

MAY 2009



Charlotte-Mecklenburg
CREATIVE VITALITY INDEX
2008

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SECTION ONE: INTRODUCTION

Overview

This report details the findings of research on the overall health of Charlotte Mecklenberg's arts-related creative economy. The strongest indicator of this health is a region's score on the Creative Vitality Index™ (CVI™). The CVI™ is a robust and inclusive measure of the economic vitality of the arts and arts activities in a specified geographic or political region of the United States. Rigorously constructed and updated annually, a region's CVI™ is a credible and clear data source for arts research and advocacy purposes.

What is an index?

An index is generally an efficient means of summarizing quantities of interrelated information and describing complex relationships. An index can be, as in the case of the CVI™, a single indicator of multiple variables and interaction between these variables. Changes in an index will reflect changes in the data used to generate the index. Standardization and unification of data mean that indexes are ideally suited for comparative analysis. The comparative nature of the CVI has added analytical and policy value.

What is the Creative Vitality Index™?

The Creative Vitality Index™ (CVI™) measures the annual changes in the economic health of an area by integrating economic data streams from both the for-profit and nonprofit sectors. Through per capita measurements of revenue data from both for-profit and nonprofit entities as well as jobs data from a selection of highly creative occupations, the system aggregates the data streams into a single Index value that reflects the relative economic health of a geography's creative economy. The CVI™ provides an easily understandable measure of economic health to help communicate information from a broad arts coalition to policy makers and stakeholders. This longitudinal data allows for compelling year-to-year comparisons as well as cross-city, county, and state comparisons. The system also provides users with a series of reports on the rise and fall of key data factors measured by the Index. The CVI™ goes beyond an annual tally of what is often inflation-driven growth in the non-profit art sector. Instead, it is a more inclusive reporting mechanism that is rooted in robust data streams that reflect the entire arts-based creative economy.

The Creative Vitality Index™ is a resource for informing public policy and supporting the work of advocates for creative economies. CVI™ reports have been used as a way to define the parameters of an area's creative economy and as a means of educating communities about the components and dynamics of a creative economy. The CVI is frequently used as a source of information for arts advocacy messaging and to call attention to significant changes in regional creative economies. This research has also been used to underscore the economic relationships between the for- and nonprofit sectors and as a mechanism for diagnosing a region's creative strengths and weaknesses.

What does the Creative Vitality Index measure?

The CVI measures a carefully selected set of economic inputs related to the arts and creativity in a given geographic area, with measurements of both for-profit and nonprofit arts-related activities. The Index has two major components including measurements of community participation based on per capita revenues of arts-related goods and services, and, measurements of per capita occupational employment in the arts. The weighted indicators within the community participation portion of the Index are: nonprofit arts organization income, nonprofit humanities organizational income, per capita book store sales, per capita music store sales, per capita photography store sales, per capita performing arts revenues, and per capita art gallery and individual artist sales. These indicators account for 60 percent of the overall Index values. A 40 percent weighting has been assigned to occupational employment in the arts that captures the incidence of jobs associated with measurably high levels of creative output.

The rationale for this approach relates to consideration of the cause-and-effect relationship between participation levels and jobs. The underlying theory is that public participation in the arts or public demand for arts experiences and events ultimately is what drives budgets and organizational funding levels, which in turn support artists and art-related jobs within the economy.

Where does Creative Vitality Index data come from?

Index data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics, and Economic Modeling Specialists, Inc (EMSI).

The Urban Institute's National Center for Charitable Statistics aggregates information from the Internal Revenue Service's 990 forms. The forms are required to be submitted by nonprofit 501(c) organizations with annual gross receipts of \$25,000 or more, though organizations with less revenues will also report on a case by case basis.

EMSI uses a proprietary economic modeling technique to capture industry and occupational employment data. A brief synopsis of the data sources employed in this model are outlined as follows:

Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau.

Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

Report Organization

There are three sections to this report following the introduction: 1) a preview of key research findings; 2) a detailed report on the creative vitality of this region; and 3) a thorough overview of the CVI™ and its potential uses. Findings in the data preview section include the CVI™ of the study region compared to the nation and additional regions of interest. Additionally, select economic figures from the index are presented. Detailed description and analyses of the data are documented in the subsequent technical report section. The fourth section outlines the original project's core assumptions, reports on the construction and rationale for the formulae used to arrive at an Index value, and provides a rationale for the use of various annual streams of data that undergird the CVI™. Here you will also find suggested uses for the CVI™.

Note on changes between prior year and current year Charlotte Mecklenburg CVI™ report

Since the last Creative Vitality Index™ report, there have been several changes within the CVI™ methodology, resulting in a small shift in the overall CVI values for Charlotte Mecklenburg. These changes included the omission of movie theater sales figures and the inclusion of a number of performing arts participation measurements as well as revenues

from individual artists, writers and performers. WESTAF researchers made these methodological changes after examining multiple years of data over a number of geographies, along with recommendations within an audit of CVI™ data performed by Economic Modeling Specialists, Inc. Additionally, employment included in the current year report shows full-time, part-time and the self employed by county. Given large percentages of self employment within creative occupations, the inclusion of this full data set was seen as a more appropriate measure

First, WESTAF researchers had found information on movie theater sales to be volatile, showing the greatest variation and standard deviations out of all measurements within the CVI™. Research into the motion picture industry showed general volatility due to individual motion pictures from year to year and the overall economic condition of an area. Given this data and analysis, it was determined that these particular sales figures were not the best data to report, given the intentions of the CVI™ to measure creative participation within a geographic area. Recommendations from EMSI noted the need for additional measurements for arts-services, given the already substantial contribution of arts-related goods in the CVI™. Substituted for movie theater sales is the inclusion of multiple performing arts revenue inputs, including revenues from local theater and dance companies, both for-profit and non-profit, and the reported revenues of musicians. Additionally, the index now captures revenues for independent artists, writers and performers, a measurement included to show the often large economic contribution of these independent artists. Unfortunately, these changes have caused a slight downward shift in the overall CVI™ for the Charlotte Mecklenburg region. In the prior CVI™ report, these figures were reported as 0.77 for 2006 and 0.76 for 2007. In this report, these figures are now reported as 0.74 and 0.73, respectively. Additionally, there are several shifts within the individual county CVI™ numbers due to these changes.

WESTAF believes that the data changes, create a more accurate sample of creative economic activity within a region and given the implementation of these changes on a national basis, Charlotte Mecklenburg will benefit from the inclusion of additional comparative reporting. The usefulness of these comparisons is heightened by the recent completion of the statewide North Carolina CVI™ report.

SECTION TWO: DATA PREVIEW

A region's Creative Vitality Index™ value is compared to a national baseline score of 1.00. For example, a locality with a CVI™ value of 1.30 has a stronger creative vitality score than the nation as a whole by 30%. A CVI™ compared to a specific region—a county, state, or combined area—can also be generated. The unique geographic sensitivity of this measure means that arts advocates and policy makers have a clear and concise understanding of their particular region.

Charlotte Mecklenburg Region to the United States, 2008: 0.72

Interpretation: The value of 0.72 reflects the strength of the region's creative economy compared to the nation. This pattern is consistent from 2006-2008, showing the region's CVI™ marginally decreasing from 0.74 to 0.72 over the three year period. While all inputs included are below 1.00 when compared to the nation, the region's best performing individual CVI™ values include sales of musical instruments, sales of records and books, along with per capita employment within the creative economy.

Charlotte Mecklenburg Region to North Carolina: 1.12

Interpretation: The value reflects the greater strength of the region's creative economy compared to the state. When comparing the Charlotte Mecklenburg region to the state of

North Carolina, the creative significance of this region within the state is realized. Here, each CVI™ category is above 0.90 and only photography store sales and arts-active organizations fall below the 1.00 mark.

Charlotte Mecklenburg Region to Southern Arts Federation States: 1.05

Interpretation: The values reflect the greater strength of the region's creative economy compared to a region including the nine states that are members of the Southern Arts Federation. The region's CVI™ is nearly twice that of the state. Here, Charlotte's comparative individual CVI™ figures are improved within the measurements of photography store sales and arts-active organizations, though values related to art galleries, individual artist sales and performing arts participation decrease.

Charlotte-Gastonia-Rock Hill MSA to the United States: 0.95

Interpretation: This measurement includes the five counties included within the Charlotte Metropolitan Statistical Area (Anson, Cabarrus, Gaston, Mecklenburg, Union & York) compared to the United States as the baseline 1.00 value. The CVI™ value of 0.95 shows the relative strength of the Charlotte region compared to the country. This value shows the relatively higher CVI™ values of the five county region closest to Charlotte when compared with the 0.72 CVI™ value of the region as a whole. The Charlotte MSA scores higher than Atlanta, New Orleans and is near the Chicago MSA CVI™ value (see Table #3).

Data Highlights

CVI™ data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics, and Economic Modeling Specialists, Inc (EMSI). Section four of this report details these data streams. The totality of data from these streams is presented in the following section. Select data points in this region, for example, are the following:

- **There are over 29,000 creative jobs in the Charlotte Mecklenburg Region.**
- **Nearly 17,000 of these are in Mecklenburg County.**
- **Mecklenburg County's Creative Vitality Index value exceeds the national baseline by nearly 30%.**
- **In 2007, arts related non profit organizations in the 13 county Charlotte Mecklenburg region generated over \$134 million in revenues from programs, investments, special events, contributions and dues. In 2008, this number increased to over \$155 million.**
- **For 2008, 185 nonprofit organizations reported to the IRS and were classified as Arts, Culture & Humanities.**
- **Nonprofit arts organizations primarily engaged in artistic endeavors in Charlotte Mecklenburg increased from \$71.5 million to \$80.9 million between 2006 and 2007. This increase was less dramatic in 2008, with revenues increasing to \$82.2 million. Given the downturn in the economy, these organizations remained relatively stable.**
- **Per capita bookstore and record store sales in the Charlotte Mecklenburg region equated to approximately \$59 million in 2006 and \$52 million in 2007. In 2008, these sales actually increased to \$53.6 million, despite the downturn in the**

economy.

- Both Mecklenberg and Gaston Counties were above the national average for per capita sales among book and record retailers.
- Art gallery sales again increased significantly in Charlotte Mecklenburg, from \$9.7 million in 2006 to \$13.7 million in 2007, to \$15.7 million in 2008.
- Musical instrument sales in the Charlotte Mecklenburg area also trended upward, moving from \$19.2 million in 2006 to \$21.6 in 2007 to \$23.0 million in 2008. This Index value also increased from 0.76 to 0.81 to 0.97 over the past three years.
- The Occupational Index for the Arts for the Charlotte Mecklenburg defined region was 0.87 for 2008
- Job totals in the region decreased slightly in 2008, though still show an increase of 1.65% between 2006 and 2008
- The Occupational Index for Mecklenburg County was the strongest of all regions at 1.32. Cabarrus County also showed regional strengths at 0.91
- Between 2006 and 2008, creative jobs increased by 12% in Rowan County, by 6.5% in Lincoln County and 9% in Union County
- The data indicates that in 2008, the Charlotte Mecklenburg region had particular strengths in the following occupational categories: Architects, except landscape and naval; Interior designers; Musicians and singers; Public relations managers; Media and communication workers; Broadcast technicians; Film and video editors; Musical instrument repairers and tuners; Dancers; Sound Engineering Technicians; and, Directors of Religious Activities

SECTION THREE: CREATIVE VITALITY REPORT

This section of the report identifies Charlotte Mecklenberg's comparative CVI™ values and provides detailed tables for each aspect of the CVI™, including detailed industry, non-profit and employment information. This detailed information gives a more in-depth picture of the elements making up Charlotte Mecklenberg's creative economy as captured by the CVI™.

Within the CVI™, the figure "1.00" acts as a national baseline for which localities can be measured against. Thus, an index value of "1.00" means a locality is essentially "on par" with the nation. Overall, the index provides a relative indication of creative strengths as measured against consistent national data sets. While a region may not be at the "1.00" level, this does not mean an absence of activity. Here, it can be useful to look at the relative strength of the categorical index values being examined. Additionally, looking at refined state and regional contexts can give valuable insight to how a particular "low performing" region may actually be contributing within a state and regional economy.

Some key terms are used in this section:

Index: summarizes multiple sources of data into a single indicator, using one number to describe a complex set of variables, activities, and events. A few of the best-known indexes are the Dow Jones Industrial Average, the Body Mass Index (BMI) and the Consumer Price Index (CPI).

Per Capita: most simply put, per capita means the average per person. In the context of the CVI™, per capita is referring to the ratio of the CVI™ input, such as industry revenues, nonprofit revenues and jobs, to the number of people within the study area.

CVI™ a comparative indicator of a region's creative vitality, including nonprofit and for-profit arts activities; it reflects the relative economic health of a region's creative economy.

Arts Organizations: organizations that have primary missions related to serving or presenting the arts. These organizations include traditionally subsidized arts organizations such as art museums, symphonies, operas, and ballets.

Arts-Active Organizations: organizations that do not have primary missions related to serving or presenting the arts, but do conduct a number of activities that can be considered "arts-based." For example, within any history museum, there is a significant amount of arts activities associated with exhibit design; the concept reflects a widely accepted trend in arts research to consider how certain creative activities and occupations that do not directly produce art, but are creative and artistic in nature, deserve recognition as vital parts of a creative economy.

Location Quotient (LQ): an index value for each occupation, measuring whether or not there is a per capita concentration of an occupation within the area being measured; LQs are given for both the state and the nation, showing the relative concentration of employment for an area when compared with the state and with the nation.

The Charlotte Mecklenburg Vitality Index

The Charlotte Mecklenburg Creative Vitality Index™ for 2008 was 0.72, down slightly from 0.73 in 2007, and 0.74 in 2006. Out of the specified 13 county region, Mecklenburg County showed the strongest Creative Vitality Index™, which was calculated as nearly 30% greater than the nation as a whole. While no other county eclipsed the 1.00 barrier, strengths were shown in Gaston, Catawba and Cabarrus counties. While these indexes are below 1.00, they do indicate that activity is present and there is potential to build on current activities. The Gaston County CVI™ showed the highest growth rate from 2007 to 2008, in which the index grew from 0.42 in 2007 to 0.57 in 2008. Anson County, which showed the largest downward trend from 2006 to 2007, increased slightly in 2008, though this third year of data shows that the CVI™ value is likely to stabilize near the 0.17 to 0.19 values. Given these trends, it could be beneficial for the Arts & Sciences Council to investigate factors within these counties that may have led to these trends.

Table# 1
Charlotte Mecklenburg Region CVI Values 2006-2008 (Summary)

Region	Index 2006	Index 2007	Index 2008
Charlotte Mecklenburg CVI Region	0.74	0.73	0.72
Totals	0.74	0.73	0.72

Source: WESTAF, Charlotte Mecklenburg CVI 2008

Table# 2
Charlotte Mecklenburg Region CVI Values 2006-2008

Region	Index 2006	Index 2007	Index 2008
Charlotte Mecklenburg CVI Region			
Union	0.30	0.30	0.30
Stanly	0.28	0.33	0.32
Rowan	0.26	0.24	0.24
Mecklenburg	1.31	1.29	1.28
Lincoln	0.21	0.24	0.24
Iredell	0.32	0.33	0.33
Gaston	0.52	0.42	0.57
Catawba	0.52	0.50	0.45
Cabarrus	0.54	0.65	0.59
Anson	0.35	0.17	0.19
Alexander	0.31	0.30	0.30
Chester	0.15	0.15	0.15
York	0.42	0.41	0.38
Totals	0.74	0.73	0.72

Source: WESTAF, Charlotte Mecklenburg CVI 2008

Comparison of the Charlotte Metropolitan Statistical Area (MSA)

Table #3 shows CVI™ comparison data for the Charlotte MSA, to ten additional MSAs including; Atlanta, Chicago, New Orleans, Raleigh, San Francisco, Seattle, Nashville, Denver, Jacksonville and Portland. MSAs have been identified as appropriate comparison areas given the oft-regional relationship of creative economies. The US Census Bureau defines an MSA as a geographic entity that is defined by the U.S. Office of Management and Budget (OMB) for statistical use. MSAs contain one or more counties with a core urban area and neighboring counties that are highly socially and economically integrated.

Here, the Charlotte MSA scores higher than Atlanta, New Orleans and is near the Chicago MSA CVI™.

A note on CVI™ values, population density, and regional sensitivity is important here. The CVI™ measures the concentration of creative economic activities within a geographic area. While concentration rates, and thus an Index value, can be affected by changes in the size of the region being studied, CVI™ values are not necessarily tied to population and population density. For example, some states with low population numbers, such as Alaska, Wyoming, and Nevada, have high CVI™ values when compared to states with much higher populations and urban concentrations. Conversely, areas with high populations or population densities do not consistently have high CVI™ values. Certainly, the complexities of urban, suburban and rural geographies and demographics play a role in the creativity and vibrancy of a region. The adjustable sensitivity of the CVI™ to precise regions is a considerable strength of this measure.

Table# 3
Charlotte MSA Compared 2006 to 2008 (Summary)

Region	Index 2006	Index 2007	Index 2008
Atlanta-Sandy Springs-Marietta, GA MSA	0.92	0.93	0.89
Charlotte-Gastonia-Rock Hill, NC-SC MSA	0.97	0.95	0.95
Chicago-Naperville-Joliet, IL-IN-WI MSA	1.03	1.00	0.98
Denver-Aurora-Broomfield, CO MSA	1.26	1.28	1.22
Jacksonville, FL MSA	0.71	0.72	0.73
Nashville-Davidson–Murfreesboro–Fran..	2.13	2.03	1.97
New Orleans-Metairie-Kenner, LA MSA	1.02	0.95	0.91
Portland-Vancouver-Hillsboro, OR-WA MS	1.16	1.12	1.17
Raleigh-Cary, NC MSA	1.03	0.97	1.02
San Fransisco-Oakland-Fremont, CA MSA	1.67	1.69	1.65
Seattle-Tacoma-Bellevue, WA MSA	1.40	1.38	1.43
Totals	1.23	1.21	1.19

Source: WESTAF, Charlotte Mecklenberg CVI 2008

Creative Vitality Index by Year

The following tables summarize data for the Charlotte Mecklenburg Region for the years 2006 through 2008. The data show both local and national trends for data fields included within the CVI™. The longitudinal data reveal interesting trends related to how creative industries and nonprofits fared within this region when compared to the rest of the nation. Fluctuations in the index should be considered along side general local, regional, and national trends. The nature of the index accounts for both the influence of national trends and inflation by recalculating national comparison data in each year. This comparative mechanism allows for an accurate description of local and regional trends while accounting for the influence of national changes. Sources for the variation of the index in each year are shown within the individual data streams.

Charlotte Mecklenburg CVI™ Values and Calculations 2006 through 2008

Tables #4 through #6 shows the summarized data versus against the national average from 2006 through 2008. The index remained relatively constant from 2006-08, though data indicates a small downward trend. However, there is some important variance in the individual index categories illustrated in Tables #4 through #6. Music, Arts-Active Organizations and Book and Record store sales show increasing values, while Art Gallery, Individual Artist Sales, Performing Arts Participation, Photography stores, Arts Organizations and Jobs all show decreasing values. The nonprofit data reveals exceptionally high index values.

While there is variation among CVI™ values, 2008 data shows that musical instrument store sales, book and record store sales, jobs and arts organization revenues are the strengths of Charlotte's creative economy.

Table# 4
Charlotte Mecklenburg CVI 2006 Summary

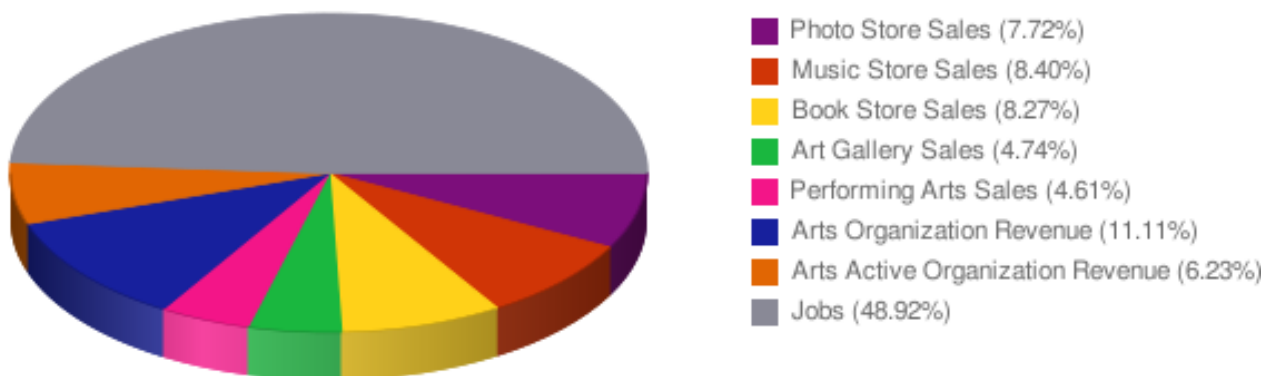
Region A: Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Region B: United States

Description	Region A	Region B	CVI	Weightage	CVI-Contribution
Year - 2006					
Population	2,218,077	298,754,819			
Industry Data					
Photography Store Sales	\$9,227,000	\$1,735,991,000	0.716	8%	0.057
Music Store Sales	\$19,750,000	\$3,412,515,000	0.780	8%	0.062
Book and Record Store Sales	\$59,209,000	\$10,427,520,000	0.765	8%	0.061
Art Gallery and Individual Artist Sales	\$105,294,000	\$32,327,946,000	0.439	8%	0.035
Performing Arts Participation	\$40,194,000	\$12,904,417,000	0.420	8%	0.034
Non Profit Data					
Arts Organization Revenue	\$74,392,664	\$12,252,800,650	0.818	10%	0.082
Arts-Active Organization Revenue	\$44,811,543	\$13,035,027,058	0.463	10%	0.046
Occupation Data					
Total Jobs	28,772	4,297,609	0.902	40%	0.361
Total CVI : 0.738					

Source: WESTAF, Charlotte Mecklenberg CVI 2008

Chart# 1
Charlotte Mecklenberg CVI 2006 Summary



Source: WESTAF, Charlotte Mecklenberg CVI 2008

Table# 5
Charlotte Mecklenburg CVI 2007 Summary

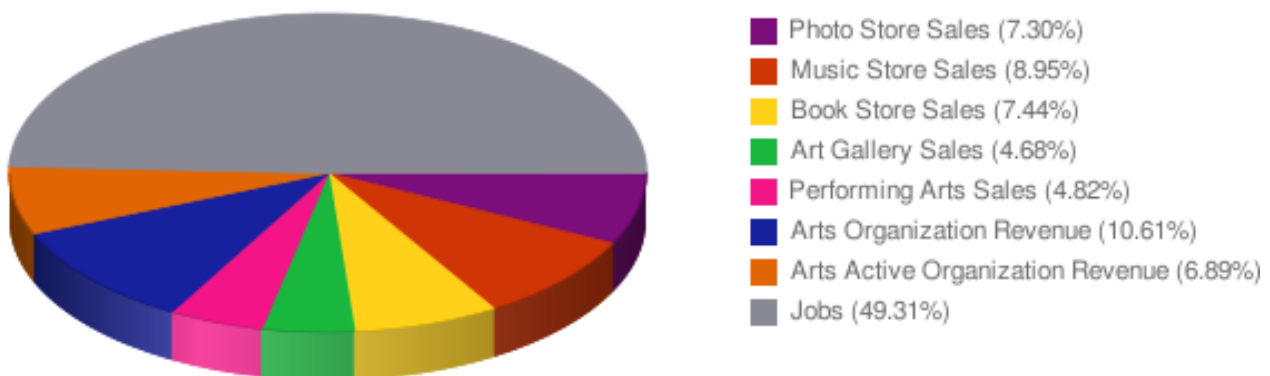
Region A: Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Region B: United States

Description	Region A	Region B	CVI	Weightage	CVI-Contribution
Year - 2007					
Population	2,297,270	301,621,157			
Industry Data					
Photography Store Sales	\$9,203,000	\$1,824,665,000	0.662	8%	0.053
Music Store Sales	\$21,442,000	\$3,439,717,000	0.818	8%	0.065
Book and Record Store Sales	\$52,101,000	\$10,068,675,000	0.679	8%	0.054
Art Gallery and Individual Artist Sales	\$109,380,000	\$33,443,706,000	0.429	8%	0.034
Performing Arts Participation	\$44,933,000	\$13,484,589,000	0.437	8%	0.035
Non Profit Data					
Arts Organization Revenue	\$80,216,950	\$13,758,446,825	0.766	10%	0.077
Arts-Active Organization Revenue	\$53,916,497	\$14,258,757,702	0.496	10%	0.050
Occupation Data					
Total Jobs	29,574	4,342,725	0.894	40%	0.358
Total CVI : 0.726					

Source: WESTAF, Charlotte Mecklenberg CVI 2008

Chart# 2
Charlotte Mecklenberg CVI 2007 Summary



Source: WESTAF, Charlotte Mecklenberg CVI 2008

Table# 6
Charlotte Mecklenburg CVI 2008 Summary

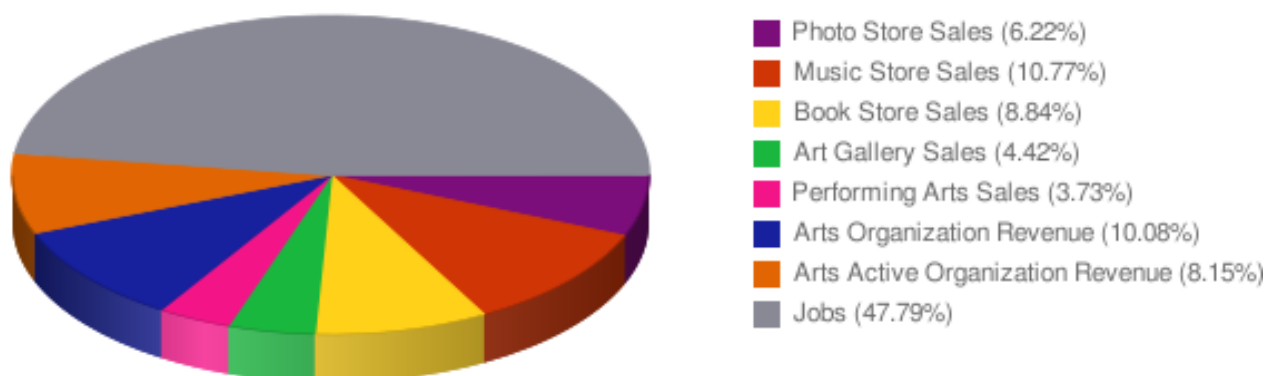
Region A: Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Region B: United States

Description	Region A	Region B	CVI	Weightage	CVI-Contribution
Year - 2008					
Population	2,356,977	304,059,724			
Industry Data					
Photography Store Sales	\$6,180,000	\$1,426,736,000	0.559	8%	0.045
Music Store Sales	\$23,061,000	\$3,064,022,000	0.971	8%	0.078
Book and Record Store Sales	\$53,625,000	\$8,640,277,000	0.801	8%	0.064
Art Gallery and Individual Artist Sales	\$105,728,000	\$34,129,019,000	0.400	8%	0.032
Performing Arts Participation	\$36,880,000	\$14,086,245,000	0.338	8%	0.027
Non Profit Data					
Arts Organization Revenue	\$82,212,845	\$14,520,426,857	0.730	10%	0.073
Arts-Active Organization Revenue	\$73,109,817	\$16,107,694,069	0.586	10%	0.059
Occupation Data					
Total Jobs	29,247	4,361,087	0.865	40%	0.346
Total CVI : 0.724					

Source: WESTAF, Charlotte Mecklenburg CVI 2008

Chart# 3
Charlotte Mecklenburg CVI 2008 Summary



Source: WESTAF, Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Compared with North Carolina

Table #7 illustrates the strength of Charlotte Mecklenburg's creative economy when compared to the state. Here the region shows areas of strength across within every CVI™ category, when the state of North Carolina is used as the 1.00 baseline. Interestingly, the highest individual CVI values in Table #7 are shown within Performing Arts Participation (1.312) and Arts Organization Revenues (1.444). These two data points show that Charlotte is an important center for large non-profit arts and performing arts organizations in the state.

Table# 7
Charlotte Mecklenburg vs. North Carolina CVI 2008 Summary

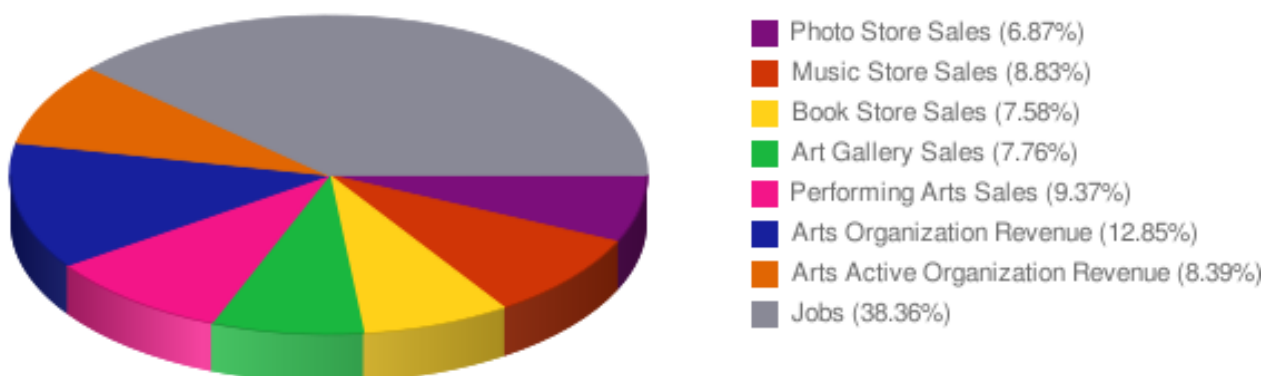
Region A: Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Region B: North Carolina

Description	Region A	Region B	CVI	Weightage	CVI-Contribution
Year - 2008					
Population	2,356,977	9,222,414			
Industry Data					
Photography Store Sales	\$6,180,000	\$25,238,000	0.958	8%	0.077
Music Store Sales	\$23,061,000	\$73,164,000	1.233	8%	0.099
Book and Record Store Sales	\$53,625,000	\$197,095,000	1.065	8%	0.085
Art Gallery and Individual Artist Sales	\$105,728,000	\$381,265,000	1.085	8%	0.087
Performing Arts Participation	\$36,880,000	\$109,969,000	1.312	8%	0.105
Non Profit Data					
Arts Organization Revenue	\$82,212,845	\$222,757,493	1.444	10%	0.144
Arts-Active Organization Revenue	\$73,109,817	\$303,249,345	0.943	10%	0.094
Occupation Data					
Total Jobs	29,247	106,340	1.076	40%	0.430
Total CVI : 1.121					

Source: WESTAF, Charlotte Mecklenberg CVI 2008

Chart# 4
Charlotte Mecklenburg vs. North Carolina CVI 2008 Summary



Source: WESTAF, Charlotte Mecklenberg CVI 2008

Table# 8
Charlotte Mecklenburg vs. SAF States CVI 2008 Summary

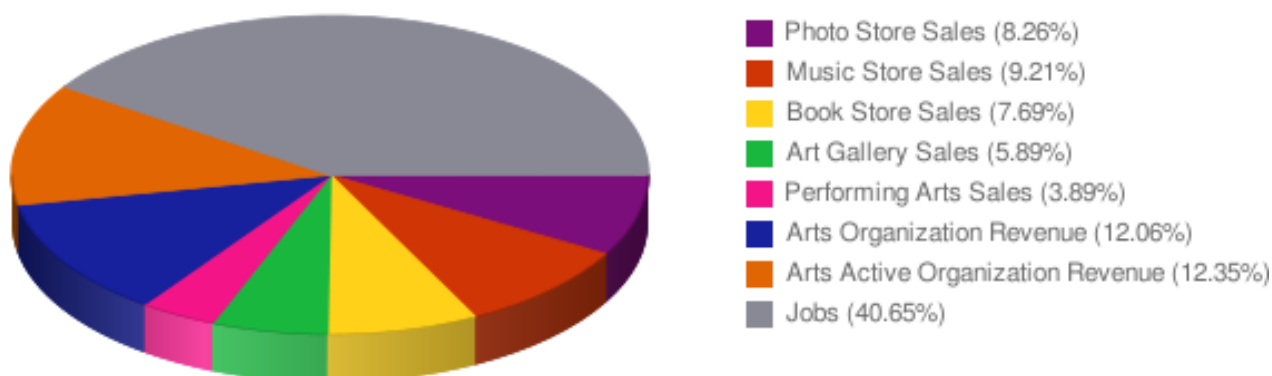
Region A: Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Region B: Tennessee, South Carolina, North Carolina, Mississippi, Louisiana, Kentucky, Georgia, Florida, Alabama

Description	Region A	Region B	CVI	Weightage	CVI-Contribution
Year - 2008					
Population	2,356,977	64,211,745			
Industry Data					
Photography Store Sales	\$6,180,000	\$154,159,000	1.092	8%	0.087
Music Store Sales	\$23,061,000	\$516,249,000	1.217	8%	0.097
Book and Record Store Sales	\$53,625,000	\$1,437,249,000	1.016	8%	0.081
Art Gallery and Individual Artist Sales	\$105,728,000	\$3,743,706,000	0.769	8%	0.062
Performing Arts Participation	\$36,880,000	\$1,943,474,000	0.517	8%	0.041
Non Profit Data					
Arts Organization Revenue	\$82,212,845	\$1,763,899,636	1.270	10%	0.127
Arts-Active Organization Revenue	\$73,109,817	\$1,536,961,121	1.296	10%	0.130
Occupation Data					
Total Jobs	29,247	745,598	1.069	40%	0.428
Total CVI : 1.053					

Source: WESTAF, Charlotte Mecklenberg CVI 2008

Chart# 5
Charlotte Mecklenburg vs. SAF States CVI 2008 Summary



Source: WESTAF, Charlotte Mecklenberg CVI 2008

Nonprofit Organizations by Type 2008

Table #9 shows Arts Organizations by Type in 2008. High CVI™ values for Performing Arts Participation in this region when compared with the state may be partly explained in Table #9 by the percentage share of theater organizations. In the arts-active category, Historical Societies/ Historic Preservation and Cultural/Ethnic Awareness organizations both represented over 13% of all organizations. Organizations reporting generically as “Historical

Organizations” made up the highest percentage share overall at over 18%.

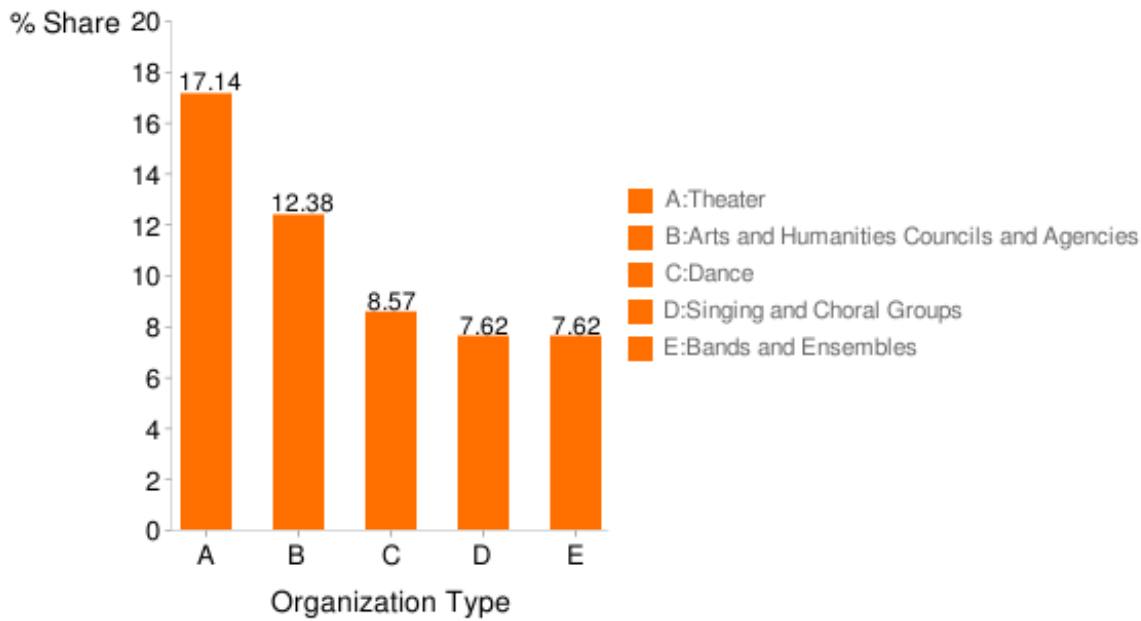
Table# 9
Charlotte Mecklenburg Region Organization Counts 2008

Regions : Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Arts Organizations 2008	Number	Share	Arts-Active Organizations 2008	Number	Share
Art Museums	5	4.76%	Other Arts & Culture Organizations	0	0.00%
Arts & Culture	3	2.86%	Fund Raising & Fund Distribution	2	2.47%
Arts & Humanities Councils & Agencies	13	12.38%	Management & Technical Assistance	1	1.23%
Arts Education	5	4.76%	Professional Societies & Associations	1	1.23%
Arts Services	1	0.95%	Single Organization Support	6	7.41%
Alliances & Advocacy	1	0.95%	Other Arts & Culture Support Organizations	0	0.00%
Ballet	4	3.81%	Children's Museums	1	1.23%
Bands & Ensembles	8	7.62%	Commemorative Events	1	1.23%
Dance	9	8.57%	Community Celebrations	1	1.23%
Film & Video	1	0.95%	Cultural/Ethnic Awareness	11	13.58%
Folk Arts	1	0.95%	Fairs	2	2.47%
Music	7	6.67%	Folk Arts Museums	0	0.00%
Opera	3	2.86%	Historical Organizations	15	18.52%
Performing Arts	3	2.86%	Historical Societies & Historic Preservation	11	13.58%
Performing Arts Centers	4	3.81%	History Museums	6	7.41%
Singing & Choral Groups	8	7.62%	Humanities	3	3.70%
Symphony Orchestras	7	6.67%	Media & Communications	0	0.00%
Theater	18	17.14%	Museums	9	11.11%
Visual Arts	4	3.81%	Natural History & Natural Science Museums	0	0.00%
	0	0.00%	Performing Arts School	4	4.94%
	0	0.00%	Printing & Publishing	3	3.70%
	0	0.00%	Radio	1	1.23%
	0	0.00%	Research Institutes & Public Policy Analysis	0	0.00%
	0	0.00%	Science & Technology Museums	2	2.47%
	0	0.00%	Television	1	1.23%
Totals	105	100%	Totals	81	100%

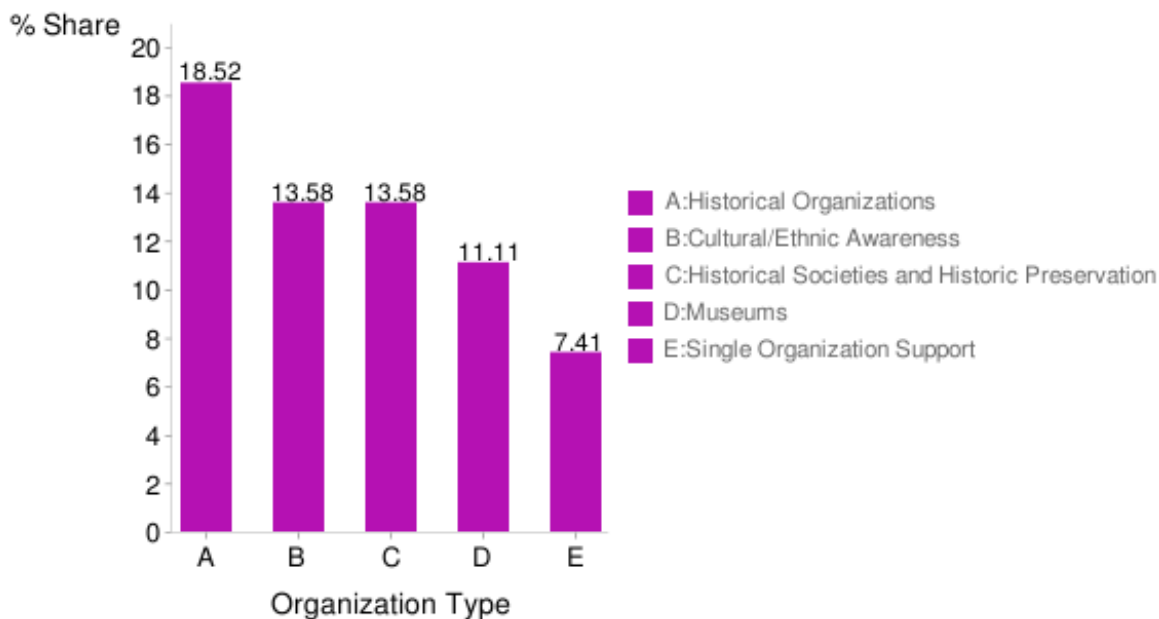
Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenburg CVI 2008

Chart# 6
Charlotte Mecklenburg Region Organization Counts 2008



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenberg CVI 2008

Chart# 7



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenberg CVI 2008

Arts Organization Income and Index 2008

Arts organizations are generally qualified within the CVI™ as organizations with a primary mission in presenting or serving mediums that are traditionally categorized as "the arts." These types of organizations include the traditionally subsidized arts such as visual arts museums, the symphony, the opera, the ballet and the theater. Organization revenues being measured within this study can be affected by the number of organizations reporting from year to year, categorization and general reporting errors as submitted by individual agencies, disbursements

of federal grants, and individual organization fundraising efforts, such as capital campaigns. Generally, these fluctuations are occurring throughout nonprofit revenue measurements across the nation as reported in this study. Due to this, the annual index values provide a more informative indicator of nonprofit organization health, rather than the total revenue figures. Although, revenue figures as aggregated within this study provide a substantive approximation of dollar amounts going to nonprofit arts organizations within a reporting period. Within the 2008 database, \$82,212,845 in revenues were reported for nonprofit arts-active organizations. As shown, the greatest proportion of these revenues came from the categories Program Revenues and Contributions, Gifts, and Grants. The overall index value compared with the nation was 0.73.

Table# 10
Charlotte Mecklenburg Arts Organization Income 2008 (Summary)

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Charlotte Mecklenburg CVI..	\$28,528,313	\$5,106,738	\$2,149,993	\$45,447,888	\$979,913	\$82,212,845
Totals	\$28,528,313	\$5,106,738	\$2,149,993	\$45,447,888	\$979,913	\$82,212,845

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenburg CVI 2008

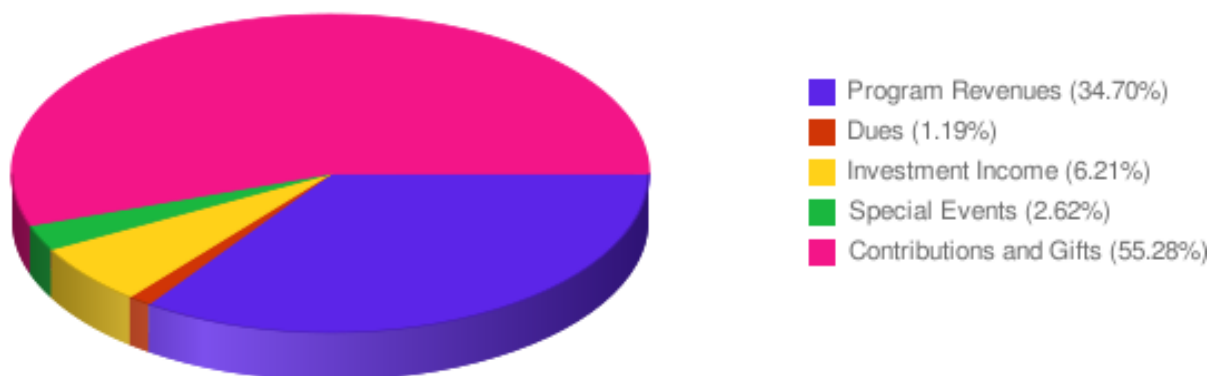
Table# 11
Charlotte Mecklenburg Arts Organization Income 2008

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Charlotte Mecklenburg CVI Region						
Union	\$23,241	\$13,683	\$79,060	\$449,579	\$0	\$565,563
Stanly	\$134,336	\$2,053	\$82,218	\$141,278	\$1,165	\$361,050
Rowan	\$327,286	\$19,439	\$32,213	\$913,937	\$20,961	\$1,313,836
Mecklenburg	\$25,740,699	\$4,763,633	\$1,282,804	\$40,028,373	\$824,451	\$72,639,960
Lincoln	\$7,314	\$5,756	\$73,615	\$292,031	\$27,334	\$406,050
Iredell	\$54,614	\$258	\$0	\$2,691	\$0	\$57,563
Gaston	\$54,214	\$14,522	\$90,317	\$518,070	\$65,474	\$742,597
Catawba	\$661,564	\$251,324	\$404,114	\$1,652,273	\$24,635	\$2,993,910
Cabarrus	\$124,084	\$7,515	\$25,169	\$807,624	\$0	\$964,392
Anson	\$15,787	\$11,297	\$14,092	\$45,956	\$0	\$87,132
Alexander	\$0	\$0	\$0	\$0	\$0	\$0
Chester	\$550	\$0	\$1,840	\$6,255	\$4,233	\$12,878
York	\$1,384,624	\$17,258	\$64,551	\$589,821	\$11,660	\$2,067,914
Totals	\$28,528,313	\$5,106,738	\$2,149,993	\$45,447,888	\$979,913	\$82,212,845

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenburg CVI 2008

Chart# 8

Charlotte Mecklenburg Arts Organization Income 2008



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Table# 12

Charlotte Mecklenburg Arts Organization Index 2008 (Summary)

Region	Total Revenues	Per Capita	Index
Charlotte Mecklenburg CVI Region	\$82,212,845	34.88	0.73
Totals	\$82,212,845	34.88	0.73

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Table# 13

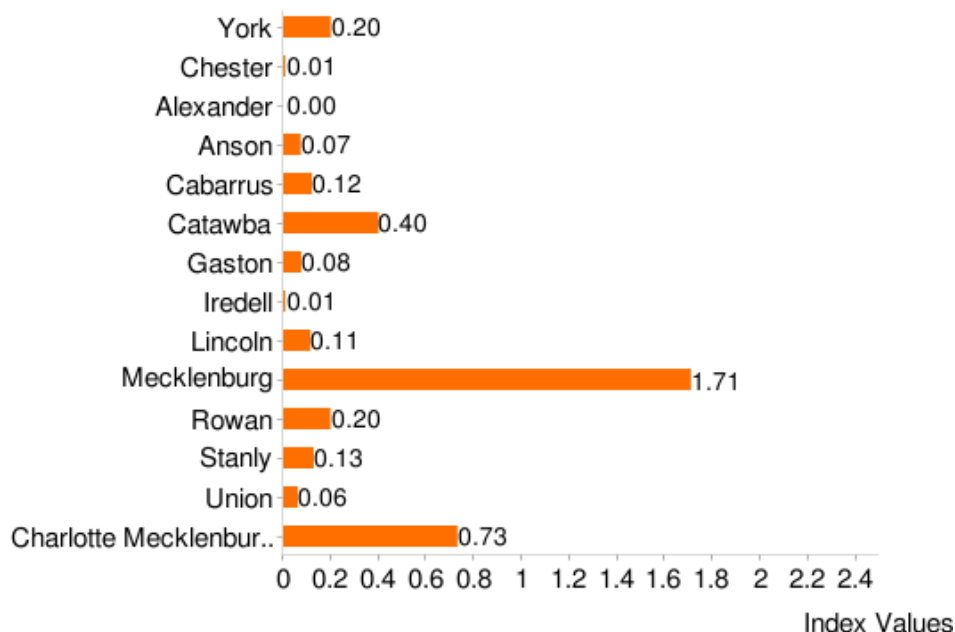
Charlotte Mecklenburg Arts Organization Index 2008

Region	Total Revenues	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$565,563	2.93	0.06
Stanly	\$361,050	6.06	0.13
Rowan	\$1,313,836	9.44	0.20
Mecklenburg	\$72,639,960	81.57	1.71
Lincoln	\$406,050	5.43	0.11
Iredell	\$57,563	0.37	0.01
Gaston	\$742,597	3.59	0.08
Catawba	\$2,993,910	19.06	0.40
Cabarrus	\$964,392	5.72	0.12
Anson	\$87,132	3.46	0.07
Alexander	\$0	0.00	0.00
Chester	\$12,878	0.39	0.01
York	\$2,067,914	9.51	0.20
Totals	\$82,212,845	34.88	0.73

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Chart# 9

Charlotte Mecklenburg Arts Organization Index 2008



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Arts-Active Organization Income and Index 2008

Arts-active organizations are generally qualified within the CVI™ as organizations that do not have primary missions related to serving or presenting the arts, but do conduct a number of activities that can be considered "arts-based." For example, within any history museum, there is a significant amount of arts activities associated with exhibit design. Additionally, there are inherently close ties between humanities, culture and the arts. Within the 2008 database, \$73,109,817 in revenues were reported for nonprofit arts-active organizations. As shown, the greatest proportion of these revenues came from the categories Program Revenues and Contributions, Gifts, and Grants. The overall index value compared with the nation was 0.59.

Organization revenues being measured within this study can be affected by the number of organizations reporting from year to year, categorization and general reporting errors as submitted by individual agencies, disbursements of federal grants, and individual organization fundraising efforts, such as capital campaigns. Generally, these fluctuations are occurring throughout nonprofit revenue measurements across the nation as reported in this study. Due to this, the annual index values provide a more informative indicator of nonprofit organization health, instead of the total revenue figures. Though, revenue figures as aggregated within this study provide a substantive approximation of dollar amounts going to nonprofit arts organizations within a reporting period.

Table# 14

Charlotte Mecklenburg Arts-Active Organization Income 2008 (Summary)

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Charlotte Mecklenburg CVI..	\$11,073,737	\$1,747,227	\$2,401,323	\$55,863,138	\$2,024,392	\$73,109,817
Totals	\$11,073,737	\$1,747,227	\$2,401,323	\$55,863,138	\$2,024,392	\$73,109,817

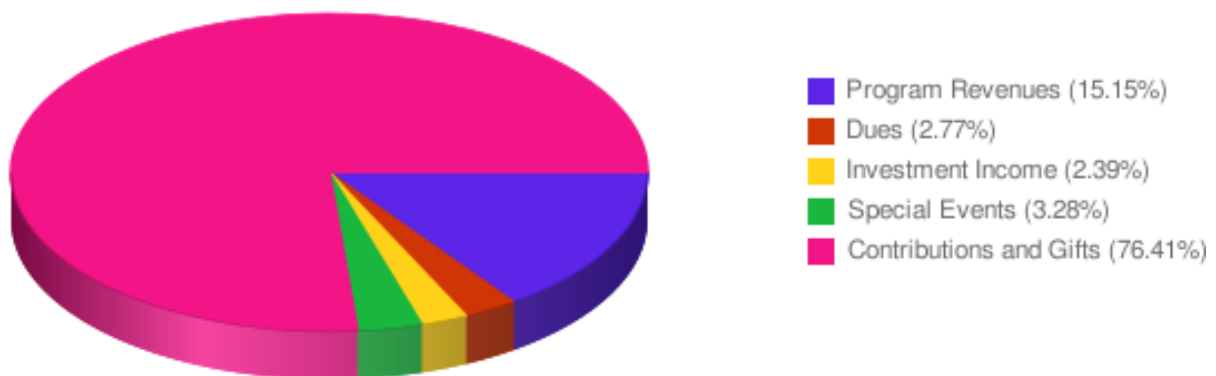
Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenburg CVI 2008

Table# 15
Charlotte Mecklenburg Arts-Active Organization Income 2008

Region	Program Revenues	Investment Income	Special Events	Contributions, Gifts & Grants	Membership Dues	Total Revenues
Charlotte Mecklenburg CVI Region						
Union	\$30,611	\$41	\$27,907	\$162,422	\$1,045	\$222,026
Stanly	\$0	\$0	\$0	\$11,147	\$0	\$11,147
Rowan	\$249,310	\$221,916	\$654,247	\$798,543	\$110,248	\$2,034,264
Mecklenburg	\$9,045,978	\$1,128,575	\$1,118,335	\$44,723,023	\$1,299,291	\$57,315,202
Lincoln	\$0	\$0	\$0	\$0	\$0	\$0
Iredell	\$31,426	\$15,829	\$25,311	\$313,430	\$48,075	\$434,071
Gaston	\$366,004	\$75,139	\$25,788	\$804,927	\$112,927	\$1,384,785
Catawba	\$1,131,721	\$172,266	\$320,454	\$4,240,056	\$99,160	\$5,963,657
Cabarrus	\$0	\$12,714	\$10,546	\$140,335	\$6,189	\$169,784
Anson	\$8,903	\$3,021	\$0	\$302,890	\$10,830	\$325,644
Alexander	\$0	\$0	\$0	\$0	\$0	\$0
Chester	\$0	\$0	\$0	\$0	\$0	\$0
York	\$209,784	\$117,726	\$218,735	\$4,366,365	\$336,627	\$5,249,237
Totals	\$11,073,737	\$1,747,227	\$2,401,323	\$55,863,138	\$2,024,392	\$73,109,817

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Organizations, Charlotte Mecklenburg CVI 2008

Chart# 10
Charlotte Mecklenburg Arts-Active Organization Income 2008



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Table# 16

Charlotte Mecklenburg Arts-Active Organization Index 2008 (Summary)

Region	Total Revenues	Per Capita	Index
Charlotte Mecklenburg CVI Region	\$73,109,817	31.02	0.59
Totals	\$73,109,817	31.02	0.59

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

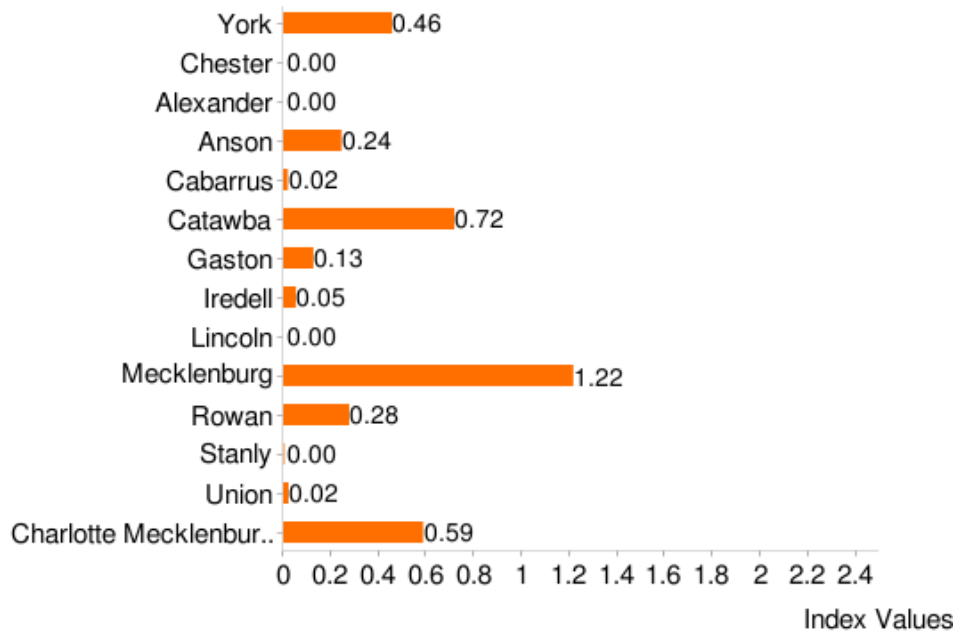
Table# 17

Charlotte Mecklenburg Arts-Active Organization Index 2008

Region	Total Revenues	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$222,026	1.15	0.02
Stanly	\$11,147	0.19	0.00
Rowan	\$2,034,264	14.61	0.28
Mecklenburg	\$57,315,202	64.36	1.22
Lincoln	\$0	0.00	0.00
Iredell	\$434,071	2.79	0.05
Gaston	\$1,384,785	6.70	0.13
Catawba	\$5,963,657	37.97	0.72
Cabarrus	\$169,784	1.01	0.02
Anson	\$325,644	12.94	0.24
Alexander	\$0	0.00	0.00
Chester	\$0	0.00	0.00
York	\$5,249,237	24.14	0.46
Totals	\$73,109,817	31.02	0.59

Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Chart# 11
Charlotte Mecklenburg Arts-Active Organization Index 2008



Source: National Center for Charitable Statistics, Core PC Data Base for Arts, Cultural and Humanities Org, Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Per Capita Photography Store Sales 2008

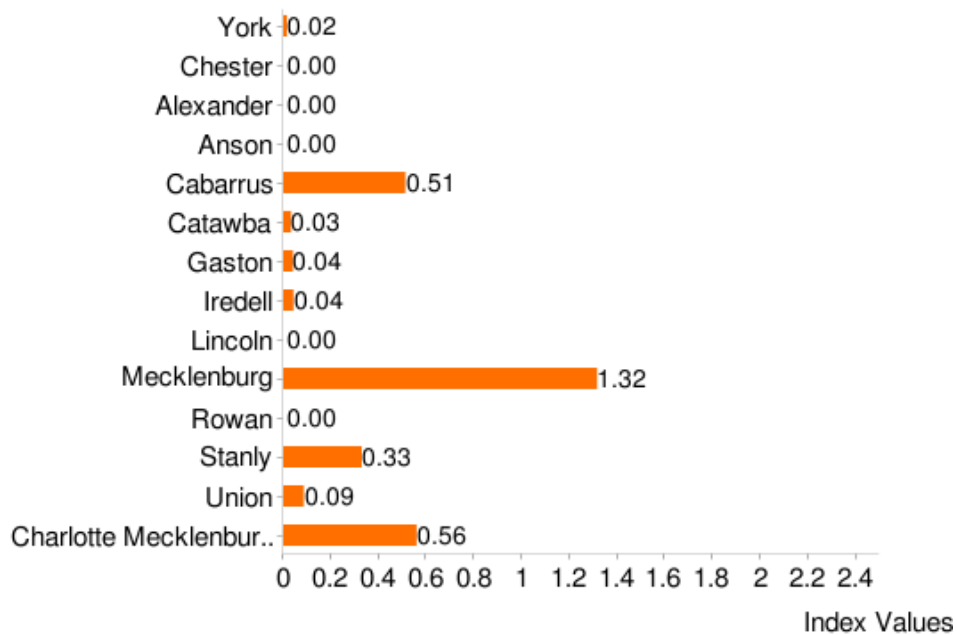
Table #18 addresses Photography Store Sales. This category comprises establishments primarily engaged in either retailing new cameras, photographic equipment, and photographic supplies or retailing new cameras, and photographic equipment in combination with activities, such as repair services and film developing (US Census Bureau). Table #18 summarizes sales for these types of businesses in 2008. Total sales for the year was \$6,180,000 with a per capita rate of \$2.62 and Index value of 0.56.

Table# 18
Charlotte Mecklenburg Photography Store Sales 2008

Region	Photography Store Sales	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$78,000	0.40	0.09
Stanly	\$92,000	1.54	0.33
Rowan	\$0	0.00	0.00
Mecklenburg	\$5,494,000	6.17	1.32
Lincoln	\$0	0.00	0.00
Iredell	\$31,000	0.20	0.04
Gaston	\$40,000	0.19	0.04
Catawba	\$24,000	0.15	0.03
Cabarrus	\$405,000	2.40	0.51
Anson	\$0	0.00	0.00
Alexander	\$0	0.00	0.00
Chester	\$0	0.00	0.00
York	\$16,000	0.07	0.02
Totals	\$6,180,000	2.62	0.56

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 12
Charlotte Mecklenburg Photography Store Sales 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Musical Instrument Store Sales 2008

Table #19 addresses Musical Instrument Store Sales. This industry comprises establishments primarily engaged in

retailing new musical instruments, sheet music, and related supplies; or retailing these new products in combination with musical instrument repair, rental, or music instruction (US Census Bureau). Table #19 summarizes sales within these types of businesses in 2008. Total sales figure was \$23,061,000, with a per capita rate of \$9.78 and Index value of 0.97.

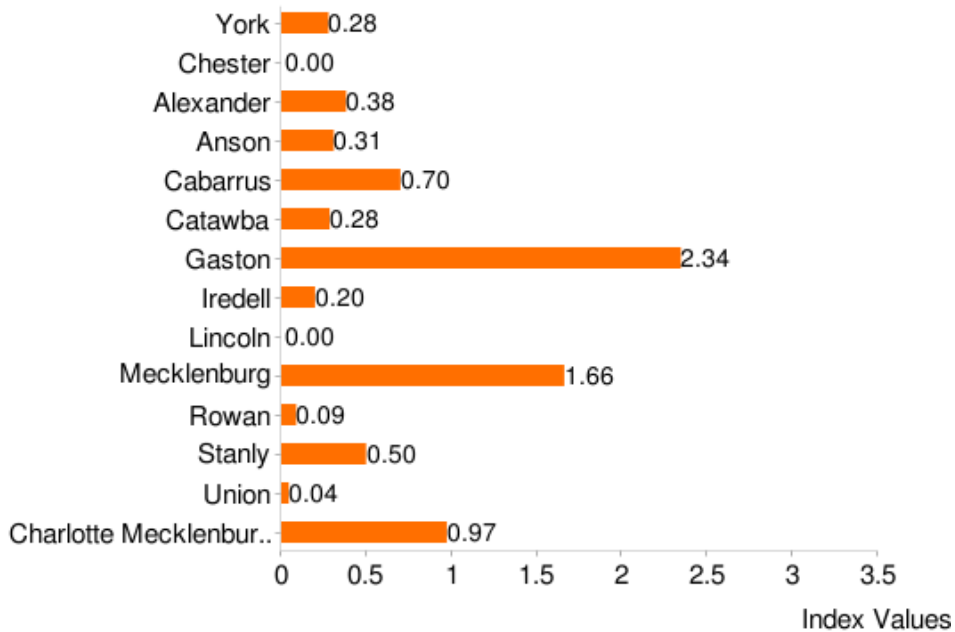
Table# 19
Charlotte Mecklenburg Musical Instrument Store Sales 2008

Region	Music Store Sales	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$86,000	0.45	0.04
Stanly	\$299,000	5.02	0.50
Rowan	\$124,000	0.89	0.09
Mecklenburg	\$14,897,000	16.73	1.66
Lincoln	\$0	0.00	0.00
Iredell	\$310,000	2.00	0.20
Gaston	\$4,882,000	23.62	2.34
Catawba	\$450,000	2.86	0.28
Cabarrus	\$1,188,000	7.04	0.70
Anson	\$78,000	3.10	0.31
Alexander	\$140,000	3.83	0.38
Chester	\$0	0.00	0.00
York	\$607,000	2.79	0.28
Totals	\$23,061,000	9.78	0.97

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 13

Charlotte Mecklenburg Musical Instrument Store Sales 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Book and Record Store Sales 2008

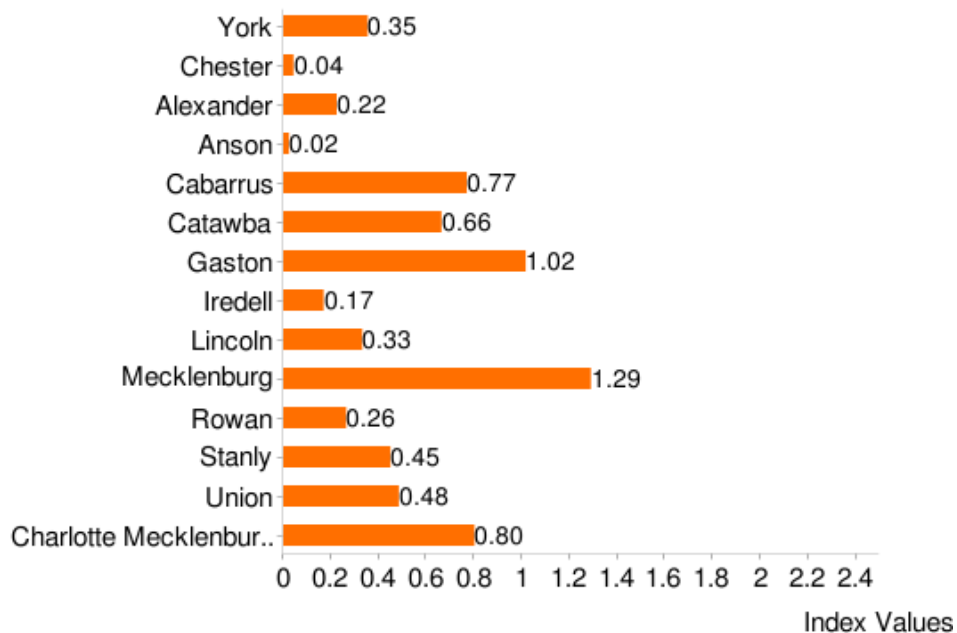
Table #20 address Book and Record Store Sales. This CVI™ category comprises establishments primarily engaged in retailing new books as well as establishments primarily engaged in retailing new prerecorded audio and video, tapes, CDs and records (US Census Bureau). Table #20 summarizes sales within these types of businesses in 2008. Total sales were \$53,625,000, with a per capita rate of \$22.75 and an Index vale of 0.80.

Table# 20
Charlotte Mecklenburg Book and Record Store 2008

Region	Bookstore and Record Store Sales	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$2,656,000	13.74	0.48
Stanly	\$760,000	12.75	0.45
Rowan	\$1,046,000	7.51	0.26
Mecklenburg	\$32,624,000	36.63	1.29
Lincoln	\$704,000	9.42	0.33
Iredell	\$747,000	4.81	0.17
Gaston	\$5,967,000	28.87	1.02
Catawba	\$2,959,000	18.84	0.66
Cabarrus	\$3,686,000	21.84	0.77
Anson	\$17,000	0.68	0.02
Alexander	\$233,000	6.38	0.22
Chester	\$40,000	1.23	0.04
York	\$2,186,000	10.05	0.35
Totals	\$53,625,000	22.75	0.80

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 14
Charlotte Mecklenburg Book and Record Store 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Art Gallery Sales 2008

Table #21 addresses Art Gallery Sales. This industry comprises establishments primarily engaged in retailing original and limited edition art works. Included in this industry are establishments primarily engaged in displaying works of art for retail sale in art galleries (US Census Bureau). Table #21 reveals \$15,716,000 sales in this region, with a per capita rate of \$6.67 and an index value of 0.47 in 2008.

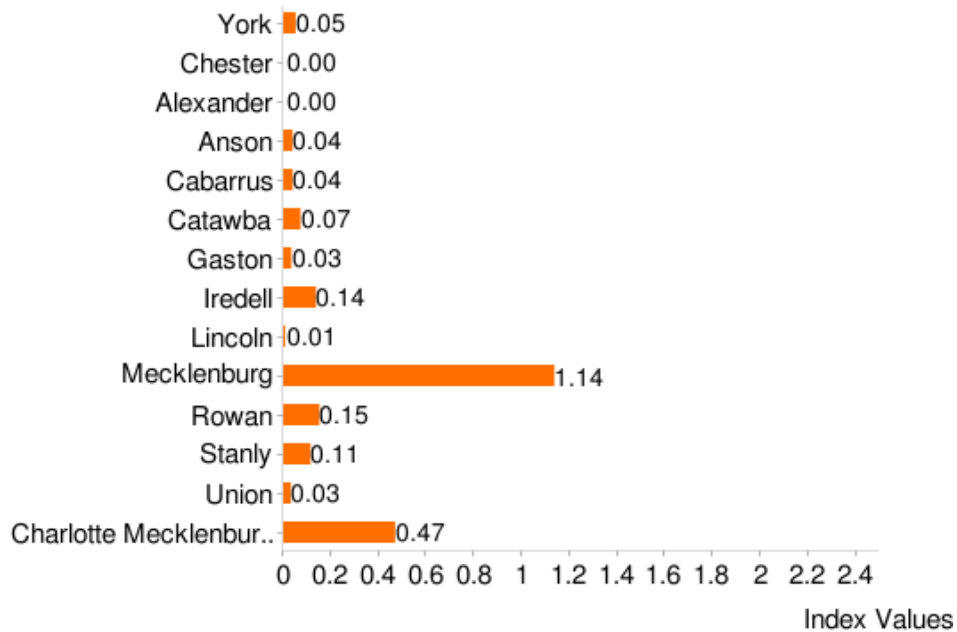
Table# 21
Charlotte Mecklenburg Art Gallery Sales 2008

Region	Art dealers	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$88,000	0.46	0.03
Stanly	\$97,000	1.63	0.11
Rowan	\$301,000	2.16	0.15
Mecklenburg	\$14,390,000	16.16	1.14
Lincoln	\$9,000	0.12	0.01
Iredell	\$302,000	1.94	0.14
Gaston	\$100,000	0.48	0.03
Catawba	\$160,000	1.02	0.07
Cabarrus	\$93,000	0.55	0.04
Anson	\$14,000	0.56	0.04
Alexander	\$0	0.00	0.00
Chester	\$0	0.00	0.00
York	\$162,000	0.75	0.05
Totals	\$15,716,000	6.67	0.47

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 15

Charlotte Mecklenburg Art Gallery Sales 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Independent Writers and Performers 2008

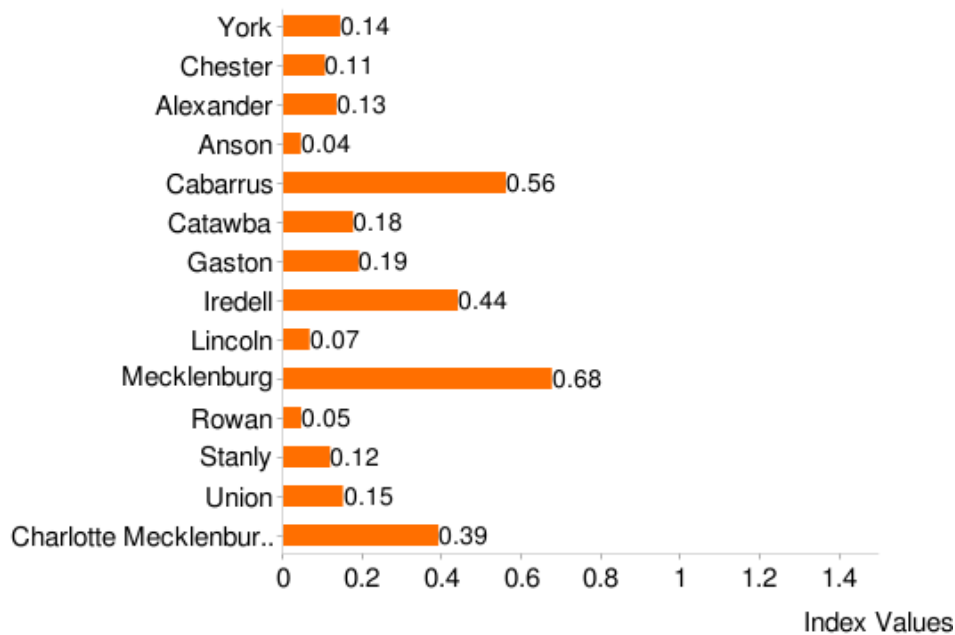
Table #22 addresses Independent Artist Revenue. This industry comprises independent (i.e., freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions (US Census Bureau). Table #22 reveals \$90,012,000 in sales, with a per capita rate of \$38.19 and an index value of 0.39 in 2008.

Table# 22
Charlotte Mecklenburg Independent Artists Sales 2008

Region	Independent artists, writers, and performers	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$2,847,000	14.73	0.15
Stanly	\$689,000	11.56	0.12
Rowan	\$617,000	4.43	0.05
Mecklenburg	\$58,894,000	66.13	0.68
Lincoln	\$481,000	6.44	0.07
Iredell	\$6,688,000	43.05	0.44
Gaston	\$3,856,000	18.66	0.19
Catawba	\$2,713,000	17.27	0.18
Cabarrus	\$9,255,000	54.85	0.56
Anson	\$109,000	4.33	0.04
Alexander	\$481,000	13.16	0.13
Chester	\$335,000	10.27	0.11
York	\$3,047,000	14.01	0.14
Totals	\$90,012,000	38.19	0.39

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 16
Charlotte Mecklenburg Independent Artists Sales 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Charlotte Mecklenburg Performing Arts Revenues 2008

Tables 36-38 address Performing Arts Revenues. This category includes theater companies and dinner theaters, musical groups and artists, and other performing arts companies primarily engaged in producing live theatrical presentations (US Census Bureau). Table 38 summarizes sales within these types of businesses by region in 2008. Total sales for all regions being examined for the year was \$36,880,000. Per capita sales were \$15.65 with an index value of 0.34.

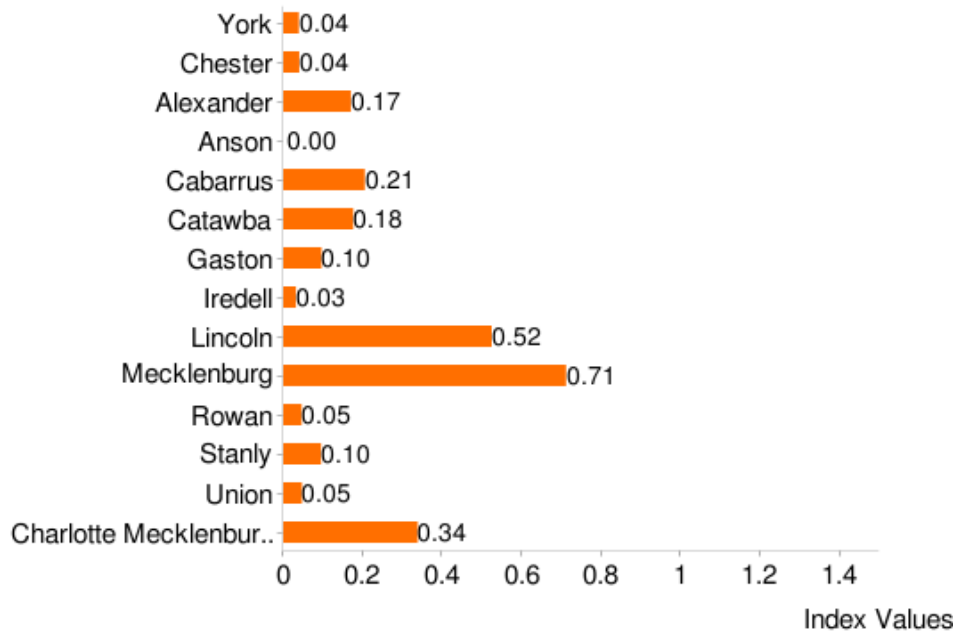
Table# 23
Charlotte Mecklenburg Performing Arts Participation 2008

Region	Performing Arts Participation	Per Capita	Index
Charlotte Mecklenburg CVI Region			
Union	\$419,000	2.17	0.05
Stanly	\$263,000	4.41	0.10
Rowan	\$294,000	2.11	0.05
Mecklenburg	\$29,325,000	32.93	0.71
Lincoln	\$1,814,000	24.27	0.52
Iredell	\$233,000	1.50	0.03
Gaston	\$916,000	4.43	0.10
Catawba	\$1,278,000	8.14	0.18
Cabarrus	\$1,601,000	9.49	0.21
Anson	\$0	0.00	0.00
Alexander	\$288,000	7.88	0.17
Chester	\$60,000	1.84	0.04
York	\$389,000	1.79	0.04
Totals	\$36,880,000	15.65	0.34

Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

Chart# 17

Charlotte Mecklenburg Performing Arts Participation 2008



Source: Economic Modeling Specialist, Inc., Charlotte Mecklenburg CVI 2008

The Occupational Index

The Occupational Index of the Arts measures the level of creative occupations per capita in a given geographic area compared with national per capita occupational employment. The CVI™ 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. Given this meticulous selection of occupations, the CVI™ presents a extremely justifiable report of creative economy employment.

The Charlotte Mecklenburg CVI™ Region Occupational Index remained relatively stable, decreasing slightly from 0.90 to 0.87 from 2006 to 2008, a rate slightly below the national average, over the past three years. Table #25 shows all occupations within the Charlotte region by county. This data shows how creative occupations are distributed throughout the metro area. Mecklenburg county has by far the highest number of jobs within the occupational categories being studied. Cabarrus county also holds a relatively high occupational index, though this value has decreased over the past several years from 0.97 to 0.91.

There was minor job loss from 2007 to 2008, but overall creative employment increased by nearly 500 jobs from 2006 to 2008. This points to relative stability, which is somewhat impressive given general economic conditions.

Table #26 shows the detailed job numbers in the Charlotte Mecklenburg Region for each occupation being considered in the Index.

Chart #21 shows that the most highly concentrated employment types for Charlotte Mecklenburg when compared with the nation for 2008 are within the the occupational categories: Architects, Broadcast Technicians, Directors, Religious Activities, Musical Instrument Repairers and Tuners, and Interior Designers.

Tables #28 through #32 give detailed job and location quotient data for Mecklenburg, Catawba and Carrabus Counties.

Table# 24
Charlotte Mecklenburg Total Jobs by County (Summary)

County	2006 Jobs	2007 Jobs	2008 Jobs	#Change	%Change	2006 Index	2007 Index	2008 Index
Charlotte Mecklenburg CVI Region	28,772	29,574	29,247	475	1.65%	0.90	0.89	0.87
Totals	28,772	29,574	29,247	475	1.65%	0.90	0.89	0.87

Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

Table# 25
Charlotte Mecklenburg Total Jobs by County

County	2006 Jobs	2007 Jobs	2008 Jobs	#Change	%Change	2006 Index	2007 Index	2008 Index
Charlotte Mecklenburg CVI Region								
Union	1,415	1,460	1,543	128	9.05%	0.57	0.55	0.56
Stanly	385	390	397	12	3.12%	0.46	0.46	0.46
Rowan	672	684	753	81	12.05%	0.35	0.35	0.38
Mecklenburg	16,731	17,288	16,829	98	0.59%	1.39	1.39	1.32
Lincoln	380	385	405	25	6.58%	0.37	0.37	0.38
Iredell	1,366	1,364	1,405	39	2.86%	0.65	0.63	0.63
Gaston	1,819	1,842	1,898	79	4.34%	0.64	0.63	0.64
Catawba	1,382	1,372	1,318	-64	-4.63%	0.63	0.61	0.59
Cabarrus	2,172	2,262	2,198	26	1.20%	0.97	0.96	0.91
Anson	124	126	112	-12	-9.68%	0.34	0.35	0.31
Alexander	332	321	294	-38	-11.45%	0.64	0.61	0.56
Chester	149	148	158	9	6.04%	0.32	0.32	0.34
York	1,845	1,932	1,937	92	4.99%	0.65	0.64	0.62
Totals	28,772	29,574	29,247	475	1.65%	0.90	0.89	0.87

Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

Table# 26

Charlotte Mecklenburg Total Jobs by Occupation

Regions : Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Occupation Type	2006 Jobs	2007 Jobs	2008 Jobs	%Change
Actors	390	403	528	35.38
Advertising and Promotions Managers	307	317	302	-1.63
Agents and Business Managers of Artists, Performers, and Athletes	423	440	371	-12.29
Architects, Except Landscape and Naval	1,530	1,633	1,503	-1.76
Art Directors	677	697	658	-2.81
Audio and Video Equipment Technicians	228	240	224	-1.75
Broadcast Technicians	467	513	404	-13.49
Camera Operators, Television, Video, and Motion Picture	152	156	162	6.58
Choreographers	120	133	120	0.00
Commercial and Industrial Designers	636	645	479	-24.69
Dancers	133	141	137	3.01
Directors, Religious Activities	1,473	1,468	1,482	0.61
Editors	1,134	1,177	836	-26.28
Fashion Designers	381	385	370	-2.89
Film and Video Editors	241	254	215	-10.79
Fine Artists including Painters, Sculptors, and Illustrators	564	580	608	7.80
Floral Designers	692	713	688	-0.58
Graphic Designers	1,375	1,388	1,765	28.36
Interior Designers	942	943	885	-6.05
Landscape Architects	425	434	395	-7.06
Librarians	1,024	1,048	1,271	24.12
Media and Communication Equipment Workers, All Other	195	201	202	3.59
Media and Communication Workers, All Other	908	924	714	-21.37
Multi-Media Artists and Animators	593	613	612	3.20
Music Directors and Composers	1,299	1,326	1,325	2.00
Musical Instrument Repairers and Tuners	162	170	167	3.09
Musicians and Singers	2,120	2,154	2,129	0.42
Photographers	4,073	4,087	4,399	8.00
Producers and Directors	757	786	769	1.59
Public Relations Managers	507	533	505	-0.39
Public Relations Specialists	1,784	1,878	1,970	10.43
Radio and Television Announcers	339	372	219	-35.40
Set and Exhibit Designers	364	375	376	3.30
Sound Engineering Technicians	100	110	129	29.00
Technical Writers	224	235	279	24.55
Writers and Authors	2,033	2,102	2,049	0.79
Total	28,772	29,574	29,247	1.65

Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

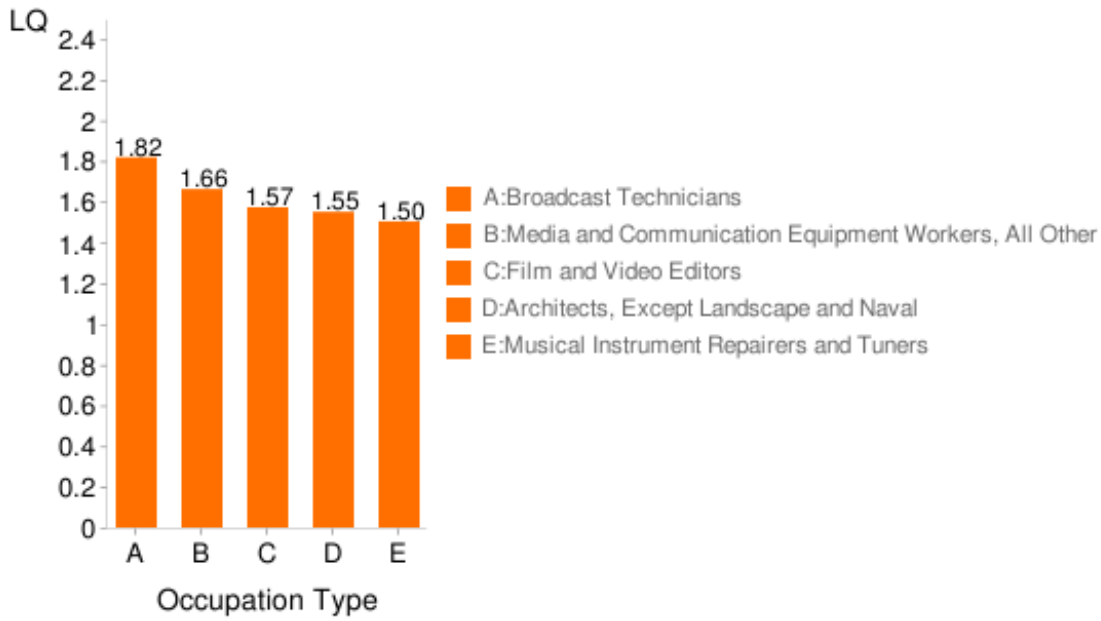
Table# 27
Charlotte Mecklenburg Location Quotients

Regions : Union, Stanly, Rowan, Mecklenburg, Lincoln, Iredell, Gaston, Catawba, Cabarrus, Anson, Alexander, Chester, York

Occupation Type	2007 State LQ	2008 State LQ	2007 National LQ	2008 National LQ
Actors	1.01	1.11	0.54	0.70
Advertising and Promotions Managers	1.05	1.07	0.79	0.74
Agents and Business Managers of Artists, Performers, and Athletes	1.31	1.24	1.16	0.96
Architects, Except Landscape and Naval	1.55	1.50	1.44	1.29
Art Directors	0.98	0.94	0.71	0.65
Audio and Video Equipment Technicians	1.07	0.91	0.68	0.56
Broadcast Technicians	1.82	1.48	1.70	1.35
Camera Operators, Television, Video, and Motion Picture	1.39	1.31	0.71	0.75
Choreographers	1.39	1.32	0.71	0.68
Commercial and Industrial Designers	1.21	1.00	1.10	0.82
Dancers	1.13	1.43	0.84	0.84
Directors, Religious Activities	1.27	1.25	1.55	1.50
Editors	1.42	1.00	0.97	0.66
Fashion Designers	1.13	1.09	0.85	0.80
Film and Video Editors	1.57	1.32	1.25	1.00
Fine Artists including Painters, Sculptors, and Illustrators	0.91	0.99	0.74	0.77
Floral Designers	0.97	0.92	0.93	0.90
Graphic Designers	0.94	1.07	0.71	0.86
Interior Designers	1.38	1.25	1.30	1.19
Landscape Architects	1.00	1.03	0.91	0.86
Librarians	0.80	0.94	0.83	0.98
Media and Communication Equipment Workers, All Other	1.66	1.63	1.10	1.06
Media and Communication Workers, All Other	1.06	0.87	0.96	0.74
Multi-Media Artists and Animators	0.86	0.81	0.65	0.62
Music Directors and Composers	1.09	1.10	0.96	0.94
Musical Instrument Repairers and Tuners	1.50	1.24	1.34	1.34
Musicians and Singers	1.20	1.22	1.10	1.08
Photographers	0.91	0.98	0.74	0.80
Producers and Directors	1.28	1.17	0.82	0.76
Public Relations Managers	1.33	1.17	1.22	1.04
Public Relations Specialists	1.27	1.26	0.88	0.86
Radio and Television Announcers	0.99	0.59	0.90	0.55
Set and Exhibit Designers	1.10	1.03	0.96	0.95
Sound Engineering Technicians	1.22	1.39	0.68	0.74
Technical Writers	0.65	0.87	0.52	0.60
Writers and Authors	0.99	0.99	0.76	0.73

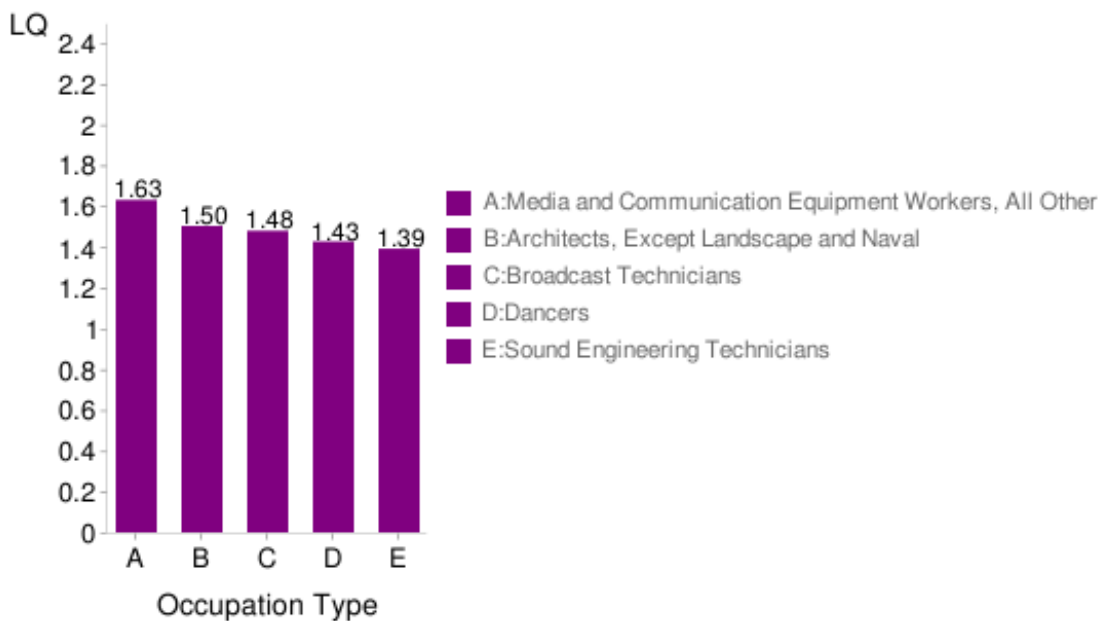
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

Chart# 18
State Location Quotient 2007



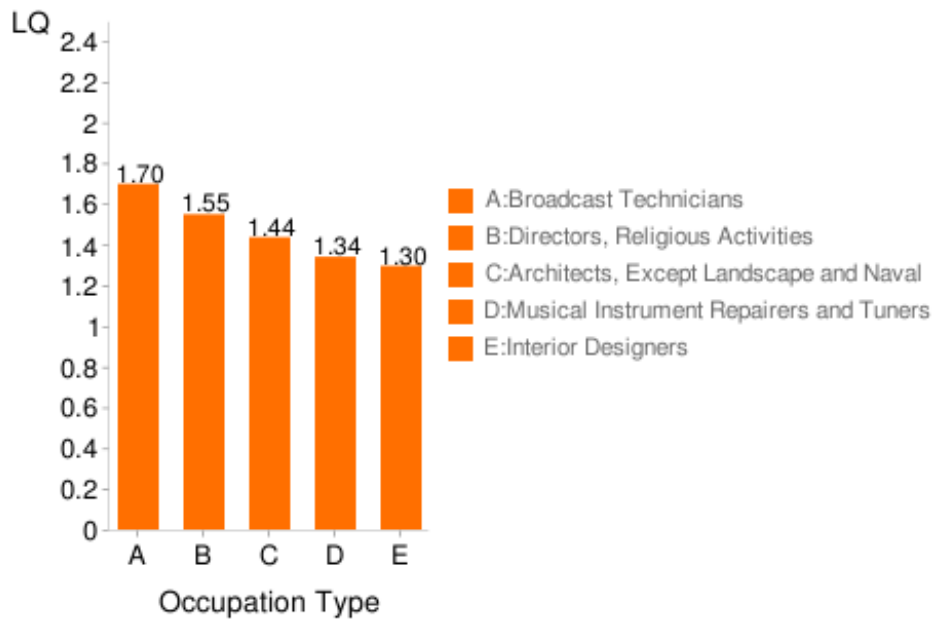
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 19
State Location Quotient 2008



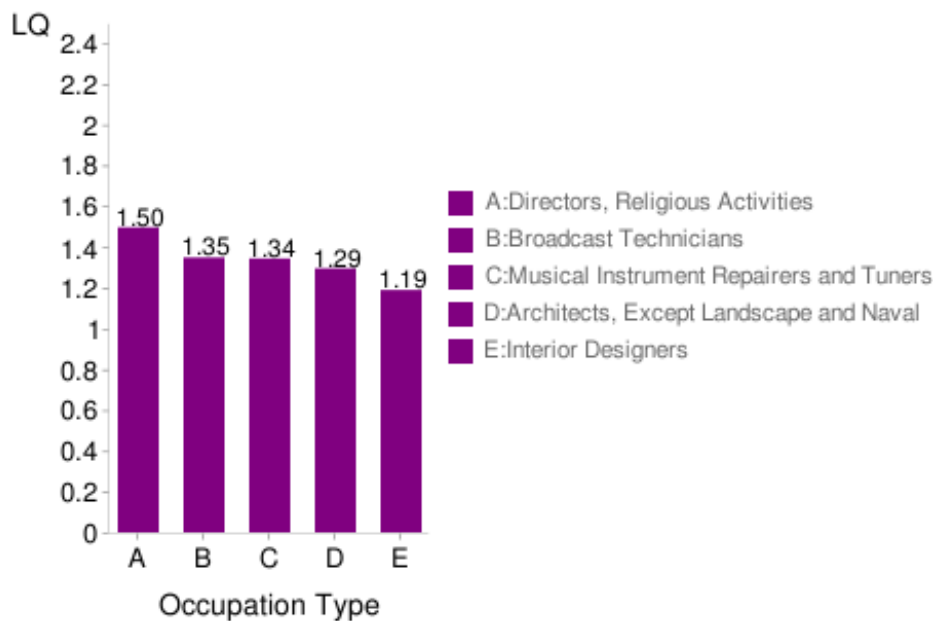
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 20
National Location Quotient 2007



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 21
National Location Quotient 2008



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Table# 28
Mecklenburg County Total Jobs by Occupation

Regions : Mecklenburg

Occupation Type	2006 Jobs	2007 Jobs	2008 Jobs	%Change
Actors	225	232	330	46.67
Advertising and Promotions Managers	188	196	175	-6.91
Agents and Business Managers of Artists,Performers, and Athletes	285	295	228	-20.00
Architects, Except Landscape and Naval	1,094	1,168	1,103	0.82
Art Directors	365	378	351	-3.84
Audio and Video Equipment Technicians	143	150	144	0.70
Broadcast Technicians	385	415	311	-19.22
Camera Operators, Television, Video, and Motion Picture	107	109	118	10.28
Choreographers	69	67	62	-10.14
Commercial and Industrial Designers	328	339	242	-26.22
Dancers	75	77	80	6.67
Directors, Religious Activities	725	727	699	-3.59
Editors	768	773	532	-30.73
Fashion Designers	204	209	209	2.45
Film and Video Editors	192	197	169	-11.98
Fine Artists including Painters, Sculptors, and Illustrators	295	304	324	9.83
Floral Designers	320	334	311	-2.81
Graphic Designers	760	785	1,031	35.66
Interior Designers	547	571	520	-4.94
Landscape Architects	222	223	202	-9.01
Librarians	503	516	613	21.87
Media and Communication Equipment Workers, All Other	146	151	150	2.74
Media and Communication Workers, All Other	533	545	391	-26.64
Multi-Media Artists and Animators	317	328	323	1.89
Music Directors and Composers	685	702	686	0.15
Musical Instrument Repairers and Tuners	91	101	92	1.10
Musicians and Singers	1,184	1,202	1,169	-1.27
Photographers	2,132	2,148	2,393	12.24
Producers and Directors	527	548	535	1.52
Public Relations Managers	340	357	330	-2.94
Public Relations Specialists	1,160	1,229	1,242	7.07
Radio and Television Announcers	229	262	112	-51.09
Set and Exhibit Designers	212	219	217	2.36
Sound Engineering Technicians	69	77	96	39.13
Technical Writers	160	169	202	26.25
Writers and Authors	1,146	1,185	1,137	-0.79
Total	16,731	17,288	16,829	0.59

Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

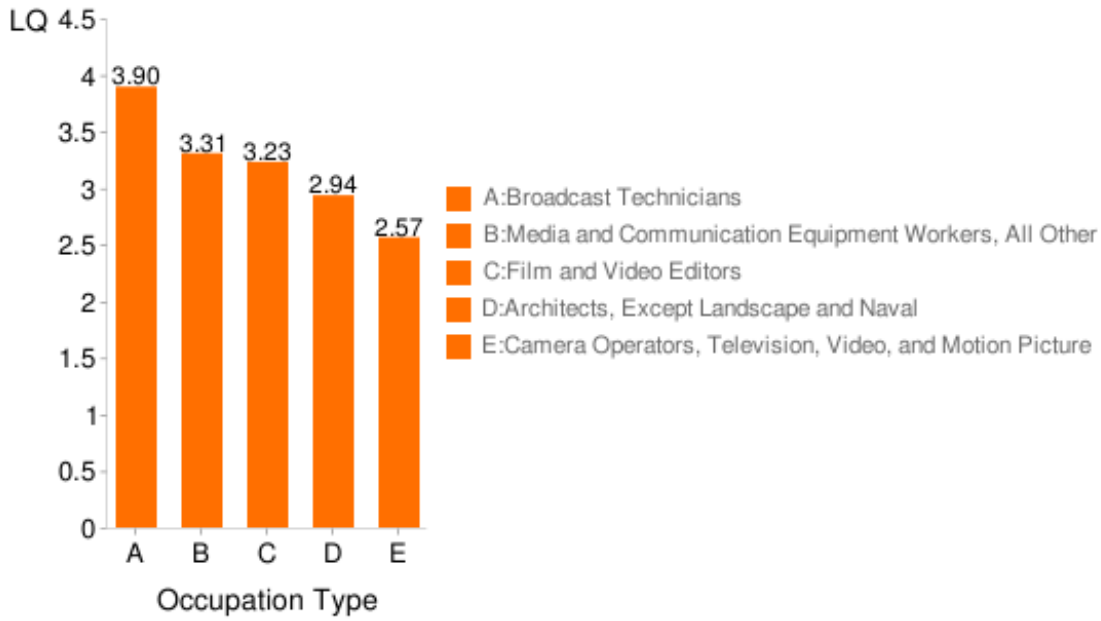
Table# 29
Mecklenburg County Location Quotients

Regions : Mecklenburg

Occupation Type	2007 State LQ	2008 State LQ	2007 National LQ	2008 National LQ
Actors	1.54	1.84	0.82	1.16
Advertising and Promotions Managers	1.72	1.65	1.29	1.14
Agents and Business Managers of Artists, Performers, and Athletes	2.33	2.01	2.07	1.56
Architects, Except Landscape and Naval	2.94	2.92	2.72	2.51
Art Directors	1.41	1.33	1.02	0.92
Audio and Video Equipment Technicians	1.77	1.55	1.12	0.96
Broadcast Technicians	3.90	3.01	3.64	2.75
Camera Operators, Television, Video, and Motion Picture	2.57	2.53	1.32	1.45
Choreographers	1.85	1.80	0.95	0.93
Commercial and Industrial Designers	1.68	1.34	1.53	1.09
Dancers	1.63	2.20	1.21	1.29
Directors, Religious Activities	1.66	1.56	2.03	1.87
Editors	2.48	1.68	1.69	1.12
Fashion Designers	1.62	1.63	1.22	1.19
Film and Video Editors	3.23	2.75	2.58	2.09
Fine Artists including Painters, Sculptors, and Illustrators	1.26	1.40	1.02	1.08
Floral Designers	1.20	1.11	1.16	1.08
Graphic Designers	1.40	1.65	1.06	1.33
Interior Designers	2.21	1.95	2.08	1.85
Landscape Architects	1.36	1.40	1.24	1.16
Librarians	1.05	1.19	1.08	1.25
Media and Communication Equipment Workers, All Other	3.31	3.20	2.19	2.08
Media and Communication Workers, All Other	1.65	1.26	1.50	1.07
Multi-Media Artists and Animators	1.21	1.14	0.92	0.87
Music Directors and Composers	1.53	1.51	1.34	1.29
Musical Instrument Repairers and Tuners	2.37	1.80	2.11	1.96
Musicians and Singers	1.77	1.77	1.62	1.56
Photographers	1.27	1.41	1.03	1.15
Producers and Directors	2.36	2.16	1.51	1.39
Public Relations Managers	2.36	2.02	2.16	1.80
Public Relations Specialists	2.20	2.11	1.53	1.43
Radio and Television Announcers	1.85	0.79	1.68	0.75
Set and Exhibit Designers	1.70	1.58	1.49	1.45
Sound Engineering Technicians	2.27	2.74	1.26	1.45
Technical Writers	1.25	1.66	0.98	1.14
Writers and Authors	1.48	1.45	1.13	1.07

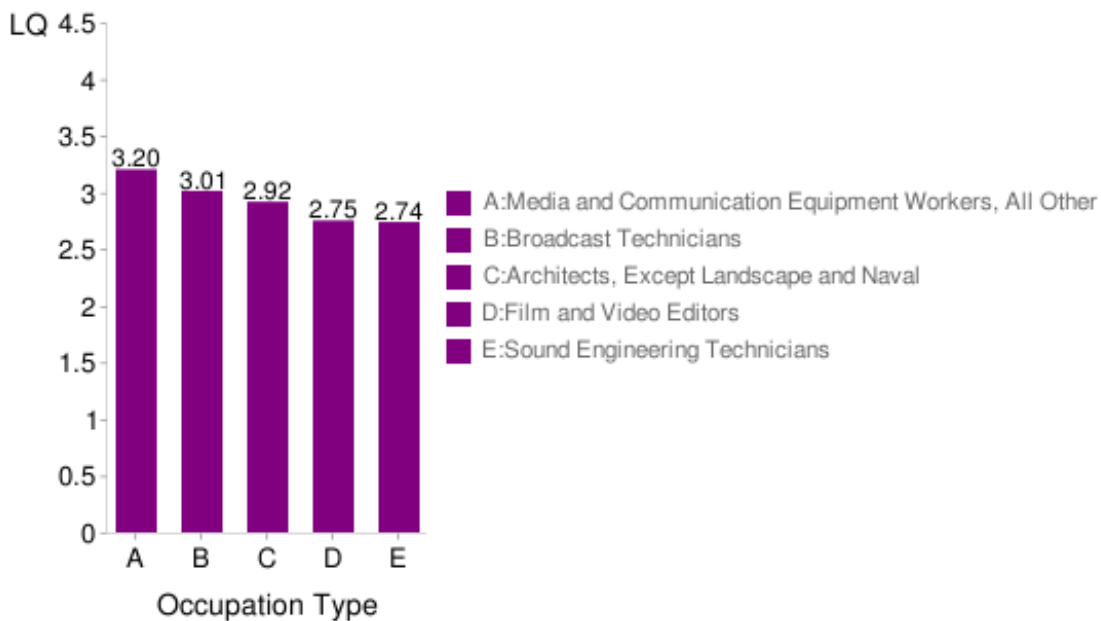
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenburg CVI 2008

Chart# 22
State Location Quotient 2007



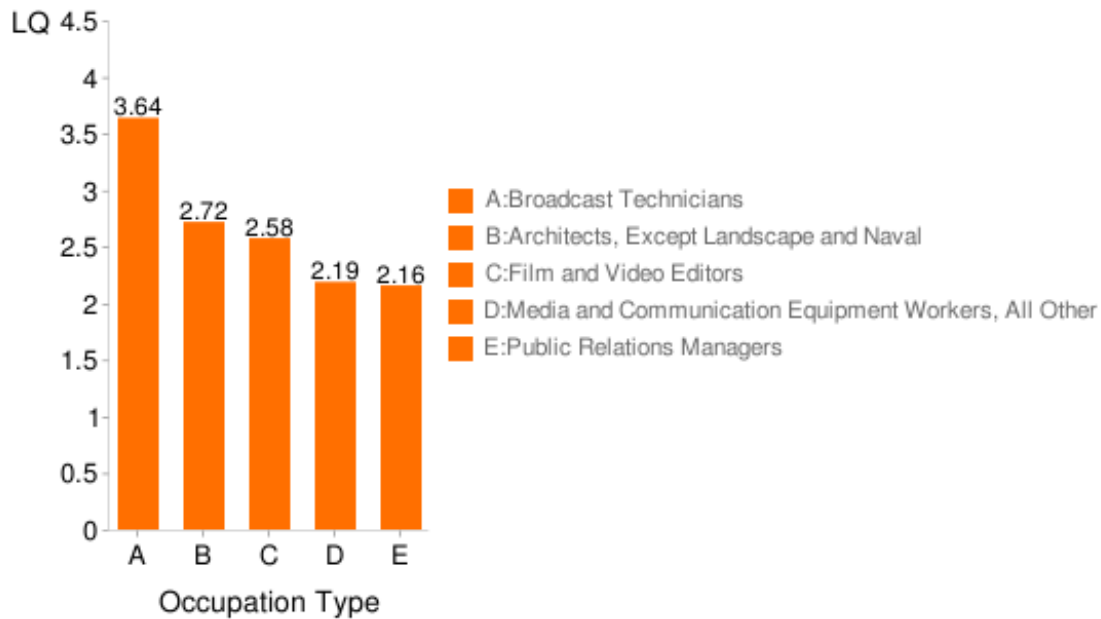
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 23
State Location Quotient 2008



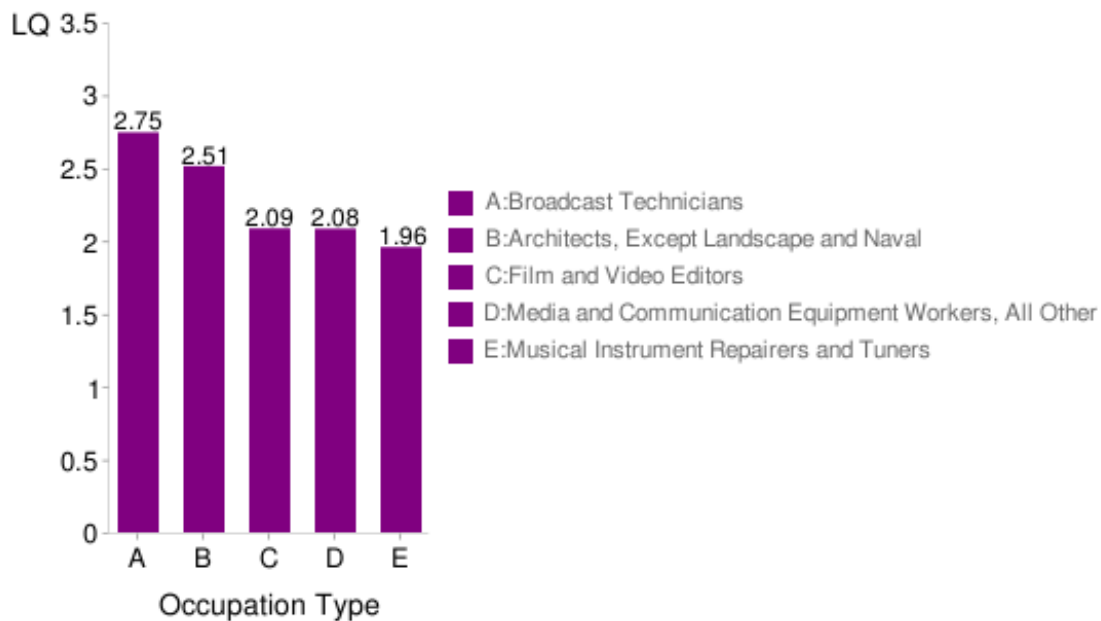
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 24
National Location Quotient 2007



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 25
National Location Quotient 2008



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Table# 30
Cabarrus County Jobs by Occupation

Regions : Cabarrus

Occupation Type	2006 Jobs	2007 Jobs	2008 Jobs	%Change
Actors	36	38	42	16.67
Advertising and Promotions Managers	18	19	17	-5.56
Agents and Business Managers of Artists,Performers, and Athletes	37	41	33	-10.81
Architects, Except Landscape and Naval	63	69	60	-4.76
Art Directors	62	64	60	-3.23
Audio and Video Equipment Technicians	24	26	23	-4.17
Broadcast Technicians	7	15	8	14.29
Camera Operators, Television, Video, and Motion Picture	10	11	11	10.00
Choreographers	15	17	17	13.33
Commercial and Industrial Designers	45	48	32	-28.89
Dancers	18	20	21	16.67
Directors, Religious Activities	100	99	107	7.00
Editors	55	71	41	-25.45
Fashion Designers	33	35	31	-6.06
Film and Video Editors	7	8	7	0.00
Fine Artists including Painters, Sculptors, and Illustrators	56	58	58	3.57
Floral Designers	49	52	46	-6.12
Graphic Designers	82	85	98	19.51
Interior Designers	72	64	56	-22.22
Landscape Architects	36	37	35	-2.78
Librarians	92	94	112	21.74
Media and Communication Equipment Workers, All Other	11	12	12	9.09
Media and Communication Workers, All Other	76	78	59	-22.37
Multi-Media Artists and Animators	57	59	57	0.00
Music Directors and Composers	116	119	119	2.59
Musical Instrument Repairers and Tuners	14	12	10	-28.57
Musicians and Singers	165	171	173	4.85
Photographers	366	361	389	6.28
Producers and Directors	51	55	50	-1.96
Public Relations Managers	33	35	35	6.06
Public Relations Specialists	116	124	132	13.79
Radio and Television Announcers	16	19	12	-25.00
Set and Exhibit Designers	29	31	28	-3.45
Sound Engineering Technicians	5	6	5	0.00
Technical Writers	12	13	14	16.67
Writers and Authors	188	196	188	0.00
Total	2,172	2,262	2,198	1.20

Source: Economic Modeling Specialist, Inc. Complete Employment

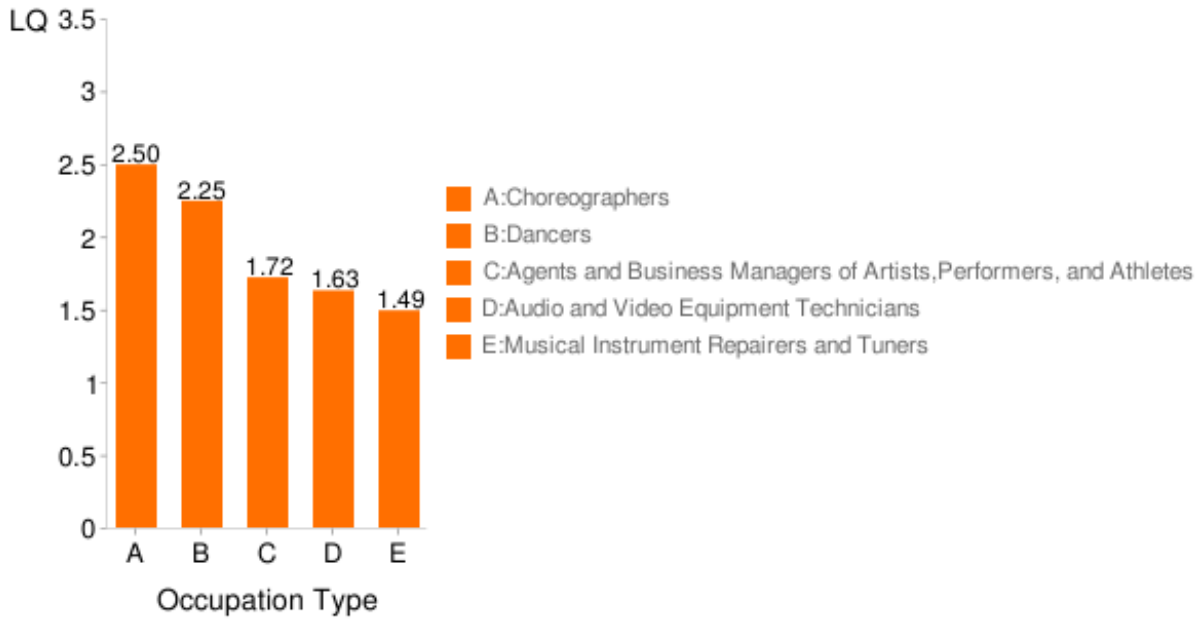
Table# 31
Cabarrus County Location Quotients

Regions : Cabarrus

Occupation Type	2007 State LQ	2008 State LQ	2007 National LQ	2008 National LQ
Actors	1.34	1.24	0.72	0.78
Advertising and Promotions Managers	0.88	0.84	0.67	0.58
Agents and Business Managers of Artists, Performers, and Athletes	1.72	1.54	1.53	1.19
Architects, Except Landscape and Naval	0.92	0.84	0.85	0.72
Art Directors	1.27	1.20	0.91	0.83
Audio and Video Equipment Technicians	1.63	1.31	1.03	0.81
Broadcast Technicians	0.75	0.41	0.70	0.37
Camera Operators, Television, Video, and Motion Picture	1.37	1.24	0.71	0.71
Choreographers	2.50	2.60	1.28	1.34
Commercial and Industrial Designers	1.26	0.94	1.15	0.76
Dancers	2.25	3.05	1.67	1.79
Directors, Religious Activities	1.20	1.26	1.47	1.51
Editors	1.21	0.68	0.82	0.45
Fashion Designers	1.44	1.28	1.09	0.93
Film and Video Editors	0.70	0.60	0.56	0.46
Fine Artists including Painters, Sculptors, and Illustrators	1.28	1.33	1.03	1.02
Floral Designers	0.99	0.86	0.96	0.84
Graphic Designers	0.81	0.83	0.61	0.67
Interior Designers	1.32	1.11	1.24	1.05
Landscape Architects	1.20	1.28	1.09	1.06
Librarians	1.01	1.15	1.05	1.20
Media and Communication Equipment Workers, All Other	1.40	1.35	0.92	0.88
Media and Communication Workers, All Other	1.25	1.01	1.14	0.85
Multi-Media Artists and Animators	1.16	1.06	0.87	0.81
Music Directors and Composers	1.38	1.39	1.21	1.18
Musical Instrument Repairers and Tuners	1.49	1.03	1.33	1.12
Musicians and Singers	1.34	1.38	1.23	1.22
Photographers	1.13	1.21	0.92	0.99
Producers and Directors	1.26	1.07	0.81	0.69
Public Relations Managers	1.23	1.13	1.12	1.01
Public Relations Specialists	1.18	1.18	0.82	0.80
Radio and Television Announcers	0.71	0.45	0.65	0.42
Set and Exhibit Designers	1.28	1.07	1.12	0.99
Sound Engineering Technicians	0.94	0.75	0.52	0.40
Technical Writers	0.51	0.61	0.40	0.42
Writers and Authors	1.30	1.27	1.00	0.93

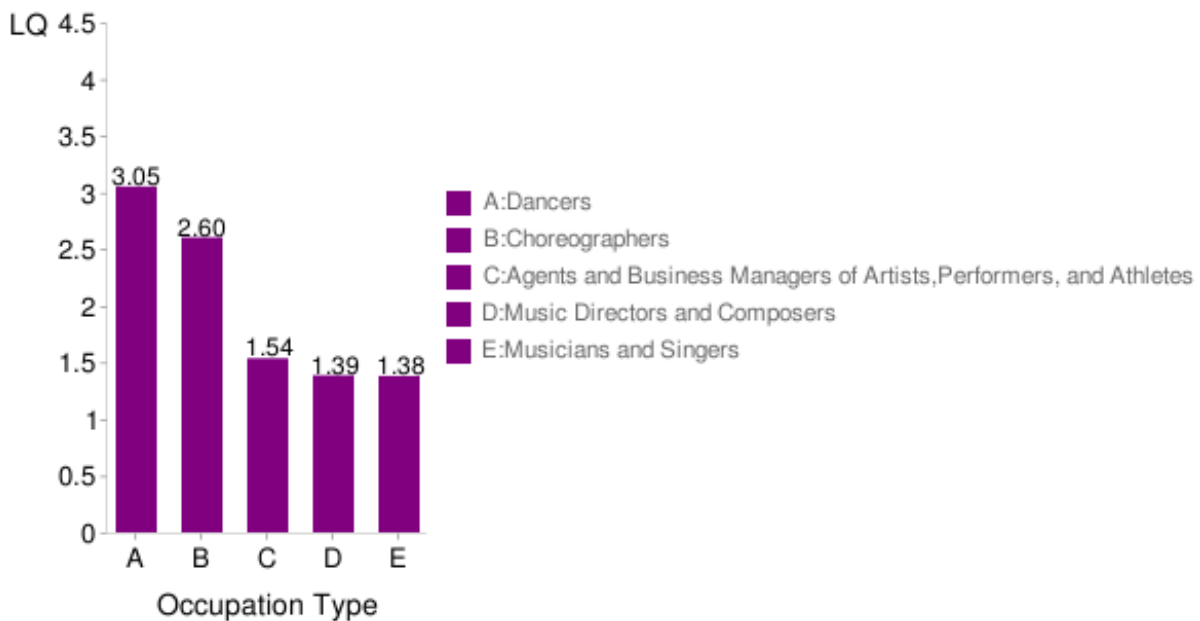
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 26
State Location Quotient 2007



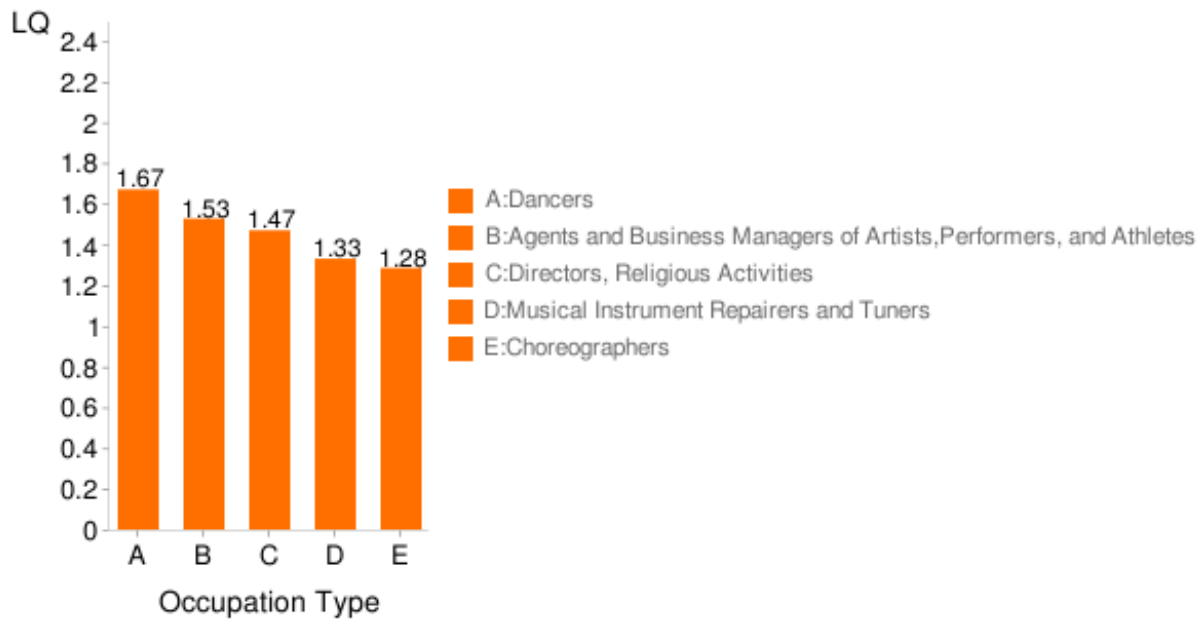
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 27
State Location Quotient 2008



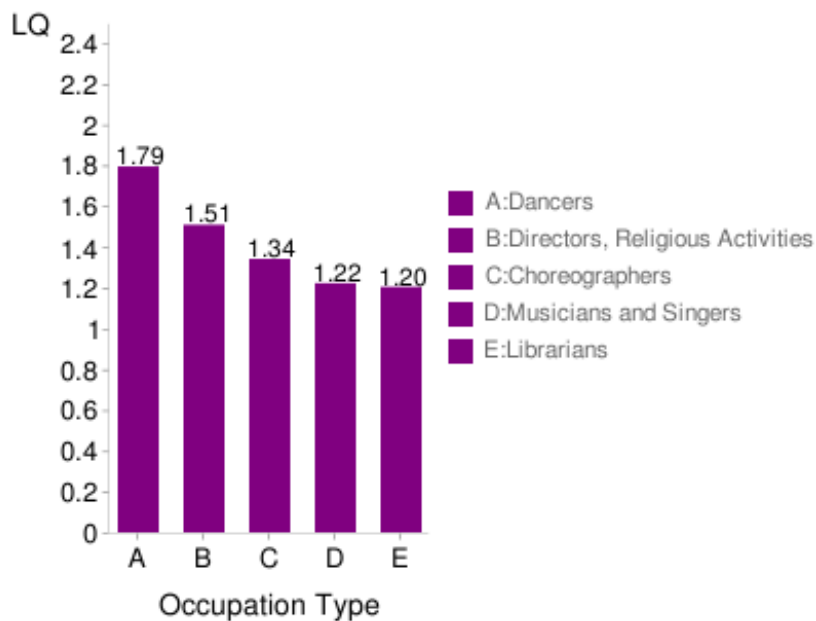
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 28
National Location Quotient 2007



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 29
National Location Quotient 2008



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Table# 32
Catawba County Jobs by Occupation

Regions : Catawba

Occupation Type	2006 Jobs	2007 Jobs	2008 Jobs	%Change
Actors	21	20	20	-4.76
Advertising and Promotions Managers	17	17	17	0.00
Agents and Business Managers of Artists,Performers, and Athletes	16	16	13	-18.75
Architects, Except Landscape and Naval	36	37	32	-11.11
Art Directors	37	36	29	-21.62
Audio and Video Equipment Technicians	12	13	7	-41.67
Broadcast Technicians	12	12	7	-41.67
Camera Operators, Television, Video, and Motion Picture	8	8	5	-37.50
Choreographers	4	5	4	0.00
Commercial and Industrial Designers	41	38	38	-7.32
Dancers	9	10	4	-55.56
Directors, Religious Activities	99	97	101	2.02
Editors	29	31	19	-34.48
Fashion Designers	30	28	17	-43.33
Film and Video Editors	12	14	7	-41.67
Fine Artists including Painters, Sculptors, and Illustrators	27	27	22	-18.52
Floral Designers	33	32	55	66.67
Graphic Designers	122	112	144	18.03
Interior Designers	38	33	22	-42.11
Landscape Architects	16	16	15	-6.25
Librarians	84	86	79	-5.95
Media and Communication Equipment Workers, All Other	5	5	3	-40.00
Media and Communication Workers, All Other	35	35	32	-8.57
Multi-Media Artists and Animators	29	29	27	-6.90
Music Directors and Composers	66	66	62	-6.06
Musical Instrument Repairers and Tuners	4	5	7	75.00
Musicians and Singers	112	112	101	-9.82
Photographers	184	183	200	8.70
Producers and Directors	26	26	17	-34.62
Public Relations Managers	25	26	22	-12.00
Public Relations Specialists	65	66	68	4.62
Radio and Television Announcers	11	14	22	100.00
Set and Exhibit Designers	19	18	18	-5.26
Sound Engineering Technicians	6	5	4	-33.33
Technical Writers	8	8	7	-12.50
Writers and Authors	84	86	71	-15.48
Total	1,382	1,372	1,318	-4.63

Source: Economic Modeling Specialist, Inc. Complete Employment

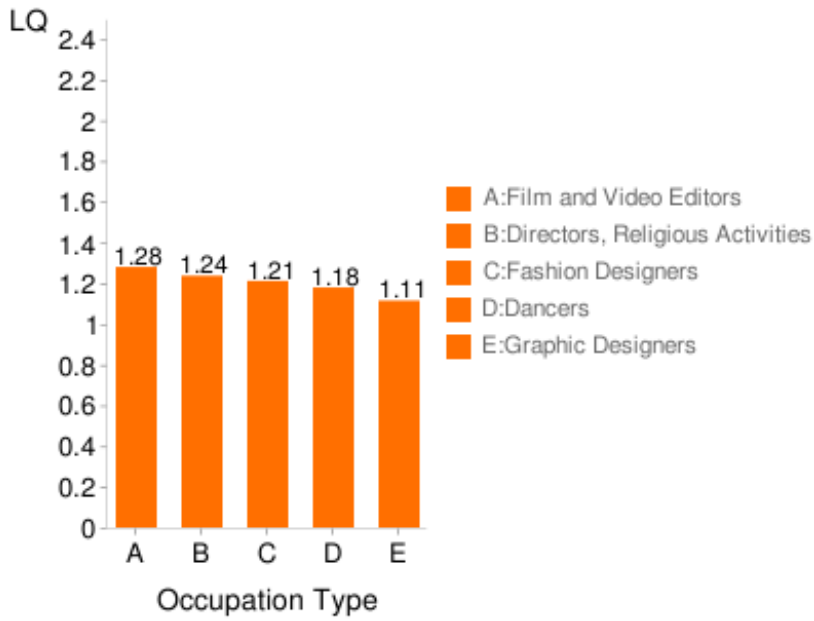
Table# 33
Catawba County Location Quotients

Regions : Catawba

Occupation Type	2007 State LQ	2008 State LQ	2007 National LQ	2008 National LQ
Actors	0.74	0.63	0.40	0.40
Advertising and Promotions Managers	0.83	0.91	0.62	0.63
Agents and Business Managers of Artists, Performers, and Athletes	0.70	0.65	0.62	0.50
Architects, Except Landscape and Naval	0.52	0.48	0.48	0.41
Art Directors	0.75	0.62	0.54	0.43
Audio and Video Equipment Technicians	0.86	0.43	0.54	0.26
Broadcast Technicians	0.63	0.38	0.59	0.35
Camera Operators, Television, Video, and Motion Picture	1.05	0.61	0.54	0.35
Choreographers	0.77	0.66	0.40	0.34
Commercial and Industrial Designers	1.05	1.19	0.95	0.97
Dancers	1.18	0.62	0.88	0.37
Directors, Religious Activities	1.24	1.28	1.51	1.53
Editors	0.55	0.34	0.38	0.23
Fashion Designers	1.21	0.75	0.91	0.55
Film and Video Editors	1.28	0.65	1.02	0.49
Fine Artists including Painters, Sculptors, and Illustrators	0.62	0.54	0.51	0.42
Floral Designers	0.64	1.11	0.62	1.09
Graphic Designers	1.11	1.31	0.84	1.05
Interior Designers	0.71	0.47	0.67	0.44
Landscape Architects	0.54	0.59	0.49	0.49
Librarians	0.97	0.87	1.01	0.91
Media and Communication Equipment Workers, All Other	0.61	0.36	0.40	0.24
Media and Communication Workers, All Other	0.59	0.59	0.54	0.50
Multi-Media Artists and Animators	0.60	0.54	0.45	0.41
Music Directors and Composers	0.80	0.78	0.70	0.66
Musical Instrument Repairers and Tuners	0.65	0.78	0.58	0.84
Musicians and Singers	0.92	0.87	0.84	0.77
Photographers	0.60	0.67	0.49	0.55
Producers and Directors	0.62	0.39	0.40	0.25
Public Relations Managers	0.96	0.77	0.88	0.68
Public Relations Specialists	0.66	0.65	0.46	0.44
Radio and Television Announcers	0.55	0.88	0.50	0.83
Set and Exhibit Designers	0.78	0.74	0.68	0.68
Sound Engineering Technicians	0.82	0.65	0.45	0.34
Technical Writers	0.33	0.33	0.26	0.22
Writers and Authors	0.60	0.51	0.46	0.38

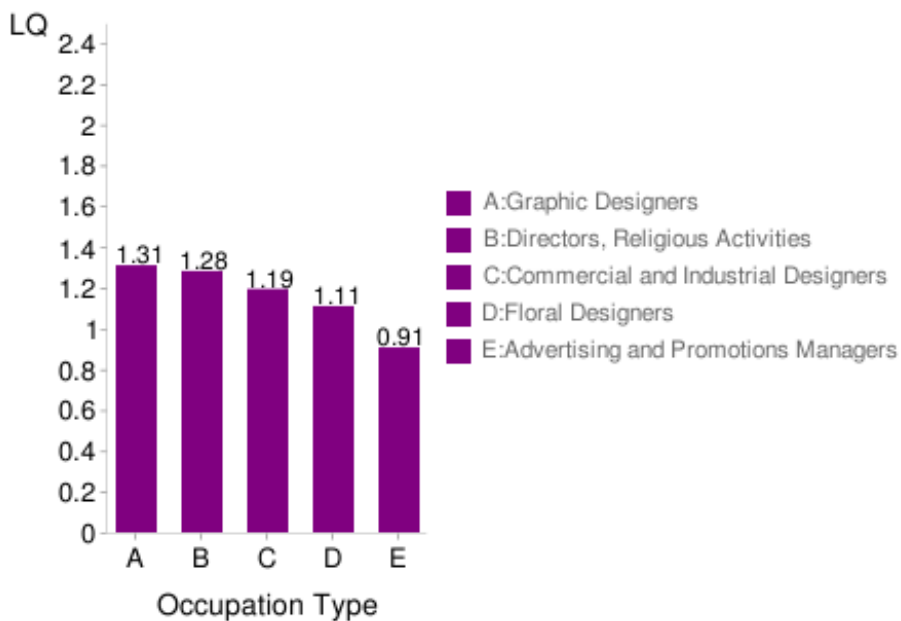
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 30
State Location Quotient 2007



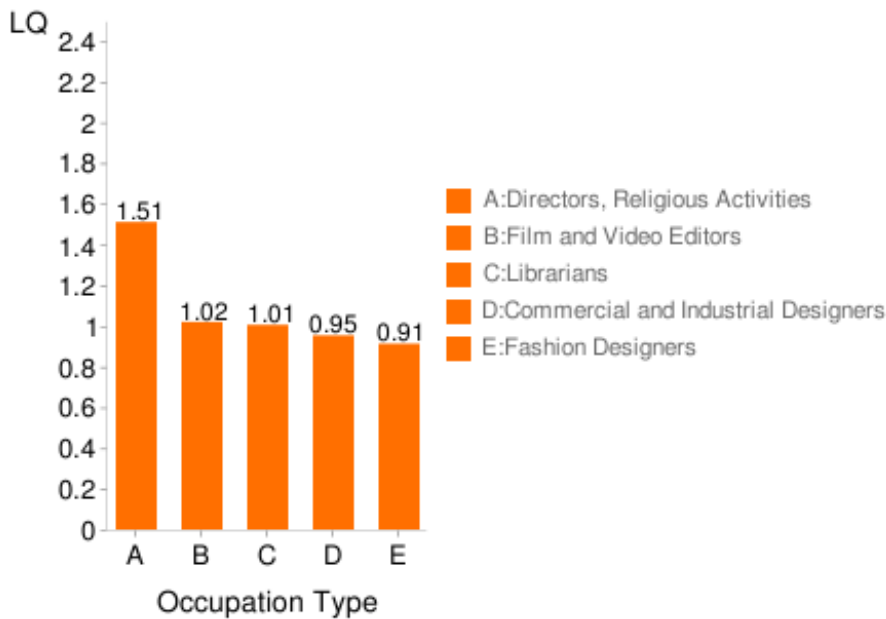
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 31
State Location Quotient 2008



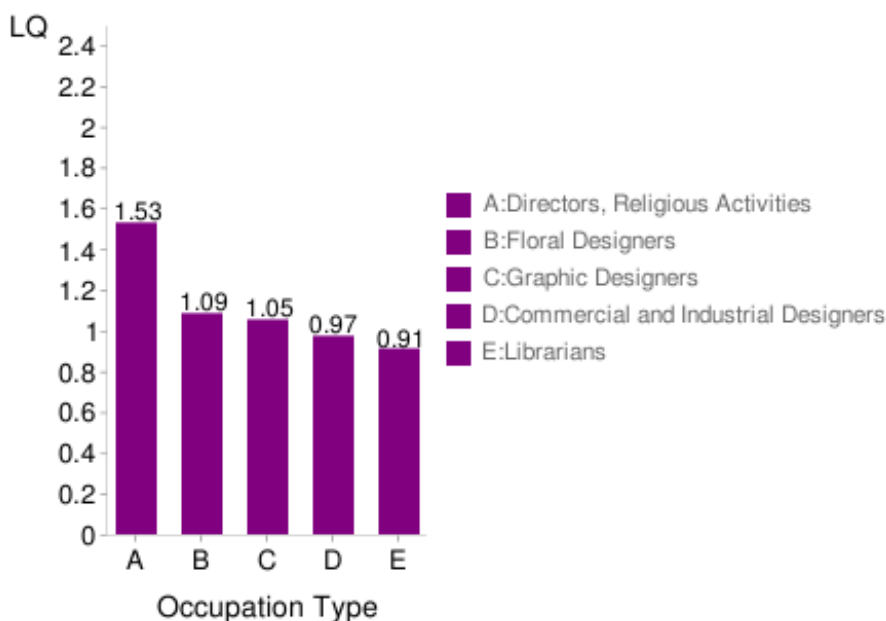
Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 32
National Location Quotient 2007



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Chart# 33
National Location Quotient 2008



Source: Economic Modeling Specialist, Inc. Complete Employment, Charlotte Mecklenberg CVI 2008

Section Four: Technical Report and Understanding the CVI™

While the informational value of this report is immense, the potential benefit to arts advocacy, planning, and policy-making is equally great. In order to realize the practical value of this research, it is important to review and consider the history of the CVI™ and its differentiation from economic impact studies. Some suggestions for making use of the research are also presented here to encourage immediate application of the research. Finally, the sources of CVI™ data are itemized to provide transparency of the research process.

Developing the Creative Vitality Index™

The CVI™ was developed in the context of innovations in cultural policy and economic development. The CVI™ was initially conceived of to help public sector arts agencies clearly communicate that their work encompasses a much larger segment of creative economic activity than had previously been the case. This was necessary because, beginning in the mid 1960s, when state arts agencies were established and city arts agencies were either founded or expanded, the primary focus of these entities was on the growth of the supply and quality of primarily nonprofit-based arts activities.

These entities made great progress in this area. Once the supply and quality of nonprofit arts activities was greatly bolstered, however, the public sector funders of the nonprofit arts field began to consider how their goals and the work of the nonprofit arts were part of a much larger creative system. They also became aware that the nonprofit arts and public arts policy depended on the health of that larger system to survive in the present and thrive in the future.

Simultaneous with these developments, practitioners from fields representing for-profit creative activities and occupations began to discuss the creative economy in broad, highly inclusionary terms. The arts field and public sector arts funders embraced this broader concept as reflective of how they now envisioned their work—as a stimulative part of an overall creative system and not simply as suppliers of funding to maintain a supply of nonprofit-sourced arts opportunities. The CVI™ reflects this broader systems-oriented thinking and reinforces the fact that the nonprofit arts and public arts agencies are part of an interdependent whole called the creative sector.

The CVI™ grew out of a conversation about whether to undertake an economic impact study of the arts. The staff leadership of the Washington State Arts Commission and the Seattle Office of Arts & Cultural Affairs, in collaboration with others, explored ways to expand and enrich the economic argument for support of the arts and especially public funding of the arts. In doing so, the group was influenced by two national conversations concerning economic development: the defining of a creative economy and the outlining of the concept of economic development clusters. Those conversations did something the nonprofit arts community was very late in doing- they included the related for-profit creative sector in a universe normally reserved for nonprofits.

The public value work articulated by Mark Moore also played a role in the development of the CVI™. That work helped the public sector component of the nonprofit arts funding community move away from a perspective oriented toward saving the arts to considering ways to be responsive to what citizens wanted in the arts. The approach also worked to shape agency deliverables to reflect their actual value to the public rather than the value arts aficionados considered them to have for the public. One result of this influence was that the CVI™ was developed in a context of thinking in which individuals are assumed to have choices and that, to remain viable, public sector arts funders need to offer choices the public will value and thus select. In this concept of selection is the understanding that choice in the arts ranges outside the nonprofit arts and that the public sector arts agency needs to ensure that such choice is available.

The Relationship of the CVI™ to Economic Impact Studies

Although it evolved from a discussion of whether to commission an economic impact study, the CVI™ is not an economic impact study of the arts. Economic impact studies are enumerations of the total economic value and impact of a specific basket of arts activities on the community, taking into account estimates of the ripple effect on jobs and revenues in other non-related industries. The majority of such studies focus on the nonprofit art sector and either measure its impact exclusively or introduce measures of the impact of selected for-profit activities in a supplementary manner. The CVI™ utilizes some of the data typically included in arts economic impact studies. However it draws on many more data streams, and its goal is quite different in that it seeks to provide an indicator of the relative health of the economic elements of the creative economy.

Economic impact studies are rooted in advocacy and generally have as a core purpose the definition of the nonprofit arts sector as a meaningful component of the larger economic system. The results of such studies are commonly used to argue for the allocation of scarce budget dollars to the arts because a dollar invested in the arts multiplies many times over and helps nurture a more robust overall economy. These studies have also been used to help the arts compete with other discretionary forms of government spending--and often these other interests have their own economic impact studies. The studies have been used most effectively to counteract the misguided notion that funds invested in the nonprofit arts are removed from the economy and thus play no role in building or sustaining it.

Economic impact studies have also been commissioned to call attention to the size and scope of arts and culture as a component of the overall economic activity of an area. Often, community leaders and the public are only familiar with one segment of the arts through their personal acquaintance with a single institution or discipline. The

economic impact study aggregates information in ways that call attention to the size and scope of a cluster of endeavors that are often considered to be of minor importance in economic terms. As a result, the prestige of the arts and culture community in an area is enhanced, and the ability of the sector to be heard is often increased.

Although the CVI™ can partially address each of the uses to which economic impact studies are employed, it has a different purpose. The CVI™ is about exploring a complex set of relationships and changes in the dynamics of those relationships over time. It is not a replacement for economic impact studies but can be a complement to them.

Making Use of the Creative Vitality Index™

The Creative Vitality Index™ is designed to serve as a tool to inform public policy decision making and to support the work of advocates for the development of the creative economy.

Here are some of the major uses of the CVI™: As a definitional tool, the Index can be used to call attention to and educate the community at large concerning the components and dynamics of the creative economy. Of particular significance is the promotion of the concept that the creative economy includes both the for-profit and the nonprofit arts-related activities of an area. Many economic studies centered on the arts have focused almost entirely on the nonprofit sector, and the inclusion of for-profit activities is, for many, a new conceptualization of the role of the arts in an economy. This approach locates all arts and arts-related creative activities in a continuum of creative activities.

The Index can serve as a source of information for advocacy messaging. Individuals engaged in advocacy on behalf of the creative economy as a whole or elements of it can use the Index to do some of the following: Call the attention of the public to significant changes in the creative economy ecosystem. For example, if contributions from private foundations drop substantially in a year and three major architectural firms leave the area, advocates for a healthy creative economy can call attention to these factors as negative elements that will affect an overall ecosystem. Similarly, if nonprofit arts groups at the same time experience increases in income from individuals and there are substantial increases in employment within other major creative occupations such as graphic design and advertising, the negative impact of the events noted above may be cushioned or alleviated altogether. --Underscore the economic relationships between the for-profit sector and the nonprofit sector and make the point that a healthy nonprofit arts sector is important to the development of a healthy for-profit sector. Advocate for improvements to the allocation of resources or the creation of policies that will increase the Index numbers through the expansion of the role of a creative economy in a region.

The Index can serve as a framework upon which to define and build a creative coalition. With the components of the Index setting forth a vision for a creative community rather than a nonprofit arts community, those who wish to build coalitions to influence change for the benefit of the development of the creative economy have a broader and deeper platform from which to begin the conversation. The Index can be used to benchmark an area of endeavor and lay the groundwork for the improvement of one or more aspects of the creative economy. The Index can serve as an initial diagnostic tool to create a baseline and then can be used to measure progress in that area. Elected officials and civic leaders can use the Index as a starting point for discussing ways in which an area's local economy can be enriched through the development of the creative-economy segment of that community.

More on the CVI™ Data Sources

Index data streams are analyzed by WESTAF and taken from two major data partners: the Urban Institute's National Center for Charitable Statistics, and Economic Modeling Specialists, Inc (EMSI).

The Urban Institute's National Center for Charitable Statistics aggregates information from the Internal Revenue Service's 990 forms. The forms are required to be submitted by nonprofit 501(c) organizations with annual gross receipts of \$25,000 or more. Organizations with more than \$25,000 but less than \$250,000 in annual gross receipts can file a 990 EZ form that collects less information. The CVI uses the information contained in the 990 forms to identify changes in charitable giving in an area. These numbers are the best available but are not absolute. Some numbers may not be reported because of errors made in the completion of the form. These include nested fund transfers within larger fund allocations that include the arts in a significant way but are not broken out, and/or the failure to capture data because an organization is either not required to file a 990 or does not file the full 990 form, thus limiting the level of data available.

Economic Modeling Specialists, Inc.'s (EMSI) expertise is centered on regional economics, data analysis, programming, and design so that it can provide the best available products and services for regional decision makers. In an effort to present the most "complete" possible picture of local economies, EMSI estimates jobs and earnings for all workers using Bureau of Labor Statistics data, data from the U.S. Bureau of Economic Analysis, and information from the U.S. Census Bureau. Because the number of non-covered workers in a given area can be large, job figures from EMSI will often be much larger than those in state LMI data. In order to estimate occupation

employment numbers for a region, EMSI first calculates industry employment, then uses regionalized staffing patterns for every industry and applies the staffing patterns to the jobs by industry employment data in order to convert industries to occupations. EMSI bases occupation data on industry data because it is generally more reliable and is always published at the county level, whereas occupation data is only published by Occupational Employment Statistics (OES) region (usually 4-6 economically similar counties). Occupation employment data includes proprietors and self-employed workers. EMSI uses nearly 90 federal, state and private sources including the U.S. Department of Commerce, the U.S. Department of Labor, The U.S. Department of Education, the U.S. Department of Housing and Urban Development, The U.S. Department of Health and Human Services, the U.S. Postal Service, and the Internal Revenue Service. (Partially Reprinted from www.economicmodeling.com)

Getting More Out of the CVI™

WESTAF's research and development team is committed to delivering the highest quality research in broadly accessible formats. Please visit CreativeVitalityIndex.org to learn more about the CVI™, and how it can be additionally useful.