study.

KEY FINDINGS AND OBSERVATIONS
Daytrip and Overnight Markets

Lifestyle Group Strategy

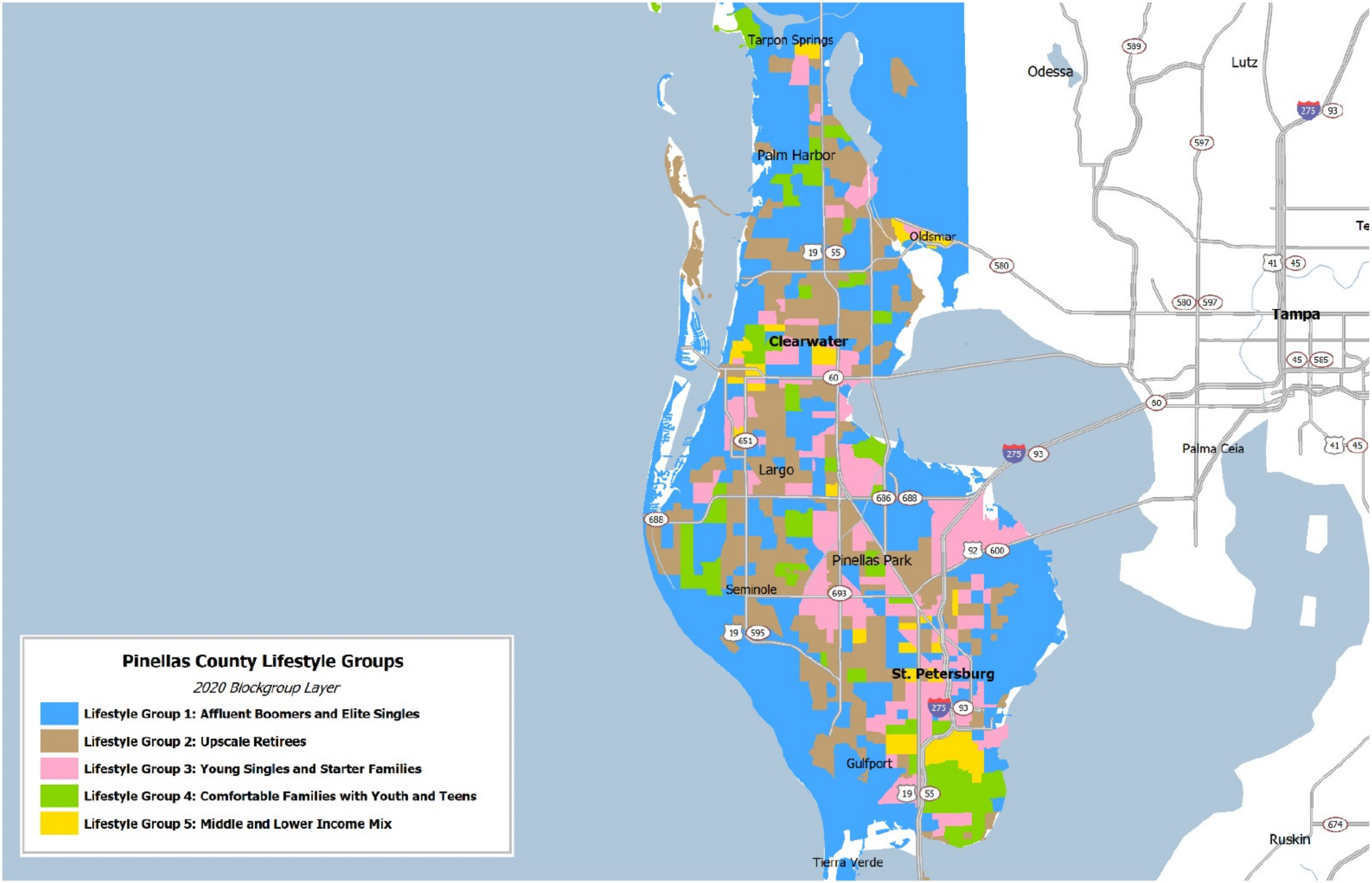
Lifestyle Group 1: (42% of households) Affluent Boomers and Elite Singles Well connected, well served, high demand (Deepen)

Lifestyle Group 2: (23% of households) Upscale Retirees Somewhat connected and served, moderate demand (Broaden)

Lifestyle Group 3: (15% of households) Young Singles and Starter Families Loosely connected and served, low demand (Diversify)

Lifestyle Group 4: (11% of households) Comfortable Families with Youth and Teens Loosely connected, moderate demand (Broaden)

Lifestyle Group 5: (9% of households) Middle and Lower Income Mix Disconnected, low demand (Diversify)


Pinellas County Lifestyle Groups
2020 Blockgroup Layer
Lifestyle Group 1: Affluent Boomers and Elite Singles
Lifestyle Group 2: Upscale Retirees
Lifestyle Group 3: Young Singles and Starter Families
Lifestyle Group 4: Comfortable Families with Youth and Teens
Lifestyle Group 5: Middle and Lower Income Mix
Tarpon Springs
Palm Harbor
Oldsmar
Clearwater
Largo
Pinellas Park
Seminole
St. Petersburg
Gulfport
Tierra Verde
Odessa
Lutz
Tampa
Palma Ceia
Ruskin