



# Commission for Arts and Culture

## Advocacy & Outreach Committee

### Meeting Agenda

San Diego Central Library, Mary Hollis Room

330 Park Blvd, San Diego 92101

Friday, October 13

10:45 a.m. – 11:30 a.m.

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10:45 a.m.	I.	Call to Order	Becky Phillpott, Chair
10:47 a.m.	II.	Non-agenda Public Comment	Becky Phillpott, Chair
10:50 a.m.	III.	Chair's Reports	Becky Phillpott, Chair
11:00 a.m.	IV.	City Council Outreach	Becky Phillpott, Chair
11:15 a.m.	V.	Director's Report	Jonathon Glus, Executive Director
11:30 a.m.	VI.	Adjourn	Becky Phillpott, Chair

Meeting will be aired live and recorded. PUBLIC COMMENT: Any member of the public may address the Committee on any subject in its area of responsibility on any matter not presently pending or previously discussed at the Committee. Pursuant to the provisions California Executive Order 29-20, Committee meetings will be held via teleconference until further notice. In lieu of in-person attendance, members of the public may submit their comments via a public comment [webform](#), or they may join the meeting as a "webinar attendee" at the link provided in the [Commission or Committee meeting website](#). For members of the public wishing to address the Committee under Public Comment via the [webform](#) prior to the meeting, instructions for word limitations and deadlines will be noted on the [webform](#). Pursuant to open meeting laws, no discussion or action, other than a referral, shall be taken by the Committee on any issue brought forth under non-agenda public comment. As required by the Americans with Disabilities Act (ADA), requests for agenda information to be made available in alternative formats, and any requests for disability-related modifications or accommodations required to facilitate meeting participation, including requests for alternatives to observing meetings and offering public comment as noted above, may be made by contacting the City Clerk at (619) 533-4000 or <mailto:cityclerk@sandiego.gov>. The City is committed to resolving accessibility requests swiftly in order to maximize accessibility.

# The Economic and Social Impact of Nonprofit Arts and Culture Organizations and Their Audiences in City of San Diego, CA

Direct Economic Activity	Organizations	Audiences	Total Expenditures
<b>Total Industry Expenditures (FY2022)</b>	\$657,675,603	\$528,236,404	<b>\$1,185,912,007</b>

## Economic Impact of Spending by Arts and Culture Organizations and Their Audiences

Total Economic Impacts (includes direct, indirect, and induced impacts)	Organizations	Audiences	Total Impacts
Employment (Jobs)	9,912	6,988	<b>16,900</b>
Personal Income Paid to Residents	\$585,642,798	\$292,388,512	<b>\$878,031,310</b>
Local Tax Revenue (city and county)	\$17,185,563	\$17,582,459	<b>\$34,768,022</b>
State Tax Revenue	\$30,527,590	\$27,587,405	<b>\$58,114,995</b>
Federal Tax Revenue	\$124,590,170	\$58,266,884	<b>\$182,857,054</b>

## Event-Related Spending by Arts and Culture Audiences Totaled \$528.2 million

Attendance to Arts and Culture Events	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Total Attendance to In-Person Events	13,837,399	2,480,288	<b>16,317,687</b>
Percentage of Total Attendance	84.8%	15.2%	100.0%
Average Per Person, Per Event Expenditure	\$29.21	\$66.77	\$34.94
<b>Total Event-Related Expenditures<sup>2</sup></b>	<b>\$340,395,459</b>	<b>\$187,840,945</b>	<b>\$528,236,404</b>

## Nonprofit Arts and Culture Audiences Spend an Average of \$34.94 Per Person, Per Event

Category of Event-Related Expenditure	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Food and Drink	\$15.49	\$13.96	\$15.26
Retail Shopping	\$2.32	\$9.73	\$3.45
Overnight Lodging (one night only)	\$0.95	\$26.33	\$4.82
Local Transportation	\$5.33	\$5.41	\$5.34
Clothing and Accessories	\$2.43	\$4.69	\$2.78
Groceries and Supplies	\$1.12	\$2.78	\$1.37
Childcare	\$0.55	\$0.68	\$0.57
Other/Miscellaneous	\$1.02	\$3.19	\$1.35
<b>Overall Average Per Person, Per Event</b>	<b>\$29.21</b>	<b>\$66.77</b>	<b>\$34.94</b>

Source: Arts & Economic Prosperity 6: The Economic and Social Impact Study of Nonprofit Arts and Culture Organizations and Their Audiences in the City of San Diego. For more information about this study or about other cultural initiatives in the City of San Diego, contact the City of San Diego Commission for Arts and Culture.

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Past studies have focused primarily on the financial, economic, and tourism contributions of the nonprofit arts and culture industry. AEP6 expands beyond those topics to include measures of social impact. Surveys completed by individual attendees in the the City of San Diego demonstrate an appreciation for how the arts and culture impacts the development and well-being of the community and its residents.

### Audiences Demonstrate Appreciation for the Impact of Arts and Culture

Level of Agreement with Social Impact Statements	Audiences
“This venue or facility is an important pillar for me within my community.”	84.7%
“I would feel a great sense of loss if this activity or venue were no longer available.”	87.2%
“This activity or venue is inspiring a sense of pride in this neighborhood or community.”	87.8%
“My attendance is my way of ensuring that this activity or venue is preserved for future generations”	84.4%

#### About This Study

Americans for the Arts conducted AEP6 to document the economic and social benefits of the nation’s nonprofit arts and culture industry. The study was conducted in 373 diverse communities and regions across the country, representing all 50 states and Puerto Rico. **The City of San Diego Commission for Arts and Culture joined the study on behalf of the City of San Diego.** For additional information including the national report, summaries for the 373 communities, an online calculator, and the project methodology, visit [www.AEP6.AmericansForTheArts.org](http://www.AEP6.AmericansForTheArts.org).

#### Surveys of Nonprofit Arts and Culture Organizations

Nationally, detailed information was collected from 16,399 nonprofit arts and culture organizations about their FY2022 expenditures (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition), as well as their event attendance, in-kind contributions, and volunteerism. Surveys were collected from February through July 2023. Some organizations only provided total expenditures and attendance (they are included in the study). Responding organizations had budgets ranging from a low of \$0 to a high of \$375 million. Response rates for the 373 communities averaged 43.9% and ranged from 5% to 100%. **In the City of San Diego, 89 of the 326 total eligible nonprofit arts and culture organizations identified by the City of San Diego Commission for Arts and Culture provided the financial and attendance information required for the study analysis—an overall participation rate of 27.3%.** It is important to note that each study region’s results are based solely on the survey data collected. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings.

#### Surveys of Nonprofit Arts and Culture Audiences

Audience-intercept surveying, a common and accepted research method, was conducted to measure event-related spending by audiences. Attendees were asked to complete a short survey while attending an event. Nationally, a total of 224,677 attendees completed the survey. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging, as well as socioeconomic information, ZIP code of primary residence, and four social impact questions. Data was collected from May 2022 through June 2023 at a broad range of both paid and free events. **In the City of San Diego, a total of 1,548 valid audience-intercept surveys were collected from attendees to nonprofit arts and culture performances, events, exhibits, and special events during the period from May 2022 through June 2023.**

#### Studying Economic Impact Using Input-Output Analysis

Americans for the Arts uses the IMPLAN platform to create the customized models for each of the 373 study regions. Input-output models calculate the interdependencies between various sectors or industries within a region. This analysis traces how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for AEP studies because it can be customized specifically to each participating community, region, or state. **To complete this analysis for the City of San Diego, the researchers used the IMPLAN platform to build a customized input-output model based on the unique economic and industrial characteristics of San Diego County.**

#### Research Notes:

- <sup>1</sup> For the purpose of this study, local attendees live within San Diego County; nonlocals live elsewhere.
- <sup>2</sup> To calculate the total audience expenditures in the City of San Diego, first the audience expenditure findings were calculated for the Balboa Park Cultural District. Next, the residency percentages and the average per person arts-related expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within the City of San Diego but outside the District. Finally, the results were added to the District’s findings. It is important to note that, as a result, the aggregate audience expenditures for the City of San Diego do not equal the average per person event-related expenditure for locals multiplied by the total estimated attendance by locals plus the average per person event-related expenditure for nonlocals multiplied by the total estimated attendance by nonlocals.



# The Economic and Social Impact of Nonprofit Arts and Culture Organizations and Their Audiences in San Diego County, CA

Direct Economic Activity	Organizations	Audiences	Total Expenditures
<b>Total Industry Expenditures (FY2022)</b>	\$731,445,052	\$637,846,089	<b>\$1,369,291,141</b>

## Economic Impact of Spending by Arts and Culture Organizations and Their Audiences

Total Economic Impacts (includes direct, indirect, and induced impacts)	Organizations	Audiences	Total Impacts
Employment (Jobs)	11,368	8,403	<b>19,771</b>
Personal Income Paid to Residents	\$663,214,550	\$348,350,586	<b>\$1,011,565,136</b>
Local Tax Revenue (city and county)	\$20,043,875	\$21,323,714	<b>\$41,367,589</b>
State Tax Revenue	\$35,716,987	\$33,040,120	<b>\$68,757,107</b>
Federal Tax Revenue	\$141,280,845	\$69,288,330	<b>\$210,569,175</b>

## Event-Related Spending by Arts and Culture Audiences Totaled \$637.8 million

Attendance to Arts and Culture Events	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Total Attendance to In-Person Events	17,015,925	2,146,153	<b>19,162,078</b>
Percentage of Total Attendance	88.8%	11.2%	100.0%
Average Per Person, Per Event Expenditure	\$31.26	\$69.74	\$35.57
<b>Total Event-Related Expenditures<sup>2</sup></b>	<b>\$426,790,609</b>	<b>\$211,055,480</b>	<b>\$637,846,089</b>

## Nonprofit Arts and Culture Audiences Spend an Average of \$35.57 Per Person, Per Event

Category of Event-Related Expenditure	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Food and Drink	\$13.81	\$15.95	\$14.05
Retail Shopping	\$4.92	\$11.78	\$5.69
Overnight Lodging (one night only)	\$1.50	\$22.95	\$3.91
Local Transportation	\$3.76	\$5.81	\$3.99
Clothing and Accessories	\$2.63	\$5.38	\$2.94
Groceries and Supplies	\$2.95	\$3.77	\$3.04
Childcare	\$0.59	\$0.73	\$0.60
Other/Miscellaneous	\$1.10	\$3.37	\$1.35
<b>Overall Average Per Person, Per Event</b>	<b>\$31.26</b>	<b>\$69.74</b>	<b>\$35.57</b>

Source: *Arts & Economic Prosperity 6: The Economic and Social Impact Study of Nonprofit Arts and Culture Organizations and Their Audiences in San Diego County*. For more information about this study or about other cultural initiatives in San Diego County, contact the City of San Diego Commission for Arts and Culture.

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Past studies have focused primarily on the financial, economic, and tourism contributions of the nonprofit arts and culture industry. AEP6 expands beyond those topics to include measures of social impact. Surveys completed by individual attendees in the San Diego County demonstrate an appreciation for how the arts and culture impacts the development and well-being of the community and its residents.

### Audiences Demonstrate Appreciation for the Impact of Arts and Culture

Level of Agreement with Social Impact Statements	Audiences
“This venue or facility is an important pillar for me within my community.”	81.6%
“I would feel a great sense of loss if this activity or venue were no longer available.”	85.0%
“This activity or venue is inspiring a sense of pride in this neighborhood or community.”	87.9%
“My attendance is my way of ensuring that this activity or venue is preserved for future generations”	85.1%

#### About This Study

Americans for the Arts conducted AEP6 to document the economic and social benefits of the nation’s nonprofit arts and culture industry. The study was conducted in 373 diverse communities and regions across the country, representing all 50 states and Puerto Rico. **The City of San Diego Commission for Arts and Culture joined the study on behalf of San Diego County.** For additional information including the national report, summaries for the 373 communities, an online calculator, and the project methodology, visit [www.AEP6.AmericansForTheArts.org](http://www.AEP6.AmericansForTheArts.org).

#### Surveys of Nonprofit Arts and Culture Organizations

Nationally, detailed information was collected from 16,399 nonprofit arts and culture organizations about their FY2022 expenditures (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition), as well as their event attendance, in-kind contributions, and volunteerism. Surveys were collected from February through July 2023. Some organizations only provided total expenditures and attendance (they are included in the study). Responding organizations had budgets ranging from a low of \$0 to a high of \$375 million. Response rates for the 373 communities averaged 43.9% and ranged from 5% to 100%. **In San Diego County, 226 of the 699 total eligible nonprofit arts and culture organizations provided the financial and attendance information required for the study analysis—an overall participation rate of 32.3%.** It is important to note that each study region’s results are based solely on the survey data collected. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings.

#### Surveys of Nonprofit Arts and Culture Audiences

Audience-intercept surveying, a common and accepted research method, was conducted to measure event-related spending by audiences. Attendees were asked to complete a short survey while attending an event. Nationally, a total of 224,677 attendees completed the survey. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging, as well as socioeconomic information, ZIP code of primary residence, and four social impact questions. Data was collected from May 2022 through June 2023 at a broad range of both paid and free events. **In San Diego County, a total of 4,636 valid audience-intercept surveys were collected from attendees to nonprofit arts and culture performances, events, exhibits, and special events during the period from May 2022 through June 2023.**

#### Studying Economic Impact Using Input-Output Analysis

Americans for the Arts uses the IMPLAN platform to create the customized models for each of the 373 study regions. Input-output models calculate the interdependencies between various sectors or industries within a region. This analysis traces how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for AEP studies because it can be customized specifically to each participating community, region, or state. **To complete this analysis for San Diego County, the researchers used the IMPLAN platform to build a customized input-output model based on the unique economic and industrial characteristics of San Diego County.**

#### Research Notes:

- <sup>1</sup> For the purpose of this study, local attendees live within San Diego County; nonlocals live elsewhere.
- <sup>2</sup> To calculate the total audience expenditures in San Diego County, first the audience expenditure findings were calculated for each of the participating sub-regions that are located within San Diego County. Next, the residency percentages and the average per person arts-related expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within San Diego County but outside the participating sub-regions. Finally, the results were added to the findings from the individual sub-regions. It is important to note that, as a result, the aggregate audience expenditures for San Diego County do not equal the average per person event-related expenditure for locals multiplied by the total estimated attendance by locals plus the average per person event-related expenditure for nonlocals multiplied by the total estimated attendance by nonlocals.



## The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the City of San Diego, CA (Fiscal Year 2015)

Direct Economic Activity	Arts and Cultural Organizations	+	Arts and Cultural Audiences	=	Total Industry Expenditures
Total Industry Expenditures	\$553,563,393		\$546,370,965		\$1,099,934,358

### Economic Impact of Spending by Arts and Cultural Organizations and Their Audiences

Total Economic Impact of Expenditures	Economic Impact of Organizations	+	Economic Impact of Audiences	=	Total Economic Impact
Full-Time Equivalent (FTE) Jobs Supported	22,513		13,401		35,914
Household Income Paid to Residents	\$516,229,000		\$378,177,000		\$894,406,000
Revenue Generated to <u>Local</u> Government	\$21,577,000		\$26,545,000		\$48,122,000
Revenue Generated to <u>State</u> Government	\$29,322,000		\$38,549,000		\$67,871,000

### Event-Related Spending by Arts and Cultural Audiences Totaled \$546.4 million (excluding the cost of admission)<sup>1</sup>

Attendance to Arts and Culture Events	Resident <sup>2</sup> Attendees	+	Nonresident <sup>2</sup> Attendees	=	All Cultural Audiences
Total Attendance to Arts and Culture Events	8,687,091		3,670,079		12,357,170
Percentage of Total Attendance	70.3%		29.7%		100.0%
Average Event-Related Spending Per Person	\$31.64		\$78.80		\$45.66
<b>Total Event-Related Expenditures</b>	<b>\$206,011,496</b>		<b>\$340,359,469</b>		<b>\$546,370,965</b>

### Nonprofit Arts and Cultural Event Attendees Spend an Average of \$45.66 Per Person (excluding the cost of admission)

Category of Event-Related Expenditure	Resident <sup>2</sup> Attendees	Nonresident <sup>2</sup> Attendees	All Cultural Audiences
Meals and Refreshments	\$19.22	\$27.50	\$21.68
Souvenirs and Gifts	\$3.27	\$7.49	\$4.52
Ground Transportation	\$3.79	\$8.64	\$5.23
Overnight Lodging (one night only)	\$1.99	\$32.26	\$11.00
Other/Miscellaneous	\$3.37	\$2.91	\$3.23
<b>Average Event-Related Spending Per Person</b>	<b>\$31.64</b>	<b>\$78.80</b>	<b>\$45.66</b>

Source: *Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the City of San Diego*. For more information about this study or about other cultural initiatives in the City of San Diego, visit the City of San Diego Commission for Arts and Culture's web site at [www.sandiego.gov/arts-culture](http://www.sandiego.gov/arts-culture).

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## About This Study

This Arts & Economic Prosperity 5 study was conducted by Americans for the Arts to document the economic impact of the nonprofit arts and culture industry in 341 communities and regions (113 cities, 115 counties, 81 multicounty or multicounty regions, 10 states, and 12 individual arts districts)—representing all 50 U.S. states and the District of Columbia. The diverse communities range in population (1,500 to more than 4 million) and type (small rural to large urban). Project economists from the Georgia Institute of Technology customized an input-output analysis model for each participating region to provide specific and localized data on four measures of economic impact: full-time equivalent jobs, household income, and local and state government revenue. These localized models allow for the uniqueness of each local economy to be reflected in the findings.

Americans for the Arts partnered with 250 local, regional, and statewide organizations that represent the 341 study regions (30 partners included multiple study regions as part of their participation). **To complete this customized analysis for the City of San Diego, the City of San Diego Commission for Arts and Culture joined the study as one of the 250 partners.**

## Surveys of Nonprofit Arts and Cultural ORGANIZATIONS

Each of the 250 partner organizations identified the universe of nonprofit arts and cultural organizations that are located in its region(s) using the Urban Institute's National Taxonomy of Exempt Entity (NTEE) coding system, a definitive classification system for nonprofit organizations recognized as tax exempt by the Internal Revenue Code. In addition, the study partners were encouraged to include other types of eligible organizations if they play a substantial role in the cultural life of the community or if their primary purpose is to promote participation in, appreciation for, and understanding of the visual, performing, folk, and literary and media arts. These include government-owned or government-operated cultural facilities and institutions; municipal arts agencies and councils; private community arts organizations; unincorporated arts groups; living collections (such as zoos, aquariums, and botanical gardens); university presenters, programs, and facilities; and arts programs that are embedded under the umbrella of a nonarts organization or facility (such as a hospital or church). In short, if it displays the characteristics of a nonprofit arts and cultural organization, it is included. *For-profit businesses (e.g., Broadway, motion picture theaters) and individual artists were excluded from this study.*

Nationally, data was collected from a total of 14,439 organizations for this study. Response rates among all eligible organizations located in the 341 study regions was 54.0 percent, and ranged from 9.5 percent to 100 percent. Responding organizations had budgets ranging from \$0 to \$785 million (Smithsonian Institution). It is important to note that each study region's results are based solely on the actual survey data collected. There are no estimates made to account for nonresponding organizations. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.

**In the City of San Diego, 137 of the 293 eligible nonprofit arts and cultural organizations participated in this study—an overall participation rate of 46.8 percent.** A list of the participating organizations can be obtained from the City of San Diego Commission for Arts and Culture.

## Surveys of Nonprofit Arts and Cultural AUDIENCES

Audience-intercept surveying, a common and accepted research method, was completed in all 341 study regions to capture information about spending by audiences at nonprofit arts and culture events. Patrons were selected randomly and asked to complete a short survey while attending an event. A total of 212,691 attendees completed the survey. The respondents provided itemized travel party expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging. Data was collected throughout the year to guard against seasonal spikes or drop-offs in attendance, and at a broad range of events (because a night at the opera will typically yield more spending than a Saturday children's theater production). Using total attendance data for 2015 (collected from the participating organizations), standard statistical methods were then used to derive a reliable estimate of total arts event-related expenditures by attendees in each study region.

**In the City of San Diego, a total of 1,261 valid audience-intercept surveys were collected from attendees to nonprofit arts and cultural performances, events, and exhibitions during 2016.**

## Studying Economic Impact Using Input-Output Analysis

To derive the most reliable economic impact data, input-output analysis was used to measure the impact of expenditures by nonprofit arts and cultural organizations and their audiences. This highly-regarded type of economic analysis has been the basis for two Nobel Prizes in economics. The models are systems of mathematical equations that combine statistical methods and economic theory in an area of study called econometrics. The analysis traces how many times a dollar is respent within the local economy before it leaves the community, and it quantifies the economic impact of each of those rounds of spending. Project economists customized an input-output model for each of the 341 participating study regions based on the local dollar flow among 533 finely detailed industries within its economy. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), state and local tax data (e.g., sales taxes, lodging tax, property taxes, income tax, and miscellaneous local option taxes), and the survey data collected from the responding arts and cultural organizations and their audiences.

<sup>1</sup> To calculate the total estimated audience expenditures in the City of San Diego, first the audience expenditure findings for any individual participating study regions that are located within the City of San Diego were summed. Next, the residency percentages and the average per person arts-related expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within the City of San Diego but outside of the individual participating study region(s). Finally, the results were added to the aggregate of the individual participating region(s). Therefore, the total audience expenditures for the City of San Diego do not equal the average per person event-related expenditure for residents multiplied by the total estimated attendance by residents plus the average per person event-related expenditure for nonresidents multiplied by the total estimated attendance by nonresidents.

<sup>2</sup> For the purpose of this study, residents are attendees who live within San Diego County; nonresidents live elsewhere.