

Performing Arts



6th

Largest **performing arts** cluster in Florida.



1,432

Employed in the **performing arts** cluster.



150

Establishments in the **performing arts** cluster.



3.3%

Average annual employment growth in the **performing arts** cluster.



178

Job seekers from top 10 occupations in the **performing arts** cluster.

Industry Overview

Pablo Picasso once said, “The purpose of art is washing the dust of daily life off our souls”. The performing arts cluster represents people engaged in producing, promoting, supporting and participating in live artistic performance. The cluster consists of eight NAICS industries, including theater companies, musicians, dancers, actors and artists. The value of this cluster is that performing arts create local economic benefits that extend or are “exported” beyond the region. A strong and vibrant performing arts cluster provides a region with a comparative advantage. The economic impact is felt on incomes and employment in the region as visitors come from other areas and spend their dollars on performances. These “new dollars” generate positive economic impacts beyond just the performing arts cluster, such as money spent on lodging, dining and entertainment.

This cluster also includes sports promoters as well as managers for athletes, public figures, entertainers and artists. Lee County has houses an entertainment bureau as well as the JetBlue Park, home to the Boston Red Sox spring training facility. There are many small groups and organizations that have come together to work on promoting the arts to audiences large and small. These organizations provide opportunities to young artists, in the form of auditions and professional performances. Larger venues in the areas have succeeded in attracting nationally recognized productions to the Southwest Florida region. These include classical orchestral performances, Broadway plays, and international dance and ballet troupes. People involved in this cluster recognize the importance of supporting the arts and providing cultural experiences to the local population, seasonal residents and tourists.

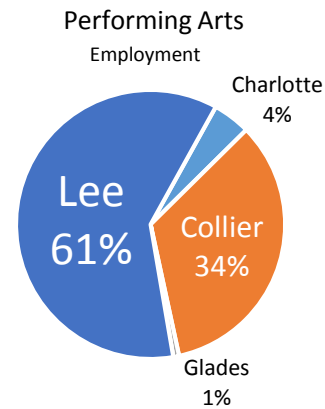
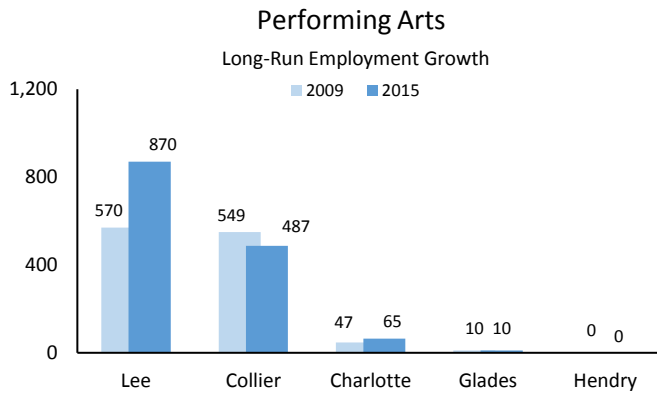
Economic Profile

Southwest Florida’s performing arts cluster is the sixth largest in the state. With 150 establishments as of 2015, this represents 5 percent of the total number of performing arts establishments in the state. Employment growth was strong between 2014 and 2015 (almost 14 percent), reflecting the strong type of growth that prevailed over the 6-year period (2009-2015). Location Quotients measure the degree to which an occupation is over or underrepresented in an area. Employment in this cluster has a location quotient that is greater than one relative to both the state of Florida and the U.S. With a value that exceeds 1, the implication is that employment concentration in this cluster is higher relative to the state and the country in like industries. The implication is that this region has a comparative advantage in this employment cluster. The location quotient for performing arts in Southwest Florida was 1.46 relative to the state and 1.35 relative to the country. This compares with just .93 for the entire state of Florida relative to the U.S.

Performing Arts Economic Profile		
	Southwest Florida	Florida
Employment, 2015	1,432	20,607
Number of Establishments, 2015	150	2,773
Short-run employment growth, 2014 to 2015	13.7%	4.3%
Long-run employment growth, 2009 to 2015	21.8%	1.9%
Average annual employment growth, 2009 to 2015	3.3%	0.4%
Workforce Region Employment Ranking, 2015	6th	--
Location Quotient, Relative to Florida, 2015	1.46	--
Location Quotient, Relative to United States, 2015	1.35	0.93

Source: County Business Patterns: 2015

Employment by County



Lee and Collier county together account for about 95 percent of total employment in performing arts, reflecting greater demand for these services in areas populated by seasonal residents, tourists and year-round residents. Charlotte and Glades counties employ fewer people in this cluster, reflecting both their smaller population on the demand side and fewer venues on the supply side.

Performing Arts Employment		
By County		
County	Employment	Percent of Total Employment
Charlotte	65	4.5%
Collier	487	34.0%
Glades	10	0.7%
Hendry	0	0.0%
Lee	870	60.8%
Southwest Florida	1,432	100.0%

Source: County Business Patterns: 2015

Collier County is the only one of the five counties in the region that has one establishment that employs between 250 and 499 people in the performing arts cluster. Lee County has four establishments employing between 100 and 250 employees. There are many smaller establishments in the performing arts cluster that employ typically employ 10 or fewer workers. From a total 150 establishments, 83 percent employ fewer than five percent employees. (Hendry County has no employees in this cluster.)

Performing Arts Establishments										
By County										
County	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Charlotte	12	1	0	1	0	0	0	0	0	14
Collier	53	4	2	3	0	0	1	0	0	63
Glades	1	0	0	0	0	0	0	0	0	1
Hendry	0	0	0	0	0	0	0	0	0	0
Lee	59	5	1	2	1	4	0	0	0	72
Southwest Florida	125	10	3	6	1	4	1	0	0	150

Source: County Business Patterns: 2015

Employment in the performing arts continued to grow in the five-county region over the most recent six-year period, as shown on the table below. However, the location of the growth varied among the counties. Collier County employment fell about 11 percent between 2009 and 2015 while Lee County increased by a substantial 53 percent during the same time period. Charlotte County also showed an increase in employment, although total employment in this county accounted for less than five percent during this time. Of the total 1,432 employees in 2015 in the performing arts, about 61 percent were employed in Lee County.

Performing Arts Long-Run Employment Growth					
By County					
County	Employment			Percent Change	Average Annual Percent Change
	2009	2015			
Charlotte	47	65	38.3%	5.6%	
Collier	549	487	-11.3%	-2.0%	
Glades	10	10	0.0%	0.0%	
Hendry	0	0	N/A	N/A	
Lee	570	870	52.6%	7.3%	
Southwest Florida	1,176	1,432	21.8%	3.3%	

Source: County Business Patterns: 2015

Employment by Subcluster

The eight industries (as indicated by NAICS codes) in the performing arts cluster are part of two subclusters, shown on the table below. As can be seen, the promoters and managers subcluster accounts for a larger percentage of employment. This subcluster provides for the attainment, support, exposure and ultimate employment of the artists. Of the total 1,432 employed in this cluster, 57 percent are the promoters and managers while about 43 percent are the performers themselves.

Performing Arts Employment		
By Subcluster		
Subcluster	Employment	Percent of Total Employment
Promoters and Managers	818	57.1%
Performing Artists	614	42.9%
Total	1,432	100.0%

Source: County Business Patterns: 2015

Employees classified by the subcluster are typically found in establishments that employ less than five people. The number of establishments employing performing artists relative to promoters and managers are about three to one. Again, the number of establishments with more than 100 artists, promoters and managers is sparse and are located in the larger two counties of Southwest Florida, as shown in a previous table. Overall, there are 150 establishments in the region with the greatest employment opportunities for artists, managers, and promoters concentrated in the larger venues of Collier and Lee counties.

Performing Arts Establishments										
By Subcluster										
Subcluster	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Performing Artists	96	7	2	1	1	2	0	0	0	109
Promoters and Managers	29	3	1	5	0	2	1	0	0	41
Total	125	10	3	6	1	4	1	0	0	150

Source: County Business Patterns: 2015

The performing arts cluster in the five-county region is growing, as measured by the number of performing artists. Between 2009 and 2015, growth in employment averaged almost 10 percent annually. The number of promoters and managers decreased by less than 1 percent. Looking at both subclusters combined shows a very positive growth rate annually for this region as of 2015.

Performing Arts Long-Run Employment Growth				
By Subcluster				
Subcluster	Employment		Percent Change	Average Annual Percent Change
	2009	2015		
Performing Artists	353	614	73.9%	9.7%
Promoters and Managers	823	818	-0.6%	-0.1%
Total	1,176	1,432	21.8%	3.3%

Source: County Business Patterns: 2015

Workforce Ranking

This table indicates how employment in the performing arts cluster of Southwest Florida ranked when compared to the other regions in the state. Of the total employed in the state, Southwest Florida ranked sixth for jobs in the performing arts, behind the Palm Beach workforce region but ahead of Broward.

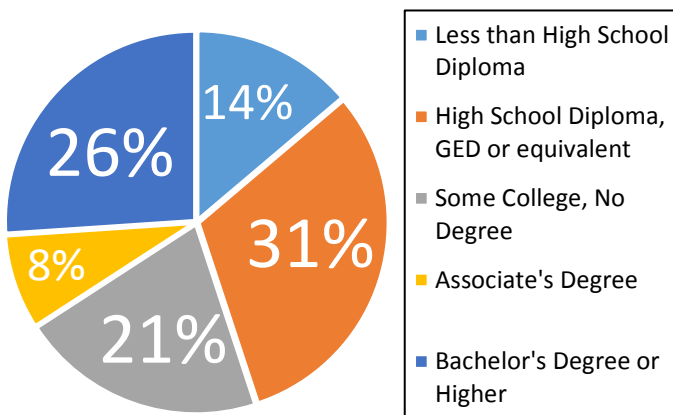
Performing Arts Workforce Rankings		
Rank	Workforce Region	Employment Level
1	South Florida	4,465
2	Central Florida	2,815
3	Northeast Florida	2,497
4	Tampa Bay	2,456
5	Palm Beach County	2,139
6	Southwest Florida	1,432
7	Broward	1,360
8	Escarosa	845
9	Suncoast	773
10	Polk	596
11	Research Coast	566
12	Pasco Hernando	531
13	Pinellas	527
14	Capital Region	218
15	Brevard	177
16	Flagler Volusia	166
17	Citrus Levy Marion	157
18	North Central Florida	137
19	Okaloosa Walton	124
20	Gulf Coast	54
21	Heartland	50
22	Florida Crown	20
23	North Florida	20
24	Chipola	0

Source: County Business Patterns: 2015

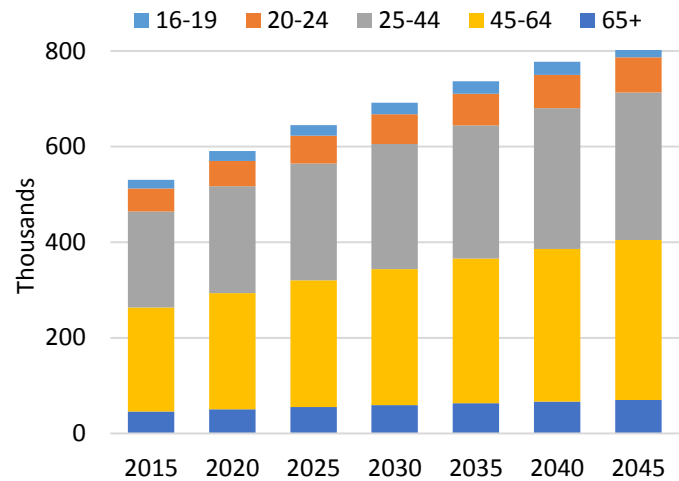
Workforce Profile

Many companies choose to operate in Southwest Florida due to its workforce. Of the region’s adult population, 26 percent have a Bachelor’s Degree or higher, while 86 percent have at least a high school diploma. Florida Gulf Coast University conferred 2,331 Bachelor’s Degrees to students during the 2015-2016 academic year, while Florida Southwestern State College, with its four campuses throughout the region, conferred 1,942 Associate’s Degrees and 341 Bachelor’s Degrees during the 2014-2015 academic year. Other educational institutions serving the area include Hodges University in Naples and Kaiser University in Fort Myers. Meanwhile, regional training programs, such as CareerSource Florida, provide training programs and certificates in numerous areas. Furthermore, the composition of the workforce is expected to change as the population grows over the next 25 years. Southwest Florida’s population is expected to grow 50 percent by 2045, expanding the region’s customer base while increasing its labor force by 54 percent.

Educational Attainment



Projected Labor Force



Performing Arts Occupations

By Total Employed

Occupation	Total Working Across All Industries	Number of Available Applicants	Number of Graduates	Entry Wage	Median Wage	Experienced Wage	Education Level
Security Guards	4,145	60	0	\$9.53	\$11.19	\$12.74	PSAV
Amusement and Recreation Attendants	1,728	12	0	\$8.79	\$9.38	\$11.10	Less than High School
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	1,681	13	0	\$8.74	\$9.04	\$9.96	Less than High School
Sales Managers	545	79	98	\$35.45	\$61.68	\$79.49	Bachelor's Degree
Music Directors and Composers	388	2	0	\$13.70	\$21.33	\$27.37	Bachelor's Degree
Locker Room, Coatroom, and Dressing Room Attendant	270	3	0	\$8.86	\$10.08	\$12.11	Less than High School
Ushers, Lobby Attendants, and Ticket Takers	147	4	0	\$8.84	\$9.00	\$9.51	Less than High School
Art Directors	79	3	0	\$21.52	\$32.33	\$35.30	Bachelor's Degree
Umpires, Referees, and Other Sports Officials	40	1	0	\$15.83	\$18.70	\$20.00	PSAV
Gaming Change Persons and Booth Cashiers	34	1	0	\$9.28	\$10.94	\$12.31	High School/GED

Source: Florida Department of Economic Opportunity, Occupational Supply/Demand Report

Cluster Highlights

KEY COMPANY ANNOUNCEMENTS

- The performing arts center Artis—Naples received its largest donation in 27 years in 2016 in the amount of \$15 million.
- Artis—Naples named its five building campus the Kimberly K. Querrey and Louis A. Simpson Cultural Campus, after the generous donation by the couple.
- Artis—Naples received a \$10 million donation from Sharon and Timothy Ubben in late 2015 to begin an orchestra endowment.
- Southwest Florida Symphony Society serves as a fundraiser for the Southwest Florida Symphony Orchestra and manages scholarships to help support young music students
- Artis—Naples received a \$1 million donation from Kimberly Querrey and Louis Simpson in early 2016 to develop audiences and programming.
- Alliance for the Arts runs programs to promote, create and educate the public in the arts culture in Southwest Florida. Its operations include hosting the annual “Fall for Arts” for young performers and artists, providing free exhibition space for student exhibits in Lee County, and furnishing rental space for area artists and businesses
- The Barbara B. Mann performing arts halls runs the Broadway Series with plays and musicals off the Broadway stage. In 2016-2017, it featured separate performances by Bob Dylan and Jay Leno. In fall of 2017, it will host the Moscow Ballet’s version of the Nutcracker.

EVENTS, AWARDS AND RECOGNITIONS

- Florida SouthWestern State College hosted the 2017 Spring Student Music Concert Series at its Barbara B. Mann Performing Arts Hall. Concerts are free to the public.
- Collier County celebrates Arts Month every November with free concerts and other festivities.
- Naples offers the Naples International Film Festival in November to celebrate independent films.
- The Baker Museum on the campus of the Artis Naples performing arts center runs special exhibits monthly.
- Alliance for the Arts provides space for the annual Young Artists Awards.
- Alliance for the Arts was named by the Lee County Port Authority to be the organization responsible for permanent art exhibits at the SWFL International Airport

Companies

- Artis—Naples
www.artisnaples.org
- Naples Performing Arts Center
www.naplesperformingartscenter.com
- Gulfshore Playhouse
www.gulfshoreplayhouse.org
- Naples Players
www.naplesplayers.org
- Alliance for the Arts
www.artinlee.org
- Barbara B. Mann Performing Arts Hall
www.bbmannpah.com
- Center for Performing Arts
www.thecpac.net
- Cultural Center of Charlotte County
www.theculturalcenter.com
- Southwest Florida Performing Arts
www.swflpac.com

Education & Training

Florida’s system of higher and post-secondary education provides hundreds of training programs generating advanced degrees and occupational certificates that prepare students for productive careers in our region. The state university system includes 13 institutions, while community colleges number 28. Furthermore, there are 84 private universities and occupational and technical schools in the state. A list of the top educational institutions producing graduates that work in the performing arts cluster would include the following:

- Florida Gulf Coast University
www.fgcu.edu
- Broward College
www.broward.edu
- University of Miami
www.miami.edu
- Florida State University
www.fsu.edu
- University of Central Florida
www.ucf.edu
- University of South Florida
www.usf.edu
- Florida SouthWestern State College
www.fsw.edu
- Florida Atlantic University
www.fau.edu
- Florida International University
www.fiu.edu
- Miami-Dade College
www.mdc.edu
- University of Florida
www.ufl.edu

Cluster Definition

The performing arts cluster includes services that produce, promote and support live artistic performances. These performances are offered in a variety of venues and include professional and semi-professional artists. Southwest Florida has eight “industries” as defined by their NAICS codes and fall within two subclusters – performing artists and promoters and managers.

Performing Arts Breakdown of Subclusters	
Subcluster/NAICS Description	6-Digit NAICS Code
<i>Performing Artists</i>	
Theater companies and dinner theaters	711110
Musical groups and artists	711130
Independent artists, writers, and performers	711510
Dance companies	711120
Other performing arts companies	711190
<i>Promoters and Managers</i>	
Promoters of performing arts, sports, and similar events with facilities	711310
Promoters of performing arts, sports, and similar events without facilities	711320
Agents and managers for artists, athletes, entertainers, and other public figures	711410

Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School