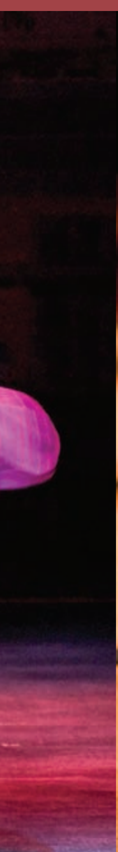



CREATIVE INDUSTRIES IN ALABAMA

SUMMARY REPORT

A South Arts Research Publication

By Allen Bell

BUILDING A BETTER ALABAMA THROUGH THE ARTS

Alabama

Creative Industries Profile

Table of Contents

OFFICE OF THE GOVERNOR

ROBERT BENTLEY
GOVERNOR

STATE CAPITOL
MONTGOMERY, ALABAMA 36130

(334) 242-7100
FAX: (334) 242-3282

STATE OF ALABAMA

Alabama has historically been blessed with a wide range of cultural assets and creative individuals. From shape note singing to quilting, from pottery making to country music, from Shakespeare to galleries filled with Southern masterpieces, the state is rich in both contemporary and traditional arts. These artists and art forms not only reflect our unique cultural environment but also constitute a creative industry that contributes to the state's economy and economic development future.

Increasingly, quality of life will determine where companies decide to locate, invest and expand business activity. Quality of life plays a big part in attracting employees, families and the best and brightest executives, all whom want to live in a community that is culturally vibrant and stimulating. Quality of life also contributes toward keeping our best and brightest in the state engaged in good jobs that are part of a changing employment landscape. To this end, creative communities and creative industries are important to Alabama's economic future and strategy for growth.

While we may appreciate our fine arts and artists integral to performances, exhibitions and a wide range of community celebrations, we may not fully appreciate the arts as an important industry in Alabama. The arts and creative industries in the state have a significant economic impact in both the not-for-profit and the for-profit sectors. Whether a symphony hall or a recording studio, a museum or a commercial gallery, a library or a publishing house, the creative industries in Alabama account for 4,700 businesses and over 71,000 jobs, with wages of more than 2 billion dollars generating nearly 8.7 billion dollars in annual revenue. These are significant numbers reflecting activity in the state that is important on many levels.

A revealing report has been compiled and printed by South Arts, a nine-state regional organization based in Atlanta and the Alabama State Council on the Arts. The report provides a comprehensive profile of the creative industries in Alabama. The data in this report will hopefully be shared, used and considered as we craft economic development strategies in the challenging years ahead. The data should also be a motivating factor for supporting and nurturing our valuable creative industries that both enhance our quality of life and create jobs. As Governor, I am pleased to highlight yet another asset of our great state that should be part of our growth in the future.

Robert Bentley

Robert Bentley
Governor

Office of the Governor

Robert Bentley
Governor

State of Alabama

Department of Commerce

Greg Canfield
Secretary of Commerce

Alabama has long recognized the importance the arts and culture play in economic development. Business officials don't just work in a community; they want their families to have an excellent quality of life in a community rich with opportunities. The arts are an important part of our quality of life and factor in when business executives are making the decision where to locate new companies.

Alabama is the ideal place to live and raise a family. From its beautiful mountain ranges to the white, sandy beaches of the Gulf Coast, Alabama is a state of amazing diversity. The Alabama Shakespeare Festival in Montgomery brings worldwide attention to the state and the state's museums from Huntsville to Mobile are second to none. There are numerous music festivals as well as street festivals for artists. Art museums abound in the state and a special high school for creative young people called the Alabama School of Fine Arts in Birmingham has produced talented and successful young writers and artists.

Arts and culture increase economic development by attracting businesses, creating new jobs, increasing tax revenues and promoting tourism. They are excellent tools to attract professionals to our cities, thereby both retaining and increasing Alabama's pool of talented employees needed for the high-technology jobs being attracted in the state.

Leveraging our state's creative industries can be an excellent way to accomplish our goals of bringing good paying jobs to the citizens of our state.

Greg Canfield

Secretary

Alabama Department of Commerce

401 Adams Avenue • Montgomery, Alabama 36130-4106 • (334) 242-0400 • USA (800) 248-0033 • www.commerce.alabama.gov

Alabama State Council on the Arts

James I. Harrison, III
Chairman

Albert B. Head
Executive Director

201 Monroe Street
Suite 110
Montgomery, Alabama
36130-1800
334•242•4076
FAX: 334•240•3269
staff@arts.alabama.gov
www.arts.state.al.us

South Arts, a nine-state regional organization that responds to the arts environment and cultural trends, recently conducted a study on the creative industries in the South. The study released in 2012 provided data for nine states showing the scope and breadth of the creative industries in a region including Mississippi, Tennessee, South Carolina, North Carolina, Louisiana, Florida, Georgia, Kentucky and Alabama.

A snapshot of the study profiling Alabama reflects our state having almost 5,000 creative industries employing over 70,000 people with wages totaling right at 2 billion dollars. The revenue of creative industries is at the 9 billion dollar mark. These figures don't even include government arts activity such as civic centers, public museums, schools and university arts programming. But, these numbers do include individual artists and those self-employed in creative fields. Those sectors add significantly to the total dollars involved in this broad-based field.

While the regional study spotlighting Alabama was useful and enlightening, the State Council on the Arts felt it would be valuable to also provide a profile for each of the major metropolitan areas in the state, Huntsville, Birmingham, Montgomery and Mobile. With this in mind, the Council asked South Arts to extend the study to reflect the creative industries in each of these areas. So, this report is the results of the initial Alabama profile plus the details on these four geographic regions of the state.

While the numbers provide details and specifics, the important story here is the arts are the backbone of what is now becoming known as the Creative Economy. This is an economy that attracts creative professionals, creative businesses and community design concepts oriented to sustained growth. This progressive approach to economic development promotes new jobs, better jobs, and a smarter workforce that engages in creative problem solving in both business and the broader community.

As this study illustrates, Alabama has rich cultural resources and, thus, great potential. The question remains, to what degree will we recognize, support and utilize these resources and this potential? The challenge and opportunity needs to be met with a public-private partnership focused on nurturing a more creative economy and industry. As the State Council on the Arts plans for the future and directs public support for the arts, increasing emphasis will be placed on contributing to creative communities, creative programs and creative ideas that are part of "Building a Better Alabama Through the Arts."

Finally, the Council needs to thank South Arts and specifically the work of Allen Bell for conducting this study and collecting data that will have both short and long-term impact in Alabama. In the case of the creative industries study, leadership and initiative at the regional level has proven to be a valuable service to many organizations, agencies, communities and individuals with a vested interest in positive growth for the South.

Albert B. Head
Executive Director

Introduction

The Value of the Arts – Intrinsic, Social, Pedagogical, Economic

The arts are essential for a variety of reasons. They provide intrinsic value through the psychological well-being experienced by individuals engaged in the creative process. The arts are a powerful catalyst for community-building through the common experiences and identities which cultural events, narratives, and traditions create. The arts enhance and enrich the education of children, adults, and seniors by engaging areas of the brain that are left untouched by pursuits in other academic areas; through the practice of creativity which translates into other fields and aspects of life; and by providing an essential part of a holistic education that engages the mind, body, and spirit. These are all reasons that are just as or more important than the economic impact of the arts, culture, and creativity in the economy. But the U.S. and global economies are just emerging from the Great Recession. While all of the previously mentioned benefits of the arts are noteworthy, it is the argument for the economic benefit of the arts, culture, and creativity that rings loud and true at a time when limited resources must be invested for the greatest gain. It is in this context that South Arts has developed this baseline study on the creative economy in its nine-state region of Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, and Tennessee.

The Culture of the South

The region of the southeastern United States, also known as the American South, is famous for its artists and their cultural output. The South has a rich reputation in many disciplines of the arts and culture – as the birthplace of blues, jazz, and rock; as the home of the unofficial capital of country music; as the place of origin for an unmatched tapestry of folklife and traditional artists; and as the inspiration for many of the nation's most talented writers. The South Arts region is also known for some of the largest and most important arts festivals in the country, from Spoleto to Art Basel Miami, from the National Black Arts Festival to Kentuck, from the New Orleans Jazz & Heritage Festival to Bonnaroo, from Kentucky Crafted to the Alabama Shakespeare Festival, from Full Frame to the Mississippi Delta Blues and Heritage Festival, from the Savannah Music Festival to Mardi Gras. The South is also home to some of the best arts schools in the U.S., including Savannah College of Art & Design, Full Sail University, North Carolina School of the Arts, Ringling College of Art and Design, Watkins College of Art & Design and The Watkins Film School, and the Art Institute of Atlanta. The region also boasts some of the best non-degree-granting arts programs in the nation, including Penland School of Crafts, Appalshop, John C. Campbell Folk School, Arrowmont School of Arts and Crafts, Southern Highland Craft Guild, and the Folk Arts Workshops of Warren Wilson College.

Defining the Creative Economy and Creative Industries

When most people talk about the arts, they are actually referring to independent artists and the non-profit arts sector. While both components have a significant impact on the overall creative economy, the definition of creative economy also includes for-profit businesses engaged in creative activity that may directly involve the arts and artists, or more broadly may involve applying artistic skills and creativity that does not result in a work of art, per se, but rather, produces a product or output that would not otherwise be viable if not for the value added through creative genesis or aesthetic transformation. In addition, the creative economy includes all aspects of the value chain related to creative products, including design, development, production, distribution, marketing, sales, and equipment.

There are a couple of ways to look at the scope of the creative economy based on the availability of existing data. One way is to look at the creative workforce – those who are engaged in occupations that require artistic knowledge, skills, or creative ingenuity, working in industries that may or may not be considered creative. Examples include automobile designers for a car manufacturer, and graphic designers for a financial institution. Studies looking at the creative workforce will capture all workers engaged in creative pursuits, but will miss the non-creative jobs that are generated as a result of the economic activity of creative industries.

Another way to explore the scope of the creative economy is to look at creative industries – businesses that produce, distribute, or sell goods and services that result from the application of artistic knowledge, skills, or creative ingenuity. In studies on the creative industries, the data and reports will miss some of the creative occupations that reside in industries that do not produce an artistic or mostly aesthetic product; however, such studies will capture workers within creative industries who may or may not be engaged in creative pursuits. For instance, creative industries studies will include data that represents accountants for arts organizations and salespeople for book stores.

For the purposes of this report, we are studying the creative economy through the lens of the creative industries by looking at data collected and made public by the U.S. Census Bureau through the 2007 Economic Census and 2007 Nonemployer Statistics. It is necessary to include the data from the Nonemployer Statistics because the Economic Census does not capture the economic activity of the self-employed who represent an important segment of the creative industries.

In addition, we take a brief look at the nonprofit arts, culture, and humanities, through the data made available from the National Center for Charitable Statistics. Looking at these numbers helps provide a sense of the economic size and scope of the nonprofit arts industry in the region.

Getting at the Value of the Creative Industries in the South

The creative industries in the South boast some impressive numbers – 82,852 establishments, more than 1.1 million workers, $41.4 billion in annual payroll, and $142.6 billion in annual revenues. Based on these numbers, the creative industries have a sizable impact on the economy of the South, representing 5.5% of all business establishments in the region, 4.1% of all employment, at least 3.9% of all payroll and 2.9% of all industry revenues.[9] The creative industries represent the fourth largest industry cluster in the region based on number of establishments, the fifth largest based on employment, and at least the eighth largest based on total wages.

At the heart of the creative industries are the nonprofit arts, culture, and humanities organizations. The South is home to 17,155 registered nonprofit arts, culture, and humanities organizations. Of those, 6,649 had at least $25,000 in annual revenue and therefore filed IRS form 990. The organizations that filed form 990 reported total annual revenue of approximately $3.6 billion and total assets of $9.4 billion.

In general, the largest industry sector groups in the region are film and media, and literary and publishing, followed by design, and visual arts and crafts. The most significant film and media sectors in the region include radio, television, and other electronics stores; software publishers; broadcasting; television broadcasting; advertising agencies; cable and other program distribution; and video tape and disc rental. The largest literary and publishing sectors include commercial lithographic printing, newspaper publishers, periodical publishers, and independent writers. The top design categories are architectural services, specialized design services, interior design services, graphic design services, and florists. The biggest visual arts and crafts sectors include jewelry stores, and photography studios.

The information in the following pages presents the creative economy data for the South Arts region in more detail with appropriate documentation.

List of Tables

List of Figures

Acknowledgements

This study could not have been completed without the efforts and guidance of many people. First, we would like to thank Al Head, executive director, and the Alabama State Council on the Arts for their support of this study. It would not have been created without them. Also, we would like to acknowledge Stuart Rosenfeld and Jenna Bryant with Regional Technology Strategies, Inc. for their advice regarding the structure and methodology of our previous study, *Creative Industries in the South*, which provides the methodological basis for this study.

We would like to thank the contributions of the members of the South Arts Creative Economies Advisory Committee for their advice and counsel. They include: Ted Abernathy, Southern Growth Policies Board; H. Martin Lancaster, Smith Anderson Law Firm; J. Martin Lett, Register Lett, LLP; Todd Lowe, Parthenon, LLC; Wayne Martin, North Carolina Arts Council; Stuart Rosenfeld, Regional Technology Strategies, Inc.; and Malcolm White, Mississippi Arts Commission.

The creative economies research work would not be possible without the vision and commitment demonstrated by South Arts board and staff, including Margaret Mertz, board chair; Malcolm White, executive vice chair; Lori Meadows, vice chair portfolio; Gerri Combs, executive director; and Mollie Lakin-Hayes, deputy director.

We also appreciate the efforts by those who took the time to painstakingly proofread a full draft of the study: Gerri Combs, Mollie Lakin-Hayes, and Clare Yaghjian, intern.

Preface

As part of the new research program developed by South Arts, explorations into the creative economy are a top priority. While numerous studies have made strong arguments about the economic benefits of the nonprofit arts, as well as the broader field of creative industries, none of those studies have taken a local look at the creative industries within the major metropolitan areas of Alabama. Hence, South Arts is pursuing a research agenda that includes the creative economy and continues with this study, a follow-up to *Creative Industries in the South*, released in January 2012.[1]

Back in 2001, in *The Creative Industries Mapping Document*, the United Kingdom Department of Culture, Media and Sport defined the creative industries as:

> … those industries which have their origin in individual creativity, skill and talent which have a potential for wealth and job creation through the generation and exploitation of intellectual property. The creative industries include: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio.[2]

This concept of creative industries helped expand the definition of arts-related work and businesses, and influenced researchers in a way that encouraged them to develop a new scope for how they measure and analyze the creative economy. The perspective of new research grew beyond just looking at the nonprofit arts industry to include the vast array of jobs and industries that require skills and knowledge in the various fields of creativity. Today, the creative economy is a major theme among economic development agencies in the U.K., Canada, Australia, and Singapore, among other countries.[3] In the U.S., however, the creative economy is just now beginning to catch on as a theme among economic developers.

[1] Allen Bell, *Creative Industries in the South*, published by South Arts, January, 2012. Available at www.southarts.org/creativeeconomies/.

[2] United Kingdom Department of Culture, Media and Sport, *The Creative Industries Mapping Document*, 2001.

[3] Government and university offices working on creative economy research and policy development include the UK's Department of Culture, Media and Sport, Australia's ARC Centre of Excellence for Creative Industries and Innovation at Queensland University of Technology, Singapore's Creative Industry Strategy Group in the Ministry of Information, Communications and the Arts, Create Hong Kong, the European Commission, Dun Laughaire Institute of Art, Design, & Technology in Ireland, The Creative Industries Innovation Fund in Northern Ireland, the Centre for Creative Industries in Macau SAR, China, among many others.

The National Governor's Association recently acknowledged the importance of and expansive reach of the creative industries in their 2010 study *Arts and the Economy: Using Arts and Culture to Stimulate State Economic Development*:

> Arts and culture are important to state economies. Arts and culture-related industries, also known as 'creative industries,' provide direct economic benefits to states and communities: They create jobs, attract investments, generate tax revenues, and stimulate local economies through tourism and consumer purchases. These industries also provide an array of other benefits, such as infusing other industries with creative insight for their products and services and preparing workers to participate in the contemporary workforce. In addition, because they enhance quality of life, the arts and culture are an important complement to community development, enriching local amenities and attracting young professionals to an area.[4]

While these benefits of the creative industries ring true, it makes an even more convincing argument when the scale and scope of the creative economy can be quantified and presented in a way that makes its impact clear.

The definition of the creative economy used for this report, which determines the specific North American Industrial Classification System (NAICS) sectors included in the analysis, is a broad one. It is mostly based on areas of plurality and consensus between the creative economy studies developed by New England Foundation for the Arts (NEFA), Americans for the Arts (AFTA), Louisiana, North Carolina, Mississippi, Arkansas, and Colorado.[5]

---

[4] National Governors Association, *Arts and the Economy: Using Arts and Culture to Stimulate State Economic Development*, 2010. Their follow-up study released in 2012, *New Engines of Growth: Five Roles for Arts, Culture and Design*, examines specific case studies demonstrating the role of the arts and culture in economic development throughout the nation.

[5] DeNatale, Douglas, Gregory H. Wassall, *The Creative Economy: A New Definition*, New England Foundation for the Arts, 2007; "Economic Contribution of the Creative Industry in North Carolina," *Creative Economy: The Creative Industry in North Carolina*, North Carolina Department of Cultural Resources, 2009; *Creative Economy: The Arts Industry in North Carolina*, North Carolina Department of Cultural Resources, 2007; Mt. Auburn Associates, *Louisiana: Where Culture Means Business*, State of Louisiana, Office of the Lt. Governor, Department of Culture, Recreation and Tourism, Office of Cultural Development, Louisiana Division of the Arts, 2005; Alliance for Creative Advantage, Regional Technology Strategies and Mt. Auburn Associates, *The State of Colorado's Creative Economy*, 2008; Regional Technology Strategies, with Mt. Auburn Associates, Arkansas Arts Council, Arkansas Science & Technology Authority, and Arkansas Association of Two-Year Colleges, *Creativity in the Natural State: Growing Arkansas' Creative Economy*, 2007; Broun, Dan, Ed., *Ducks, Documentaries, & Design: Tales from Arkansas' Creative Economy*, Regional Technology Strategies, with Mt. Auburn Associates, Arkansas Arts Council, Arkansas Science & Technology Authority, and Arkansas Association of Two-Year Colleges, 2008; Regional Technology Strategies, with Mt. Auburn Associates, Arkansas Arts Council, Arkansas Science & Technology Authority, and Arkansas Association of Two-Year Colleges, *Deep Roots, High Hopes: Foundations of Arkansas' Creative Economy*, 2008; Regional Technology Strategies, with Mt. Auburn Associates, Arkansas Arts Council, Arkansas Science & Technology Authority, and Arkansas Association of Two-Year Colleges, *Unveiling the Creative Economy in Arkansas: Strategies to Increase Creative*

This definition is broader than the more specific categories of nonprofit arts and culture, but it is much more restricted than Richard Florida's concept of a creative class.[6]

The data used in this study are for industry categories very similar to, but not an exact replica of, the categories used in the UK definition of the creative economy. This study includes data from industries in the following categories: the visual arts and crafts, the performing arts, film and television, broadcasting, architecture, all areas of design, advertising and public relations, writing and publishing, museums and historical sites, and software publishers.

Even with data included from all of these categories, the numbers in this study still represent an undercount of the entire creative economy in the major metro areas of Alabama. By looking at creative industries, this study captures all of the workers employed in firms whose products take the form of intellectual property or whose services or products facilitate the production, distribution, marketing, sale, or consumption of intellectual property.

With a focus on the creative industries this study does not capture, however, those creative workers who are employed with firms in industry sectors that do not fall under this definition of the creative industries. So, for instance, this data does not include clothing or automobile designers. (For more details on this, see Appendix 1: Methodology.)

In light of the expanded definition of the creative industries and the importance of their broad reach into Alabama's economy, South Arts has conducted this study in an effort to create baseline data on the creative economy of the state's major cities. The purpose of the report is to begin the conversation on the importance of this economic sector to our Alabama's economic stability and growth.

This report includes individual metropolitan creative industries profiles for Birmingham, Huntsville, Mobile, and Montgomery. The metropolitan data will help Alabama State Council on the Arts develop a picture of the creative economy in specific local areas and will help the organization see the geographic distribution of creative industries between the four cities and provide information about their creative industry strengths.

This study is based on data from the 2007 Economic Census and the 2007 Non-Employer Statistics, both provided by the U.S. Census Bureau, as well as data collected and

---

Capacity and Competitive Advantage, 2009; Kushner, Roland J., and Randy Cohen, *National Arts Index 2010: An Annual Measure of the Vitality of Arts and Culture in the United States: 1998-2009*, Americans for the Arts, 2011.

[6] Florida, Richard, *The Rise of the Creative Class: And How It's Transforming Work, Leisure, Community, and Everyday Life*, Basic Books, 2003.

distributed by the National Center for Charitable Statistics. The exact data codes included in the study are published in Appendices 2 and 3 at the end of this report.

For the purposes of comparison and analysis, the data has been organized into six sector categories within the creative economy: design, film and media, heritage and museums, literary and publishing, performing arts, and visual arts and crafts. This breakdown of the creative industries into six sector categories borrows from the segmentation developed by the Alliance for Creative Advantage, including Regional Technology Strategies and Mt. Auburn Associates, for their 2008 study *The State of Colorado's Creative Economy*.[7]

Other studies, such as *Economic Contribution of the Creative Industry in North Carolina*[8] and *Louisiana: Where Culture Means Business*[9], have included additional industry categories like culinary arts and historic preservation. This study does not include those categories. Doing so will require taking percentages of sector data found within the Economic Census and Non-Employer Statistics, and based on industry profiles developed by the state. Due to limited time and resources, that work could not be completed in time to be included in this report. We hope to include data for the culinary arts and historic preservation in future reports.

While this study is the result of a tremendous amount of data mining from the U.S. Census Bureau and the National Center for Charitable Statistics, it only scratches the surface of the information that is available about the creative industries and the creative workforce. There is additional historical data available from the Economic Census, Non-Employer Statistics, and the National Center for Charitable Statistics, which will allow for the measurement of trends over time. In addition, there are numerous other data sources that can be accessed for information related to the creative economy, including the Bureau of Labor Statistics, the Bureau of Economic Analysis, the American Community Survey, and many others. This report establishes baseline data on the creative industries for the metro areas included. It is just the beginning of the creative economy research conducted by South Arts. Future research will build on the information and discoveries gleaned from this report.

Meanwhile, this is the first local study of the creative industries in the four Alabama

---

[7] Alliance for Creative Advantage, Regional Technology Strategies and Mt. Auburn Associates, *The State of Colorado's Creative Economy*, 2008.

[8] "Economic Contribution of the Creative Industry in North Carolina," *Creative Economy: The Creative Industry in North Carolina*, North Carolina Department of Cultural Resources, 2009.

[9] Mt. Auburn Associates, *Louisiana: Where Culture Means Business*, State of Louisiana, Office of the Lt. Governor, Department of Culture, Recreation and Tourism, Office of Cultural Development, Louisiana Division of the Arts, 2005.

metropolitan areas of Birmingham, Huntsville, Mobile, and Montgomery.

This study lays the groundwork for studying the creative economy of the state, including data from companies (including for-profits and non-profits) and the self-employed, with a focus on the number of establishments, the number of employees, annual compensation, and annual revenues. In addition, this report includes some basic information on the scope of the nonprofit arts and culture sector within the creative economy.

The goal of the study is to provide substantial objective and reliable data about the creative economy in four of the cities served by Alabama State Council on the Arts. While some organizations and agencies may use this data for advocacy, policy, or educational purposes, the purpose of this study is to take a basic survey of the creative industries in four Alabama cities, based on the most comprehensive, current, and reliable data available.

We hope this information will be distributed and shared widely among arts administrators, funders, policymakers, elected officials, economic developers, researchers, advocates and audiences who have an interest in the creative economy and the arts in Alabama. And while the focus of the report is educational and informative, we hope decision-makers will consider this research with the same gravity given to data provided by other major industries.

Alabama

Creative Industries Profile

Alabama – Creative Industries Profile

From Hank Williams to Harper Lee, from the Alabama Shakespeare Festival to Mobile's Mardi Gras, from the Birmingham Museum of Art to the Jule Collins Smith Museum of Fine Art, from the Blind Boys of Alabama to the Gee's Bend Quilters, from the Coleman Center for the Arts to the Capri Theatre, Alabama has a rich and diverse culture full of stories, icons, and institutions that help define the state's identity and reputation.

While the arts and culture are important for the state's image and for drawing tourists, they also serve as the foundational base for Alabama's creative economy, which includes a significant number of publishers with the corporate headquarters for Books-A-Million and its subsidiaries located in Florence, a significant presence by Time, Inc. division Southern Progress Corporation which produces lifestyle magazines such as Southern Living, Coastal Living, and Cooking Light based in Birmingham, the headquarters of newspaper conglomerate Community Newspaper Holdings, and periodical publisher Paragon Press in Montgomery.

The creative industries in Alabama represent 4,781 businesses, employing a total of 71,081 people, who earn annual wages totaling more than $2 billion, and generate almost $8.7 billion in annual revenue. These figures represent 4.9% of the state's businesses, 3.7% of the state's employment, at least 2.9% of all wages earned, and 2.5% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Alabama are at the core of the state's creative industries. Of the 1,225 registered arts and culture nonprofits in the state, 462 of those filed IRS form 990, reporting more than $177 million in annual revenue and almost $393 million in assets.

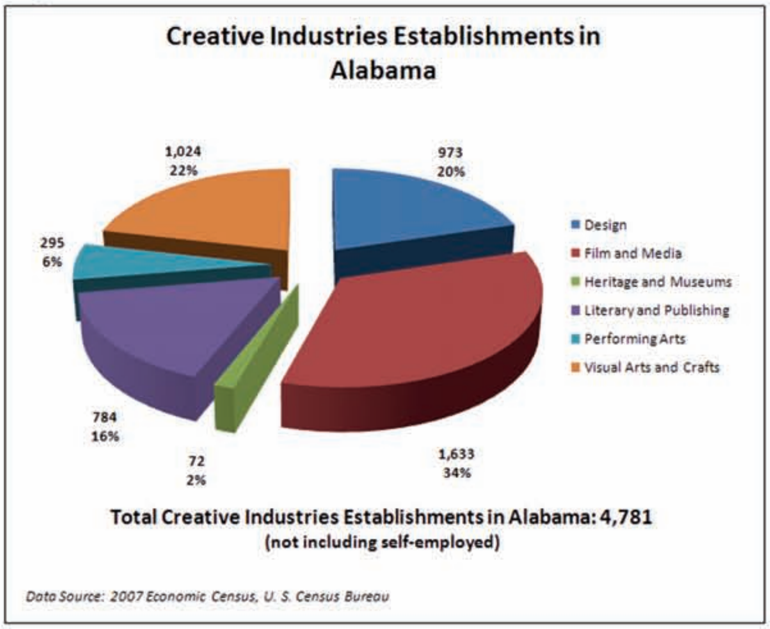
The creative industries that fall within the film and media sector and the literary and publishing sector make up the largest percentage of the state's creative economy. The literary and publishing sector is led by periodical publishers, newspaper publishers, commercial lithographic printing, and independent writers. Meanwhile, the leading industries within the film and media sector include radio, television, and other electronics stores, cable and other program distribution, software publishers, advertising agencies, and television broadcasting. Other leading sectors include independent performers, jewelry stores, and architectural services.

The information in the following pages presents the creative economy data for Alabama in more detail with appropriate documentation.

Creative Industries in Alabama – By the Numbers

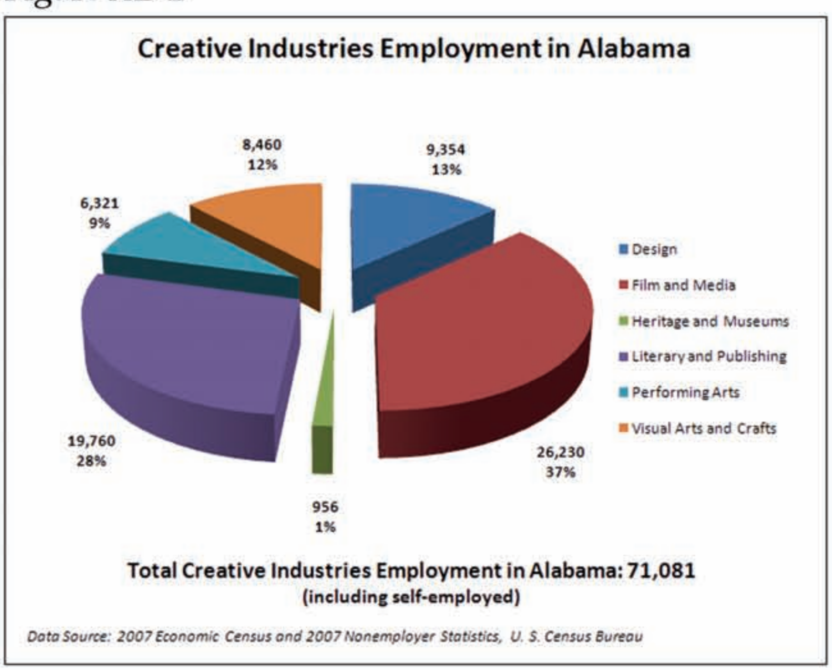
The creative industries in Alabama are driven by 4,781 creative industries establishments, including 1,633 in film and media, 1,024 in visual arts and crafts, 973 in design, and 784 in literary and publishing.

Figure AL-1



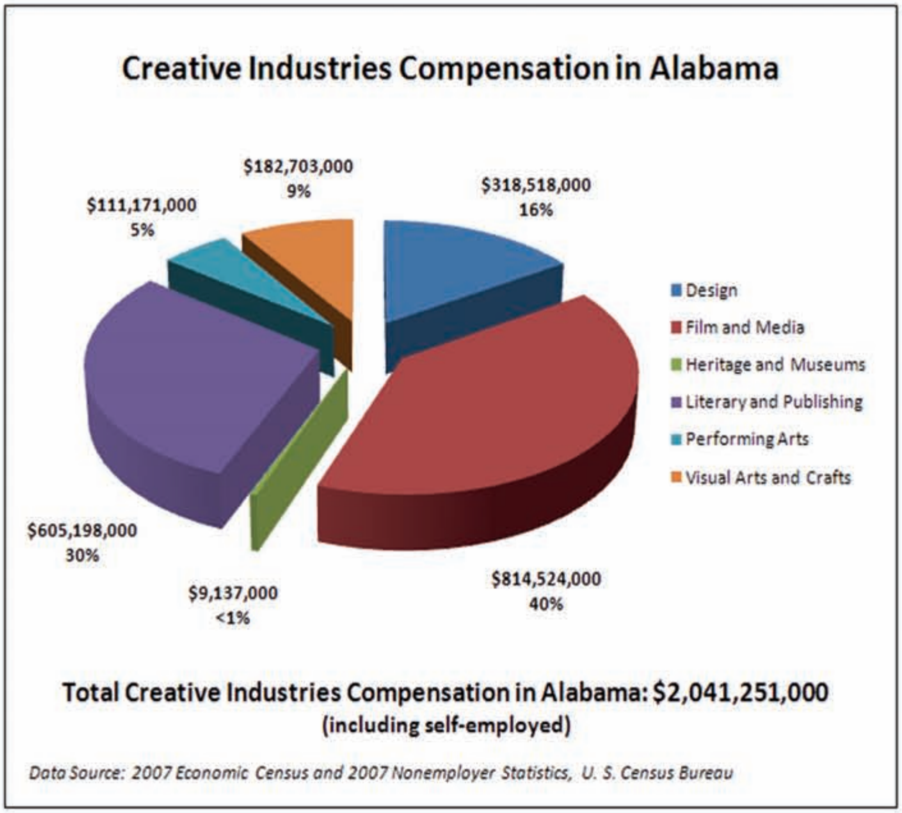
The creative industries employ 71,081 people in Alabama, including the self-employed. The largest employment sector among the creative industries is film and media with 26,230, followed by literary and publishing with 19,760 employed. The next three largest are the design sectors employing 9,354, visual arts and crafts with 8,460, and performing arts with 6,321 people employed.

Figure AL-2



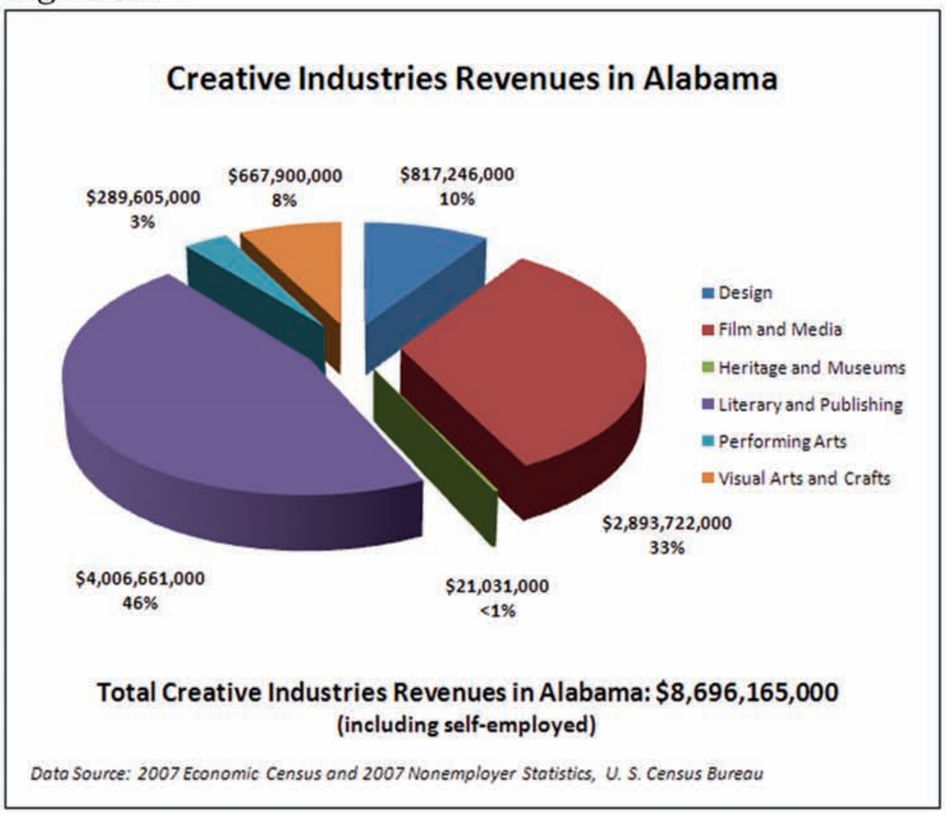
Workers in the creative industries in Alabama earned more than $2 billion in 2007. About 40% of that total, or almost $815 million, was earned by people working in film and media. Workers in literary and publishing earned more than $605 million or 30% of the total, while those employed in design earned almost $319 million. Wages in the visual arts and crafts totaled $182.7 million, with $111.2 million earned in the performing arts, and $9 million earned in heritage and museums.

Figure AL - 3



Total annual revenue for the creative industries in Alabama is $8.7 billion. The largest sector based on revenue is literary and publishing with more than $4 billion, and 46% of the total creative industries revenue for the state. Film and media revenue totaled $2.9 billion, or 33% of the total creative industries revenue for Alabama. Creative industries revenue for the state also included $817 million in design, $668 million in visual arts and crafts, $290 million in performing arts, and $21 million in heritage and museums.

Figure AL-4



Per Capita Data for Alabama Creative Industries

Based on number of establishments, the film and media sector group is the largest among the creative industries in Alabama with 1,633 businesses in the state, or 3.53 for every 10,000 residents. The state is also home to 1,024 visual arts and crafts establishments or 2.21 for every 10,000 residents. The remaining Alabama creative industries establishments include 2.1 in design, 1.69 in literary and publishing, 0.64 in performing arts, and 0.16 in heritage and museums for every 10,000 residents.

Table AL - 1

Creative Industries Establishments in Alabama – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	973	2.10
Film and Media	1,633	3.53
Heritage and Museums	72	0.16
Literary and Publishing	784	1.69
Performing Arts	295	0.64
Visual Arts and Crafts	1,024	2.21
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN ALABAMA	4,781	10.33

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 4,627,851 from the Economic Census.

The film and media sector employs 56.7 people for every 10,000 residents in the state of Alabama. Film and media is followed by literary and publishing with 42.7 workers, design with 20.2 workers, visual arts and crafts with 18.3 workers, performing arts with 13.7 workers, and heritage and museums with 2.1 workers for every 10,000 residents.

Table AL - 2

Creative Industries Employment in Alabama – Per 10,000 Residents	Employment	Employment Per 10,000
Design	9,354	20.2
Film and Media	26,230	56.7
Heritage and Museums	956	2.1
Literary and Publishing	19,760	42.7
Performing Arts	6,321	13.7
Visual Arts and Crafts	8,460	18.3
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN ALABAMA	71,081	153.6

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic Census.

Wages from work in the creative industries in Alabama totaled more than $2 billion in 2007. The total included more than $1.7 million for every 10,000 residents in film and media, $1.3 million in literary and publishing, $688,000 in design, $395,000 in visual arts and crafts, $240,000 in performing arts, and $20,000 in heritage and museums for every 10,000 residents. The total of all creative industries wages equals $4.4 million for every 10,000 residents of Alabama.

Table AL-3

Creative Industries Establishments in Alabama – Per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design	973	2.10
Film and Media	1,633	3.53
Heritage and Museums	72	0.16
Literary and Publishing	784	1.69
Performing Arts	295	0.64
Visual Arts and Crafts	1,024	2.21
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN ALABAMA	4,781	10.33

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic

Total revenue from the creative industries in Alabama in 2007 was $8.7 billion or $18.8 million for every 10,000 state residents. These totals include $4 billion or $8.6 million for every 10,000 residents from literary and publishing; and $2.9 billion or $6.3 million for every 10,000 residents from film and media. In addition, $1.7 million in revenue for every 10,000 residents was generated in design, followed by $1.4 million in the visual arts and crafts, $626,000 in the performing arts, and $45,000 in heritage and museums for every 10,000 residents.

Table AL-4

Creative Industries Revenue in Alabama – Per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design	$817,246,000	$1,765,930
Film and Media	$2,893,722,000	$6,252,842
Heritage and Museums	$21,031,000	$45,444
Literary and Publishing	$4,006,661,000	$8,657,714
Performing Arts	$289,605,000	$625,787
Visual Arts and Crafts	$667,900,000	$1,443,218
TOTAL CREATIVE INDUSTRIES REVENUE IN ALABAMA	$8,696,165,000	$18,790,936

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Including self-employed. Using 2007 population estimate of 4,627,851 from the Economic

Top Ten Creative Industry Sectors for Alabama

The top ten creative industry sectors based on number of establishments in Alabama are jewelry stores; radio, television, and other electronics stores; florists; video tape and disc rental; photography studios; architectural services; book stores; commercial lithographic printing; radio stations; and fine arts schools. The sectors are spread throughout the larger categories of film and media; visual arts and crafts; design; and literary and publishing.

Table AL-5

Alabama - Top Ten Creative Industry Sectors by Number of Establishments	
Jewelry Stores	386
Radio, Television, and Other Electronics Stores	381
Florists	367
Video Tape and Disc Rental	348
Photography Studios, Portrait	260
Architectural Services	241
Book Stores	165
Commercial Lithographic Printing	149
Radio Stations	147
Fine Arts Schools	140

Data Source: 2007 Economic Census, U. S. Census Bureau

The largest creative industry employment sectors in the state are periodical publishers; radio, television, and other electronics stores; newspaper publishers; cable and other program distribution; commercial lithographic printing; software publishers; jewelry stores; photography studios; independent writers; and independent performers.

Table AL-6

Alabama - Top Ten Creative Industry Sectors by Total Employment	
Periodical Publishers	4,473
Radio, Television, and Other Electronics Stores	3,899
Newspaper Publishers	3,877
Cable and Other Program Distribution	3,276
Commercial Lithographic Printing	3,102
Software Publishers	2,879
Jewelry Stores	2,699
Photography Studios, Portrait	2,676
Independent Writers	2,611
Independent Performers	2,505

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on wages, the top creative industry sectors in Alabama include software publishers; periodical publishers; newspaper publishers; advertising agencies; commercial lithographic printing; architectural services; cable and other program distribution; television broadcasting; radio, television, and other electronics stores; and jewelry stores.

Table AL-7

Alabama - Top Ten Creative Industry Sectors by Employee Compensation	
Software Publishers	$196,368,000
Periodical Publishers	$179,617,000
Newspaper Publishers	$143,972,000
Advertising Agencies	$137,943,000
Commercial Lithographic Printing	$123,802,000
Architectural Services	$122,097,000
Cable and Other Program Distribution	$111,577,000
Television Broadcasting	$104,982,000
Radio, Television, and Other Electronics Stores	$90,295,000
Jewelry Stores	$69,889,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Predicated on annual revenue, the largest creative industry sectors in Alabama are periodical publishers; radio, television, and other electronics stores; book, periodical, and newspaper merchant wholesalers; softwarepublishers; direct mail advertising; newspaper publishers; commercial lithographic printing; television broadcasting; jewelry stores; and architectural services.

Table AL-8

Alabama - Top Ten Creative Industry Sectors by Annual Revenue	
Periodical Publishers	$2,077,848,000
Radio, Television, and Other Electronics Stores	$797,256,000
Book, Periodical, and Newspaper Merchant Wholesalers	$622,019,000
Software Publishers	$560,493,000
Direct Mail Advertising	$541,860,000
Newspaper Publishers	$443,087,000
Commercial Lithographic Printing	$423,051,000
Television Broadcasting	$362,555,000
Jewelry Stores	$322,613,000
Architectural Services	$302,125,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Alabama Creative Industries to All Alabama Industries

The 4,781 creative industries establishments in Alabama represent 4.9% of all industry establishments in the state.

Table AL-9

Comparison of Alabama Creative Industries to Total Industries	
Category	Establishments
Alabama Creative Industries Totals	4,781
% of Alabama Total Industries	4.9%
Alabama Total Industries	98,013

Source: 2007 Economic Census, U.S. Census Bureau

The creative industries employ 71,081 people in the state of Alabama, including 17,272 who are self-employed. Creative industries workers represent 3.7% of all those employed in the state, including 5.6% of all self-employed.

Table AL-10

Comparison of Alabama Creative Industries to Total Industries			
Category	Employment in Establishments	Self-Employment	Total Employment
Alabama Creative Industries Totals	53,809	17,272	71,081
% of Alabama Total Industries	3.3%	5.6%	3.7%
Alabama Total Industries	1,625,863	309,180	1,935,043

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The creative industries in Alabama paid wages totaling $2,041,251,000 in 2007, representing 2.9% of all wages paid to workers in the state. The total includes $463,703,000 earned by the self-employed in the creative industries, representing 3.5% of all earnings by the self-employed in the state.

Table AL-11

Comparison of Alabama Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Alabama Creative Industries Totals	$1,577,548,000	$463,703,000	$2,041,251,000
% of Alabama Total Industries	2.8%	3.5%	2.9%
Alabama Total Industries	$56,068,331,000	$13,276,335,000	$69,344,666,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Total revenues generated by the creative industries in Alabama equaled $8,696,165,000 in 2007, representing 2.5% of all revenue generated by industries in the state.

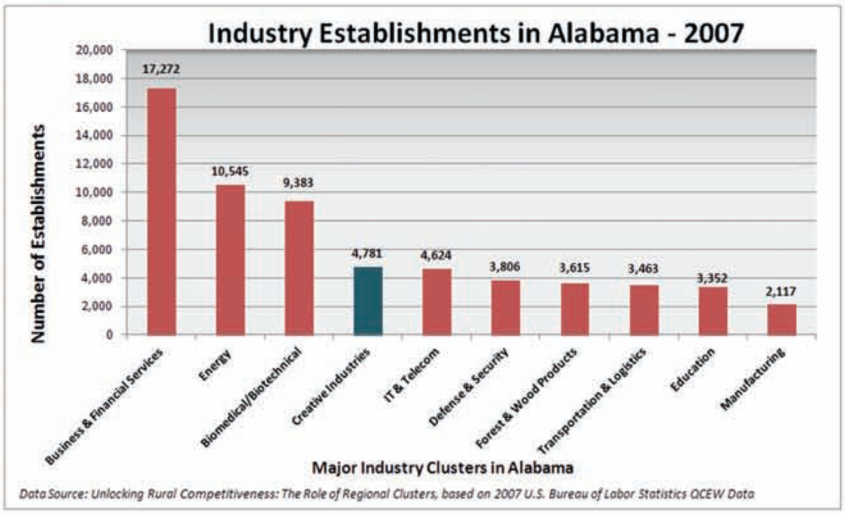
Table AL-12

Comparison of Alabama Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Alabama Creative Industries Totals	$8,232,462,000	$463,703,000	$8,696,165,000
% of Alabama Total Industries	2.4%	3.5%	2.5%
Alabama Total Industries	$337,362,121,000	$13,276,335,000	$350,638,456,000

Comparison of Alabama Creative Industries to Other Alabama Industry Clusters

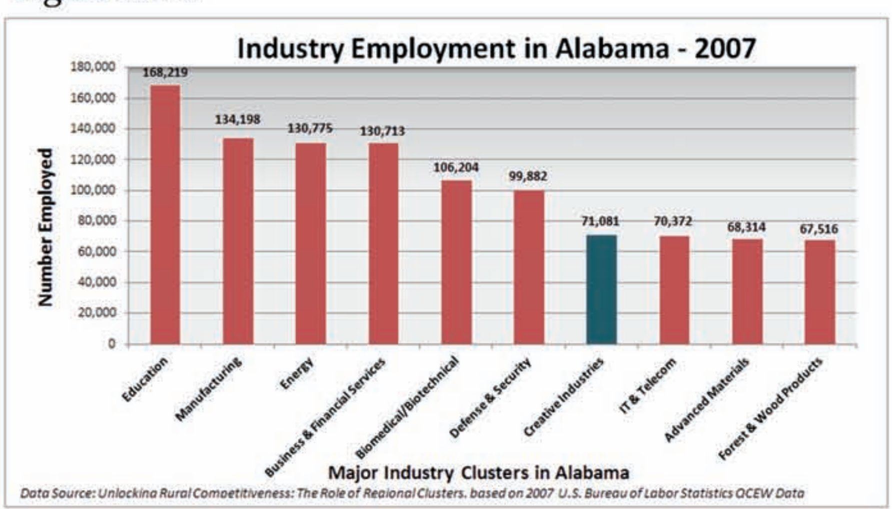
The creative industries cluster in Alabama represents 4,781 establishments, the fourth largest industry cluster in the state, eclipsing information technology and telecommunications, defense and security, forest and wood products, transportation and logistics, and manufacturing. This total number of establishments for the creative industries does not include the self-employed.

Figure AL-5



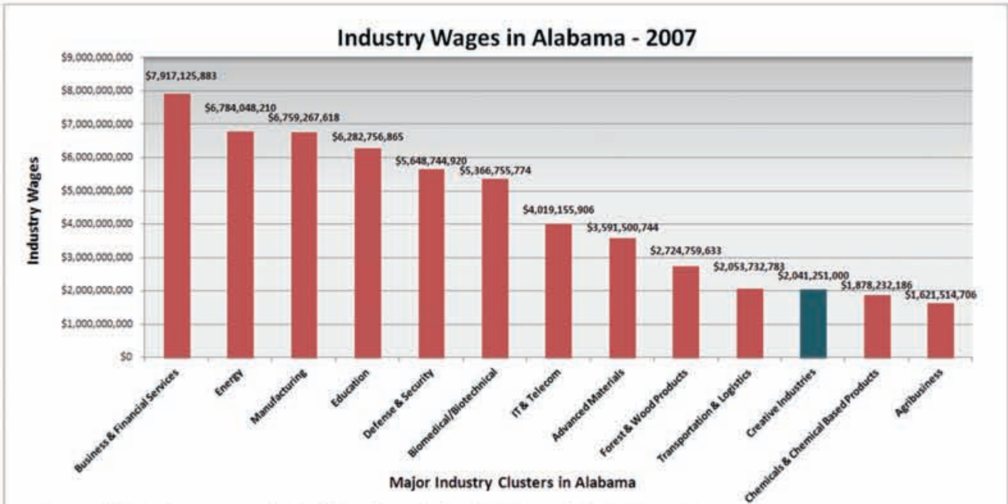
The creative industries cluster is the seventh largest in the state of Alabama based on the number employed, with 71,081 workers. The creative industries employ more than the industry clusters of information technology and telecommunications, advanced materials, and the forest and wood products industry. The actual number employed in the creative industries cluster is higher, since for 29 sectors within the creative industries the lowest number of an approximate range was selected to represent the number employed in those sectors. The approximate data is used for these sectors due to data suppression used by the Economic Census to maintain the confidentiality of data associated with individual firms within each sector.

Figure AL-6



Based on available data, the creative industries represent at least the eleventh largest industry cluster in Alabama based on payroll, larger than chemicals and chemical based products, and agribusiness industry clusters. However, it is likely that the actual total and the ranking of the creative industries cluster for Alabama is higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll in 27 separate creative industries sectors means that the total represented below is a major undercount for Alabama.

Figure AL-7



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Alabama

There were 1,225 registered arts, culture, and humanities nonprofit organizations in Alabama in 2007, representing 1.1% of the national total and 7.1% of the South Arts region total. Of those, 462 had annual revenues above $25,000 and therefore filed form 990 with the IRS, representing 1.0% of all arts, culture, and humanities nonprofits filing form 990 in the U.S, and 6.9% of those in the South Arts region.

Table AL-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Number of Registered Organizations	% of Total National Registered Organizations	Number of Organizations Filing Form 990	% of Total National Organizations Filing 990
Alabama	1,225	1.10%	462	1.00%
South Arts Region Total	17,155	14.80%	6,649	13.90%
U.S. Total	116,010	100.00%	48,175	100.00%

Source: National Center for Charitable Statistics

The organizations filing form 990 from Alabama reported total revenue of more than $177 million in 2007, 0.4% of the national total revenue for all arts, culture, and humanities nonprofit organizations, and 4.9% of the South Arts region total. Those same organizations reported total assets of almost $393 million in 2007, representing 0.3% of the total arts, culture, and humanities nonprofit organization assets reported nationally, and 4.2% of the total reported for the South Arts region.

Table AL-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities - 2007				
Geographic Area	Total Revenue Reported on Form 990	% of Total National Revenue Reported on 990	Assets Reported on Form 990	% of Total National Assets Reported on 990
Alabama	$177,225,395	0.40%	$392,886,444	0.30%
South Arts Region Total	$3,593,480,854	8.20%	$9,387,002,828	7.80%
U.S. Total	$44,259,701,653	100.00%	$120,447,409,982	100.00%

Source: National Center for Charitable Statistics

Creative Industries

IN FOUR ALABAMA METRO AREAS

Introduction

The creative industries are a major economic engine in Alabama, but especially in the state's metropolitan areas. Commissioned by Alabama State Council on the Arts, the research division of South Arts conducted this study on the creative industries in four metropolitan statistical areas in the state – Birmingham, Huntsville, Mobile, and Montgomery. This research is a follow-up to the regional and state-level research South Arts conducted and published in *Creative Industries in the South* and released in January 2012.

The data for this research includes figures for non-profit and for-profit businesses, as well as the self-employed. The data in the study is divided into six major industry sectors – design, film and media, heritage and museums, literary and publishing, performing arts, and visual arts and crafts. The specific industries that are included within each of these industry sectors can be found in Appendix 2 at the end of this report.

The main data sources for this study are the 2007 Economic Census and the 2007 Non-Employer Statistics, both from the U.S. Census Bureau, as well as the National Center for Charitable Statistics, which operates under the umbrella of The Urban Institute.

The study includes data on: number of establishments, employment, payroll and earnings, and revenue. The data is presented as totals and per capita. The report also includes creative industries percentages for each city's total economy, the top twenty creative industries sectors in each metro area, comparison between the creative industries and other industry clusters, and nonprofit arts, culture, and humanities figures.

While this study draws on numerous sources of data and attempts to be as comprehensive as the data allows, there are a number of data points and industry sectors that are left out of this study that would fall under our definition of the creative industries. Omissions due to limitations of our data sources include: all government-owned and operated cultural institutions, including local, state, and federal history museums and parks; all college and university cultural institutions, including performing arts facilities, art museums, arts departments, and arts faculty; all public and private school arts departments, arts facilities, and arts faculty; amusement parks and other purely recreational operations; antique furniture; historic preservation; culinary arts, including restaurants that reflect local cultural traditions; fashion and clothing; nightclubs with entertainment; commercial photography and graphic arts schools; cooking or culinary arts schools; and data for creative workers employed in non-creative industries.

While a lot of creative industry and creative workforce segments are omitted from this study due to the limitations of our data, a vast array of creative industry sectors are included in this study as well.

The **design** sectors include, but are not limited to, architecture firms, landscape architecture firms, interior design and graphic design establishments, drafting and industrial design services, and floral design.

The **film and media** sectors include the entire value chains for radios, televisions, and other entertainment-based electronics; film production, distribution, exhibition, sales, and rentals; radio, television, and cable broadcasting; software publishers and internet publishing and broadcasting; and advertising, public relations, and media agencies.

A more limited sector group, the **heritage and museums** sectors include museums, historical sites, zoos, and botanical gardens. In general, the data used for this sector group is considered to be a significant undercount because many of the establishments that would fall under this category are government-owned. This study does not include any government data for any of the sectors in the report.

One of the larger sector groups, **literary and publishing** sectors include all kinds of printing – lithographic, gravure, flexographic, screen, and digital printing, as well as book printing; the entire value chain for books, periodicals, and newspapers, from writing, to printing, to distribution, to sales and marketing; libraries and archives; and independent writers.

The **performing arts** sectors include the entire value chain for music, dance, theater, and festivals, comprising instrument manufacturing, distribution and sales; music recording, reproduction, distribution, and sales; theater production; dance production; promoters and agents for artists, entertainers, and other public figures; theater, music, and dance facilities; and independent performers.

Finally, the **visual arts and crafts** sectors include a wide variety of mediums, including the full value chain for photography, pottery, glass, silver, and jewelry; arts supply manufacturing, distribution, and sales; crafts stores; photography studios and developing labs; fine arts schools; art galleries and dealers; and independent artists.

In light of the expanded definition of the creative industries and the importance of their broad reach into the state and metro economies, South Arts has conducted this study in an effort to create baseline data on the creative economy of the four metro regions of Birmingham, Huntsville, Mobile, and Montgomery. The purpose of the report is to begin the conversation on the importance of this economic sector to state and municipal economic stability and growth.

Birmingham

Vulcan statue overlooking Birmingham. The world's largest cast iron statue is considered one of the most memorable works of civic art in the United States. Designed by Italian artist Giuseppe Moretti and cast from local iron in 1904. Image courtesy of Alabama State Council on the Arts.

While Birmingham has a long history as an industrial center, it is a major creative industries center as well. Alabama's largest metropolitan area with 1.1 million people, the city is home to 23% of the state's population. But the city is home to 30% of the state's creative industries establishments, 35% of the state's creative industries workers, 41% of the creative industries payroll and earnings, and 54% of the state's creative industries revenues. The city is especially strong in the literary and publishing sector, with major creative industries employers such as Southern Progress Corporation and Books-A-Million calling Birmingham home. Birmingham has so many people working in the creative industries that the city supports numerous networking and professional development organizations, including the Birmingham Media Networking Group, Media of Birmingham, Alabama Writers Conclave, Birmingham Writers' Group, and Alabama Social Media Association.

The non-profit arts and culture sector in Birmingham is strong, as well, providing entertainment, enrichment, education, community-building, tourism, economic impact, and cultural identity for the metropolitan area and beyond.

The arts scene in the metro area begins with the Cultural Alliance of Greater Birmingham. A multidisciplinary arts council, the organization manages the cultural master plan, engages in advocacy and leadership, supports arts education, delivers grants, and markets the arts and culture through Birmingham365.org.

In the visual arts, the Birmingham Museum of Art is a gem, considered one of the finest art museums in the Southeast. Other visual arts offerings include the Sloss Furnaces National Historic Landmark which includes a foundry, classes, residencies, and outreach for the metal arts; Vulcan Park and Museum which features the world's largest cast iron statue; and the African Village in America, a visionary art environment in downtown Birmingham.

Birmingham is rich with both performing arts facilities and companies. Some of the most notable venues in the metro area include the Alys Robinson Stephens Performing Arts Center at the University of Alabama at Birmingham which serves as a cultural mecca in the heart of the city; the Wright Center Concert Hall and Brock Recital Hall at Samford University; Boutwell Auditorium which features municipal performance spaces; Verizon Wireless Music Center (formerly Oak Mountain Amphitheatre); the Historic Alabama Theatre, which has been beautifully renovated and restored and hosts a variety of programming; The Lyric Theatre, a historic performance space which is scheduled for renovation and adaptive reuses; Fair Park Arena, a multi-purpose space for events and concerts; the Birmingham-Jefferson Convention Complex, with an arena, theatre and concert hall; and Workplay, a performance venue for popular music.

Producing companies in the Birmingham area include the Alabama Symphony Orchestra, considered one of the best in the Southeast; Opera Birmingham, which serves as an example of regional excellence; Alabama Ballet, a company demonstrating extraordinary quality;

Birmingham Ballet, which promotes the art of dance in Alabama; the Alabama Symphony Orchestra Chorus (formerly Birmingham Concert Chorale); Birmingham Children's Theatre, producing quality programming for young audiences since 1947; and Red Mountain Theatre Company, which produces local musical theatre.

Other major cultural institutions in the area include the Birmingham Public Library, the Carver Theatre and Alabama Jazz Hall of Fame, the Birmingham Civil Rights Institute, the Southern Museum of Flight, the Iron & Steel Museum of Alabama, Birmingham Botanical Gardens, Birmingham Zoo, Aldridge Botanical Gardens, and the Barber Vintage Motorsports Museums, among many others.

Major festivals in Birmingham include the Sidewalk Moving Picture Festival, Taste of 4th Avenue Jazz Festival, Southern Heritage Festival, Magic City Brewfest, Alabama Bound (a literary arts festival), and Bluff Park Festival, celebrating over fifty years of arts and activities.

Birmingham has also been home to quite a number of writers, performers, and artists, including actress Nell Carter, soul musician Sam Dees, author Fannie Flagg, actress Louise Fletcher, jazz musician Lionel Hampton, jazz composer Erskine Hawkins, singer Emmylou Harris, author Walker Percy, jazz musician Sun Ra, poet Sonia Sanchez, sculptor Lonnie Holley, glass artist Stephen Rolfe Powell, ceramic artist Clifton Pearson, folksinger Odetta, and author Tobias Wolff.

The creative industries in Birmingham represent 1,429 businesses, employing a total of 24,802 people, who earn annual wages totaling $831 million, and generate $4.7 billion in annual revenue. These figures represent 5.6% of the metro area's business, 4.8% of the city's employment, 4.1% of all wages earned, and 4.1% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Birmingham are at the core of the metro area's creative industries. Of the 337 registered arts, culture, and humanities nonprofits in the city, 142 of those had annual revenue above $25,000 and therefore filed IRS form 990, reporting $73 million in total annual revenue and $201 million in total assets.

The creative industries that fall within the literary and publishing sector and the film and media sector make up the largest percentage of the city's creative economy. The literary and publishing sector is led by newspaper, periodical and book publishers; printing and related support activities; independent writers; book, periodical, and newspaper merchant wholesalers; and book, periodical, and music stores. From film and media, the leading sectors are broadcasting; software publishers; radio, television, and other electronics stores; advertising agencies; and motion picture and sound recording industries. Other leading sectors include jewelry stores, architectural services, and photographic services.

The information in the following pages presents the creative industries data for metropolitan Birmingham in more detail with appropriate documentation.

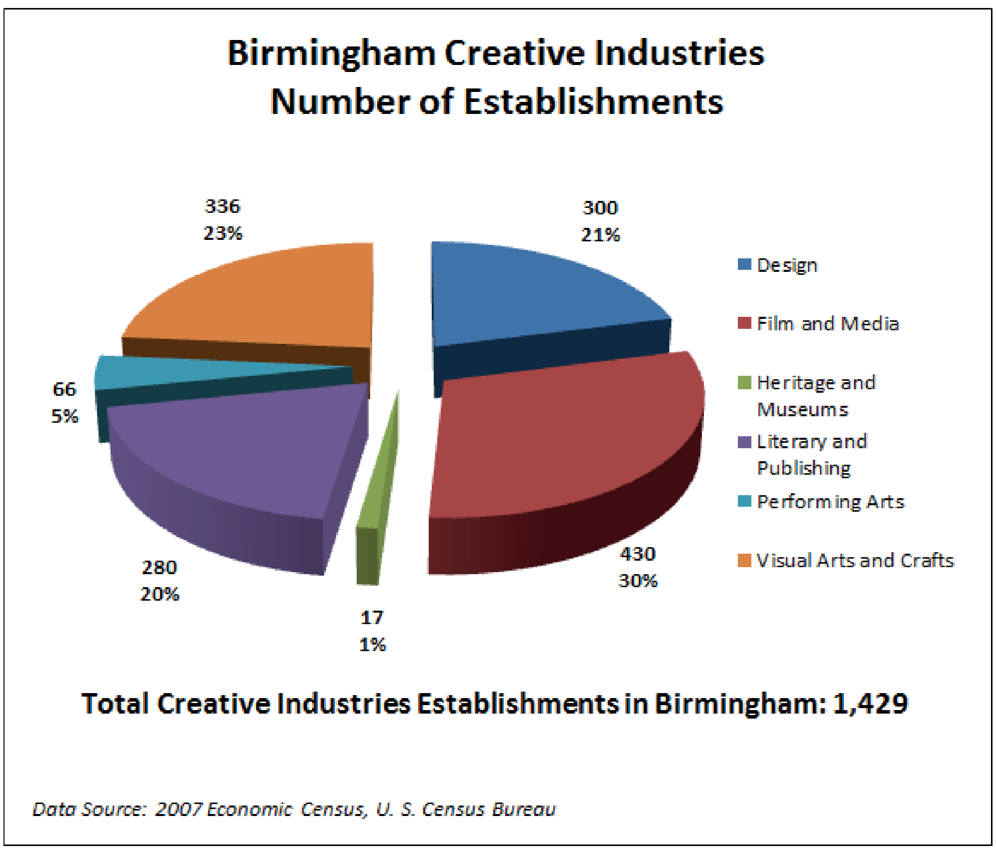

Patrons at the Magic City Festival in Birmingham. Photo by G. Lee Walls, Jr. Image courtesy of Alabama State Council on the Arts.

Creative Industries in Birmingham – By the Numbers

The creative industries are a major economic engine in Alabama, but especially in the state's metropolitan areas. Birmingham, for example, is home to more than 1,400 creative industries establishments, representing more than 5% of all businesses in the metro area. By number of establishments, the largest sectors in the city are film and media with 430 creative industries establishments representing 30% of all creative industries establishments in the Birmingham metro area. Visual arts and crafts include 336 establishments or 23% of the total, design has 300 establishments or 21%, and literary and publishing has 280 establishments or 20%. Although they rank lower in number, the performing arts and heritage and museums establishments are still impactful with 66 and 17 establishments, respectively.

Notably, the heritage and museums numbers are an undercount because the Economic Census data only includes for-profit and non-profit establishments and excludes all government entities. Many establishments that fall under the heritage and museums sector are operated under the auspices of local, state, or federal government agencies and therefore are not included in the data presented in this study.

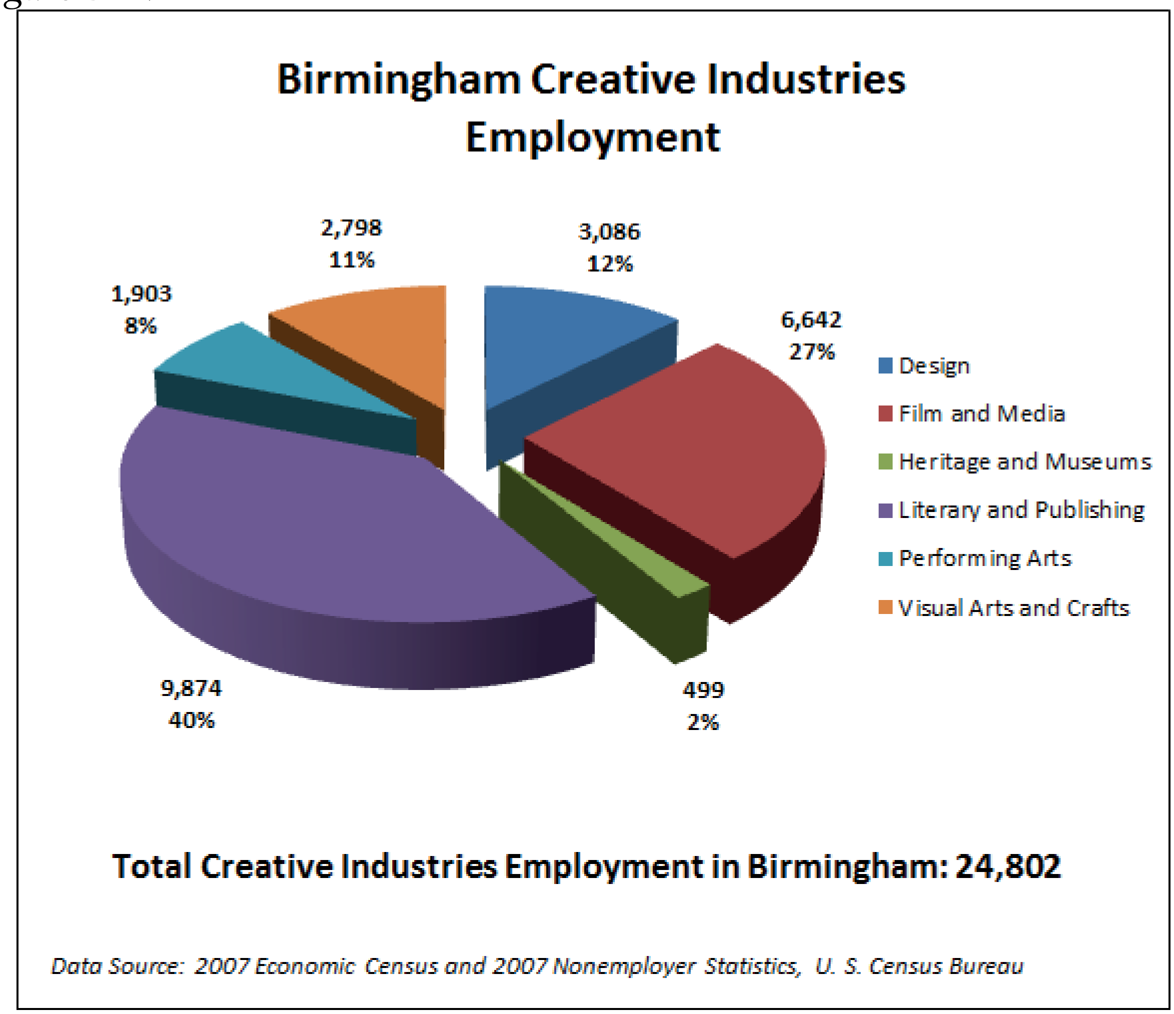
Figure BHM-1



Based on the number of establishments, literary and publishing is only the fourth-largest sector group among the Birmingham creative industries. It is by far the largest sector, however, based on employment, payroll, and annual revenue.

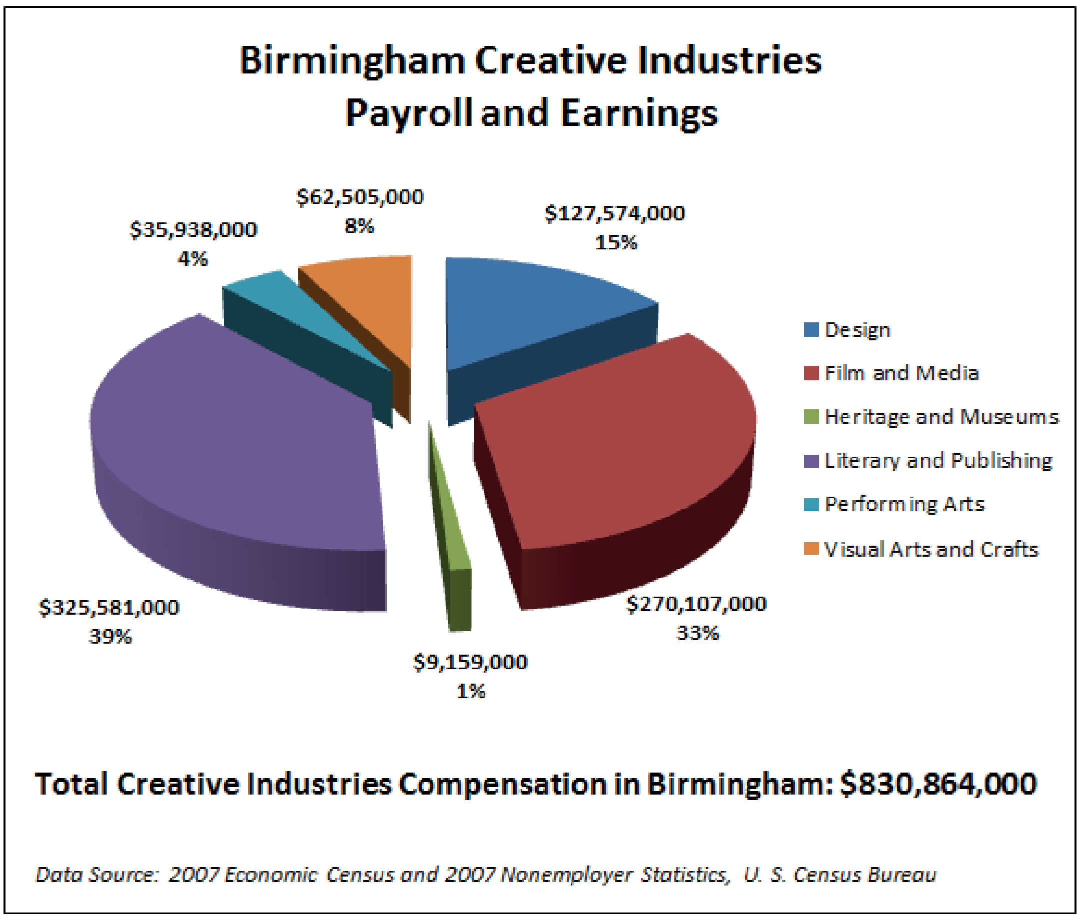
Literary and publishing represents 40% of all creative industries employment in the Birmingham MSA with 9,874 people employed and self-employed. It is followed by film and media with 6,642 workers or 27% of the Birmingham total, design with 3,086 workers or 12% of the total, visual arts and crafts with 2,798 workers or 11%, performing arts with 1,903 workers or 8%, and heritage and museums with 499 workers or 2%.

Figure BHM-2



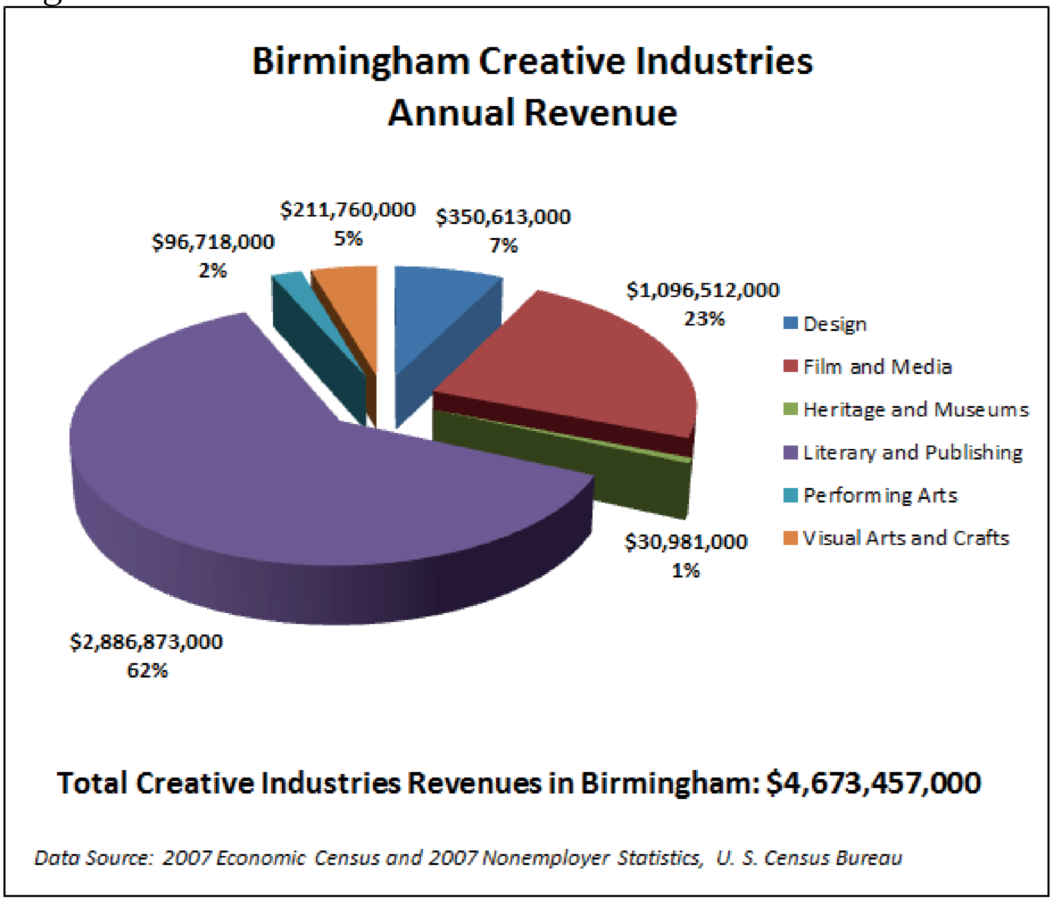
Literary and publishing represents the largest share of payroll and earnings from the self-employed among the creative industries sectors in Birmingham with more than $325 million or 39% of the MSA total. Following closely behind is film and media with more than $270 million in payroll and earnings or 33%. The remaining 22% is split between design with $128 million in payroll and earnings, visual arts and crafts with $63 million, performing arts with $36 million, and heritage and museums with $9 million.

Figure BHM-3

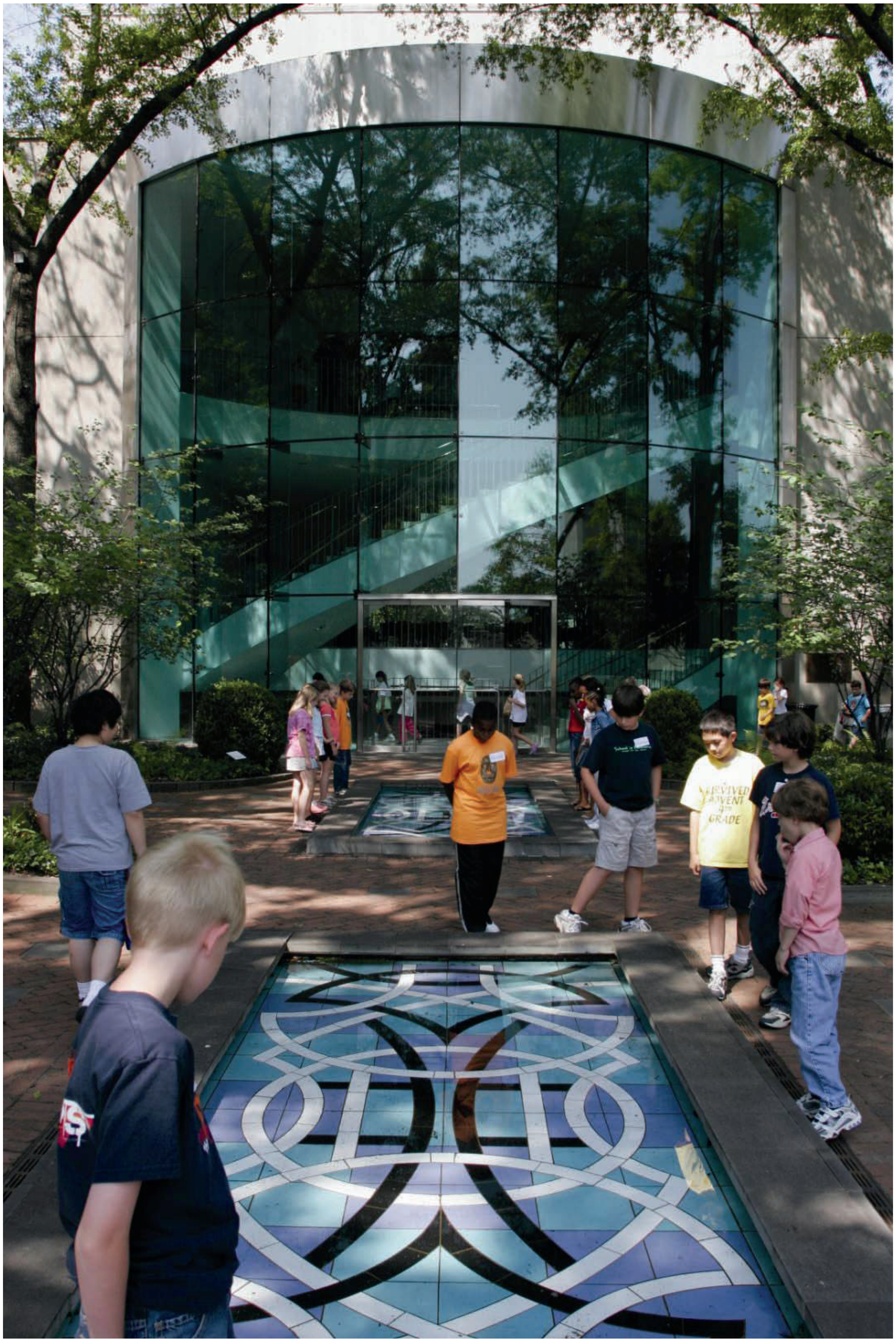


Among the creative industries in Birmingham, literary and publishing represents a whopping 62% of revenues, earning $2.9 billion annually. Film and media is the next largest sector group with $1.1 billion in revenue or 23% of the MSA total, followed by design with $351 million, visual arts and crafts with $212 million, performing arts with $97 million, and heritage and museums with $31 million in annual revenues.

Figure BHM-4



Literary and publishing represents a large percentage of the people employed, payroll and earnings, and annual revenues for the creative industries in the Birmingham MSA. With all of the business model changes as a result of the current technological revolution and its effects on the literary and publishing industries, it seems like it would be valuable for Birmingham leaders, elected officials, and economic developers to consider the implications of these changes and how best to help their local literary and publishing establishments to adapt and thrive. Major shifts include: newspaper publishers, book publishers, periodical publishers moving from a print distribution model to a digital distribution model, leading to losses in local jobs for printing and distribution; all industries moving to less printing and more digital content, leading to job losses in commercial lithographic printing; the loss of physical distribution of creative content leading to the loss of retail jobs in book stores, as well as music and movie stores. Some of the major needs include job retraining and education to grow the digital workforce, building additional infrastructure to encourage the development of digital creative industries, and incentives to keep, grow, and attract digital creative establishments. Major literary and publishing firms based in Birmingham include Books-A-Million and Southern Progress Corporation (publisher of *Southern Living*, owned by Time Warner).



Visitors enjoying the Birmingham Museum of Art. Image courtesy of Alabama State Council on the Arts.

Per Capita Data for Birmingham Creative Industries

Based on number of establishments, the film and media sector group is the largest among the creative industries in Birmingham with 430 businesses in the state, or 3.88 for every 10,000 residents. The MSA is also home to 336 visual arts and crafts establishments or 3.03 for every 10,000 residents. The remaining Birmingham creative industries establishments include 2.71 design establishments per 10,000, 2.53 for literary and publishing, 0.60 for performing arts, and 0.15 for heritage and museums.

Table BHM-1

Creative Industries Establishments in Birmingham per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design Establishments	300	2.71
Film and Media Establishments	430	3.88
Heritage and Museums Establishments	17	0.15
Literary and Publishing Establishments	280	2.53
Performing Arts Establishments	66	0.60
Visual Arts and Crafts Establishments	336	3.03
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN BIRMINGHAM	**1,429**	**12.90**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 1,108,210 from the Economic Census.

The literary and publishing sector employs 89.1 people for every 10,000 residents in the Birmingham MSA. Literary and publishing is followed by film and media with 59.9 workers, design with 27.8 workers, visual arts and crafts with 25.2 workers, performing arts with 17.2 workers, and heritage and museums with 4.5 workers for every 10,000 residents.

Table BHM-2

Creative Industries Employment in Birmingham per 10,000 Residents	Employment	Employment Per 10,000
Design Employment	3,086	27.8
Film and Media Employment	6,642	59.9
Heritage and Museums Employment	499	4.5
Literary and Publishing Employment	9,874	89.1
Performing Arts Employment	1,903	17.2
Visual Arts and Crafts Employment	2,798	25.2
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN BIRMINGHAM	**24,802**	**223.7**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 1,108,210 from the Economic Census.

Wages from work in the creative industries in Birmingham totaled $831 million in 2007. The total included $2.9 million for every 10,000 residents in literary and publishing, $2.4 million in film and media, $1.2 million in design, $564,000 in visual arts and crafts, $324,000 in design, and $83 thousand in heritage and museums for every 10,000 residents. The total of all creative industries wages equals $7.5 million for every 10,000 residents of the Birmingham MSA.

Table BHM-3

Creative Industries Compensation in Birmingham Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design Compensation	$127,574,000	$1,151,171
Film and Media Compensation	$270,107,000	$2,437,326
Heritage and Museums Compensation	$9,159,000	$82,646
Literary and Publishing Compensation	$325,581,000	$2,937,899
Performing Arts Compensation	$35,938,000	$324,288
Visual Arts and Crafts Compensation	$62,505,000	$564,017
TOTAL CREATIVE INDUSTRIES COMPENSATION IN BIRMINGHAM	**$830,864,000**	**$7,497,347**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 1,108,210 from the Economic Census.

Total revenue from the creative industries in Birmingham in 2007 was $4.7 billion or $42 million for every 10,000 residents of the MSA. These totals include $2.9 billion or $26 million per 10,000 residents for literary and publishing; and $1.1 billion or $9.9 million for every 10,000 residents for film and media. In addition, $3.1 million in revenue for every 10,000 residents was generated in design, followed by $1.9 million in the visual arts and crafts, $873,000 in the performing arts, and $280,000 in heritage and museums for every 10,000 residents.

Table BHM-4

Creative Industries Revenue in Birmingham per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design Revenue	$350,613,000	$3,163,777
Film and Media Revenue	$1,096,512,000	$9,894,442
Heritage and Museums Revenue	$30,981,000	$279,558
Literary and Publishing Revenue	$2,886,873,000	$26,049,873
Performing Arts Revenue	$96,718,000	$872,740
Visual Arts and Crafts Revenue	$211,760,000	$1,910,829
TOTAL CREATIVE INDUSTRIES REVENUE IN BIRMINGHAM	**$4,673,457,000**	**$42,171,219**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 1,108,210 from the Economic Census.

Performances on the grounds of Vulcan Park in Birmingham. Image courtesy of Alabama State Council on the Arts.

Top Twenty Creative Industry Sectors for Birmingham

The top twenty creative industry sectors based on number of establishments in Birmingham are printing and related support activities; newspaper, periodical, and book publishers; and book, periodical, and music stores in literary and publishing. In film and media, the top sectors include radio, television, and other electronics stores; video tape and disc rental; advertising agencies; motion picture and sound recording industries; broadcasting; software publishers; and advertising specialties. From the design sector the top sectors are architectural services, florists, interior design services, graphic design services, and drafting services in design. Visual arts and crafts are represented in the top twenty sectors by jewelry stores, photographic services, photography studios, fine arts schools, and art dealers.

Table BHM-5

Birmingham - Top Twenty Creative Industry Sectors by Number of Establishments	
Printing and Related Support Activities	120
Radio, Television, and Other Electronics Stores	106
Jewelry Stores	99
Architectural Services	89
Video Tape and Disc Rental	85
Newspaper, Periodical, and Book Publishers	83
Florists	77
Photographic Services	71
Photography Studios, Portrait	64
Advertising Agencies	61
Book, Periodical, and Music Stores	52
Motion Picture and Sound Recording Industries	52
Interior Design Services	45
Fine Arts Schools	42
Broadcasting	41
Software Publishers	33
Advertising Specialties and Lettering Shops	29
Graphic Design Services	29
Drafting Services	24
Art Dealers	22

Data Source: 2007 Economic Census, U. S. Census Bureau

The largest creative industry employment sectors in the Birmingham MSA are: newspaper, periodical and book publishers; printing and related support activities; independent writers; and book, periodical, and music stores from the literary and publishing sector; broadcasting; software publishers; radio, television, and other electronics stores; motion picture and sound recording industries; video tape and disc rental; advertising agencies; and direct mail advertising from film and media; architectural services, specialized design services, florists, and ornamental and architectural metal work manufacturing from design; jewelry stores, photographic services, and independent artists from visual arts and crafts; and independent performers, and performing arts companies from performing arts.

Table BHM-6

Birmingham - Top Twenty Creative Industry Sectors by Total Employment	
Newspaper, Periodical, and Book Publishers	5,029
Printing and Related Support Activities	2,624
Broadcasting	1,616
Software Publishers	1,386
Radio, Television, and Other Electronics Stores	1,027
Architectural Services	926
Independent Writers	746
Jewelry Stores	696
Independent Performers	692
Book, Periodical, and Music Stores	629
Photographic Services	618
Specialized Design Services	615
Motion Picture and Sound Recording Industries	607
Video Tape and Disc Rental	571
Advertising Agencies	506
Direct Mail Advertising	500
Florists	455
Performing Arts Companies	413
Ornamental and Architectural Metal Work Manufacturing	376
Independent Artists	337

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on total wages and earnings by the self-employed, the top creative industry sectors in the Birmingham MSA include: newspaper, periodical, and book publishers; printing and related support activities; book, periodical, and newspaper merchant wholesalers; independent writers; and publishing industries from literary and publishing; software publishers; broadcasting; advertising agencies; radio, televisions, and other electronics stores; direct mail advertising; and motion picture and sound recording industries from film and media; architectural services, specialized design services, ornamental and architectural metal work manufacturing, landscape architectural services, florists, and drafting services from design; jewelry stores, and photographic services from visual arts and crafts; and independent performers from the performing arts.

Table BHM-7

Birmingham - Top Twenty Creative Industry Sectors by Employee Compensation	
Newspaper, periodical, and book publishers	$209,513,000
Software Publishers	$95,236,000
Broadcasting	$77,903,000
Architectural Services	$57,381,000
Printing and related support activities	$56,827,000
Advertising Agencies	$28,040,000
Radio, Television, and Other Electronics Stores	$25,290,000
Jewelry Stores	$21,208,000
Specialized Design Services	$20,066,000
Book, Periodical, and Newspaper Merchant Wholesalers	$18,215,000
Ornamental and Architectural Metal Work Manufacturing	$14,969,000
Direct Mail Advertising	$12,301,000
Photographic Services	$12,135,000
Motion Picture and Sound Recording Industries	$11,811,000
Independent Writers	$10,641,000
Independent Performers	$9,880,000
Landscape Architectural Services	$9,826,000
Publishing Industries (except internet)	$9,048,000
Florists	$9,014,000
Drafting Services	$8,725,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Predicated on annual revenue by creative industries establishments and the self-employed, the largest creative industry sectors in Alabama are: newspaper, periodical, and book publishers; book, periodical, and newspaper merchant wholesalers; printing and related support activities; and book, periodical, and music stores from the literary and publishing sector; software publishers; broadcasting; radio, television, and other electronics stores; advertising specialties; advertising agencies; motion picture and sound recording industries; and video tape and disc rental from film and media; architectural services, ornamental and architectural metal work manufacturing, florists, and interior design services from the design sector; jewelry stores, and photographic services from visual arts and crafts; musical instrument and supplies stores, and promoters without facilities from the performing arts; and museums from heritage and museums.

Table BHM-8

Birmingham - Top Twenty Creative Industry Sectors by Annual Revenue	
Newspaper, periodical, and book publishers	$2,238,676,000
Software Publishers	$340,613,000
Book, Periodical, and Newspaper Merchant Wholesalers	$340,234,000
Broadcasting	$239,100,000
Radio, Television, and Other Electronics Stores	$209,161,000
Printing and related support activities	$205,666,000
Architectural Services	$148,574,000
Advertising Specialties and Lettering Shop	$105,019,000
Jewelry Stores	$99,964,000
Ornamental and Architectural Metal Work Manufacturing	$86,824,000
Advertising Agencies	$83,263,000
Book, Periodical, and Music Stores	$66,731,000
Motion Picture and Sound Recording Industries	$63,614,000
Florists	$31,845,000
Photographic Services	$26,293,000
Interior Design Services	$25,973,000
Video Tape and Disc Rental	$24,560,000
Musical Instrument and Supplies Stores	$23,875,000
Museums	$22,975,000
Promoters without Facilities	$21,900,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Birmingham Creative Industries To All Birmingham Industries

The 1,429 creative industries establishments in Birmingham represent 5.6% of all industry establishments in the MSA (see Table BHM-9). The creative industries employ 24,802 people in the Birmingham MSA, including 5,080 who are self-employed. Creative industries workers represent 4.8% of all workers employed in the state, including 6.6% of all self-employed (see Table BHM-10). The creative industries in Birmingham paid wages totaling more than $830 million in 2007, representing 4.1% of all wages paid to workers in the MSA. The total includes $138 million earned by the self-employed in the creative industries, representing 3.8% of all earnings by the self-employed in the MSA (see Table BHM-11). Total revenues generated by the creative industries in Birmingham equaled $4.7 billion in 2007, representing 4.1% of all revenue generated by industries in the MSA (see Table BHM-12).

Table BHM-9

Comparison of Birmingham Creative Industries to Total Industries	
Category	**Establishments**
Birmingham Creative Industries Totals	1,429
% of Birmingham Total Industries	5.6%
Birmingham Total Industries	25,446

Source: 2007 Economic Census, U.S. Census Bureau

Table BHM-10

Comparison of Birmingham Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Birmingham Creative Industries Totals	19,722	5,080	24,802
% of Birmingham Total Industries	4.5%	6.6%	4.8%
Birmingham Total Industries	436,837	77,263	514,100

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table BHM-11

Comparison of Birmingham Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Birmingham Creative Industries Totals	$692,274,000	$138,590,000	$830,864,000
% of Birmingham Total Industries	4.1%	3.8%	4.1%
Birmingham Total Industries	$16,739,627,000	$3,620,134,000	$20,359,761,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table BHM-12

Comparison of Birmingham Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Birmingham Creative Industries Totals	$4,534,867,000	$138,590,000	$4,673,457,000
% of Birmingham Total Industries	4.1%	3.8%	4.1%
Birmingham Total Industries	$109,528,507,000	$3,620,134,000	$113,148,641,000

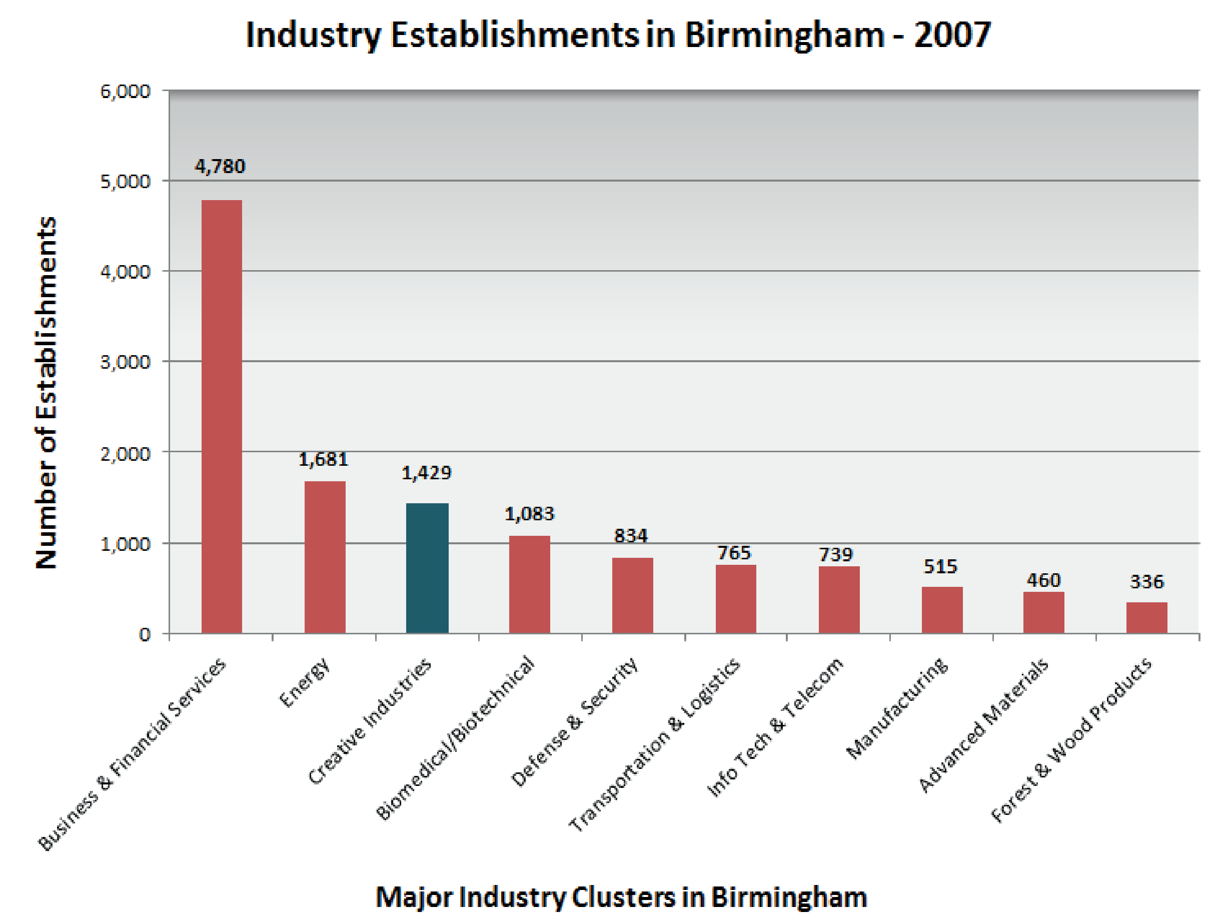
Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Alabama artist Frank Fleming created this landmark sculpture in downtown Birmingham. Image courtesy of Alabama State Council on the Arts.

Comparison of Birmingham Creative Industries to Other Birmingham Industry Clusters

The creative industries cluster in Birmingham represents 4,781 establishments, the third largest industry cluster in the metropolitan area, eclipsing biomedical/biotechnical, defense and security, transportation and logistics, information technology and telecommunications, manufacturing, advanced materials, and forest and wood products. This total number of establishments for the creative industries does not include the self-employed.

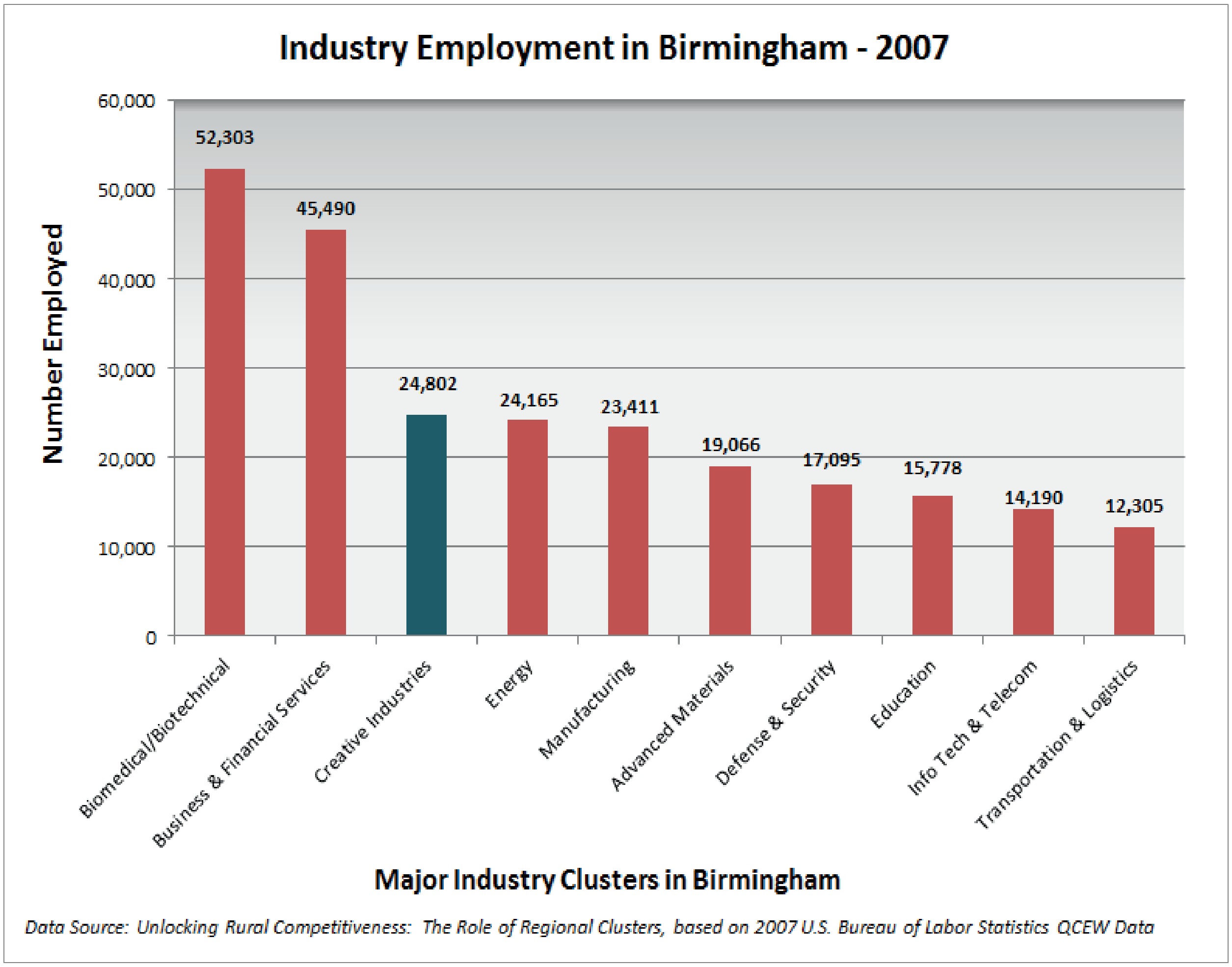
Figure BHM-5



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

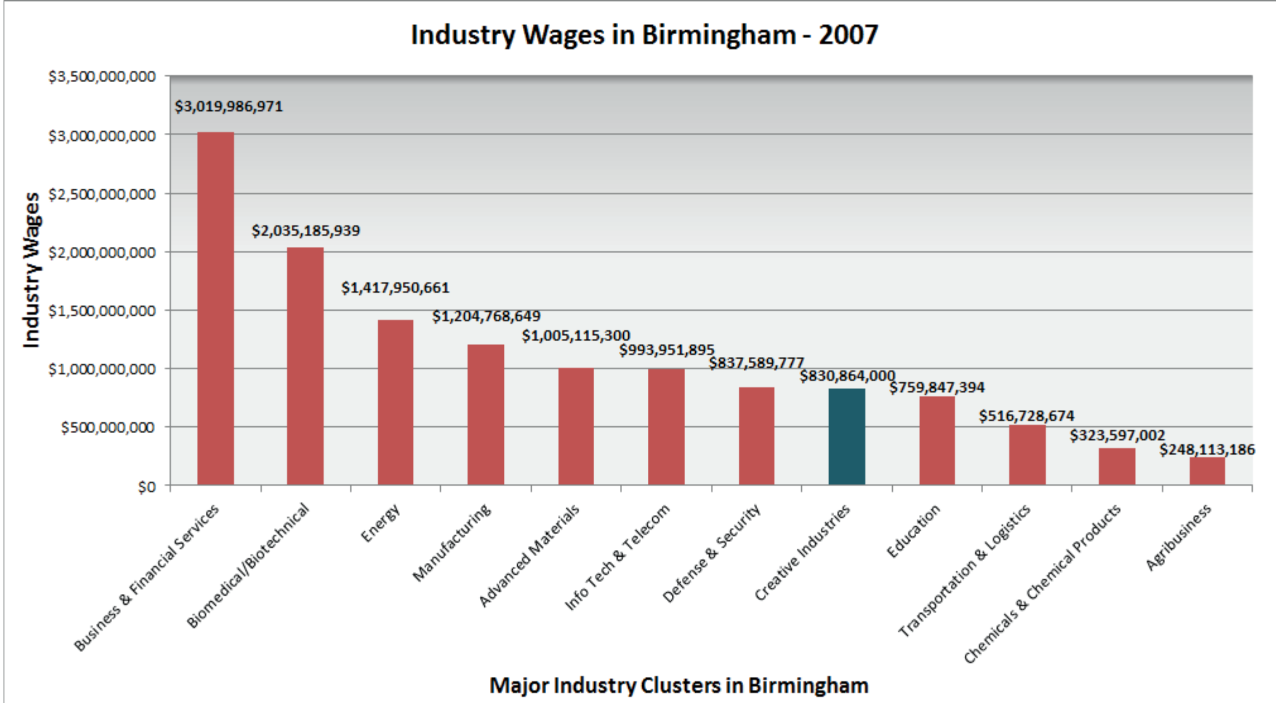
The creative industries cluster is also the third-largest in the Birmingham metropolitan area based on the number of employed and self-employed, with 24,802 workers. The creative industries employ more than the industry clusters of energy, manufacturing, advanced materials, defense and security, education, information technology and telecommunications, and transportation and logistics.

Figure BHM-6



The creative industries represent at least the eighth largest industry cluster in the Birmingham metropolitan area, with wages and earnings by the self-employed in the sector exceeding the totals in education, transportation and logistics, chemicals and chemical products, and agribusiness. It is likely that the actual total and the ranking of the creative industries cluster for Birmingham is higher. Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll led to using estimates for a number of specific industry sectors. The estimates used were extremely conservative.

Figure BHM-7



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Birmingham

There were 337 registered arts, culture, and humanities nonprofits in the Birmingham metropolitan region in 2007, representing 27.5% of the Alabama total. Of those, 142 had annual revenues above $25,000 and therefore filed form 990 with the IRS, representing 30.7% of all arts, culture, and humanities nonprofits filing form 990 in Alabama.

Table BHM-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Number of Registered Organizations	% of Alabama Total	Number of Organizations Filing Form 990	% of Alabama Total
Bibb County	1	0.10%	0	0.00%
Blount County	5	0.40%	0	0.00%
Chilton County	8	0.70%	0	0.00%
Jefferson County	276	22.50%	128	27.70%
St. Clair County	8	0.70%	0	0.00%
Shelby County	30	2.40%	11	2.40%
Walker County	9	0.70%	3	0.60%
BIRMINGHAM TOTAL	**337**	**27.50%**	**142**	**30.70%**
ALABAMA TOTAL	**1,225**	**100.00%**	**462**	**100.00%**

Source: National Center for Charitable Statistics, 2007

The organizations filing form 990 from Birmingham reported total revenue of $73 million in 2007, representing 41% of the state total for all arts, culture, and humanities nonprofit organizations. Those nonprofits reported assets of $201 million in 2007, representing 51.1% of the arts, culture, and humanities nonprofit organization assets for Alabama.

Table BHM-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Total Revenue Reported on Form 990	% of Alabama Total	Assets Reported on Form 990	% of Alabama Total
Bibb County	$0	0.00%	$0	0.00%
Blount County	$0	0.00%	$0	0.00%
Chilton County	$0	0.00%	$0	0.00%
Jefferson County	$71,209,405	40.20%	$198,038,039	50.40%
St. Clair County	$0	0.00%	$0	0.00%
Shelby County	$1,429,454	0.80%	$2,551,245	0.60%
Walker County	$90,179	0.10%	$460,318	0.10%
BIRMINGHAM TOTAL	**$72,729,038**	**41.10%**	**$201,049,602**	**51.10%**
ALABAMA TOTAL	**$177,225,395**	**100.00%**	**$392,886,444**	**100.00%**

Source: National Center for Charitable Statistics, 2007

Huntsville

The Huntsville Museum of Art. Image courtesy of Alabama State Council on the Arts.

Known as a center for aerospace and aeronautics engineering, Huntsville also has a significant creative industries presence, including the audio and video media reproduction establishment, Cinram. The metro area represents 8.4% of all creative industries establishments in Alabama, 13.3% of all creative industries employees, 10.6% of creative industries payroll and earnings, and 9.8% of all creative industries revenues in the state.

Huntsville is especially strong in film and media, which represents only 36% of the metro areas creative industries establishments, but which contributes 60% of employment, 54% of payroll and earnings, and 62% of annual revenue for all creative industries in the city.

The scientific culture in Huntsville is reflected in the number of science museums and botanical gardens, including the U.S. Space & Rocket Center; Sci-Quest, an interactive science museum for students; Huntsville Botanical Gardens; the headquarters for the National Speleological Society; The Von Braun Astronomical Society with two observatories and a planetarium; and the Huntsville Gem & Mineral Society.

The city is also host to Con*Stellation, a convention for science fiction enthusiasts. Other major festivals in Huntsville include the Annual North Alabama International Festival, Big Spring Jam, the Panoply Arts Festival, and The Arts Council's Concerts in the Park.

The visual arts in Huntsville are anchored by the Huntsville Museum of Art, situated at Big Spring International Park. The museum has undergone four or five major renovations and/or additions, the most recent of which was completed in November 2010. The active visual arts and crafts scene in Huntsville also includes the Huntsville Art League; the Huntsville Photographic Society; North Alabama Crafters; Tennessee Valley Ceramic Arts Guild; and the Clay House Museum, a historic house with a significant collection of Noritake porcelain.

Among the multi-disciplinary arts organizations, The Flying Monkey Arts Center is a nonprofit arts center housing artist studios, recording studios, film studios, fashion and jewelry studios, and a theatre space which hosts puppetry, performance art, film screenings, and plays. Meanwhile, The Arts Council, Inc. supports the arts in all disciplines, including the visual, performing, and literary arts, as well as arts education.

The central metropolitan area in north Alabama also has a number of producing organizations in the performing arts. They include the Huntsville Community Chorus Association, Theatre Huntsville, Fantasy Playhouse Children's Theatre, the Broadway Theatre League, Rocket City Chorus, Huntsville Symphony Orchestra, Huntsville Youth Orchestra, Huntsville Chamber Music Guild, Dance Theatre of Huntsville, and Independent Musical Productions. Performing arts venues in the metro area include the Von Braun Center with Propst Arena, Mark C. Smith Concert Hall, and a playhouse; Renaissance Theatre with their MainStage and Alpha Stage; and the Merrimack Hall Performing Arts Center.

Huntsville is also home to Ars Nova School of the Arts, a music and performing arts conservatory. The literary arts in Huntsville are supported by the Huntsville-Madison County Public Library and the Huntsville Literary Association.

The city is populated by a number of historic institutions and districts, as well. They include the 1819 Weeden House Museum, Burritt Museum and Park at Monte Sano Mountain, Historic Huntsville Depot, Alabama Constitution Village, EarlyWorks Museum, Harrison Brothers Hardware Store, and North Alabama Railroad Museum. Historic districts in the metro area include Twickenham, Old Town, and Five Points.

Notable artists from Huntsville include Fred Child, host of "Performance Today" and "Live from Lincoln Center;" syndicated comic artist Bill Holbrook; painter David Parish; actress Tallulah Bankhead; and opera singer Susanna Phillips.

While the arts and culture are important for community building, tourism, education, and quality of life in Huntsville, they also serve as the foundational base for the metro area's creative economy.

The creative industries in Huntsville represent 405 businesses which generate $856 million in annual revenue, and employ a total of 9,478 people, who earn annual wages totaling $216 million. These figures represent 4.5% of the metro area's businesses, 4.9% of the city's employment, 2.7% of all wages earned, and 2.2% of all business revenue.

The nonprofit arts, culture, and humanities organizations in Huntsville are at the core of the city's creative industries. Of the 126 registered arts, culture, and humanities organizations in the metro area, 49 of those had annual revenue above $25,000 and therefore filed form 990, reporting $19 million in total annual revenue and $25 million in total assets.

The creative industries that fall within the film and media sector and the literary and publishing sector make up the largest percentage of the Huntsville creative economy. The film and media sector is led by audio and video media reproduction; broadcast and wireless communications equipment; broadcasting; radio, television, and other electronics stores; advertising, public relations, and related services; software publishers; and motion picture and sound recording industries. Meanwhile, the leading industries within the literary and publishing sector include newspaper, periodical, and book publishers; independent writers; book, periodical, and music stores; printing; and other publishing establishments. Other leading sectors include jewelry stores; architectural services; promoters of performing arts events; photographic services; ornamental and architectural metal work manufacturing; performing arts companies; musical instrument and supplies stores; museums, historical sites, and similar institutions; interior design services; and fine arts schools.

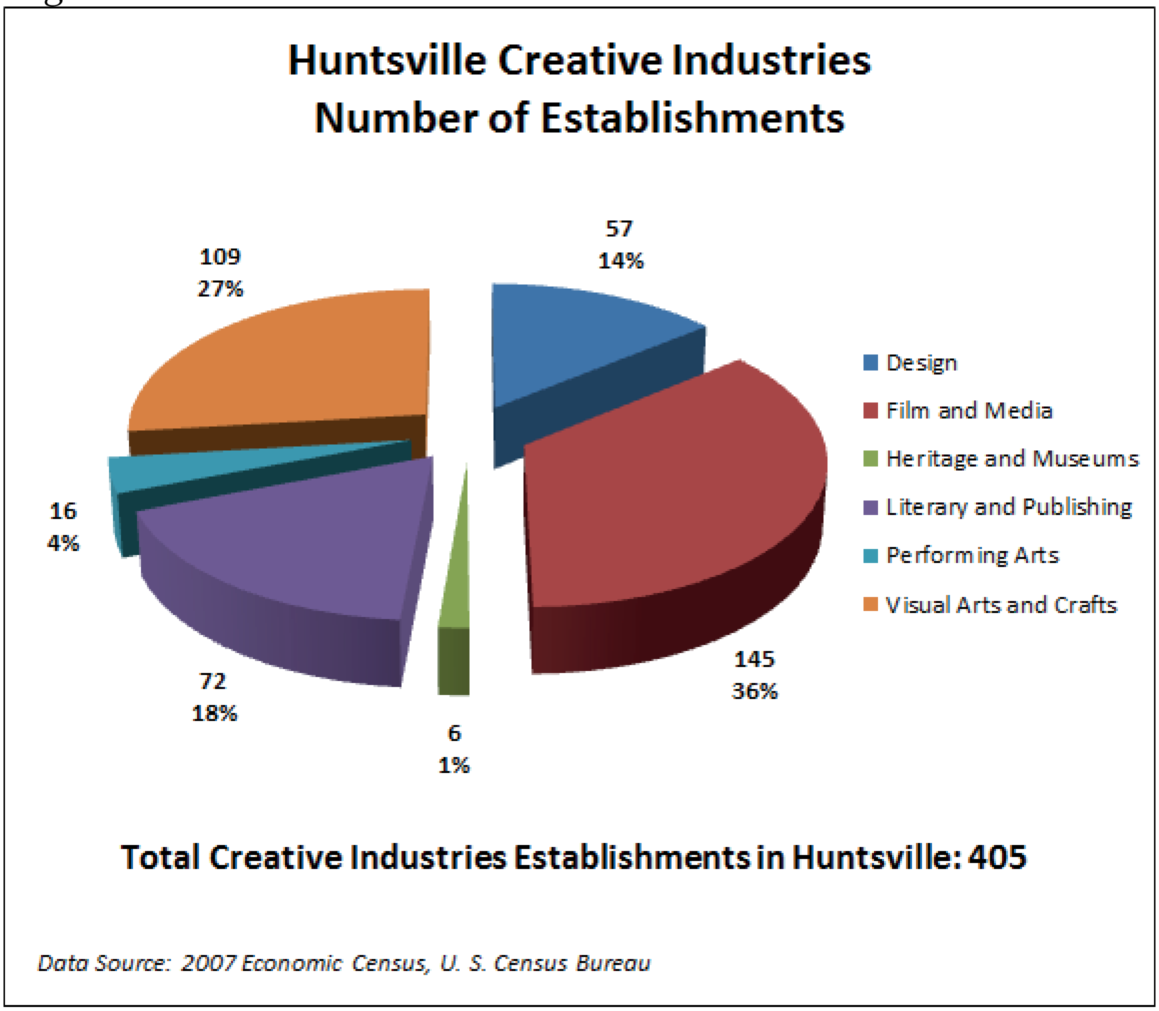
The information in the following pages presents the creative industries data for Huntsville in more detail with appropriate documentation.

Patrons viewing an exhibit at the Huntsville Museum of Art. Image courtesy of Alabama State Council on the Arts.

Creative Industries in Huntsville – By the Numbers

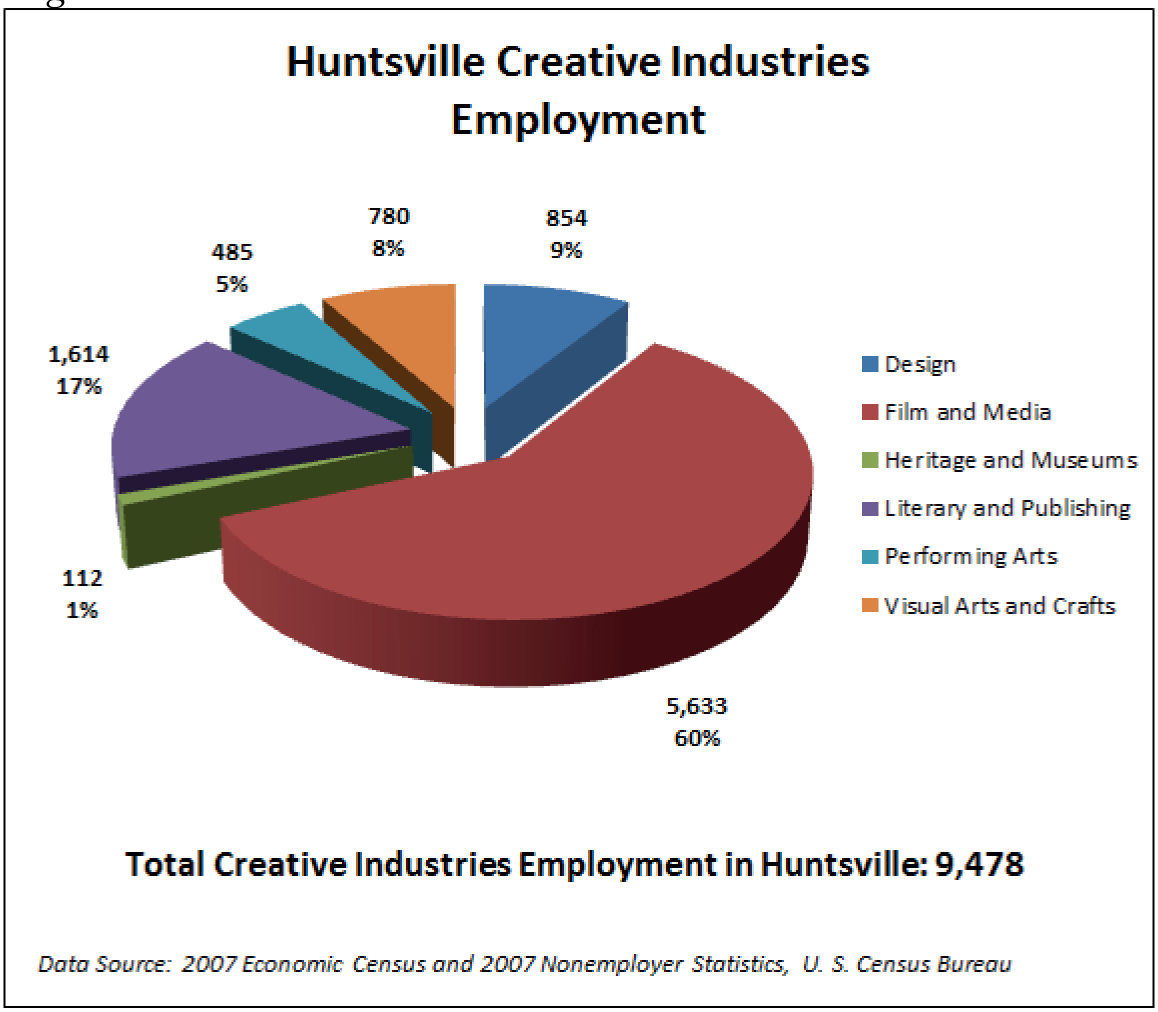
There are a total of 405 creative industries establishments in the metropolitan area of Huntsville, Alabama. The total includes 145 film and media establishments, 109 visual arts and crafts establishment, 72 in literary and publishing, 57 in design, 16 in performing arts, and 6 in heritage and museums. The creative industries represent 4.5% of all industry establishments in Huntsville.

Figure HSV-1



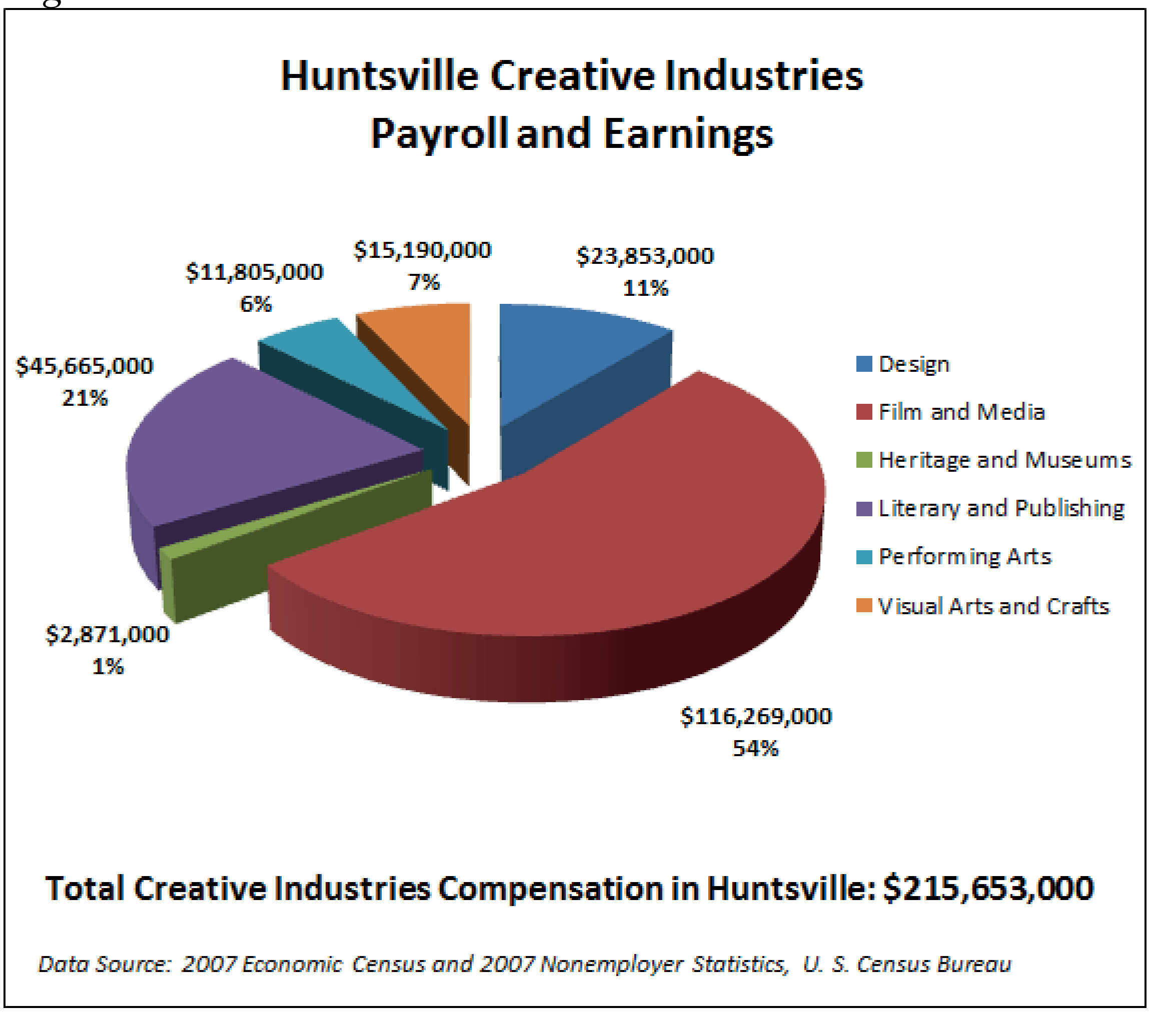
The creative industries employ 9,478 people in the Huntsville metropolitan area, including the self-employed. The total employment numbers include 5,633 from film and media, by far the largest sector, 1,614 from literary and publishing, 854 from design, 780 from visual arts and crafts, 485 from performing arts, and 112 from heritage and museums. The large number of employees included in the total for film and media is likely influenced by the location of large companies in Huntsville, including Cinram, Inc., which manufactures CD's and DVD's for movies, music, and video games, and DirecTV.

Figure HSV-2



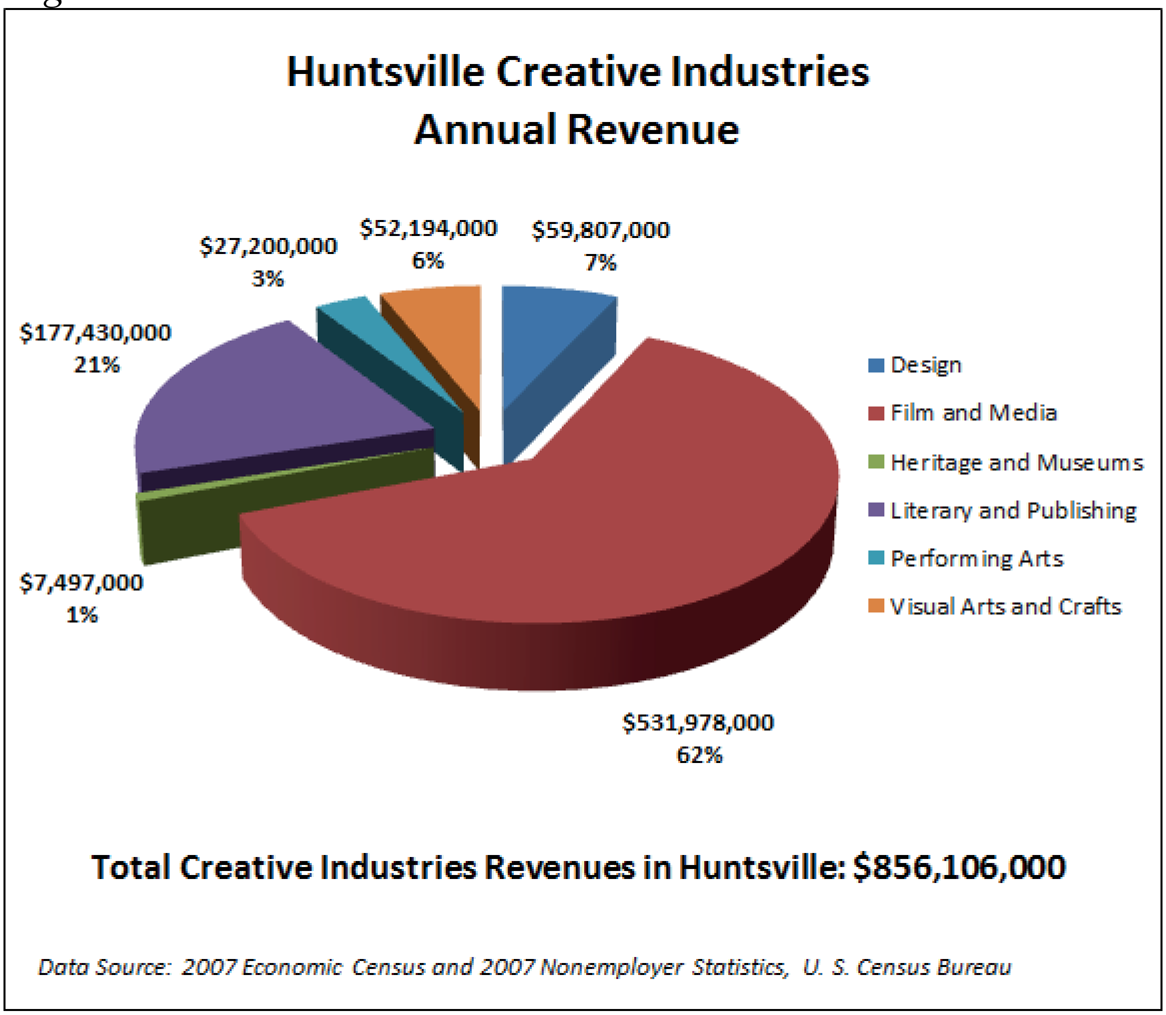
Those working in the metropolitan Huntsville creative industries earn $216 million each year, including earnings from the self-employed. A full 54% of that total is earned in the film and media segment with total payroll and earnings representing $116 million. The next two largest segments based on employee compensation are the literary and publishing sector group with wages and earnings by the self-employed totaling $46 million, and the design sector group with payroll and earnings at $24 million. The remaining segments are visual arts and crafts at $15 million, performing arts at $12 million, and heritage and museums at $2.9 million in payroll and earnings.

Figure HSV-3



Total revenues for the creative industries in Huntsville are $856 million. Again, the sector group of film and media represents the largest segment of the total with $532 million in annual revenues or 62% of all creative industries revenue in Huntsville for 2007. Film and media is followed by literary and publishing with $177 million or 21%, design with $60 million or 7%, visual arts and crafts with $52 million or 6%, performing arts with $27 million or 3%, and heritage and museums with $7.5 million or 1%.

Figure HSV-4



Per Capita Data for Huntsville Creative Industries

There are 10.47 creative industries establishments for every 10,000 residents in the Huntsville metropolitan area. The largest segment among the creative industries in Huntsville based on number of establishments per capita is film and media with 3.75 per 10,000 residents, followed by visual arts and crafts with 2.82, literary and publishing with 1.86, design with 1.47, performing arts with 0.41, and heritage and museums with 0.16.

Table HSV-1

Creative Industries Establishments in Huntsville per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design Establishments	57	1.47
Film and Media Establishments	145	3.75
Heritage and Museums Establishments	6	0.16
Literary and Publishing Establishments	72	1.86
Performing Arts Establishments	16	0.41
Visual Arts and Crafts Establishments	109	2.82
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN HUNTSVILLE	**405**	**10.47**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 386,632 from the Economic Census.

The creative industries in Huntsville generate 245.1 jobs for every 10,000 residents in the metropolitan area. The total includes 145.7 employed in film and media, 41.7 working in literary and publishing, 22.1 in design, 20.2 in visual arts and crafts, 12.5 in the performing arts, and 2.9 in heritage and museums.

Table HSV-2

Creative Industries Employment in Huntsville per 10,000 Residents	Employment	Employment Per 10,000
Design Employment	854	22.1
Film and Media Employment	5,633	145.7
Heritage and Museums Employment	112	2.9
Literary and Publishing Employment	1,614	41.7
Performing Arts Employment	485	12.5
Visual Arts and Crafts Employment	780	20.2
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN HUNTSVILLE	**9,478**	**245.1**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 386,632 from the Economic Census.

For every 10,000 people in the metropolitan area of Huntsville, those employed in the creative industries earn $5.6 million through workers' wages and earnings by the self-employed. More than 80% of that total is represented by the top three sectors – more than $3 million in payroll and earnings for every 10,000 residents in film and media, $1.2 million in literary and publishing, and $617,000 in design. The remaining figures include $393,000 in payroll and earnings in visual arts and crafts per 10,000 Huntsville residents, as well as $305,000 in performing arts, and $74,000 in heritage and museums.

Table HSV-3

Creative Industries Compensation in Huntsville Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design Compensation	$23,853,000	$616,943
Film and Media Compensation	$116,269,000	$3,007,226
Heritage and Museums Compensation	$2,871,000	$74,256
Literary and Publishing Compensation	$45,665,000	$1,181,097
Performing Arts Compensation	$11,805,000	$305,329
Visual Arts and Crafts Compensation	$15,190,000	$392,880
TOTAL CREATIVE INDUSTRIES COMPENSATION IN HUNTSVILLE	**$215,653,000**	**$5,577,731**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 386,632 from the Economic Census.

The total annual revenue for the creative industries in Huntsville is $856 million. That breaks down to $22 million for every 10,000 people in the metropolitan area. The largest sector group is film and media with $13.8 million per 10,000 residents, followed by literary and publishing with $4.6 million. Design represents $1.5 million, while visual arts and crafts represent $1.3 million in annual revenue per 10,000 residents. The performing arts represent $703,000, and heritage and museums represent $194,000 in revenue per 10,000 Huntsville residents.

Table HSV-4

Creative Industries Revenue in Huntsville per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design Revenue	$59,807,000	$1,546,871
Film and Media Revenue	$531,978,000	$13,759,285
Heritage and Museums Revenue	$7,497,000	$193,905
Literary and Publishing Revenue	$177,430,000	$4,589,118
Performing Arts Revenue	$27,200,000	$703,511
Visual Arts and Crafts Revenue	$52,194,000	$1,349,965
TOTAL CREATIVE INDUSTRIES REVENUE IN HUNTSVILLE	**$856,106,000**	**$22,142,655**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 386,632 from the Economic Census.

Top Twenty Creative Industry Sectors for Huntsville

Based on the number of establishments, the largest creative industries sectors for visual arts and crafts in Huntsville are jewelry stores, photographic services, fine art schools, and art dealers. Among the film and media segment, the largest sectors are radio, television, and other electronics stores; advertising, public relations, and related services; video tape and disc rental; broadcasting; motion picture and sound recording industries; software publishers; and broadcast and wireless communications equipment. Several design sectors are included in the top twenty – architectural services, interior design services, and graphic design services. Literary and publishing sectors in the top twenty are printing; book, periodical, and music stores; and newspaper, periodical, book, and directory publishers. The performing arts sector establishments include musical instrument and supplies stores, as well as performing arts companies. All non-profit and for-profit heritage and museums institutions in Huntsville are included under museums, historical sites, and similar institutions.

Table HSV-5

Huntsville - Top Twenty Creative Industry Sectors by Number of Establishments	
Jewelry Stores	39
Radio, Television, and Other Electronics Stores	36
Photographic Services	34
Advertising, Public Relations, and Related Services	32
Video Tape and Disc Rental	28
Printing	27
Architectural Services	26
Fine Arts Schools	26
Book, Periodical, and Music Stores	24
Broadcasting	22
Newspaper, Periodical, Book, and Directory Publishers	21
Motion Picture and Sound Recording Industries	13
Interior Design Services	13
Musical Instrument and Supplies Stores	10
Art Dealers	10
Graphic Design Services	10
Software Publishers	8
Performing Arts Companies	6
Museums, Historical Sites, and Similar Institutions	6
Broadcast and Wireless Communications Equipment	5

Data Source: 2007 Economic Census, U. S. Census Bureau

Eight of the largest creative industries sectors in Huntsville by total employment are from the film and media sector – audio and video media reproduction; broadcast and wireless communications equipment; broadcasting; radio, television, and other electronics stores; advertising, public relations, and related services; software publishers; video tape and disc rental; and motion picture and sound recording industries. Literary and publishing is also prominently represented in the list of top twenty industry sectors based on creative industries employment in Huntsville with newspaper, periodical, book, and directory publishers; independent writers; book, periodical, and music stores; and printing included on the list. Visual arts and crafts industry sectors on the list include jewelry stores, photographic services, and fine arts schools. Design sectors include ornamental and architectural metal work manufacturing, architectural services, and specialized design services. And performing arts sectors making the list are performing arts companies, and independent performers.

Table HSV-6

Huntsville - Top Twenty Creative Industry Sectors by Total Employment	
Audio and Video Media Reproduction	2,500
Broadcast and Wireless Communications Equipment	1,000
Broadcasting	637
Radio, Television, and Other Electronics Stores	572
Newspaper, Periodical, Book, and Directory Publishers	448
Independent Writers	392
Book, Periodical, and Music Stores	309
Printing	289
Advertising, Public Relations, and Related Services	281
Jewelry Stores	260
Ornamental and Architectural Metal Work Manufacturing	250
Photographic Services	247
Software Publishers	233
Architectural Services	209
Video Tape and Disc Rental	195
Specialized Design Services	193
Motion Picture and Sound Recording Industries	176
Fine Arts Schools	173
Performing Arts Companies	155
Independent Performers	153

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Based on employee compensation in Huntsville, the largest sectors for film and media include broadcast and wireless communications equipment; broadcasting; software publishers; advertising, public relations, and related services; radio, television, and other electronics stores; motion picture and sound recording industries; and video tape and disc rental. Literary and publishing sectors in the top twenty by payroll and earnings are newspaper, periodical, book, and directory publishers; printing; independent writers; book, periodical, and music stores; and publishing industries. Design sectors among the highest payroll and earnings include architectural services, specialized design services, and ornamental and architectural metal work manufacturing. Visual arts and crafts sectors making the list are jewelry stores, and photographic services. Performing arts sectors among the top twenty for payroll and earnings include promoters of performing arts, sports, and similar events; and performing arts companies. The heritage and museums sector is represented by museums, historical sites, and similar institutions.

Table HSV-7

Huntsville - Top Twenty Creative Industry Sectors by Employee Compensation	
Broadcast and Wireless Communications Equipment	$35,669,000
Broadcasting	$26,137,000
Newspaper, Periodical, Book, and Directory Publishers	$22,191,000
Software Publishers	$21,865,000
Advertising, Public Relations, and Related Services	$12,741,000
Radio, Television, and Other Electronics Stores	$12,248,000
Architectural Services	$10,812,000
Printing	$10,248,000
Jewelry Stores	$6,251,000
Promoters of Performing Arts, Sports, and Similar Events	$4,314,000
Independent Writers	$4,264,000
Specialized Design Services	$4,126,000
Photographic Services	$4,015,000
Book, Periodical, and Music Stores	$3,914,000
Ornamental and Architectural Metal Work Manufacturing	$3,405,000
Performing Arts Companies	$3,388,000
Motion Picture and Sound Recording Industries	$3,241,000
Museums, Historical Sites, and Similar Institutions	$2,871,000
Video Tape and Disc Rental	$2,025,000
Publishing Industries (except Internet)	$1,977,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

The film and media sectors are also among the largest creative industries sectors in Huntsville based on annual revenues, including broadcast and wireless communications equipment; radio, television, and other electronics stores; broadcasting; software publishers; advertising, public relations, and related services; motion picture and sound recording industries; video tape and disc rental; and audio and video media reproduction. Literary and publishing sectors in the top twenty based on revenues include newspaper, periodical, book, and directory publishers; printing; and book, periodical, and music stores. Visual arts and crafts sectors included on the list are jewelry stores, photographic services, and fine arts schools. Design sectors among the top twenty based on annual revenue are architectural services; ornamental and architectural metal work manufacturing; and interior design services. Performing arts sectors in the group include musical instrument and supplies stores; and performing arts companies. Finally, the heritage and museums sector is represented by museums, historical sites, and similar institutions.

Table HSV-8

Huntsville - Top Twenty Creative Industry Sectors by Annual Revenue	
Broadcast and Wireless Communications Equipment	$221,603,000
Radio, Television, and Other Electronics Stores	$105,471,000
Broadcasting	$93,646,000
Newspaper, Periodical, Book, and Directory Publishers	$86,249,000
Printing	$45,409,000
Software Publishers	$44,235,000
Book, Periodical, and Music Stores	$36,460,000
Advertising, Public Relations, and Related Services	$32,021,000
Jewelry Stores	$31,786,000
Architectural Services	$22,952,000
Ornamental and Architectural Metal Work Manufacturing	$17,608,000
Motion Picture and Sound Recording Industries	$17,456,000
Musical Instrument and Supplies Stores	$10,679,000
Performing Arts Companies	$9,902,000
Photographic Services	$9,883,000
Video Tape and Disc Rental	$9,215,000
Audio and Video Media Reproduction	$7,513,000
Museums, Historical Sites, and Similar Institutions	$7,497,000
Interior Design Services	$5,923,000
Fine Arts Schools	$4,863,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Huntsville Creative Industries To All Huntsville Industries

The 405 creative industries establishments in Huntsville represent 4.5% of the 9,076 total nonprofit and for-profit industry establishments in the metropolitan area (see Table HSV-9). The creative industries employ 9,478 people, representing 4.9% of employment in all Huntsville industries. This total includes 1,700 people who are self-employed in the creative industries, representing 6.6% of all self-employed in the state (see Table HSV-10).

The total wages and earnings for the creative industries in Huntsville is $216 million, representing 2.7% of all payroll and self-employed earnings in the state. The total includes $38 million in self-employment revenues, representing 3.4% of all self-employment revenues in the state (see Table HSV-11). The total revenues for the creative industries in Huntsville are $856 million, representing 2.2% of all industry revenues in the state (see Table HSV-12).

Table HSV-9

Comparison of Huntsville Creative Industries to Total Industries	
Category	**Establishments**
Huntsville Creative Industries Totals	405
% of Huntsville Total Industries	4.5%
Huntsville Total Industries	9,076

Source: 2007 Economic Census, U.S. Census Bureau

Table HSV-10

Comparison of Huntsville Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Huntsville Creative Industries Totals	7,778	1,700	9,478
% of Huntsville Total Industries	4.6%	6.6%	4.9%
Huntsville Total Industries	168,519	25,909	194,428

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table HSV-11

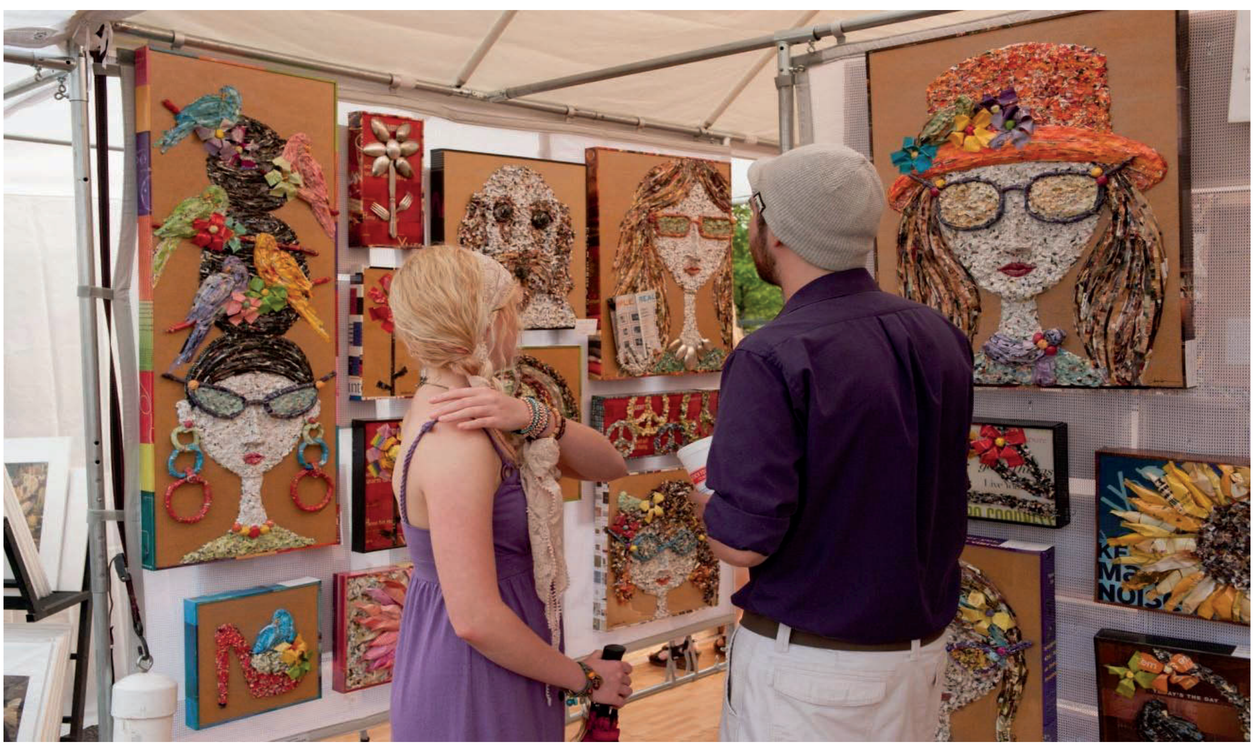
Comparison of Huntsville Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Huntsville Creative Industries Totals	$177,296,000	$38,357,000	$215,653,000
% of Huntsville Total Industries	2.6%	3.4%	2.7%
Huntsville Total Industries	$6,894,643,000	$1,132,397,000	$8,027,040,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table HSV-12

Comparison of Huntsville Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Huntsville Creative Industries Totals	$817,749,000	$38,357,000	$856,106,000
% of Huntsville Total Industries	2.2%	3.4%	2.2%
Huntsville Total Industries	$37,666,377,000	$1,132,397,000	$38,798,774,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

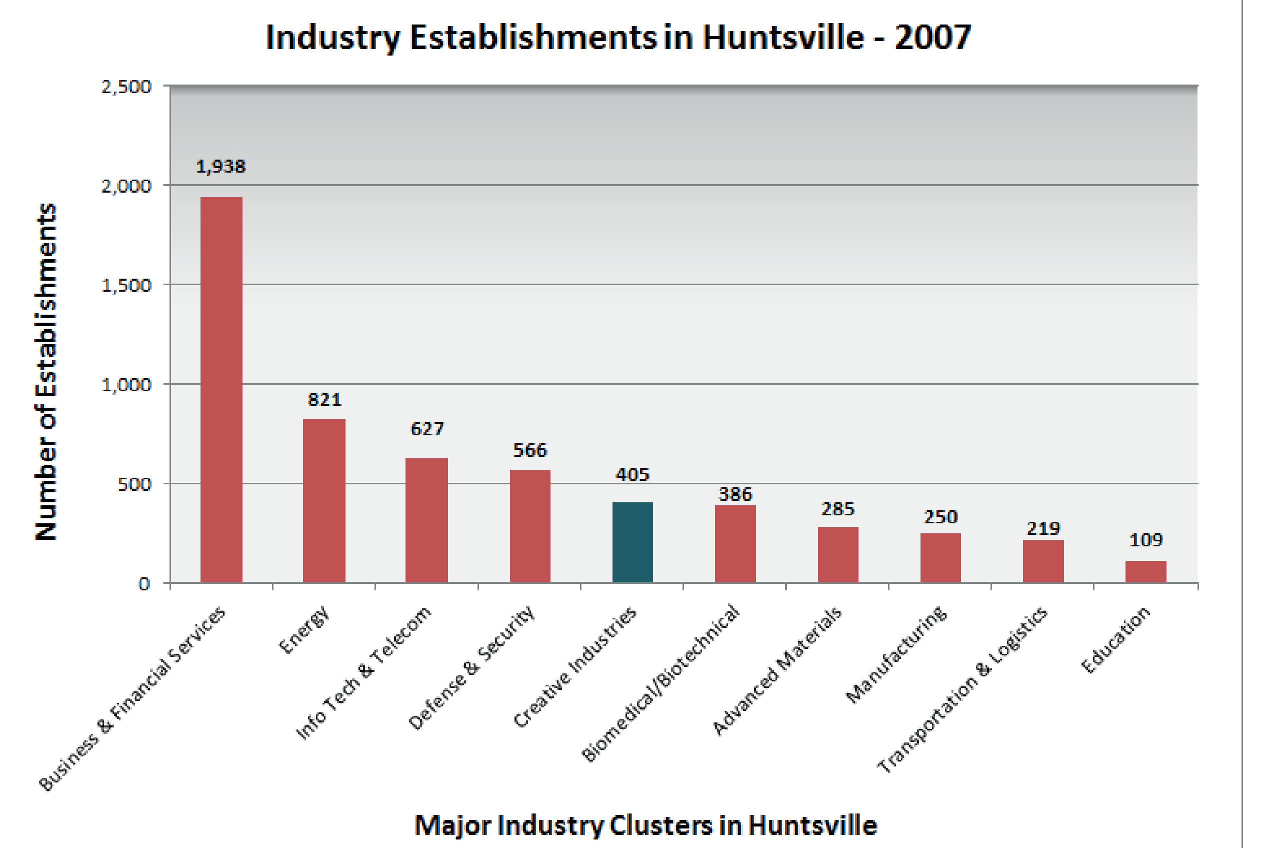


Patrons in the Arts Marketplace at Panoply Arts Festival in Huntsville, AL. Image courtesy of Alabama State Council on the Arts.

Comparison of Huntsville Creative Industries to Other Huntsville Industry Clusters

The creative industries establishments in Huntsville number 405, making them the fifth-largest industry cluster in the metropolitan area, larger than biomedical/biotechnical, advanced materials, manufacturing, transportation and logistics, and education. This total number of establishments for the creative industries does not include the self-employed.

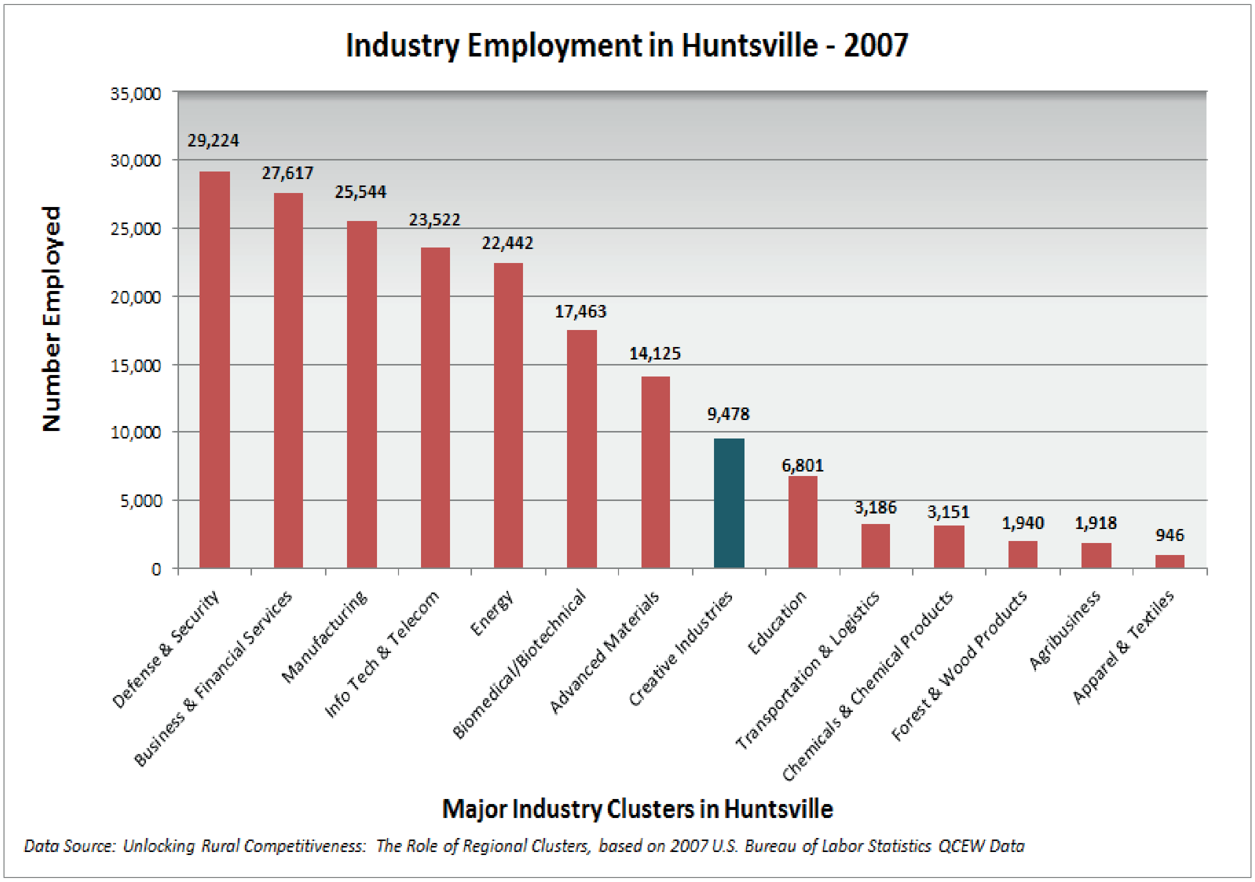
Figure HSV-5



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

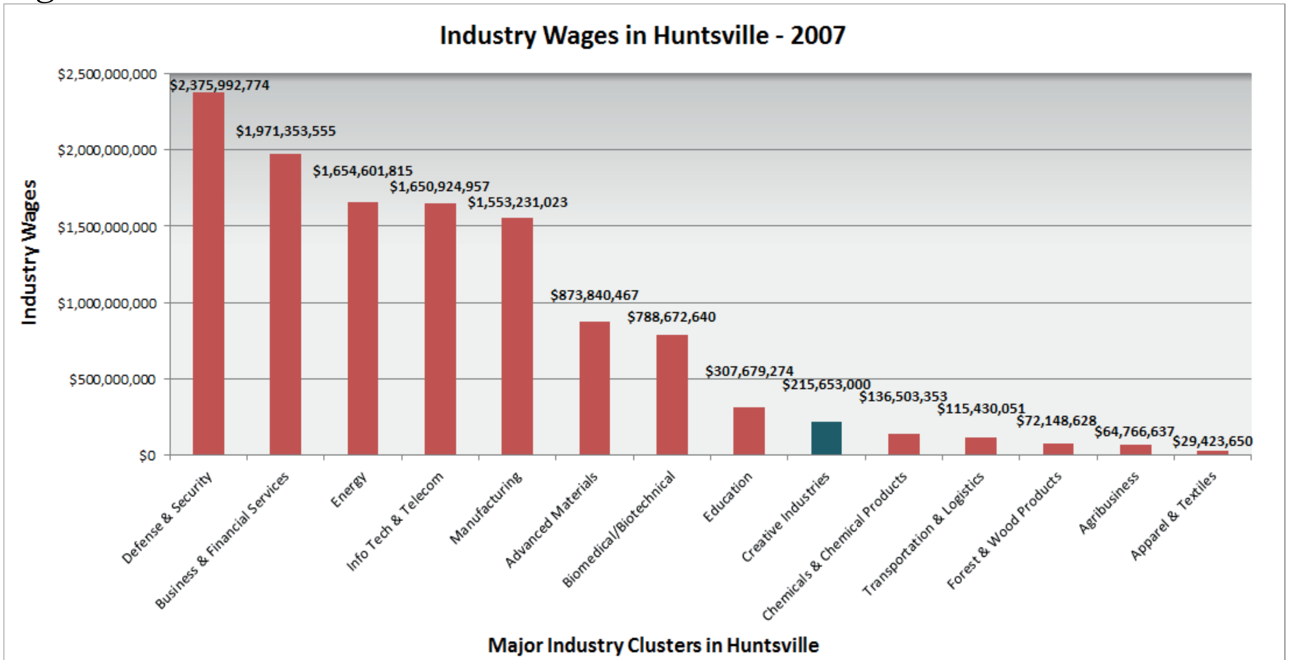
The creative industries in Huntsville employ 9,478 people. That means the industry cluster is the eighth largest in the state by total employment, larger than the industry clusters of education, transportation and logistics, chemicals and chemical products, forest and wood products, agribusiness, and apparel and textiles.

Figure HSV-6



Huntsville's creative industries pay $216 million in wages each year, ranking the industry cluster ninth in total payroll and earnings among all industry clusters in the metropolitan area, larger than chemicals and chemical products, transportation and logistics, forest and wood products, agribusiness, and apparel and textiles.

Figure HSV-7



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll led to using estimates for a number of specific industry sectors. The estimates used were extremely conservative.

Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Huntsville

There are 126 registered nonprofit arts, culture, and humanities organizations in Huntsville, representing 10.3% of the state total. Of those, 49 organizations had annual revenues above $25,000 and therefore filed IRS form 990, representing 10.6% of all nonprofit arts, culture, and humanities organizations filing form 990 in Alabama.

Table HSV-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Number of Registered Organizations	% of Alabama Total	Number of Organizations Filing Form 990	% of Alabama Total
Limestone County	13	1.10%	3	0.60%
Madison County	113	9.20%	46	10.00%
HUNTSVILLE TOTAL	126	10.30%	49	10.60%
ALABAMA TOTAL	1,225	100.00%	462	100.00%

Source: National Center for Charitable Statistics, 2007

Those nonprofit arts, culture, and humanities organizations that filed form 990 in Huntsville in 2007 reported total revenues of $19 million, representing 10.7% of the Alabama total. Those same organizations reported $25.5 million in assets, representing 6.4% of the Alabama total.

Table HSV-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Total Revenue Reported on Form 990	% of Alabama Total	Assets Reported on Form 990	% of Alabama Total
Limestone County	$140,372	0.10%	$310,395	0.10%
Madison County	$18,888,429	10.70%	$25,147,920	6.40%
HUNTSVILLE TOTAL	$19,028,801	10.80%	$25,458,315	6.50%
ALABAMA TOTAL	$177,225,395	100.00%	$392,886,444	100.00%

Source: National Center for Charitable Statistics, 2007

The Huntsville Symphony Orchestra. Image courtesy of Alabama State Council on the Arts.

The Huntsville Symphony Orchestra. Image courtesy of Alabama State Council on the Arts.

Mobile

Festivities during Mobile's Mardi Gras. Image courtesy of Alabama State Council on the Arts.

Located on the Gulf Coast of Alabama, Mobile is a port city that got its start as the capital city of French Louisiana in 1702. Because of its long history and French origins, Mobile is known as the founding home of Mardi Gras, the Carnival season celebration that dominates the Gulf Coast during the winter season, and brings a million tourists to the metro area each year. Other major annual festivals in the region include BayFest, a world class music festival; the Festival of Flowers; Mobile Jazz Festival; and Greek Fest.

Because of its long history, Mobile has a plethora of historic architecture, history museums, and historic homes. They include the National African American Archives and Museum, the University of South Alabama Archives, the Mobile Genealogical Society Library and Media Center, Battleship Memorial Park, the Museum of Mobile, the Oakleigh Mansion and Historic Complex, the William J. and Emily Staples Hearin Mobile Carnival Museum, the Bragg-Mitchell Mansion, the Richards D.A.R. House, the Conde-Charlotte House, Fort Morgan, Fort Gaines, Historic Blakeley State Park, the Vincent-Doan House, the Phoenix Fire Museum, and the Mobile Police Department Museum. Additional libraries and archives in Mobile include the Ben May Main Library, Mobile Public Library, and The Saint Ignatius Archives, Museum and Theological Research Library.

Mobile also has a vibrant visual arts scene, anchored by the Mobile Museum of Art and the Eastern Shore Art Center in Fairhope.

Centered on the Saenger Theatre of Mobile and the Mobile Civic Center, the performing arts in Mobile are thriving, with the Mobile Symphony Orchestra, Mobile Opera, and Mobile Ballet.

Mobile is also rich with science museums and botanical gardens, including the Mobile Medical Museum, the Gulf Coast Exploreum, the Dauphin Island Sea Lab and Estuarium, Mobile Botanical Gardens, the Bellingrath Gardens and Home, and the Five Rivers Delta Resource Center.

Major artists, writers, and performers from Mobile include musician Jimmy Buffett, ceramist Charles Smith, country musician Jamey Johnson, actor Orlando Jones, character actor Richard Tyson, author Eugene Walter, musician Fred Wesley, and jazz musician Ward Swingle.

Based on the industry sector group breakdown of Mobile's 373 creative industries establishments, the metro area has a balanced creative industries presence between literary and publishing, visual arts and crafts, and film and media. Mobile's creative industries represent 4.3% of all industry establishments in the city. They also employ 7,761 people in Mobile or 2.9% of all employment for the area, including 1,444 who are self-employed or 5.2% of all self-employed in the state. Wages earned by creative industries workers totaled $285 million in 2007, or 4.4% of all wages and earnings. Annual revenues for the creative industries in Mobile totaled $883 million, or 2.2% of all industry revenue in the metro area.

Mobile is home to a robust network of nonprofit arts, culture, and humanities organizations with 151 registered in the city and serving as the foundation for the creative industries in the metro area. Of those organizations, 53 had annual revenue above $25,000 and therefore filed form 990 in 2007 and reported total annual revenues of $24 million and total assets of $44 million.

The city has a significant creative industries presence, with film and media representing the largest segment based on annual revenues, including the leading sectors of software publishers; radio, television, and other electronics stores; radio and television broadcasting; motion picture and sound recording industries; and advertising, public relations, and related services. Mobile's creative industries are also carried by the significant literary and publishing segment, with leading sectors that include publishing industries; commercial lithographic printing; book, periodical, and music stores; and independent writers. Other leading sectors include photographic services; jewelry stores; independent performers; museums, historical sites, and similar institutions; performing arts companies; specialized design services; and architectural services.

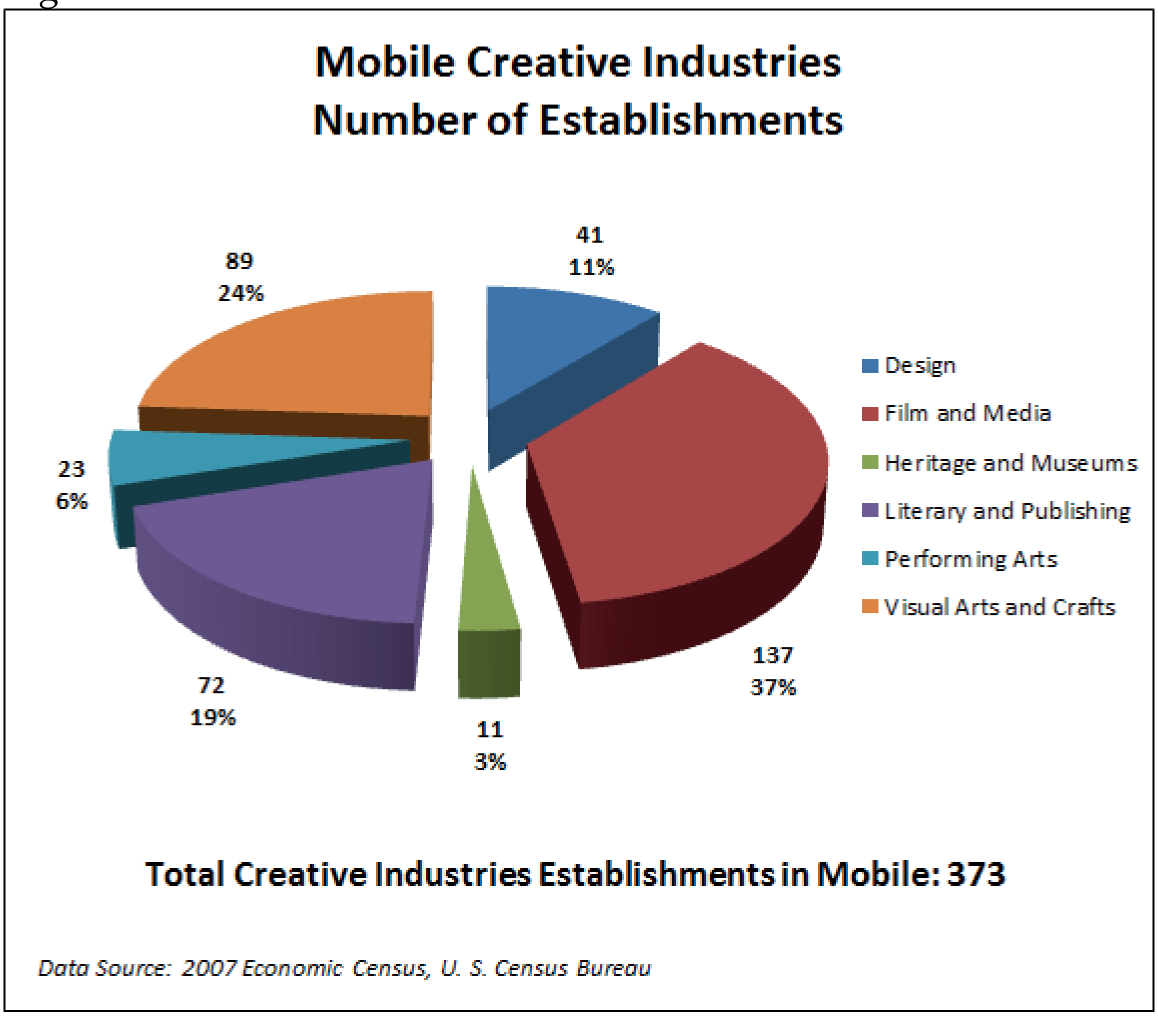
The information in the following pages represents the creative industries data for the Mobile metropolitan area in more detail with appropriate documentation.

Space 301 Gallery in downtown Mobile. Image courtesy of Alabama State Council on the Arts.

Creative Industries in Mobile – By the Numbers

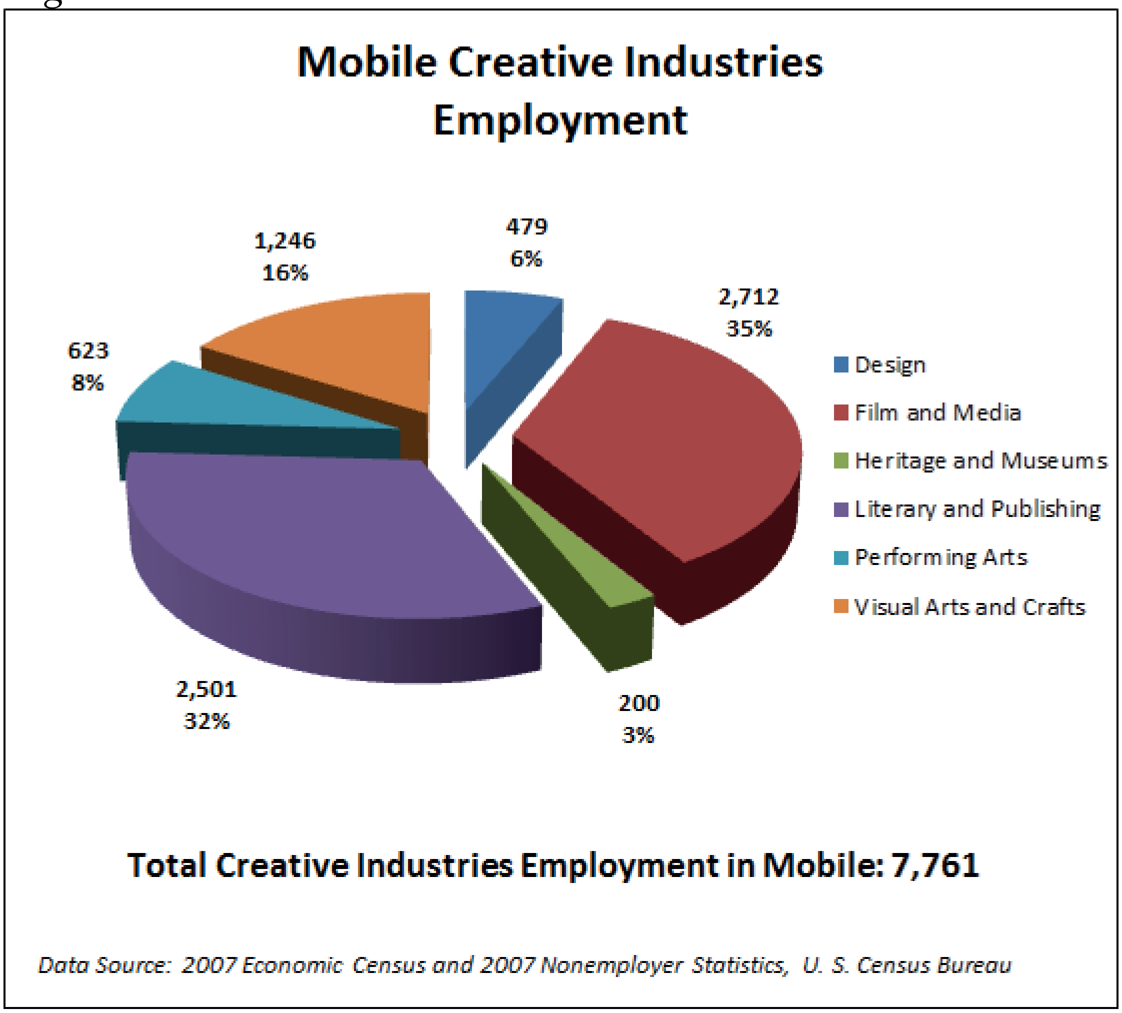
Based on the sector group breakdown of Mobile's 373 creative industries establishments, the state has a balanced creative industries presence between film and media, visual arts and crafts, literary and publishing, design, performing arts, and heritage and museums. The total includes 137 film and media establishments, 89 in visual arts and crafts, 72 in literary and publishing, 41 in design, 23 in performing arts, and 11 in heritage and museums. This total number of establishments for the creative industries does not include the self-employed.

Figure MOB-1



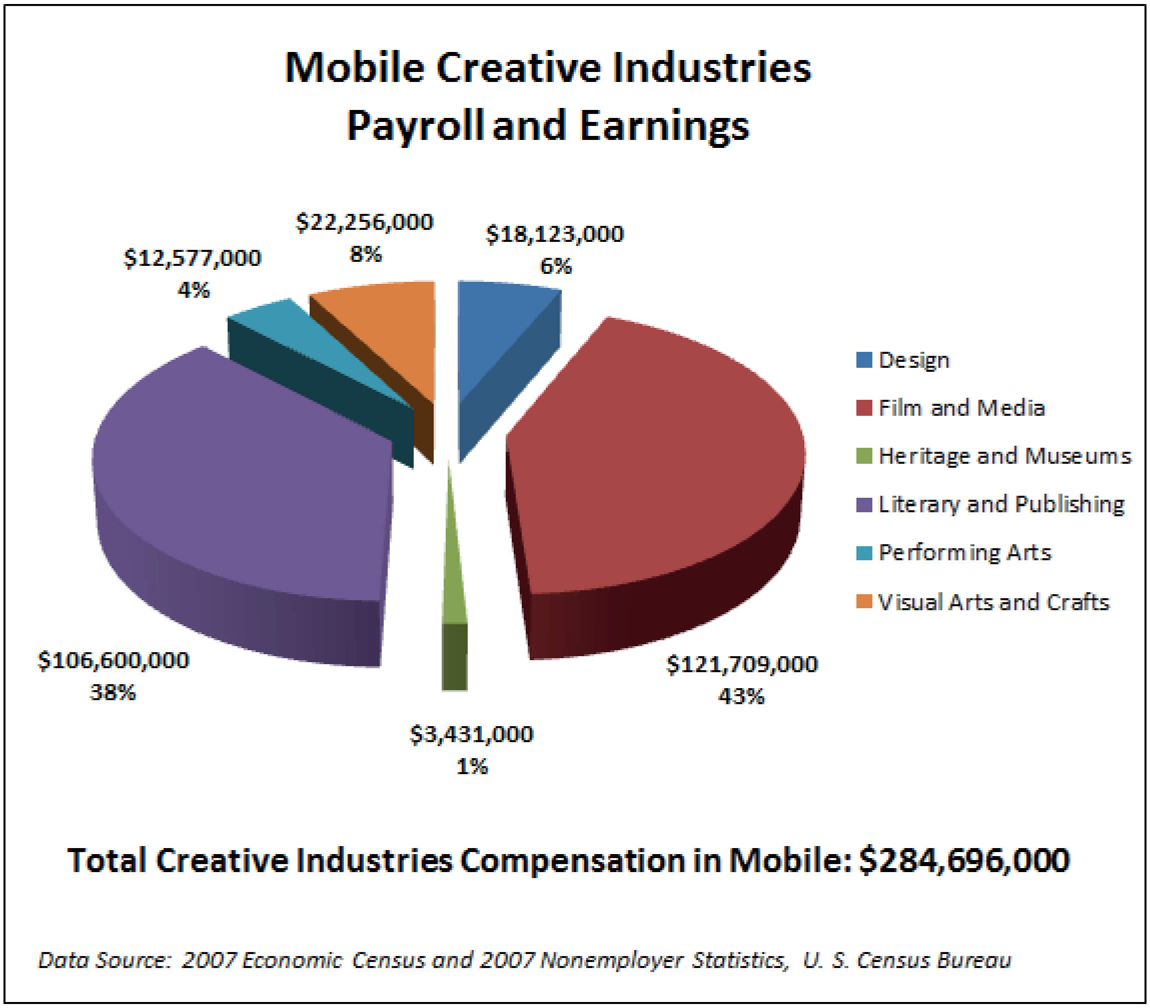
The creative industries employ 7,761 people in Mobile, including 1,444 who are self-employed. Among the creative industry sector groups, the largest in Mobile is film and media with 2,712, people employed, followed by literary and publishing with 2,501. The next largest segments are visual arts and crafts with 1,246 employed, performing arts with 623, design with 479, and heritage and museums with 200 employees.

Figure MOB-2



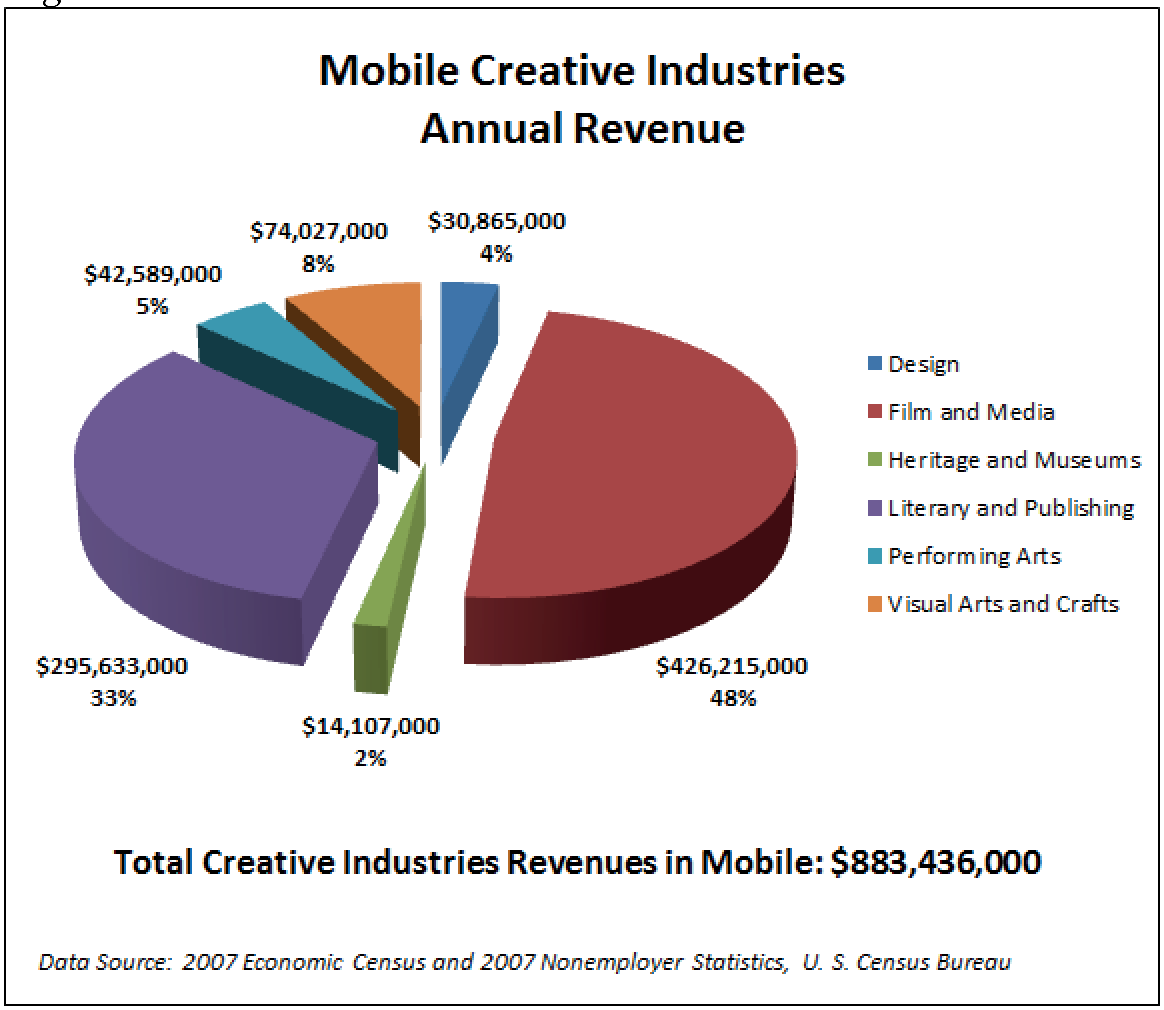
Wages earned by workers in the creative industries totaled $285 million in 2007. The largest share of that total came from the film and media sector with $122 million paid in wages and earned by the self-employed. That is followed by literary and publishing with $107 million in earnings, visual arts and crafts with $22 million, design with $18 million, performing arts with $13 million, and heritage and museums with $3.4 million in payroll and earnings.

Figure MOB-3



Annual revenues for creative industries in Mobile totaled $883 million, including $426 million from film and media, $296 million from literary and publishing, $74 million from visual arts and crafts, $43 million from performing arts, $31 million from design, and $14 million from heritage and museums establishments and self-employed revenue.

Figure MOB-4



Per Capita Data for Mobile Creative Industries

Based on per capita figures for number of establishments, the film and media sector is the largest among the creative industries in Mobile with 3.39 establishments for every 10,000 residents. It is followed by visual arts and crafts with 2.20, literary and publishing with 1.78, design with 1.01, performing arts with 0.57, and heritage and museums with 0.27 establishments for every 10,000 residents.

Table MOB-1

Creative Industries Establishments in Mobile per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design Establishments	41	1.01
Film and Media Establishments	137	3.39
Heritage and Museums Establishments	11	0.27
Literary and Publishing Establishments	72	1.78
Performing Arts Establishments	23	0.57
Visual Arts and Crafts Establishments	89	2.20
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN MOBILE	**373**	**9.22**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 404,406 from the Economic Census.

When considering employment numbers, the film and media sector remains the largest among the creative industries in Mobile with 67.1 people either employed or self-employed for every 10,000 residents in the state. The next largest is literary and publishing with 61.8, followed by visual arts and crafts with 30.8, performing arts with 15.4, design with 11.8, and heritage and museums with 5.0 people employed or self-employed for every 10,000 residents in the state. In total, the creative industries employ 191.9 people in Mobile for every 10,000 residents.

Table MOB-2

Creative Industries Employment in Mobile per 10,000 Residents	Employment	Employment Per 10,000
Design Employment	479	11.8
Film and Media Employment	2,712	67.1
Heritage and Museums Employment	200	5.0
Literary and Publishing Employment	2,501	61.8
Performing Arts Employment	623	15.4
Visual Arts and Crafts Employment	1,246	30.8
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN MOBILE	**7,761**	**191.9**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 404,406 from the Economic Census.

Looking at wages paid to employees and income earned by the self-employed, the creative industries in Mobile generate $7.0 million in income per 10,000 residents in the metropolitan area. The leading sector groups are film and media with $3.0 million, and literary and publishing with $2.6 million. Those sector groups are followed by visual arts and crafts with $550 thousand, design with $448 thousand, performing arts with $311 thousand, and heritage and museums with $85 thousand in payroll and earnings for every 10,000 residents in Mobile.

Table MOB-3

Creative Industries Compensation in Mobile Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design Compensation	$18,123,000	$448,138
Film and Media Compensation	$121,709,000	$3,009,574
Heritage and Museums Compensation	$3,431,000	$84,840
Literary and Publishing Compensation	$106,600,000	$2,635,964
Performing Arts Compensation	$12,577,000	$310,999
Visual Arts and Crafts Compensation	$22,256,000	$550,338
TOTAL CREATIVE INDUSTRIES COMPENSATION IN MOBILE	**$284,696,000**	**$7,039,853**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 404,406 from the Economic Census.

When considering annual revenue, the film and media sector remains the largest among the creative industries in Mobile with $10.5 million in revenue for every 10,000 residents of the metropolitan area. Film and media is followed by literary and publishing with $7.3 million, visual arts and crafts with $1.8 million, performing arts with $1.1 million, design with $763 thousand, and heritage and museums with $349 thousand in revenue per 10,000 residents of Mobile. The average revenue per 10,000 residents for the creative industries in Mobile is $21.8 million.

Table MOB-4

Creative Industries Revenue in Mobile per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design Revenue	$30,865,000	$763,218
Film and Media Revenue	$426,215,000	$10,539,284
Heritage and Museums Revenue	$14,107,000	$348,832
Literary and Publishing Revenue	$295,633,000	$7,310,302
Performing Arts Revenue	$42,589,000	$1,053,124
Visual Arts and Crafts Revenue	$74,027,000	$1,830,511
TOTAL CREATIVE INDUSTRIES REVENUE IN MOBILE	**$883,436,000**	**$21,845,271**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 404,406 from the Economic Census.

Top Twenty Creative Industry Sectors for Mobile

Based on the number of establishments located in the metropolitan area, the largest creative industry sector in Mobile is advertising, public relations, and related services in the film and media sector group. Other film and media industry sectors in the top twenty include: radio, television, and other electronic stores; radio and television broadcasting; video tape and disc rental; motion picture and sound recording industries; and software publishers. From the visual arts and crafts, Mobile's top industry sectors include jewelry stores; photographic services; fine arts schools; and sewing, needlework, and piece goods stores. From literary and publishing the list includes commercial lithographic printing; publishing industries; and book, periodical, and music stores. Design industry sectors include architectural services and specialized design services. From the performing arts, the top twenty features musical instrument and supplies stores; promoters without facilities; performing arts companies; and promoters with facilities. Heritage and museums are represented by museums, historical sites, and similar institutions.

Table MOB-5

Mobile - Top Twenty Creative Industry Sectors by Number of Establishments	
Advertising, Public Relations, and Related Services	43
Jewelry Stores	36
Commercial Lithographic Printing	34
Photographic Services	28
Radio, Television, and Other Electronics Stores	27
Architectural Services	23
Radio and Television Broadcasting	22
Video Tape and Disc Rental	22
Publishing Industries (except Internet)	20
Specialized Design Services	18
Book, Periodical, and Music Stores	18
Motion Picture and Sound Recording Industries	15
Fine Arts Schools	14
Museums, Historical Sites, and Similar Institutions	11
Sewing, Needlework, and Piece Goods Stores	11
Software Publishers	8
Musical Instrument and Supplies Stores	7
Promoters without Facilities	7
Performing Arts Companies	6
Promoters with Facilities	3

Data Source: 2007 Economic Census, U. S. Census Bureau

When looking at employment levels, including the self-employed, the largest single sector among the creative industries in Mobile is the publishing industries with 1,713 people. Other literary and publishing industry sectors in the top twenty include commercial lithographic printing; independent writers; and book, periodical, and music stores. The top film and media industry sectors in Mobile based on employment are software publishers; radio and television broadcasting; radio, television, and other electronics stores; advertising, public relations, and related services; motion picture and sound recording industries; and video tape and disc rental. Among the visual arts and crafts industry sectors the largest employers are photographic services; jewelry stores; and sewing, needlework, and piece goods stores. From the performing arts, the industry sectors with the highest employment numbers are independent performers; performing arts companies; and promoters of performing arts, sports, and similar events. Design sectors with higher employment figures include architectural services; and landscape architectural services. Heritage and museums is represented by museums, historical sites, and similar institutions.

Table MOB-6

Mobile - Top Twenty Creative Industry Sectors by Total Employment	
Publishing Industries (except Internet)	1,713
Software Publishers	926
Photographic Services	769
Radio and Television Broadcasting	592
Radio, Television, and Other Electronics Stores	383
Advertising, Public Relations, and Related Services	351
Motion Picture and Sound Recording Industries	287
Commercial Lithographic Printing	277
Jewelry Stores	236
Independent Writers	234
Independent Performers	224
Museums, Historical Sites, and Similar Institutions	200
Specialized Design Services	199
Book, Periodical, and Music Stores	185
Performing Arts Companies	145
Video Tape and Disc Rental	136
Architectural Services	126
Promoters of Performing Arts, Sports, and Similar Events	103
Sewing, Needlework, and Piece Goods Stores	100
Landscape Architectural Services	77

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Mobile has a number of large creative industry sectors based on total employee wages and revenue earned by the self-employed. The category is led by publishing industries with $91 million in payroll and earnings. Other literary and publishing industry sectors in the top twenty include commercial lithographic printing; independent writers; and book, periodical, and music stores. Film and media industry sectors making the list of largest total employee payroll and earnings include software publishers; radio and television broadcasting; advertising, public relations, and related services; motion picture and sound recording industries; radio, television, and other electronics stores; and video tape and disc rental. Visual arts and crafts industry sectors with large payrolls include photographic services; jewelry stores; and sewing, needlework, and piece goods stores. Design sectors in the top twenty for compensation include architectural services; specialized design services; and landscape architectural services. Performing arts industry sectors with larger payroll and earnings in Mobile include performing arts companies; independent performers; and promoters of arts, sports, and similar events. Again, the heritage and museums sector group is represented by museums, historical sites, and similar institutions.

Table MOB-7

Mobile - Top Twenty Creative Industry Sectors by Employee Compensation	
Publishing Industries (except Internet)	$91,110,000
Software Publishers	$57,355,000
Radio and Television Broadcasting	$24,042,000
Advertising, Public Relations, and Related Services	$19,642,000
Photographic Services	$13,493,000
Motion Picture and Sound Recording Industries	$10,337,000
Commercial Lithographic Printing	$8,349,000
Radio, Television, and Other Electronics Stores	$7,690,000
Architectural Services	$7,537,000
Specialized Design Services	$6,280,000
Jewelry Stores	$5,429,000
Performing Arts Companies	$3,788,000
Museums, Historical Sites, and Similar Institutions	$3,431,000
Independent Writers	$2,758,000
Landscape Architectural Services	$2,746,000
Independent Performers	$2,645,000
Promoters of Performing Arts, Sports, and Similar Events	$2,640,000
Book, Periodical, and Music Stores	$2,246,000
Video Tape and Disc Rental	$1,759,000
Sewing, Needlework, and Piece Goods Stores	$1,681,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Mobile also has a number of large creative industry sectors based on annual revenue. The sectors are led by the publishing industries with $240 million in annual revenue. Additional literary and publishing sectors with larger annual revenues in Mobile include commercial lithographic printing; and book, periodical, and music stores. Among film and media sectors, the largest based on annual revenues are software publishers; radio, television, and other electronics stores; radio and television broadcasting; motion picture and sound recording industries; advertising, public relations, and related services; and video tape and disc rental.

Visual arts and crafts industry sectors with higher revenues are photographic services; jewelry stores; sewing, needlework, and piece goods stores; and fine arts schools. Design industry sectors in the top twenty include architectural services; and specialized design services. The performing arts are represented by performing arts companies; promoters without facilities; musical instrument and supplies stores; and promoters of performing arts, sports, and similar events with facilities. Museums, historical sites, and similar institutions made the list from the heritage and museums sector group.

Table MOB-8

Mobile - Top Twenty Creative Industry Sectors by Annual Revenue	
Publishing Industries (except Internet)	$239,611,000
Software Publishers	$126,720,000
Radio, Television, and Other Electronics Stores	$94,235,000
Radio and Television Broadcasting	$88,676,000
Motion Picture and Sound Recording Industries	$55,676,000
Advertising, Public Relations, and Related Services	$50,481,000
Photographic Services	$33,916,000
Commercial Lithographic Printing	$31,789,000
Jewelry Stores	$28,999,000
Book, Periodical, and Music Stores	$19,338,000
Architectural Services	$15,844,000
Museums, Historical Sites, and Similar Institutions	$14,107,000
Specialized Design Services	$10,715,000
Performing Arts Companies	$10,301,000
Promoters without Facilities	$10,268,000
Musical Instrument and Supplies Stores	$10,221,000
Video Tape and Disc Rental	$9,543,000
Promoters of Performing Arts, Sports, and Similar Events	$8,581,000
Sewing, Needlework, and Piece Goods Stores	$6,953,000
Fine Arts Schools	$3,277,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Mobile Creative Industries To All Mobile Industries

The total number of creative industries establishments in the Mobile metropolitan area is 373, which represents 4.3% of all business establishments in the area (see Table MOB-9). When looking at the number employed and self-employed in the creative industries in Mobile, the sector represents 7,761 jobs, or 2.9% of all employment in Mobile, including 1,444 who are self-employed, representing 5.2% of all the self-employed in the metro area (see Table MOB-10).
The total wages for employees and earnings by the self-employed in the creative industries in Mobile is $285 million. This total represents 4.4% of the wages paid by all industries in Alabama. The total includes $36 million earned by the self-employed in the creative industries, representing 3.0% of all revenue earned by the self-employed in the metro area (see Table MOB-11). The revenue total for all creative industries in Mobile in 2007 was $883 million or 2.2% of revenue earned by all industries in the metropolitan region (see Table MOB-12).

Table MOB-9

Comparison of Mobile Creative Industries to Total Industries	
Category	**Establishments**
Mobile Creative Industries Totals	373
% of Mobile Total Industries	4.3%
Mobile Total Industries	8,730

Source: 2007 Economic Census, U.S. Census Bureau

Table MOB-10

Comparison of Mobile Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Mobile Creative Industries Totals	6,317	1,444	7,761
% of Mobile Total Industries	2.6%	5.2%	2.9%
Mobile Total Industries	242,066	27,849	269,915

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table MOB-11

Comparison of Mobile Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Mobile Creative Industries Totals	$249,108,000	$35,588,000	$284,696,000
% of Mobile Total Industries	4.7%	3.0%	4.4%
Mobile Total Industries	$5,260,278,000	$1,204,593,000	$6,464,871,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table MOB-12

Comparison of Mobile Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Mobile Creative Industries Totals	$847,848,000	$35,588,000	$883,436,000
% of Mobile Total Industries	2.2%	3.0%	2.2%
Mobile Total Industries	$38,852,570,000	$1,204,593,000	$40,057,163,000

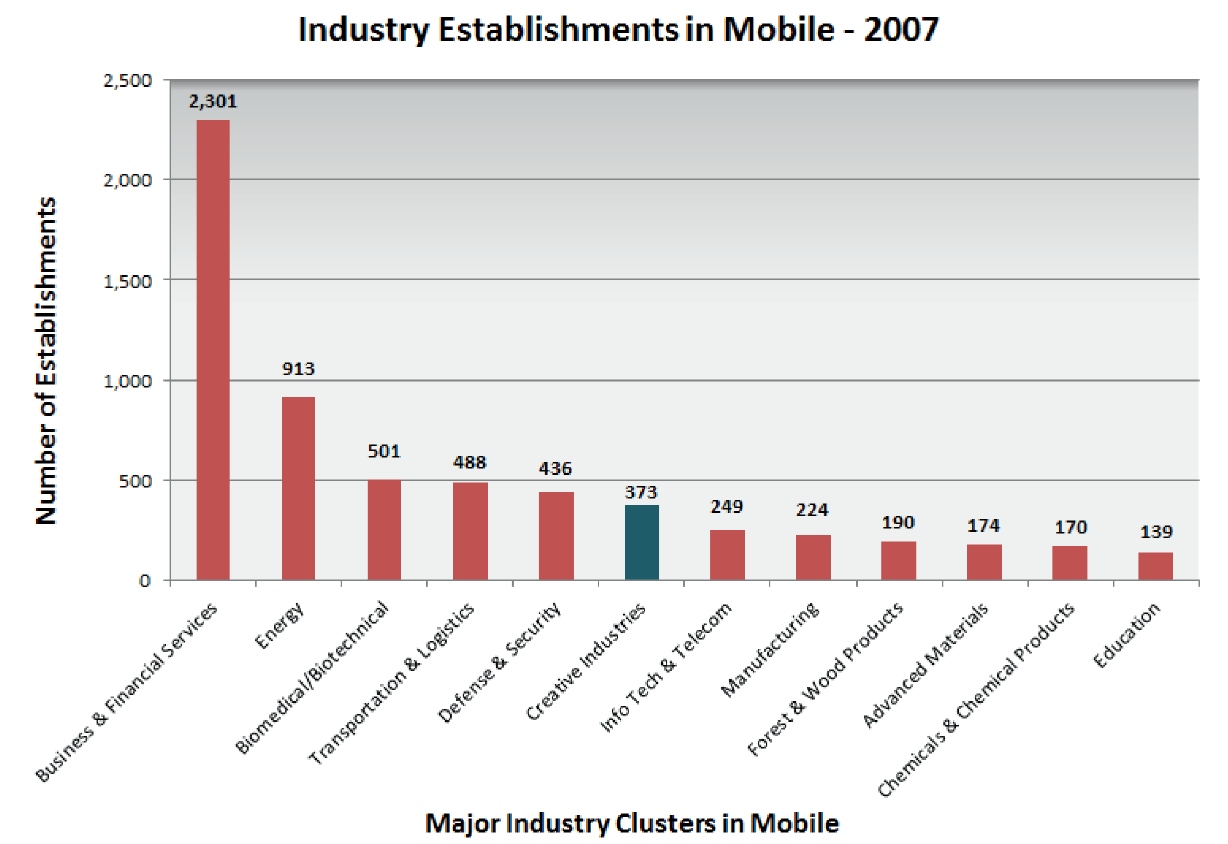
Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The Mobile Museum of Art. Image courtesy of Alabama State Council on the Arts.

Comparison of Mobile Creative Industries to Other Mobile Industry Clusters

There are 373 creative industries establishments in the Mobile metropolitan statistical area. As an industry cluster, this represents the sixth largest in the region – greater than information technology and telecommunications, manufacturing, forest and wood products, advanced materials, chemicals and chemical products, and education. This total number of establishments for the creative industries does not include the self-employed.

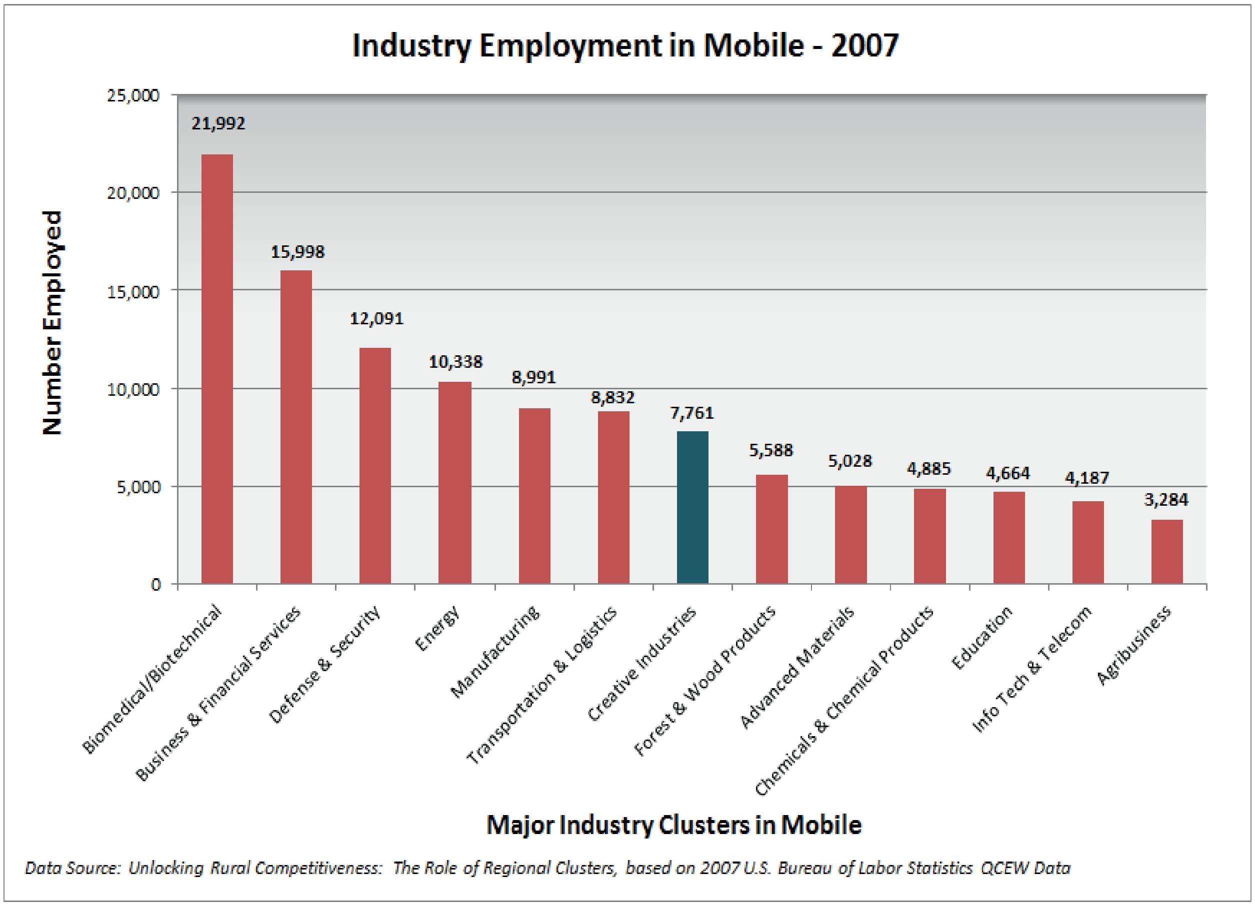
Figure MOB-5



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

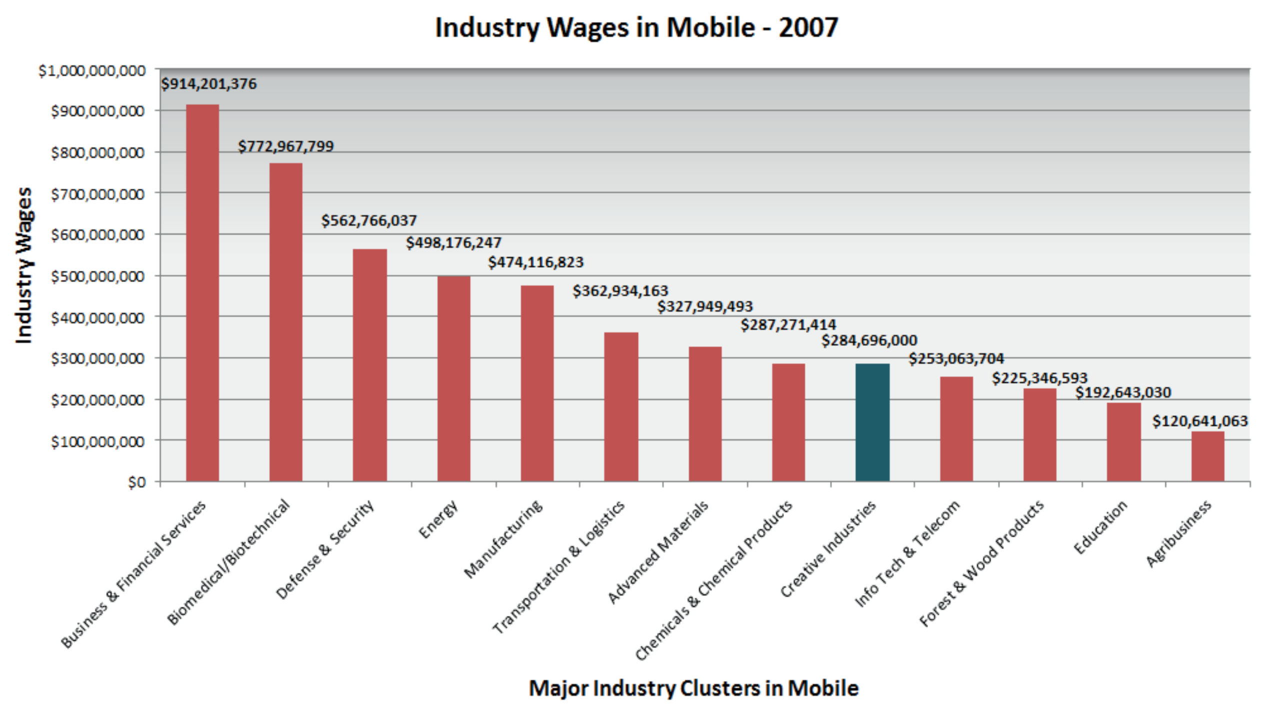
The number of employed and self-employed working in the creative industries in Mobile is 7,761, representing the seventh-largest industry cluster in the metro area. Based on employment, the creative industries are larger than the industry clusters of forest and wood products, advanced materials, chemicals and chemical products, education, information technology and telecommunications, and agribusiness in Mobile.

Figure MOB-6



Based on available data, the creative industries represent at least the ninth-largest industry cluster in Mobile based on payroll and earnings by the self-employed. The creative industries are larger than the industry clusters for information technology and telecommunications, forest and wood products, education, and agribusiness.

Figure MOB-7



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll led to using estimates for a number of specific industry sectors. The estimates used were extremely conservative.

Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Mobile

Mobile is home to 151 registered nonprofit organizations in the arts, culture, and humanities, representing 12.3% of the state total. Of those, 53 nonprofit arts, culture, and humanities organizations in Mobile had annual revenues above $25,000 and therefore filed IRS form 990.

Table MOB-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Number of Registered Organizations	% of Alabama Total	Number of Organizations Filing Form 990	% of Alabama Total
Baldwin County	53	4.30%	12	2.60%
Mobile County	98	8.00%	41	8.90%
MOBILE TOTAL	**151**	**12.30%**	**53**	**11.50%**
ALABAMA TOTAL	**1,225**	**100.00%**	**462**	**100.00%**

Source: National Center for Charitable Statistics, 2007

The nonprofit arts, culture, and humanities organizations in Mobile that filed form 990 reported total revenues of $24 million, or 13.7% of the state total. In addition, those same organizations reported $44 million in assets, representing 11.1% of the state total.

Table MOB-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Total Revenue Reported on Form 990	% of Alabama Total	Assets Reported on Form 990	% of Alabama Total
Baldwin County	$1,135,203	0.60%	$3,219,234	0.80%
Mobile County	$23,258,435	13.10%	$40,578,356	10.30%
MOBILE TOTAL	**$24,393,638**	**13.70%**	**$43,797,590**	**11.10%**
ALABAMA TOTAL	**$177,225,395**	**100.00%**	**$392,886,444**	**100.00%**

Source: National Center for Charitable Statistics, 2007

Mobile's Mardi Gras. Image courtesy of Alabama State Council on the Arts.

Art on display at a Mobile area festival. Image courtesy of Alabama State Council on the Arts.

Montgomery

The world-class Alabama Shakespeare Festival is among the largest Shakespeare theatres in the world. Image courtesy of Alabama State Council on the Arts.

As the state capital of Alabama, Montgomery has a long and somewhat tumultuous history. Founded in 1819, the city served as the first capital of the Confederate States of America, and went on to become a central battleground in the Civil Rights Movement in the mid-twentieth century. Many of the cultural institutions in Montgomery commemorate and reflect upon this history.

Major historic institutions in the city include Alabama's State Capitol, the First White House of the Confederacy, The Teague House (now home of the Alabama Historical Commission), the Rosa Parks Library and Museum, the Civil Rights Memorial & Center, the Freedom Rides Museum, the Dexter Avenue King Memorial Baptist Church & Parsonage Museum, and the National Center for the Study of Civil Rights and African American Culture at Alabama State University.

Additional cultural museums in the capital area include the Hank Williams Museum & Memorial, the F. Scott and Zelda Fitzgerald Museum, Old Alabama Town, and the Alabama Department of Archives and History.

Possibly the most well-known performing arts organization in the state, the Alabama Shakespeare Festival makes its home in Montgomery at Carolyn Blount Theatre. Additional major producing organizations in the metro area include the Montgomery Symphony Orchestra, Alabama Dance Theatre, Montgomery Ballet, Cloverdale Playhouse, and Faulkner University's Dinner Theatre. Some of the major performing arts venues in the city include the Davis Theatre for the Performing Arts at Troy University, the Armory Learning Arts Center, The Alley, the Riverfront Entertainment District, the Montgomery Performing Arts Centre, the Riverwalk Amphitheatre, and the Elizabeth Crump Theater.

The center of the visual arts scene in the metro area is the Montgomery Museum of Fine Arts at The Wynton M. Blount Cultural Park. In addition, the Society of Arts and Crafts and the Alabama Artists' Gallery serve the visual arts community and consumers in the city.

Montgomery is also home to The Capri Theatre, a classic art house theatre for independent film screenings, as well as the Montgomery City-County Public Library and the Juliette Hampton Morgan Memorial Library.

The capital region harbors numerous science museums, gardens, and zoos, as well. They include the Montgomery Zoo, W.A. Gayle Planetarium, The Alabama Science Center, William Bartram Arboretum at Jackson Park, Fort Toulouse at Jackson Park, The Alabama Cattleman's Association MOOseum, The Hampstead Institute, Mann Wildlife Learning Museum, Kelly Bartlett Conservancy, Jasmine Hill Gardens and Outdoor Museum, Alabama Nature Center and Alabama Wildlife Federation, and the U.S. Air Force Heritage Museum and Monument to Powered Flight.

Major annual cultural celebrations in Montgomery include the Flimp Festival, Alabama Jazz and Blues Federation River Jam, the Storytelling Festival, the Alabama Highland Games, the Alabama National Fair at Garrett Coliseum, Riverfront Wine Festival, Southern Makers Festival, Capital Shape Note Sing, and the Alabama Book Festival.

Notable artists, writers, and performers from Montgomery include singer Nat King Cole, country musician Hank Williams, Sr., singer Big Mama Thornton, author Zelda Sayre Fitzgerald, author Sidney Lanier, singer Melvin Franklin of the Temptations, painter Anne Goldthwaite, painter Charles Shannon, soul singer and musician Clarence Carter, actress Octavia Spencer, and singer Toni Tennille.

The creative economy of Montgomery is significant. The creative industries alone represent 335 businesses, with 5,450 employees, earning $169 million in wages, and generating $584 million in revenue. This includes 1,440 people self-employed in the creative industries earning $39 million annually. The creative industries in total represent 4.2% of establishments, 3.4% of employees, 3.0% of payroll, and 1.8% of revenue generated by all industries in Montgomery.

These totals include the metro area's nonprofit arts, culture, and humanities sector which is comprised of 125 registered organizations, 52 of which earned more than $25,000 in annual revenue for 2007 and filed form 990. The nonprofit arts, culture, and humanities organizations that filed form 990 produce $32 million in revenue each year and control $58 million in assets.

The creative industries in Montgomery are led by the literary and publishing sectors, with $63 million in annual payroll and earnings, and $229 million in annual revenue. The leading industries within the literary and publishing sectors include the publishing industries; printing and related support activities; commercial lithographic printing; independent writers; and book, periodical, and music stores. In addition, the metro area is home to a sizable film and media sector, with $45 million in annual payroll and earnings, and $203 million in annual revenue. The leading industries within the film and media sector are radio, television, and other electronics stores; broadcasting; advertising agencies; public relations agencies; and motion picture recording industries. Other leading industry sectors include architectural services; specialized design services; jewelry, luggage, and leather goods stores; performing arts companies; and photographic services.

The information in the following pages presents the creative industries data for the Montgomery metropolitan area in more detail with appropriate documentation.

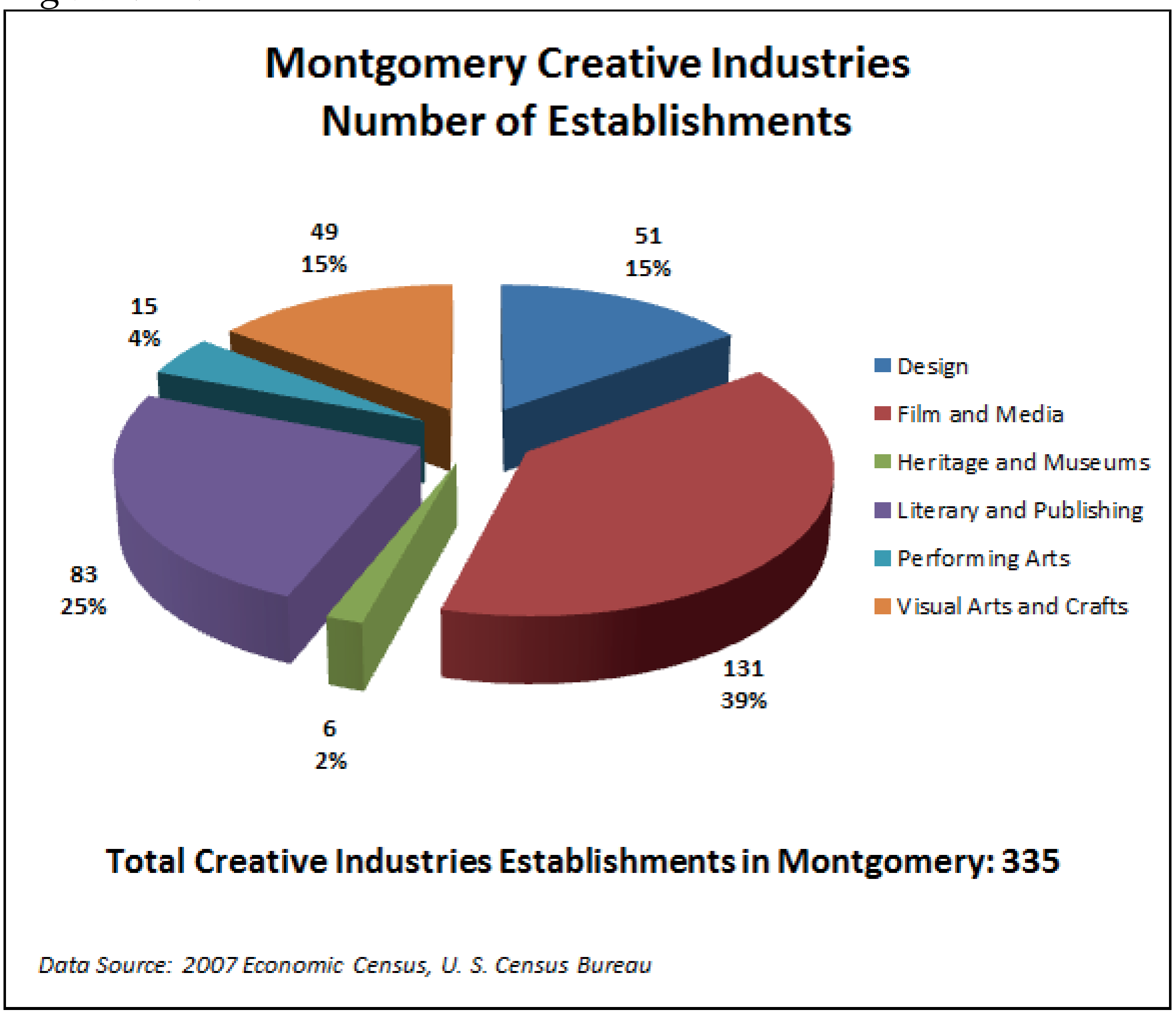
The Montgomery Symphony Orchestra's annual Jubilee Pops Concert in downtown Montgomery. This free event kicks off the Memorial Day weekend from the steps of the Alabama Archives and History Building. Image courtesy of Alabama State Council on the Arts.

Creative Industries in Montgomery – By the Numbers

In the metropolitan area of Montgomery, there are 335 creative industries establishments, including 131 in film and media, 83 in literary and publishing, 51 in design, 49 in visual arts and crafts, 15 in performing arts, and 6 in heritage and museums. This total number of establishments for the creative industries does not include the self-employed.

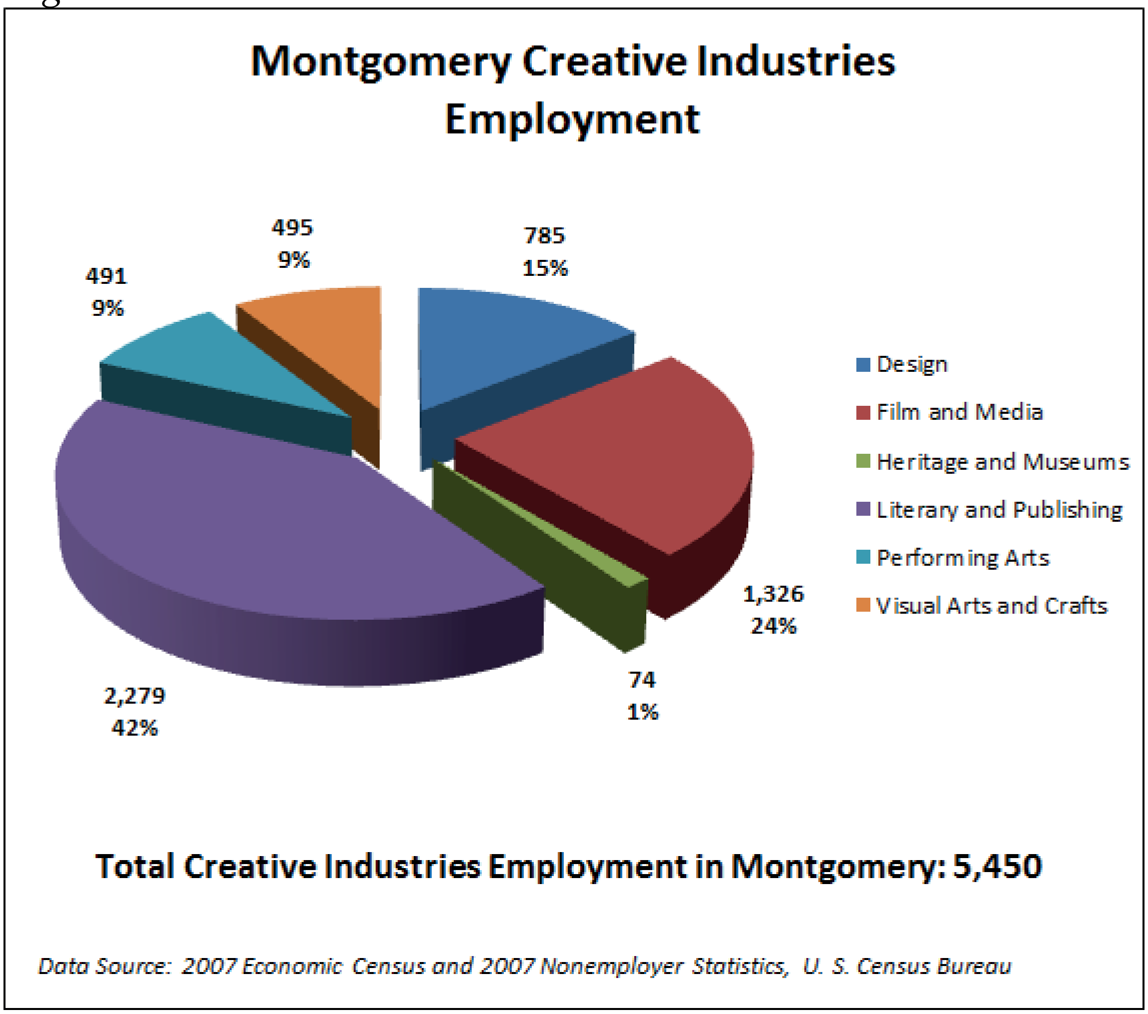
The largest creative industry sectors in the metro area based on number of establishments include: radio, television, and other electronics stores; architectural services; publishing industries; jewelry, luggage, and leather goods stores, and printing and related support activities.

Figure MGM-1



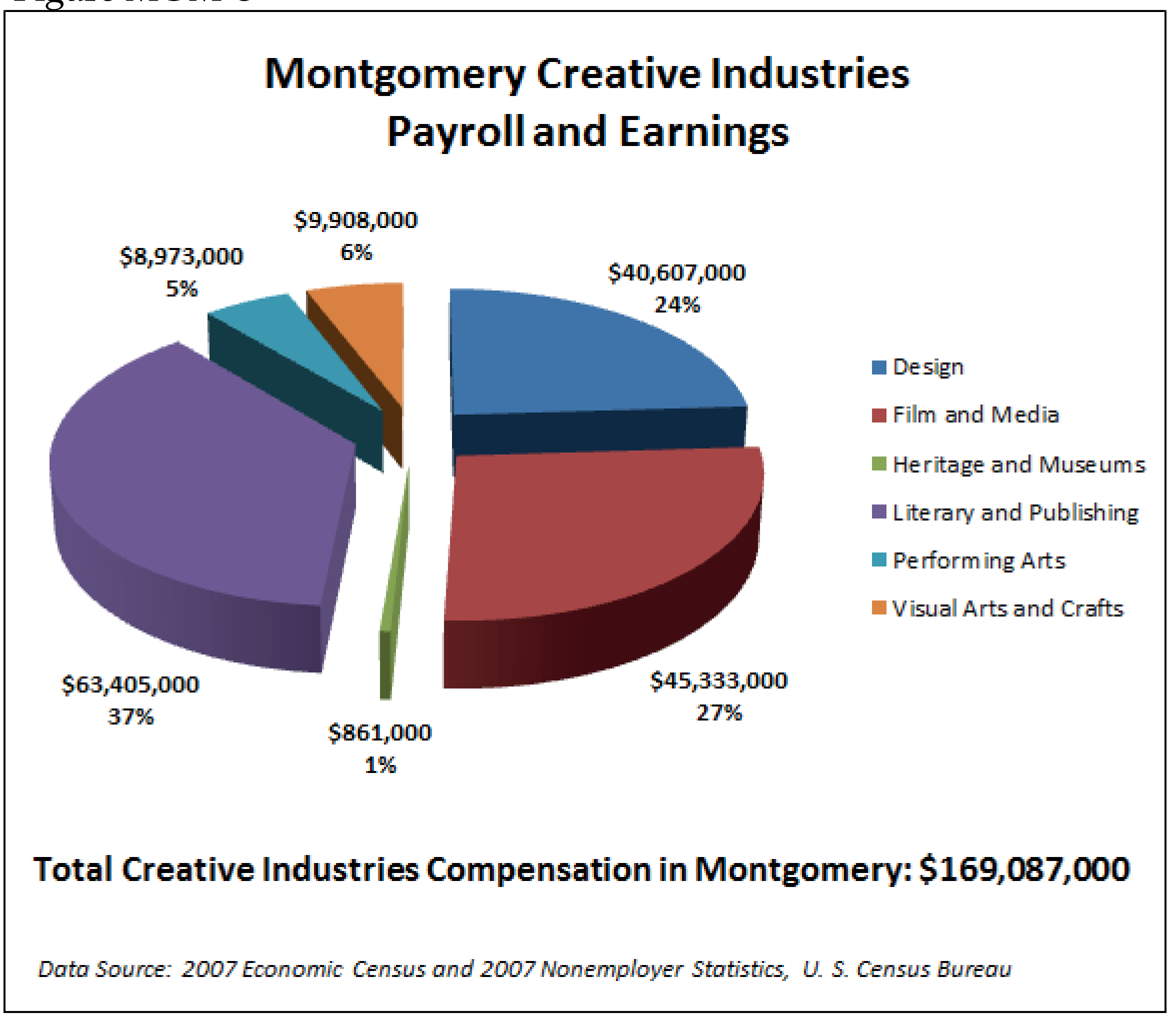
The creative industries employ a total of 5,450 people in Montgomery. The largest employer is the literary and publishing sector group with 2,279 people employed, followed by film and media with 1,326; design with 785; visual arts and crafts with 495; performing arts with 491; and heritage and museums with 74. While literary and publishing is the second-largest creative industries sector based on the number of establishments, it is the largest sector based on employment. This is due in large part to the number of people employed in the publishing industries and commercial lithographic printing in the metro area. Other industry sectors with high employment levels include radio, television, and other electronics stores; architectural services; and broadcasting.

Figure MGM-2



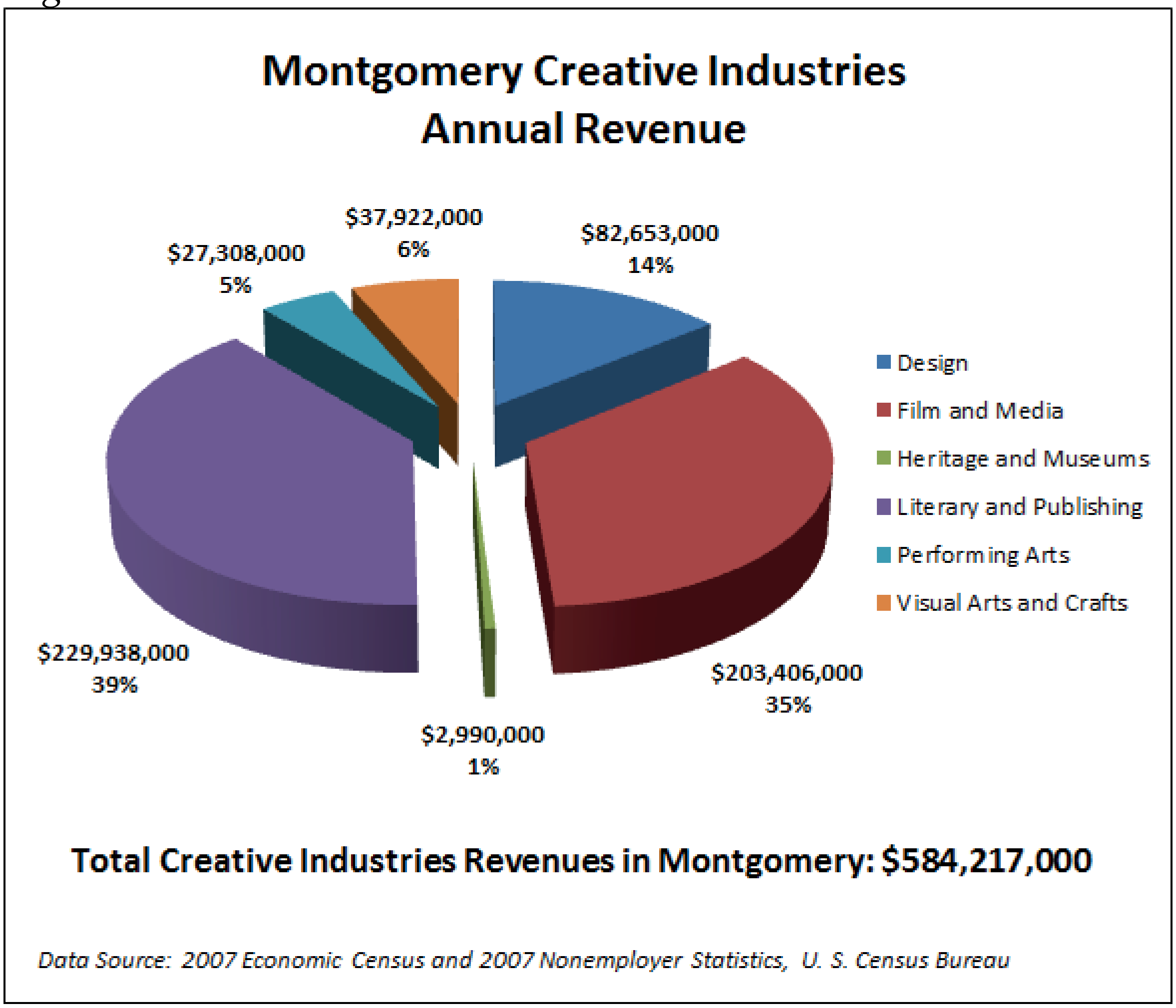
Creative industries wages in Montgomery total more than $169 million annually, including earnings by the self-employed. Based on total wages, the largest sector group in the metro area is literary and publishing with a total of $63 million in wages for 2007. On average, employees in the design sector group are paid a higher wage than other sectors in the metro area, with the film and media sector paying the second highest wages on average. In Montgomery, the largest industry sectors based on total wages are the publishing industries with $34.5 million in payroll and earnings; architectural services with $25.4 million; broadcasting with $13.4 million; printing and related support activities with $11.0 million; and specialized design services with $11.0 million.

Figure MGM-3



The Montgomery creative industries earned revenues totaling $584 million in 2007. The highest total revenues were earned in the literary and publishing sector group with $230 million, followed closely by the film and media sector with $203 million. The two leading sector groups are followed by design with $83 million; visual arts and crafts with $38 million; performing arts with $27 million; and heritage and museums with $3 million in annual revenue. Based on industry sector total revenues, the largest single sector among Montgomery creative industries is the publishing industries with $124 million, followed by radio, television, and other electronics stores with $75 million; architectural services with $63 million; broadcasting with $42 million; and printing and related support activities with $42 million in annual revenue.

Figure MGM-4



Per Capita Data for Montgomery Creative Industries

For the creative industries in total, Montgomery has 9.15 establishments per 10,000 residents, including 3.58 in film and media, 2.27 in literary and publishing, 1.39 in design, 1.34 in visual arts and crafts, 0.41 in performing arts, and 0.16 in heritage and museums.

Table MGM-1

Creative Industries Establishments in Montgomery per 10,000 Residents	No. of Establishments	Establishments Per 10,000
Design Establishments	51	1.39
Film and Media Establishments	131	3.58
Heritage and Museums Establishments	6	0.16
Literary and Publishing Establishments	83	2.27
Performing Arts Establishments	15	0.41
Visual Arts and Crafts Establishments	49	1.34
TOTAL CREATIVE INDUSTRIES ESTABLISHMENTS IN MONTGOMERY	**335**	**9.15**

Source: 2007 Economic Census, U.S. Census Bureau
Not including self-employed. Using 2007 population estimate of 365,962 from the Economic Census.

The creative industries in Montgomery employ 148.9 people per 10,000 residents. The total includes 62.3 employed in literary and publishing, 36.2 in film and media, 21.5 in design, 13.5 in visual arts and crafts, 13.4 in performing arts, and 2.0 in heritage and museums.

Table MGM-2

Creative Industries Employment in Montgomery per 10,000 Residents	Employment	Employment Per 10,000
Design Employment	785	21.5
Film and Media Employment	1,326	36.2
Heritage and Museums Employment	74	2.0
Literary and Publishing Employment	2,279	62.3
Performing Arts Employment	491	13.4
Visual Arts and Crafts Employment	495	13.5
TOTAL CREATIVE INDUSTRIES EMPLOYMENT IN MONTGOMERY	**5,450**	**148.9**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 365,962 from the Economic Census.

The creative industries payroll and earnings for every 10,000 residents in Montgomery is $4.6 million. This total is comprised of payroll and earnings totaling $1.7 million per 10,000 residents in literary and publishing; $1.2 million in film and media; $1.1 million in design; $270,000 in visual arts and crafts; $245,000 in performing arts; and $24,000 in heritage and museums.

Table MGM-3

Creative Industries Compensation in Montgomery Per 10,000 Residents	Annual Compensation	Compensation Per 10,000
Design Compensation	$40,607,000	$1,109,596
Film and Media Compensation	$45,333,000	$1,238,735
Heritage and Museums Compensation	$861,000	$23,527
Literary and Publishing Compensation	$63,405,000	$1,732,556
Performing Arts Compensation	$8,973,000	$245,189
Visual Arts and Crafts Compensation	$9,908,000	$270,738
TOTAL CREATIVE INDUSTRIES COMPENSATION IN Montgomery	**$169,087,000**	**$4,620,341**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 365,962 from the Economic Census.

For every 10,000 residents in the Montgomery metropolitan statistical area, the creative industries generate $15.9 million in annual revenue for every 10,000 residents. The total includes $6.3 million per 10,000 residents in literary and publishing; $5.6 million in film and media; $2.3 million in design; $1.0 million in visual arts and crafts; $746 thousand in performing arts; and $82 thousand in heritage and museums.

Table MGM-4

Creative Industries Revenue in Montgomery per 10,000 Residents	Annual Revenue	Revenue Per 10,000
Design Revenue	$82,653,000	$2,258,513
Film and Media Revenue	$203,406,000	$5,558,118
Heritage and Museums Revenue	$2,990,000	$81,702
Literary and Publishing Revenue	$229,938,000	$6,283,111
Performing Arts Revenue	$27,308,000	$746,197
Visual Arts and Crafts Revenue	$37,922,000	$1,036,227
TOTAL CREATIVE INDUSTRIES REVENUE IN MONTGOMERY	**$584,217,000**	**$15,963,868**

Source: 2007 Economic Census and Nonemployer Statistics, U.S. Census Bureau
Using 2007 population estimate of 365,962 from the Economic Census.

Top Twenty Creative Industry Sectors for Montgomery

Based on the number of establishments, the largest creative industries sectors in Montgomery are radio, television, and other electronics stores; video tape and disc rental; public relations agencies; broadcasting; advertising agencies; motion picture recording industries; sign painting and lettering shops; other services related to advertising; and display advertising from the film and media sector group. From design, the largest sectors based on number of establishments are architectural services, and specialized design services. From literary and publishing, the largest sectors by establishments are publishing industries; printing and related support activities; book, periodical, and music stores; and commercial lithographic printing. From the visual arts and crafts, the top-twenty list includes jewelry, luggage, and leather goods stores; and photographic services. The performing arts are represented by musical instrument and supplies stores and performing arts companies, while heritage and museums have a presence with museums, historical sites, and similar institutions.

Table MGM-5

Montgomery - Top Twenty Creative Industry Sectors by Number of Establishments	
Radio, Television, and Other Electronics Stores	36
Architectural Services	33
Publishing Industries (except internet)	28
Jewelry, Luggage, and Leather Good Stores	26
Printing and Related Support Activities	25
Video Tape and Disc Rental	21
Photographic Services	20
Public Relations Agencies	19
Specialized Design Services	18
Book, Periodical, and Music Stores	17
Broadcasting	16
Advertising Agencies	14
Commercial Lithographic Printing	13
Motion Picture Recording Industries	10
Musical Instrument and Supplies Stores	7
Sign Painting and Lettering Shop	6
Performing Arts Companies	6
Museums, Historical Sites, and Similar Institutions	6
Other Services Related to Advertising	5
Display Advertising	4

Data Source: 2007 Economic Census, U. S. Census Bureau

When looking at total employment, many of the largest Montgomery creative industries sectors are from literary and publishing, including the publishing industries; commercial lithographic printing; independent writers; printing and related support activities; and book, periodical, and music stores. Leading industry sectors in film and media for the metro area include radio, television, and other electronics stores; broadcasting; motion picture recording industries; video tape and disc rental; advertising, public relations, and related services; and advertising agencies. The design industry sectors included in the top-twenty list include architectural services; specialized design services; and landscape architectural services. The visual arts are represented on the list by jewelry, luggage, and leather goods stores; and photographic services. Performing arts industry sectors included here are performing arts companies; independent performers; and musical instrument and supplies stores. The list also includes employment by museums, historical sites, and similar institutions from the heritage and museums sector group.

Table MGM-6

Montgomery - Top Twenty Creative Industry Sectors by Total Employment	
Publishing Industries (except internet)	1,234
Radio, Television, and Other Electronics Stores	362
Architectural Services	359
Broadcasting	317
Commercial Lithographic Printing	315
Independent Writers	293
Specialized Design Services	233
Printing and Related Support Activities	184
Jewelry, Luggage, and Leather Good Stores	177
Book, Periodical, and Music Stores	175
Performing Arts Companies	166
Photographic Services	150
Motion Picture Recording Industries	135
Video Tape and Disc Rental	134
Independent Performers	120
Landscape Architectural Services	102
Musical Instrument and Supplies Stores	100
Advertising, Public Relations, and Related Services	91
Advertising Agencies	89
Museums, Historical Sites, and Similar Institutions	74

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Employee compensation among creative industry sectors in Montgomery is topped by the literary and publishing sector group industries, including the publishing industries; printing and related support activities; commercial lithographic printing; independent writers; and book, periodical, and music stores. The film and media sector group is well-represented with broadcasting; radio, television, and other electronics stores; advertising, public relations, and related services; advertising agencies; public relations agencies; motion picture recording industries; display advertising; and other services related to advertising. The design industry sectors in the top twenty include architectural services; specialized design services; and florists. The performing arts have a presence on the top-twenty list for employee compensation with performing arts companies; and musical instrument and supplies stores. The visual arts are represented by jewelry, luggage and leather goods stores; and photographic services.

Table MGM-7

Montgomery - Top Twenty Creative Industry Sectors by Employee Compensation	
Publishing Industries (except internet)	$34,527,000
Architectural Services	$25,428,000
Broadcasting	$13,408,000
Printing and Related Support Activities	$11,040,000
Specialized Design Services	$11,008,000
Commercial Lithographic Printing	$10,532,000
Radio, Television, and Other Electronics Stores	$8,171,000
Advertising, Public Relations, and Related Services	$6,458,000
Advertising Agencies	$4,592,000
Public Relations Agencies	$3,685,000
Performing Arts Companies	$3,520,000
Jewelry, Luggage, and Leather Good Stores	$3,466,000
Independent Writers	$3,449,000
Motion Picture Recording Industries	$2,494,000
Photographic Services	$2,377,000
Musical Instrument and Supplies Stores	$2,331,000
Book, Periodical, and Music Stores	$2,089,000
Display Advertising	$1,991,000
Other Services Related to Advertising	$1,800,000
Florists	$1,615,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Finally, the top Montgomery creative industries sectors by annual revenue are again from the literary and publishing sector group, including the publishing industries; printing and related support activities; commercial lithographic printing; and book, periodical, and music stores. From film and media, the largest industry sectors by total annual revenue are radio, television, and other electronic stores; broadcasting; advertising agencies; public relations agencies; display advertising; motion picture recording industries; other services related to advertising; video tape and disc rental; and advertising, public relations, and related services. The largest design industry sectors by annual revenue are architectural services; and specialized design services. Visual arts sectors in the top twenty for revenue include jewelry, luggage, and leather goods stores; and photographic services. Performing arts industry sectors are led by performing arts companies; musical instrument and supplies stores; and sound recording industries.

Table MGM-8

Montgomery - Top Twenty Creative Industry Sectors by Annual Revenue	
Publishing Industries (except Internet)	$124,358,000
Radio, Television, and Other Electronics Stores	$74,971,000
Architectural Services	$62,871,000
Broadcasting	$42,085,000
Printing and Related Support Activities	$41,575,000
Commercial Lithographic Printing	$37,780,000
Jewelry, Luggage, and Leather Good Stores	$25,213,000
Book, Periodical, and Music Stores	$21,008,000
Advertising Agencies	$20,689,000
Specialized Design Services	$15,611,000
Public Relations Agencies	$14,337,000
Display Advertising	$13,568,000
Motion Picture Recording Industries	$13,433,000
Performing Arts Companies	$10,034,000
Musical Instrument and Supplies Stores	$9,815,000
Other Services Related to Advertising	$7,964,000
Video Tape and Disc Rental	$6,762,000
Advertising, Public Relations, and Related Services	$6,458,000
Sound Recording Industries	$5,217,000
Photographic Services	$5,095,000

Data Source: 2007 Economic Census and Nonemployer Statistics, U. S. Census Bureau

Comparison of Montgomery Creative Industries To All Montgomery Industries

Based on data from the 2007 Economic Census, there are 335 creative industries establishments in Montgomery, representing 4.2% of all industry establishments in the metropolitan area (see Table MGM-9). Total employment for the Montgomery creative industries is 5,450, including 1,440 self-employed. The creative industries represent 3.4% of all employment in the metro area. The self-employed in the creative industries represent 5.5% of all self-employed in Montgomery (see Table MGM-10). Total wages for creative industries workers in Montgomery were $169 million in 2007, representing 3.0% of all wages in the metro area. Earnings by the self-employed in the creative industries totaled more than $39 million or 3.6% of all self-employed earnings in Montgomery. Self-employed earnings also represent more than 23% of all creative industries earnings in the metro area (see Table MGM-11). Total creative industries revenues in Montgomery for 2007 were $584 million, representing 1.8% of all industry revenues generated in the metropolitan area (see Table MGM-12).

Table MGM-9

Comparison of Montgomery Creative Industries to Total Industries	
Category	**Establishments**
Montgomery Creative Industries Totals	335
% of Montgomery Total Industries	4.2%
Montgomery Total Industries	7,888

Source: 2007 Economic Census, U.S. Census Bureau

Table MGM-10

Comparison of Montgomery Creative Industries to Total Industries			
Category	**Employment in Establishments**	**Self-Employment**	**Total Employment**
Montgomery Creative Industries Totals	4,010	1,440	5,450
% of Montgomery Total Industries	3.0%	5.5%	3.4%
Montgomery Total Industries	134,083	26,386	160,469

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table MGM-11

Comparison of Montgomery Creative Industries to Total Industries			
Category	Annual Payroll	Self-Employment Revenues	Total Compensation
Montgomery Creative Industries Totals	$129,824,000	$39,263,000	$169,087,000
% of Montgomery Total Industries	2.9%	3.6%	3.0%
Montgomery Total Industries	$4,466,363,000	$1,097,597,000	$5,563,960,000

Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

Table MGM-12

Comparison of Montgomery Creative Industries to Total Industries			
Category	Establishment Revenues	Self-Employment Revenues	Total Revenues
Montgomery Creative Industries Totals	$544,954,000	$39,263,000	$584,217,000
% of Montgomery Total Industries	1.7%	3.6%	1.8%
Montgomery Total Industries	$31,172,303,000	$1,097,597,000	$32,269,900,000

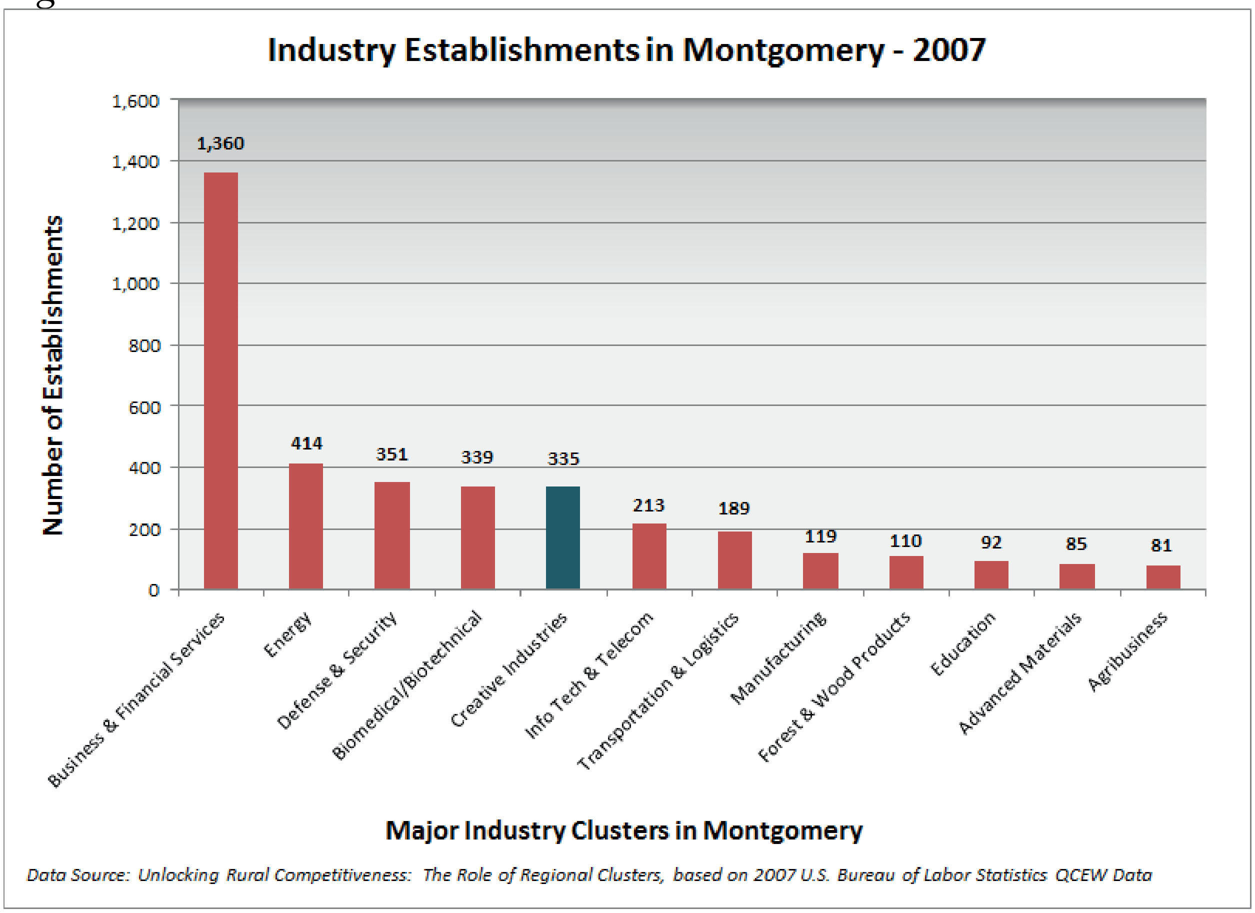
Source: 2007 Economic Census and 2007 Non-Employer Statistics, U.S. Census Bureau

The Alabama Shakespeare Festival's production of West Side Story. Photo by Phil Scarsbrook. Image courtesy of Alabama State Council on the Arts.

Comparison of Montgomery Creative Industries to Other Montgomery Industry Clusters

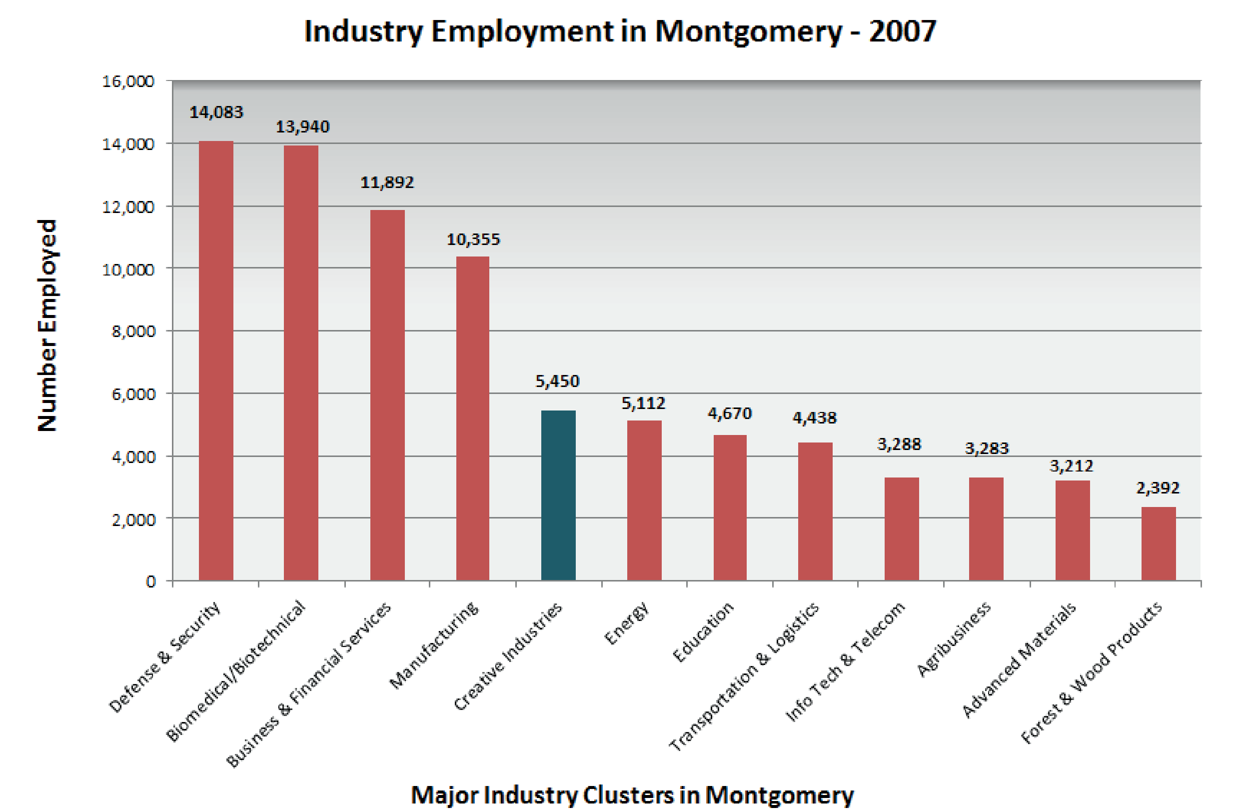
With 335 establishments, the creative industries are the fifth largest industry cluster in Montgomery – larger than information technology and telecommunications, transportation and logistics, manufacturing, forest and wood products, education, advanced materials, and agribusiness. This total number of establishments for the creative industries does not include the self-employed.

Figure MGM-5



The creative industries cluster employs the fifth-largest number of people among all industry clusters in Montgomery with 5,450 people employed or self-employed. This makes the creative industries employment base larger than energy, education, transportation and logistics, information technology and telecommunications, agribusiness, advanced materials, and forest and wood products.

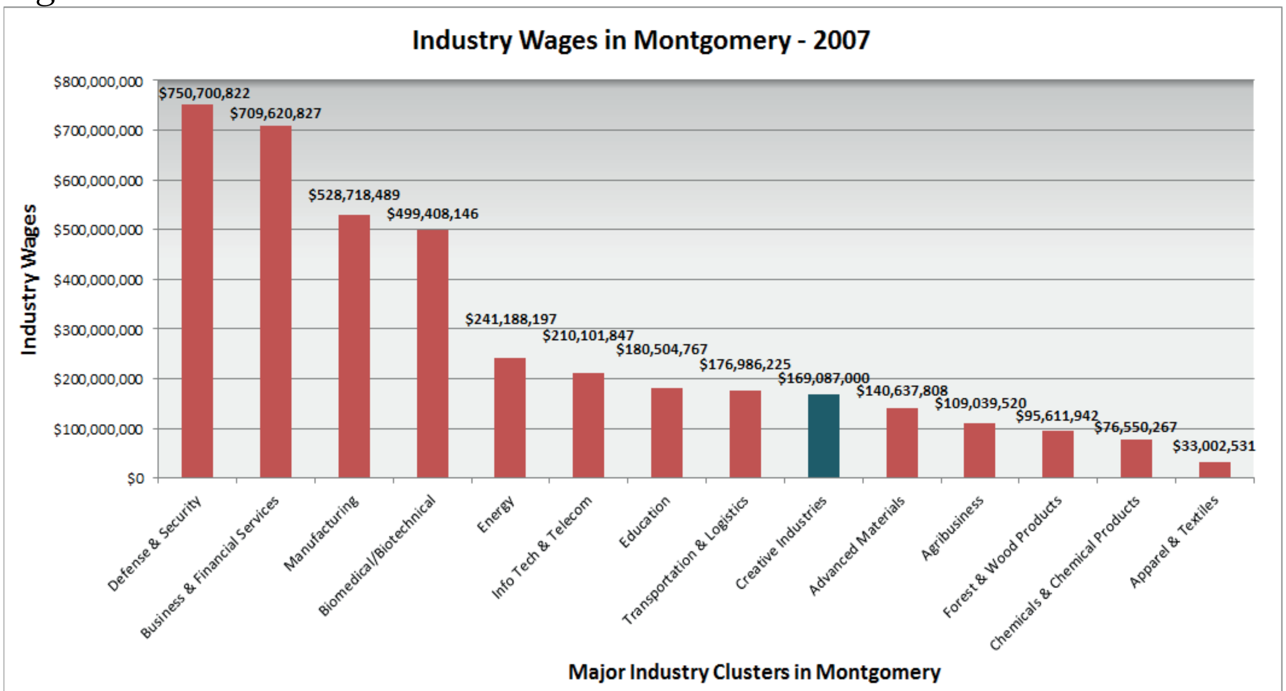
Figure MGM-6



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Based on available data for payroll and earnings, the creative industries represent at least the ninth largest industry cluster in Montgomery at $169 million, larger than advanced materials, agribusiness, forest and wood products, chemicals and chemical products, and apparel and textiles.

Figure MGM-7



Data Source: Unlocking Rural Competitiveness: The Role of Regional Clusters, based on 2007 U.S. Bureau of Labor Statistics QCEW Data

Data suppression by the U.S. Census Bureau in the 2007 Economic Census data for payroll led to using estimates for a number of specific industry sectors. The estimates used were extremely conservative.

Unfortunately, the data source for comparative industry clusters does not maintain information on annual revenues, so we are unable to compare the creative industries to other industry clusters on that basis.

Nonprofit Arts, Culture and Humanities in Montgomery

There were 125 registered arts, culture, and humanities nonprofits in Montgomery in 2007, representing 10.3% of all arts, culture, and humanities organizations in Alabama. The Montgomery total includes 52 organizations that had annual revenues above $25,000 and therefore filed IRS form 990, which represents 11.2% of all arts, culture, and humanities organizations that filed form 990 in Alabama.

Table MGM-13

Registered and 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Number of Registered Organizations	% of Alabama Total	Number of Organizations Filing Form 990	% of Alabama Total
Autauga County	8	0.70%	1	0.20%
Elmore County	12	1.00%	3	0.60%
Montgomery County	105	8.60%	48	10.40%
MONTGOMERY TOTAL	125	10.30%	52	11.20%
ALABAMA TOTAL	1,225	100.00%	462	100.00%

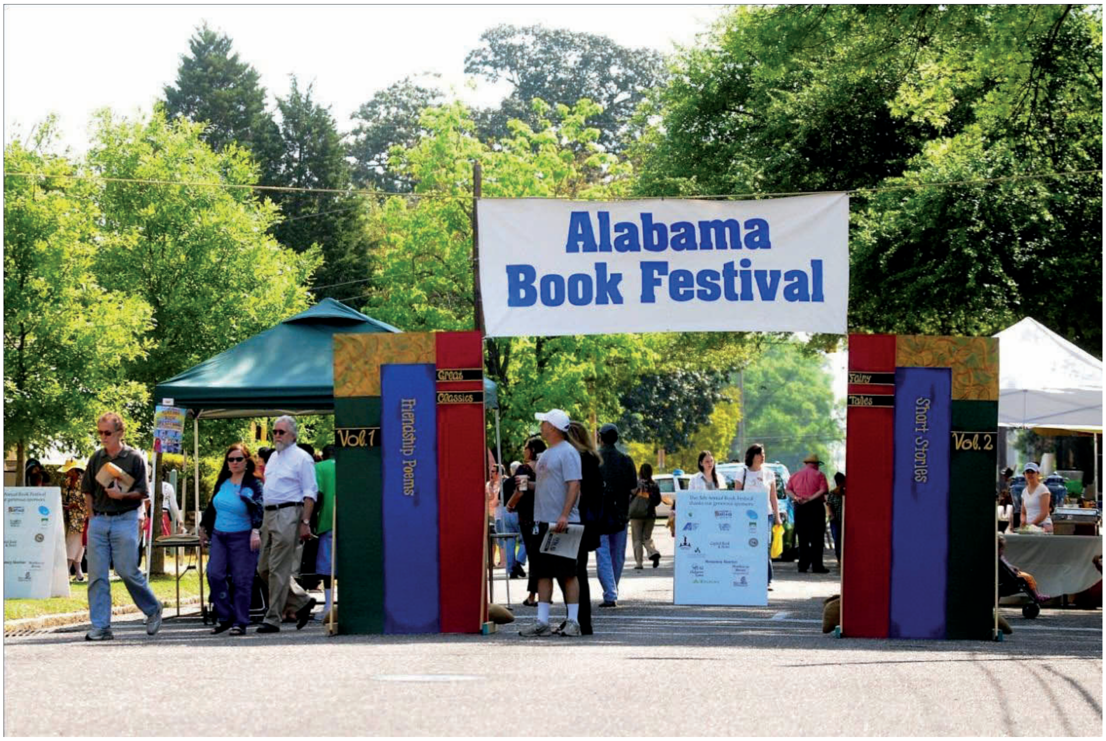
Source: National Center for Charitable Statistics, 2007

The arts, culture, and humanities nonprofit organizations filing form 990 in Montgomery reported $32 million in revenue for 2007 and $58 million in assets. The revenue figures for Montgomery represent 18.2% of the state total. The total assets of Montgomery's arts, culture, and humanities nonprofit organizations represent 14.6% of the total for Alabama.

Table MGM-14

Revenue and Assets for 990 Filing Nonprofit Organizations - Arts, Culture and Humanities				
Geographic Area	Total Revenue Reported on Form 990	% of Alabama Total	Assets Reported on Form 990	% of Alabama Total
Autauga County	$212,353	0.10%	$951,561	0.20%
Elmore County	$176,597	0.10%	$469,501	0.10%
Montgomery County	$31,931,194	18.00%	$56,225,884	14.30%
MONTGOMERY TOTAL	$32,320,144	18.20%	$57,646,946	14.60%
ALABAMA TOTAL	$177,225,395	100.00%	$392,886,444	100.00%

Source: National Center for Charitable Statistics, 2007



The annual Alabama Book Festival is the state's premier literary festival, with more than 4,000 people from around the state converging in the capital to meet with and hear from their favorite authors and scholars. Image courtesy of Alabama State Council on the Arts.

The Alabama Shakespeare Festival's production of Richard III. Photo by Phil Scarsbrook. Image courtesy of Alabama State Council on the Arts.

Appendix I: Source Data and Research Methodology

This study draws on data from mainly two sources, as well as a couple of supplementary sources.

The data on the creative economy for the four Alabama metro areas is from the 2007 Economic Census conducted by the U.S. Census Bureau. Additional data for the self-employed is from the 2007 Non-Employer Statistics, also published by the U.S. Census Bureau. These sources are also from where the metro totals for all economic activity derive.

Data on registered nonprofit organizations in the arts, culture, and humanities is from the 2007 figures released by the National Center for Charitable Statistics. In addition, data for industry cluster comparisons is from "Unlocking Rural Competitiveness: The Role of Regional Clusters," based on 2007 U.S. Bureau of Labor Statistics QCEW Data.

For the Economic Census data, we have collected and analyzed statistics from four categories: number of establishments, number of employees, annual wages, and annual revenue. The data has been retrieved for the industry sectors defined as part of the creative industries (see Appendix 2) for all four metro areas – Birmingham, Huntsville, Mobile, and Montgomery. The data is presented and analyzed in four sections, including individual metropolitan profiles four each of the four areas. Within each section, the data is divided into six major sector groups – design, film and media, heritage and museums, literary and publishing, performing arts, and visual arts and crafts. In addition, some data is divided into specific industry sectors to present a picture of the top creative industries in each metro area. Finally, additional data is provided on the nonprofit arts industry for each metro area based on information provided by the National Center for Charitable Statistics, including number of registered nonprofit organizations, number of organizations filing IRS form 990, annual revenue for organizations filing form 990, and assets for organizations filing form 990.

This study builds on and draws from the methodology established in several previous studies, including *Creative Industries in the South* published by South Arts, *The Creative Economy: A New Definition* published by New England Foundation for the Arts and *The State of Colorado's Creative Economy* published by the Alliance for Creative Advantage, a partnership between Regional Technology Strategies and Mt. Auburn Associates. Other studies referenced include *Creative Economy: The Arts Industry in North Carolina*, *Louisiana: Where Culture Means Business*, and *Creativity in the Natural State: Growing Arkansas' Creative Economy*.

The division of creative industries into the six major sectors of design, film and media, heritage and museums, literature and publishing, performing arts, and visual arts and crafts, borrows from the concept established in *The State of Colorado's Creative Economy*.

In the process of deciding which industry sectors to include and exclude, we looked at a number of existing studies, beginning with *The Creative Economy: A New Definition*, studies from the states of North Carolina, Louisiana, Mississippi, Arkansas, and Colorado, as well as the *National Arts Index 2009* published by Americans for the Arts. We also consulted with Stuart Rosenfeld and Jenna Bryant at Regional Technology Strategies in an effort to hone our data and clarify our reasoning for including and excluding numbers from certain industry sectors.

Despite our best efforts to be comprehensive and thorough, the total value of the creative industries is still underestimated in this study. The U.S. Census Bureau frequently implements data suppression in an effort to maintain the confidentiality of information that they receive from individual firms. For the sectors where data suppression is applied, the number of establishments represents a figure that is the actual total, while the number of employees has been estimated using ranges provided by the Census Bureau. In this case, we used the lowest number provided in that range. In addition, for the suppressed data in some wages and revenue sub-sectors, South Arts estimated these figures based on rations the number of establishments, the number employed, and percentages of the state total for that sub-sector.

In addition, there is an undercount for many retail categories such as book stores. The Census numbers only include data for books sold at the retail level through firms categorized strictly as book stores. This data does not include, therefore, revenue from book sales at the retail level through firms categorized as department stores, grocery stores, or other types of merchants that sell books. The same applies to categories such as news dealers and newsstands; radio, television, and other electronics stores; musical instruments and supplies stores; prerecorded tape, compact disc, and record stores; camera and photographic supplies stores; jewelry stores; and sewing, needlework, and piece goods stores. Data for these sectors only includes employment figures, wages, and revenue from stores specializing in these artistic, cultural, or creative goods. The data in this study does not include establishments, employees, wages, or revenue from larger department or other stores that may also sell these goods.

On the other hand, there are a few sectors where the data presented may slightly overestimate the numbers that are relevant only to the creative industries due to the way the data is collected, organized, and presented by the Census Bureau. Those sectors include promoters of performing arts, sports, and similar events with facilities; promoters of arts, sports, and similar events without facilities; and agents and managers for artists, athletes, entertainers, and other public figures. While probably not one hundred percent of these figures represent the creative industries, it is estimated that the majority of the data in these sectors is related to the creative industries and therefore these numbers are included.

Two sectors that are included among the creative industries about which there has been some debate are software publishers, and internet publishing and broadcasting. There is a very strong argument for including data from both of these sectors among the creative industries. For internet publishing and broadcasting, this sector basically represents those firms that distribute the written word, recorded sound, or video content using the internet. The production and distribution of the written word, recorded sound, and video clearly falls within the definition of the creative industries, even if the newest distribution method is through a computer interface.

The software publishers sector includes firms that design, develop and publish software, or publish only. This includes activities such as documentation, design of the software packaging, technical writing for instruction manuals, printing of the packaging and instruction manuals, as well as support. However, this sector does not include reselling packaged software, providing access to software for clients from a central host site, designing software to meet the needs of specific users, or mass duplication of software. Because the software publishers sector as defined by the Census Bureau is largely comprised of the design and publishing aspects of producing software, then it reasonably falls within the definition of the creative industries.

Finally, to further emphasize the extent of the undercount represented in this data, the Economic Census information only includes figures from for-profit and non-profit firms. This data does not include any dollars from federal, state, or local governments that may be invested in the arts, culture, or creativity. This omission especially affects the figures in the sector group for heritage and museums, as all national, state, and local historical sites, museums, and monuments owned and managed by government entities are excluded from this data. In addition, this means that figures from the National Endowment for the Arts, National Endowment for the Humanities, the Institute of Museum and Library Services, state arts councils and commissions, and local arts councils that operate under the auspices of city or county government, as well as municipally-owned cultural facilities are excluded from the data presented in this study.

So, small over-counts may exist within a handful of sectors where the data is not broken down into specific categories which will allow researchers to isolate the numbers relevant only to the creative industries. However, the sectors which are undercounted due to the absence of government sector data, as well as the retail sales data that would fall within the creative industries but which is attributed to other, unrelated sectors, more than offsets the numbers that may be included in rare over-counts. Therefore, the data presented in this study represents conservative estimates of the creative industries in these four metropolitan areas of Alabama.

In addition, due to the difficulty of pulling data out of the Economic Census for sectors such as culinary arts, historic preservation, and arts education (except for fine arts schools), those numbers and sectors are excluded from this study as well.

Appendix 2: NAICS Codes for Census Data

North American Industrial Classification System (NAICS) Codes	
NAICS Codes	**Design Sectors**
332323	Ornamental and Architectural Metal Work Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
453110	Florists
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
NAICS Codes	**Film & Media Sectors**
334310	Audio and Video Equipment Manufacturing
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
42399042	Prerecorded video tapes merchant wholesalers
443112	Radio, Television, and Other Electronics Stores
511210	Software Publishers
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
517510	Cable and Other Program Distribution
5191301	Internet Publishing and Broadcasting (replaces 516110)
532230	Video Tape and Disc Rental
541810	Advertising Agencies
541820	Public Relations Agencies
541830	Media Buying Agencies
541840	Media Representatives
541850	Display Advertising
541860	Direct Mail Advertising
541890	Other Services Related to Advertising

NAICS Codes	Heritage & Museums Sectors
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
NAICS Codes	**Literary & Publishing Sectors**
323110	Commercial Lithographic Printing
323111	Commercial Gravure Printing
323112	Commercial Flexographic Printing
323113	Commercial Screen Printing
323115	Digital Printing
323117	Books Printing
323119	Other Commercial Printing
323121	Tradebinding and Related Work
323122	Prepress Services
424920	Book, Periodical, and Newspaper Merchant Wholesalers
451211	Book Stores
451212	News Dealers and Newsstands
511110	Newspaper Publishers
511120	Periodical Publishers
511130	Book Publishers
511191	Greeting Card Publishers
511199	All Other Publishers
519110	News Syndicates
519120	Libraries and Archives
711510	Independent Writers (%)
NAICS Codes	**Performing Arts Sectors**
339992	Musical Instrument Manufacturing
4239901	Musical Instruments and Supplies Merchant Wholesalers
42399041	CDs, audio tapes, and records merchant wholesalers
451140	Musical Instrument and Supplies Stores
451220	Prerecorded Tape, Compact Disc, and Record Stores
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists

711190	Other Performing Arts Companies
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
711510	Independent Performers (%)
7139901	Dance Halls
NAICS Codes	**Visual Arts & Crafts Sectors**
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing
327212	Other Pressed and Blown Glass and Glassware Manufacturing
339911	Jewelry (except Costume) Manufacturing
339912	Silverware and Hollowware Manufacturing
339913	Jewelers' Material and Lapidary Work Manufacturing
339914	Costume Jewelry and Novelty Manufacturing
339942	Lead Pencil and Art Good Manufacturing
423410	Photographic Equipment and Supplies Merchant Wholesalers
423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
4249901	Art goods merchant wholesalers
443130	Camera and Photographic Supplies Stores
448310	Jewelry Stores
451130	Sewing, Needlework, and Piece Goods Stores
453920	Art Dealers
541921	Photography Studios, Portrait
541922	Commercial Photography
611610	Fine Arts Schools
711510	Independent Artists (%)
812921	Photofinishing Laboratories (except One-Hour)

Appendix 3: NCCS Codes for Nonprofit Data

National Center for Charitable Statistics	
Organization Types - Arts, Culture, and the Humanities	**Code**
Alliances & Advocacy	A01
Management & Technical Assistance	A02
Professional Societies & Associations	A03
Research Institutes & Public Policy Analysis	A05
Single Organization Support	A11
Fund Raising & Fund Distribution	A12
Support N.E.C.	A19
Arts & Culture	A20
Cultural & Ethnic Awareness	A23
Folk Arts	A24
Arts Education	A25
Arts & Humanities Councils & Agencies	A26
Community Celebrations	A27
Media & Communications	A30
Film & Video	A31
Television	A32
Printing & Publishing	A33
Radio	A34
Visual Arts	A40
Museums	A50
Art Museums	A51
Children's Museums	A52
Folk Arts Museums	A53
History Museums	A54
Natural History & Natural Science Museums	A56
Science & Technology Museums	A57
Performing Arts	A60
Performing Arts Centers	A61
Dance	A62
Ballet	A63
Theater	A65
Music	A68
Symphony Orchestras	A69
Opera	A6A
Singing & Choral Groups	A6B
Bands & Ensembles	A6C
Performing Arts Schools	A6E

Humanities	A70
Historical Organizations	A80
Historical Societies & Historic Preservation	A82
Commemorative Events	A84
Arts Services	A90
Arts, Culture & Humanities N.E.C.	A99

Conclusion

As is evident from this study, the creative industries are a major component of state and local economies throughout the South. Creative businesses representing film and media, literary and publishing, design, visual arts and crafts, the performing arts, and heritage and museums are prevalent throughout every state in the region. The creative industries have an enormous impact on the number of businesses, number of employees, annual payroll, and annual revenues throughout the economy of the South, and they represent one of the largest industry clusters in the region.

Even though the creative industries are a significant and growing segment of the region's economy, there is a lack of attention paid to the creative economy in the South. This is evident from the absence of a focus on the creative industries and the creative workforce at the state and regional level, and the continuing decrease in funding for the primary government departments that interact with those engaged in the creative industries, namely state arts agencies.

While the general scope of this study is the creative economy, this is much broader than the range of nonprofit arts organizations with which state arts agencies interact directly and where state arts funds have their most direct impact. It should be noted, however, that numerous studies have demonstrated the mutually beneficial interaction of for-profit businesses and non-profit organizations. In fact, industry clusters in a specific creative industry often find their foundation and initial strength in the groundworklaid by a strong community network and nonprofit base that allows the for-profit sector within that creative industry to thrive. This is where the study of industry clusters has been immensely important.[11]

Other studies have demonstrated the value of the interaction of individual artists with multiple sectors of the creative economy – including the commercial, nonprofit, and government sectors. For instance, as self-employed contractors, individual artists work on a freelance basis with numerous types of businesses, organizations, and government agencies for a wide variety of creative jobs.[12]

The goal of state and local governments and regional collaborations should be to maximize the presence and economic impact of the creative industries on the region, including establishments, revenue, employment, and payroll. This can be achieved through a number of policies and approaches at the regional, state and local levels.

Policy recommendations for government agencies, chambers of commerce, economic development agencies, and funders include:

- Matching education and workforce development policies with the needs of the creative industries
- Including the creative industries in discussions and policy considerations related to supporting and expanding existing industries
- Including creative industries entrepreneurs in policy development related to entrepreneurism and new industries
- Acknowledging the nonprofit arts, culture, and humanities industry as an essential component of the creative industries, with unique

characteristics which allow those organizations to help communities prosper, put creative people to work, attract tourism revenue, assist with rural development, attract businesses, provide a competitive advantage, and enhance community identity.[4]

- Supporting policies and funding levels that will allow local arts agencies and state arts agencies to be more effective partners, giving them the opportunity to maximize their impact on the creative economy and nonprofit arts, humanities, and cultural organizations in their respective communities and states
- Funding continuing research on the creative economy for localities, states, and the region.

While the final product of this study is a sizable report, the information contained herein raises as many questions as answers. There is still much research to be done. The South Arts research agenda for the region's creative economy includes:

- Mining Bureau of Labor Statistics data to illuminate the size and scope of the creative workforce in the South
- Looking at historical data from the 1997 and 2002 Economic Census to create a picture of trends for the creative industries and specific sectors in the region
- Expanding on this research to include a broader picture of the creative industries by adding data from the culinary arts, historic preservation, fashion, arts education, and government arts agencies and facilities
- Creating a more extensive report on the nonprofit arts, culture, and humanities organizations in the region
- Conducting creative economy research for metropolitan regions within the South
- Exploring creative economy industry clusters and their interaction with other economic sectors
- Studying artists as entrepreneurs
- Examining changes in the creative industries related to the present technology revolution.

As we work to pull our households, businesses, cities, counties, states, the region, and the nation out of the Great Recession, the creative industries will be an important part of the solution to our economic woes. A growth industry with massive numbers of establishments, employees, payroll, and revenues, the creative industries are at the forefront of innovation and invention which drives much of our economic growth. As a region, with our states working in partnership with one another and region-wide organizations, we need to take note of this and work to help the creative industries meet the full potential of their economic impact in the South.

MEMBERS
Alabama State Council on the Arts

Jim Harrison III, CHAIRMAN, Tuscaloosa
Vaughan I. Morrissette, VICE CHAIR, Mobile
Lisa Blach Weil, SECRETARY, Montgomery
Joel T. Daves IV, Mobile
Dr. Rachel Brown Fowler, Columbiana
Julie Hall Friedman, Fairhope
Ralph Frohsin Jr., Alexander City
Dora H. James, Opelika
Elaine Johnson, Dothan
Selwyn Jones, Florence
Doug C. Purcell, Eufaula
Rebecca T. B. Quinn, Huntsville
Lee Sentell, Montgomery
Ceil Jenkins Snow, Birmingham
Sontonia T. K. Stephens, Northport

STAFF
Alabama State Council on the Arts

Albert B. Head, Executive Director
Barbara Edwards, Deputy Director
Rita Gray Allen, Grants Assistant
Jacqueline Berry, Executive Assistant
Wanda DeJarnette, Grants Officer
Diana F. Green, Arts In Ed Program Manager
Yvette Jones-Smedley, Performing Arts Program Manager
Elliot Knight, Visual Arts Program Manager, and Alabama Artists Gallery Director
John Meyers, Gallery Assistant
Barbara Reed, Public Information Officer
Deborah Boykin, Community Arts Program Manager
Dexter Smith, Security
Vinnie Watson, Programs Assistant

MEMBERS
Alabama Center for Traditional Culture

Joey Brackner, Director
Jackie Ely, Administrative Secretary
Stephen Grauberger, Folklife Specialist
Anne Kimzey, Folklife Specialist/Literature Program Manager

www.arts.alabama.gov

201 Monroe Street, Suite 110
Montgomery, Alabama 36104-3721
Phone – 334-242-4076
Fax – 334-240-3269

STAFF
South Arts

Suzette Surkamer, Executive Director
Allen Bell
Nikki Estes
Naeemah Frazier
Patti French
Teresa Hollingsworth
Mollie Lakin-Hayes
Katy Malone
Leland McKeithan
Ethan Messere
Wesley Myrick
Allison Nicks
Bola Ogunlade
Ann-Laura Parks, CFRE

www.southarts.org

1800 Peachtree Street NW, Suite 808
Atlanta, GA 30309
Phone – 404-874-7244
Fax – 404-873-2148

Board of Directors

Margaret S. Mertz, Ph.D., Board Chair
Ted Abernathy
Jo Anne Anderson
Kristin Congdon
Stephanie Conner
Jim Harrison
Al Head
Gerri Hobdy
Dána La Fonta
H. Martin Lancaster
J. Martin Lett, Esq.
Wayne Martin
Ken May
Lori Meadows
William M. Nix
Merrily Orsini
Karen L. Paty
Anne B. Pope
Stuart Rosenfeld
Sandy Shaughnessy
Hellena Huntley Tidwell
Dianne Walton

Alabama State Council on the Arts

201 Monroe Street, Suite 110

Montgomery, Alabama 36130-1800

www.arts.alabama.gov