



GREATER PITTSBURGH ARTS COUNCIL  
**Arts loud and clear**

**2020 GREATER PITTSBURGH**

# **CULTURE COUNTS**

a report measuring the health of  
Greater Pittsburgh's arts and culture sector

**TECHNICAL REPORT**

# About this Report

The Greater Pittsburgh Arts Council (GPAC) regularly measures the health of Greater Pittsburgh's arts and culture sector. Every five years, the Arts Council reviews the sector to demonstrate its impacts on the area's citizens and economy in order to identify needs and gaps that the sector might more effectively address. By comparing key data between the city, the nine-county Southwestern Pennsylvania region, and notable cities nationwide, *Culture Counts 2020* is able to make cross-sector comparisons on spending, attendance, and job creation between the arts and culture sector and sports, "eds and "meds," and the full nonprofit sector. The report also addresses progress made by the arts and culture community toward indicators of public value, cultural vitality, equity, and the recruitment of visitors and talent.

The report reveals that our area's arts and culture sector is healthy in many ways, but that challenges remain. Both positive trends and shortcomings present opportunities for sustained collective action to extend the public value of the arts and culture throughout our region's communities.

As you read, please note that much of the data for this report was gathered in 2019 but analyzed and compiled for publication in 2020, which is why the charts and visualizations are labeled "2020."

# About the Greater Pittsburgh Arts Council

The Greater Pittsburgh Arts Council champions the arts in Southwestern Pennsylvania, providing financial, professional, and political support for the arts and culture sector. Comprised of more than 400 diverse artists and nonprofit organizations, GPAC offers valuable research, legal and business consulting, networking, and professional development opportunities so that artists, arts leaders, and organizations can grow their skills and advance their practice. GPAC provides grants for artists and arts organizations. We also lead the region's arts advocacy at the local, state, and national level, and model best practices for accessibility and equity in the arts. For more information, please visit [PittsburghArtsCouncil.org](https://PittsburghArtsCouncil.org).

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# Introduction

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It's in our mission to regularly measure the health of the region's arts and culture sector for the betterment of our community. In fact, every five years, we release our findings in *Culture Counts*, which demonstrates the varied impacts of our sector on the area's citizens and economy in order to identify needs and gaps that our sector might more effectively address.

We've come a long way since our inaugural report in 2010. Since then, we've expanded our methodology through a collaboration with SMU DataArts, the National Center for Arts Research at Southern Methodist University. We're now able to compare the Greater Pittsburgh arts and culture sector with those in nine benchmark locations.

These comparisons unveiled something we already know – Pittsburgh is a special place. Local attendance of arts and culture events continues to grow, while the access and vibrancy of our organizations makes our city a place to visit.

We're happy to share Culture Counts 2020 with you. We hope you gain insights into our sector through this report, helping us all to better support and nurture this special place we call home.

Sandra Solomon  
Chair, Board of Directors  
Greater Pittsburgh Arts Council

Mitch Swain  
CEO  
Greater Pittsburgh Arts Council

# Methodology

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**Culture Counts 2020** examines the health of the arts sector using sets of comparisons and indicators. By drawing on data from SMU DataArts and other secondary sources, we're able to compare changes in the size, diversity, and scope of the sector over time. We're also able to see how Allegheny County's arts sector compares to other counties within Southwestern Pennsylvania and to nine benchmark cities nationally, and how it compares with other sectors as well as cross-sector comparisons.

This report's comparative information includes data reported by 5,548 cultural organizations in nine cities. These data were augmented by IRS/NCCS data provided by SMU DataArts. Our comparisons to Pittsburgh by locale focus on Baltimore, Boston, Cleveland, Columbus, Dallas-Fort Worth, Minneapolis-St. Paul, Philadelphia, San Diego, and Washington, DC, locales with many similarities to Pittsburgh and that have served as benchmarks in previous GPAC research and other's comparative research.

The report also examines indicators of success in how our arts and culture sector impacts the area's citizens and the economy. The following indicators were created by the Pittsburgh Arts Research Committee (PARC), a network of the Greater Pittsburgh Arts Council:

1. The value and impacts of the arts for the citizens of Greater Pittsburgh
2. The cultural vitality of the Greater Pittsburgh region for artists and arts organizations
3. The extent to which the arts sector models equity and inclusion practices for the region
4. The importance of quality K-12 arts education in the school districts of Greater Pittsburgh
5. The role of the arts sector in the attraction of visitors and talent to the region

The achievement of the indicators is revealed through these kinds of measures:

- percentages of citizens who value and engage with the arts
- trends in pay equity in the arts and culture
- strategic partnerships and evaluation in the sector
- work/life balance issues of artists
- sustainable public and private support systems
- equity of arts funding and funding decisions
- accessibility in the arts for persons with disabilities
- public opinion about the arts as an educational priority
- the role of the sector in the attraction of visitors and talent

**Benchmark Locations:** By working with SMU DataArts, *Culture Counts 2020* compares the Greater Pittsburgh arts and culture sector with arts and culture sectors in these nine benchmark locations:

- Baltimore
- Boston
- Cleveland
- Columbus
- Dallas-Fort Worth
- Minneapolis-St. Paul
- Philadelphia
- San Diego
- Washington, DC

**Culture Counts 2020** also compares the arts and culture sectors of these counties in Southwestern Pennsylvania:

- Allegheny
- Armstrong
- Beaver
- Butler
- Fayette
- Greene
- Lawrence
- Washington
- Westmoreland

### **Primary Data Sources:**

Data from the Arts Council's 2018 semi-annual community survey of artists and arts and culture organizations *Having Our Say* (2018), *Racial Equity and Arts Funding in Greater Pittsburgh* (2018), *Impacts of the Arts in Allegheny County* (2017), *Culture Counts* (2015), and *Wages, Benefits, and the Arts* (2019).

### **Secondary Data Sources:**

- **National:** SMU DataArts, Americans for the Arts, National Endowment for the Arts, the National Assembly of State Arts Agencies, Helicon Collaborative, and ESPN.
- **Regional:** Allegheny Regional Conference on Community Development, University of Pittsburgh (UCSUR), VisitPittsburgh, the Bayer Center for Nonprofit Management, Greater Pittsburgh Nonprofit Partnership, and the Pittsburgh Regional Alliance.

### **Case Studies:**

In addition to these data points, *Culture Counts 2020* features four case studies of Pittsburgh-area arts organizations: the Afro-American Music Institute, Attack Theatre, Silver Eye Center for Photography, and Pittsburgh Ballet Theatre. The organizations vary in size, cultural tradition, and artistic discipline, while each illustrates a story of resilience and adaptation between 2015 and 2020.

## II. Key Findings

*Culture Counts 2020* examines the health of the Greater Pittsburgh arts sector in two ways – via sets of **comparisons** and **indicators**.

### II.A - Comparisons

#### 1. Southwestern Pennsylvania

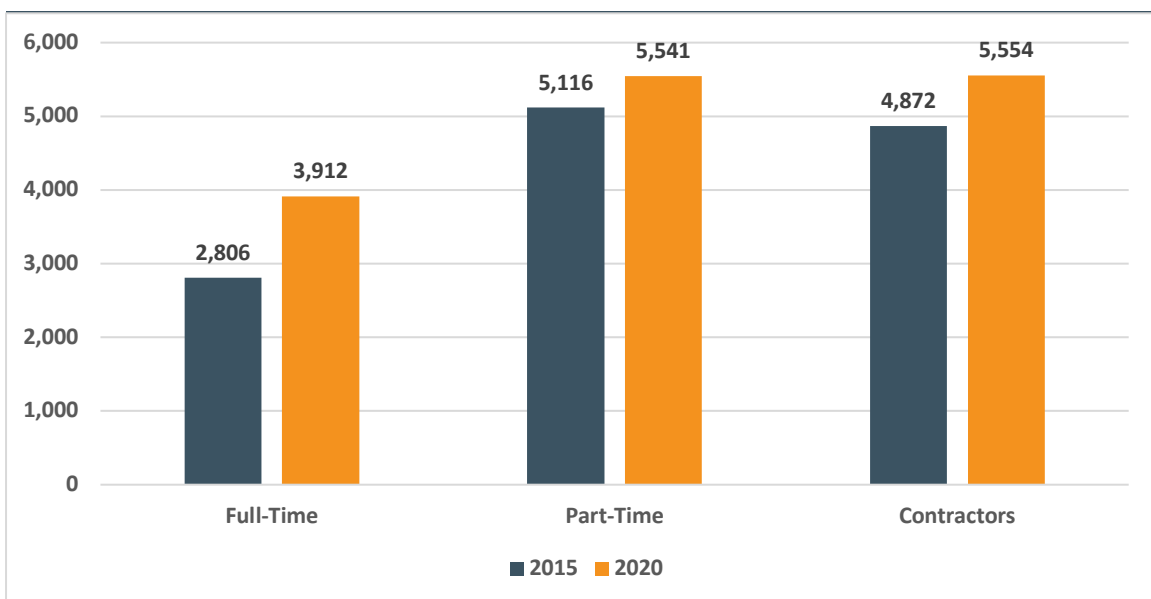
##### **Comparisons Over Time:**

- The number of arts and culture organizations in Southwestern PA seems to have dropped from 2015 to 2020—from 1,054 to 830. This may be a result of closures and mergers, but the decrease is most likely due to changes in sampling frames and stronger sampling methodologies.
- Proportional representation by county has remained the same, while there have been shifts in arts discipline categories.
- There are higher numbers and rates of organizations with less than a \$250K budget in the sector today than in 2015—504 (61%) vs. 373 (36%).
- Despite apparent changes in the supply of arts and culture organizations, attendance has increased from 25 million in 2015 to 25.5 million in 2019, when including Allegheny County Parks (ACP) attendance. Without the outlier of ACP included in the total, culture attendance increased from 5,025,240 to 6,875,300.

##### **Comparisons by Sector:**

- Annual Employment: The arts and culture sector is a strong economic force for Southwestern PA, as reflected by measures such as numbers of jobs, attendance figures, and admission revenues.

Chart A.1 – Number of Jobs in Southwestern PA: 2015 v. 2020



	2015 Jobs	2020 Jobs
<b>Full-Time</b>	2,806	3,912
<b>Part-Time</b>	5,116	5,541
<b>Contractors</b>	4,872	5,554
<b>Total</b>	12,794	15,007

SOURCE: SMU DataArts

As a regional employer, the arts and culture sector trails healthcare, the overall nonprofit sector, and higher education in full-time equivalent employment. At the same time, arts and culture employs more county residents than do real estate and utilities industries.

- Employment by Sector in Greater Pittsburgh:
  - Arts and Culture: 15,007
  - Nonprofit Sector: 52,576 (not including arts and culture jobs)
  - Higher Education: 38,900
  - Healthcare: 203,600
  - Real Estate: 9,100
  - Utilities: 4,800

SOURCES: Pittsburgh Regional Alliance, Greater Pittsburgh Nonprofit Partnership

- Attendance and Admission Revenues:
  - The arts and culture sector draws larger audiences than Pittsburgh’s three professional sports teams. In fact, annual attendance was 6,875,300 for the arts and culture sector while the total for Pittsburgh sports was 2,877,563.
  - Sports’ admission revenues (\$246,172,500) were higher due in part to higher ticket prices than those of the arts and culture sector (\$151,256,600).

SOURCES: ESPN and SMU DataArts

## 2. Benchmark Cities

### **Comparisons by Locale:**

- Pittsburgh’s Metropolitan Statistical Area (MSA)<sup>1</sup> population is ninth of the 10 benchmark locales. Yet, Pittsburgh “punches above its weight” in multiple areas of interest, including:
  - budget size (<\$250,000: #7 of 10; \$10M to \$99M: #6 of 10),
  - free attendance (#4 of 10), and
  - paid attendance (#3 of 10).
- Greater Pittsburgh also ranks high in volunteer numbers for arts and culture organizations.
- Among expense categories, our region ranks high in average percentages of expenses spent on personnel, though that ranking lowers via median calculations.
- Greater Pittsburgh arts and culture organizations rank #5 in earned income and #4 in contributed income among benchmark locales.

<sup>1</sup> As defined by the U.S. Census, an MSA consists of one or more counties that contain a city of 50,000 or more inhabitants or contain a Census Bureau-defined urbanized area (UA) and have a total population of at least 100,000 (75,000 in New England). Additional counties qualify to be included by meeting a specified level of commuting to the counties containing the population concentration and by meeting certain other requirements of metropolitan character, such as a specified minimum population density or percentage of the population that is urban.



- Regarding contributed income, our region ranks high in foundation (#1), board, and county support, and ranks low in corporate, federal support, and individual giving (#8).
- The impacts of arts and culture spending on job creation, household income, and tax revenues are higher in Allegheny County than in all other benchmark areas.

## **II.B - Indicators**

The introduction of “indicators” is new to this current installment of GPAC’s Culture Counts reports. These indicators were created in an effort to gauge how the area’s arts and culture sector is meeting its aspirations to effectively serve our communities.

### **Indicator #1: The value and impacts of the arts for the citizens of Greater Pittsburgh.**

- Despite high participation and ratings overall, the region’s arts and culture sector ranks somewhat lower among Black and African American populations on two key measures: 1) attendance and 2) ratings of the region’s arts and cultural opportunities.

**Table B.1 – Annual Attendance at Arts and Culture Events by Allegheny County Residents**

	Category	None	1-2 Times	3-5 Times	6-10 Times	11-20 Times	20+ Times
	Allegheny County	13.3%	23.1%	26.0%	18.4%	10.1%	9.1%
Race	White/Non-Hispanic	12.8%	21.0%	26.3%	19.7%	10.8%	9.4%
	Black/African American	14.1%	37.3%	26.1%	10.4%	6.2%	5.8%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh.

**Table B.2 – Ratings of Arts and Culture Opportunities by Allegheny County Residents**

	Category	Poor	Fair	Good	Very Good	Excellent
	Allegheny County	1.1%	5.9%	26.6%	44.8%	21.6%
Race	White/Non-Hispanic	0.4%	4.9%	24.8%	46.7%	23.2%
	Black/African American	6.2%	10.8%	35.7%	34.4%	12.9%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh.

#### Other Key Findings:

- Arts attendance rates increase with higher education levels and higher income levels.
- Overall, more than one-third of citizens made a donation to the arts and culture in the past year.

**SOURCES:** *Pittsburgh Regional Quality of Life Survey, 2018.*  
Center for Social & Urban Research, University of Pittsburgh.

## Indicator #2: The cultural vitality of the Greater Pittsburgh region for artists and arts providers.

Despite its vitality in many areas, the region's cultural sector also faces multiple challenges.

- Features of Greater Pittsburgh's Nonprofit Arts and Culture Organizations:
  - The diversity of our region's arts and culture organizations by race does not match our region's population demographics.
  - 80% of White/Non-Hispanic organizations see Greater Pittsburgh as a "great" arts region. In contrast, 50% of Black/African American organizations see it as great, while only 25% saw it as "supportive" and "collaborative".
  - Other challenges include: individual giving and major gifts; sustainability; and, diversity, equity, and accessibility.
  
- Wages and Benefits:
  - Only 7% of Executive Directors/CEO's are ALAANA<sup>2</sup> vs. 93% are White/Non-Hispanic.
  - The average salaries of Artistic Directors are much lower than ED's and Development Directors.
  - 82% of organizations offer medical insurance to full-time employees, and only 32% do so for part-time employees.
  - Both full-time and part-time employees commonly receive paid time-off for vacation, illness, holidays, and personal days.
  
- Support Systems:
  - Strong support systems are needed to generate a rich, diverse supply of arts opportunities that can be meaningful for audiences, which in turn lead to audience spending and economic ripple effects.

Artists are essential to the region's cultural vitality.

- According to GPAC data, there are approximately 1,534 artists in Southwestern PA.
- Individual artists also support themselves as teaching artists (40.5%), entrepreneurs (23%), activists (21.5%), and arts administrators (18.5%).
- Challenges that artists face include securing grants, fellowships and/or donations; marketing/promoting their work; managing expenses; and, acquiring affordable, studio, work, rehearsal and/or space.
- However, majorities of artists are not satisfied with their work/life balance and 57.15% of Black and African American artists feel access to funding is inequitable.

**SOURCES:** *Racial Equity & Arts Funding in Greater Pittsburgh, 2018; Having Our Say, 2018; Wages, Benefits, and the Arts in Greater Pittsburgh, 2019.*  
Greater Pittsburgh Arts Council.

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<sup>2</sup>ALAANA refers to Arab/Middle Eastern, Asian, Black/African American, Hispanic/Latino(a)(x), Indigenous (e.g., Native American, Pacific Islander), and more than one race.

### **Indicator #3: The extent to which the arts sector models equity and inclusion practices for the region.**

Over time, percentages of grants received by ALAANA organizations have increased, whereas percentages of dollars received by race have not.

- As far as the distribution of arts funds by race, ALAANA organizations are not proportionately represented in either these demographic proportions or their distribution within the Greater Pittsburgh arts sector.
  - Population proportions in Allegheny County, by race, are:
    - White/Non-Hispanic (82%),
    - Black/African American (13%),
    - Asian (2%),
    - Hispanic/Latino(x) (2%), and
    - More than one race (1%).
- The Allegheny Regional Asset District (RAD) documents the race and gender of its applicants' staff and board members. Black and African Americans populations are represented at higher percentages in the "All Employees" categories than in the "Managerial Staff" or "Board of Directors" categories.
- 61.5% of area arts and culture organizations have created a written policy or taken other steps to advance accessibility in their programs.

*SOURCES: Racial Equity & Arts Funding in Greater Pittsburgh, 2018; Having Our Say, 2018; Greater Pittsburgh Arts Council.*

### **Indicator #4: The importance of quality K-12 arts education in the school districts of Greater Pittsburgh.**

Arts education is viewed as important to the quality of K-12 schooling in our region. National polls show that 91% of the American public agrees that the arts are part of a well-rounded K-12 education – including 61% who "strongly agree."

- Further, 9 in 10 believe arts education is an important part of the curriculum in elementary school (94%), middle school (94%), and high school (93%).
- Ratings on the importance of arts education to K-12 schooling are even higher here than nationally – 96% to 91%.
- Ratings of importance are even higher among Black and African American residents (42.6% extremely important vs. 37.1% extremely important among White or Non-Hispanic residents).
- Arts education is also valued more among those with lower education levels: 46.1% of respondents with high school education or less viewed it as extremely important whereas only 28.3% of respondents holding a Masters degree or higher felt similarly.

- Arts education is valued more among those with lower incomes: 41.8% of respondents earning \$25,000 or less viewed it as extremely important whereas 35.8% of respondents earning \$100,000+ felt similarly.

**SOURCES:** *Americans Speak Out About the Arts, 2018*; Americans for the Arts. *Pittsburgh Regional Quality of Life Survey, 2018*; Center for Social & Urban Research, University of Pittsburgh.

## **Indicator #5: The role of the arts sector in the attraction of visitors and talent.**

- Tourism:
  - In 2017, the Pittsburgh area experienced a 1 million rise in daytrips in 2017 vs. 2016, the largest such rise in PA.
  - Travelers' primary reasons for visiting the Pittsburgh area are professional sports events, entertainment venues, and numerous cultural institutions. In fact, "[a lot] of cultural experiences" is rated as very influential in the choice of the Pittsburgh area as a destination.
  - \$47.61 is the average amount spent by out-of-town visitors when visiting Greater Pittsburgh for arts and culture events. These costs are in addition to admission costs, and include spending on lodging, transportation, food, childcare, and souvenirs. The average is \$25.99 among Allegheny County residents.
- Talent:
  - 71.43% of Black and African American artists expressed dissatisfaction with their current financial situations.
  - However, 70% of Black and African American artists expressed optimism about their futures as artists in Greater Pittsburgh, only slightly lower than 76.84% of White/Non-Hispanic artists.
  - Further, in response to the question "Are you planning to stay here or leave?", 78% of all artists said they are planning to stay.
- Creative, Entertainment, and Hospitality Industries:
  - In 2017, 8.4% of the Pittsburgh Metropolitan Statistical Area (MSA)<sup>3</sup> jobs were in Arts, Entertainment, Recreation, Accommodations, and Food Service, a decline of -1.5% since 2011.
  - By contrast, Arts, Entertainment, Recreation, Accommodations, and Food jobs in benchmark areas increased between 2011 and 2017 (the U.S. average 14.0% increase).

**Sources:** Longwoods International, *Pennsylvania Annual Travel Profile 2017*. Provided by VisitPittsburgh. *Having Our Say, 2018*, Greater Pittsburgh Arts Council. Also, a 2019 report to the Allegheny Conference on Community Development on "Outmigration."

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<sup>3</sup> As defined by the U.S. Census, an MSA consists of one or more counties that contain a city of 50,000 or more inhabitants or contain a Census Bureau-defined urbanized area (UA) and have a total population of at least 100,000 (75,000 in New England). Additional counties qualify to be included by meeting a specified level of commuting to the counties containing the population concentration and by meeting certain other requirements of metropolitan character, such as a specified minimum population density or percentage of the population that is urban.

# III. Comparisons

## III.A – Over Time

### 1. Perceived Changes in the Number of Arts & Culture Organizations in Southwestern PA between 2015 and 2020:

Through our partnership with SMU DataArts, GPAC had access to data for 830 arts and cultural organizations operating in Southwestern PA. The number of arts and culture organizations identified in Southwestern PA with available data seems to have dropped from 1,054 in 2015 to 830 in 2020.

Why? While some organizations closed or merged over the past five years, we believe the decline between 2015 and 2020 is more a result of two factors: a) Some organizations are not captured each year; b) The 2015 sample included organizations not reflected in 2020—e.g., booster organizations, garden clubs, non-arts schools, etc.

There was a rise in the numbers of smaller arts and culture organizations, which is notable and has implications for future support systems.

Table A.1: Number of Arts and Culture Organizations by County:

County	2020	2015	% of 2020 Total	% of 2015 Total
Allegheny	551	668	66.39%	63%
Armstrong	11	19	1.33%	2%
Beaver	34	58	4.10%	5%
Butler	41	55	4.94%	5%
Fayette	21	37	2.53%	4%
Greene	7	2	0.84%	>1%
Lawrence	10	20	1.20%	2%
Washington	52	70	6.27%	7%
Westmoreland	103	125	12.41%	12%
<b>TOTAL</b>	<b>830</b>	<b>1,054</b>	<b>100.00%</b>	<b>100.00%</b>

Source: SMU Data Arts

Table A.2: Number of Arts and Culture Organizations by Arts Discipline:

Arts Discipline	2020	2015	% of 2020 Total	% of 2015 Total
Performing Arts	203	306	24.46%	29%
Museums, Visual Arts, Historic, and Scientific	119	464	14.34%	44%
Education	141	32	16.99%	3%
Community Arts	104	133	12.53%	13%
Media Arts	32	57	3.86%	5%
Support & Advocacy Organizations	82	61	9.88%	57%
Libraries, Parks, Recreation	149	***	17.95%	6%
<b>TOTAL</b>	<b>830</b>	<b>1,054</b>	<b>100.00%</b>	<b>100.00%</b>

Source: SMU Data Arts

\*\*\* = In the 2015 study, parks and libraries were included in this category.

Table A.3: Number of Arts and Culture Organizations by Budget Size:

Budget Size	2020	2015	% of 2020 Total	% of 2015 Total
Small (Less Than \$250K)	504	373	61.00%	36%
Medium (\$250K-\$999K)	153	116	18.50%	11%
Large (\$1M-\$9.9M)	89	52	10.50%	5%
Very Large (More than \$10M)	20	13	2.50%	1%
Unknown	64	500*	7.50%	47%
<b>TOTAL</b>	<b>830</b>	<b>1,054</b>	<b>100.00%</b>	<b>100.00%</b>

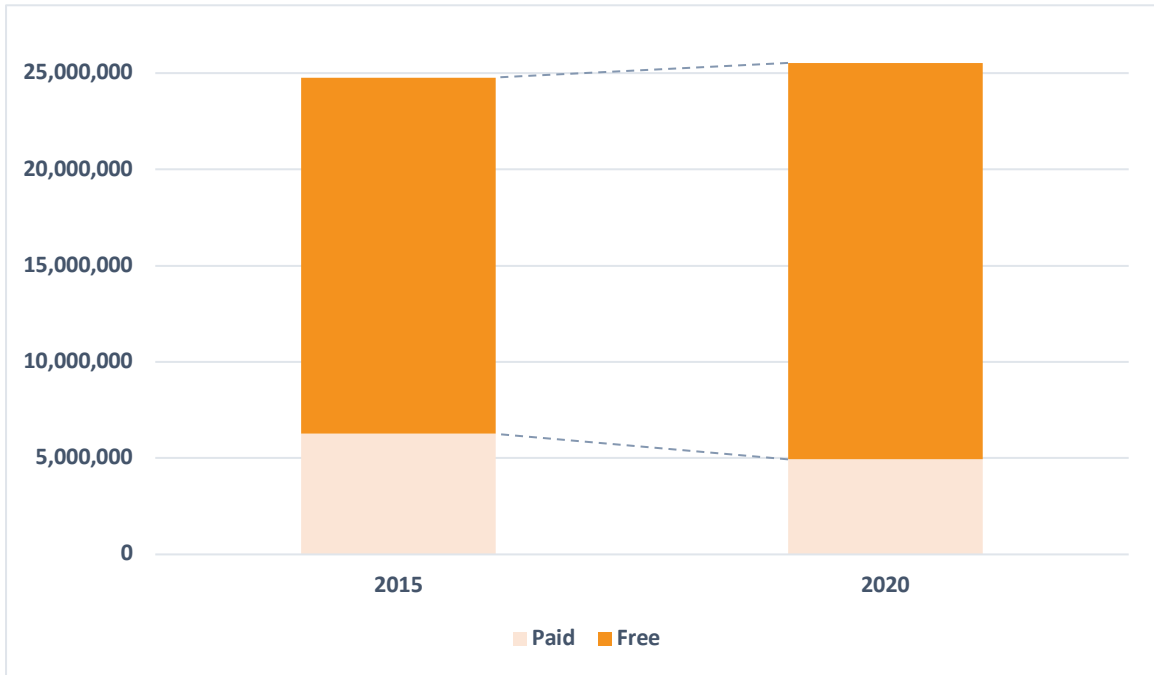
Source: SMU Data Arts

\* = Not all arts and culture organizations in the 2015 study were contained in the 2020 SMU DataArts database.

## 2. Changes in Attendance Over Time:

- Of the 1,054 reporting organizations, 130 organizations reported data for paid attendance, while 254 reported data for free attendance.
- Overall, attendance numbers for the arts and culture sector in Southwestern PA hit nearly 25.5 million in the most recent Fiscal Year.
  - Free: 20.5 Million (20,591,084)
  - Paid: 5 Million (4,938,088)
- The free attendance numbers were largely driven by the Allegheny County Parks with 18,356,360 in free attendance. Adjusted totals, without parks attendance and the focus on arts and culture attendance, are:
  - Free: 2.3 Million (2,234,724)
  - Paid 4.6 Million (4,640,576)

Graph A.5: Arts and Culture Attendance in Greater Pittsburgh:



Source: SMU Data Arts

- Attendance figures in 2015-2016, including parks, were approximately 25 million. Overall, there was a half-million increase in attendance in 2020. Specific 2015-16 figures were:
  - Free: 18,515,344 (74.7%)
  - Paid: 6,259,172 (25.3%)
- Overall, arts and culture attendance increased from 5,025,240 in 2015 to 6,875,300 in 2020. Increases in free attendance numbers largely offset the decline in paid attendance numbers.

**3. Ticket Prices for Performance Organizations in 2019:**

Table A.4: Average High and Low Range Ticket Prices:

	2020 High Range Prices	2020 Low Range Prices
<b>Average</b>	\$34.77	\$9.16
<b>Median</b>	\$20.00	\$5.00

Source: SMU DataArts

## III.B – By Locale

### 1. Sample Methodology and Sizes:

Through SMU DataArts data, GPAC accessed data reported by 5,548 cultural organizations in this report’s benchmark locales. The locales were chosen for numerous reasons, including: similarities in population size; similarities in scope and vibrancy of the arts and culture sector; GPAC’s and other intermediary groups historical use of these cities as benchmarks for Pittsburgh; and, arts service organizations in these areas.

The data, however, often suffer from coverage and/or non-response bias in that our sampling frames were not a census and not all organizations reported for all categories. Specifically, only about a third of organizations had SMU DataArts data available. The remainder only had IRS/NCCS data, likely through their 990 Forms. Further, we may not have representative populations from each city. For example, GPAC makes special efforts to include small organizations that are often under-represented in research samples. In the interest of transparency, the report’s next section includes the available sample sizes for each locale on which our analyses are based.

To Note: Any time Pittsburgh is mentioned in the forthcoming analysis, it is based on the FIPS (Federal Information Processing Standard) Code for Allegheny County. This is why the number of total organizations analyzed dropped from 830 to 551. (FIPS Codes are numbers used to uniquely identify geographic areas. County Codes have five digits.)

Table B.1: Number of Arts and Culture Organizations by Locale

City	Number of Reporting Organizations
Baltimore	300
Boston	538
Cleveland	560
Columbus	399
Dallas-Ft. Worth	599
Minneapolis	563
Philadelphia	744
Pittsburgh	551
San Diego	915
Washington, DC	930
<b>TOTAL</b>	<b>6,099</b>

Source: SMU DataArts



Table B.2: Number of Arts and Culture Organizations by Discipline by Locale

City	Community Arts	Education	Libraries, Parks, Recreation	Media Arts	Museums: Visual, Historic, Scientific	Performing Arts	Support & Advocacy
Baltimore	54	70	19	17	42	63	35
Boston	79	142	40	36	86	109	46
Cleveland	117	167	36	19	65	102	54
Columbus	66	128	24	20	38	71	52
Dallas-Ft. Worth	113	189	30	30	50	138	49
Minneapolis	94	165	33	36	53	139	43
Philadelphia	140	134	34	37	105	193	101
Pittsburgh	83	90	65	25	71	160	57
San Diego	153	299	79	33	102	169	80
Washington, DC	208	220	63	83	111	128	117
<b>TOTAL</b>	<b>1,107</b>	<b>1,604</b>	<b>423</b>	<b>336</b>	<b>723</b>	<b>1,079</b>	<b>634</b>

Source: SMU Data Arts

Table B.3: Number of Arts and Culture Organizations by Budget Size by Locale

City	<250,000	250,000-999,999	1,000,000-9,999,999	10,000,000-99,999,999	100,000,000+	N/A	Grand Total
Baltimore	169	60	53	18	-	-	300
Boston	298	107	100	27	6	-	538
Cleveland	378	95	72	15	-	-	560
Columbus	262	67	60	9	1	-	399
Dallas-Ft. Worth	392	116	61	28	1	1	599
Minneapolis	360	108	78	15	2	-	563
Philadelphia	414	157	135	36	2	-	744
Pittsburgh	305	102	69	20	-	55	551
San Diego	666	139	81	27	1	1	915
Washington, DC	463	228	187	48	4	-	930
<b>TOTAL</b>	<b>3,707</b>	<b>1,179</b>	<b>926</b>	<b>243</b>	<b>17</b>	<b>57</b>	<b>6,099</b>

Source: SMU Data Arts

Note: The organizations for which we do not have budget data in Pittsburgh were all listed with GPAC as the source. They are included in this list so that there is parity between Tables A-C.

## 2. Attendance and Admissions:

Bearing the adjusted sample sizes in mind, below are the available attendance numbers for organizations in our comparison cities and Pittsburgh. Adjusted sample sizes are available in Appendices at Table B.I.

The free attendance numbers were largely driven by the Allegheny County Parks with 18,356,360 in free attendance. Adjusted totals, without parks attendance and the focus on arts and culture attendance, are:

- Free: 2.3 Million (2,234,724)
- Paid 4.6 Million (4,640,576)

These are the totals which are recorded in the table below.

Despite population size and lower ranking of the number of arts and culture organizations, Pittsburgh ranks higher in attendance categories: Total (#4 of 10), Paid (#3), and Free (#4).

Table B.4: Tickets and Admissions by Locale

	<b>Paid Tickets and Admissions</b>	<b>% of Total</b>	<b>Free Tickets and Admissions</b>	<b>% of Total</b>	<b>TOTAL Tickets and Admissions</b>
<b>Baltimore</b>	953,923	37.45%	1,593,386	62.55%	2,547,309
<b>Boston</b>	6,404,883	70.63%	2,663,210	29.37%	9,068,093
<b>Cleveland</b>	3,019,819	62.36%	1,823,020	37.64%	4,842,839
<b>Columbus</b>	2,427,414	77.24%	715,138	22.76%	3,142,552
<b>Dallas-Ft. Worth</b>	2,072,050	58.91%	1,445,280	41.09%	3,517,330
<b>Minneapolis</b>	2,074,765	56.08%	1,624,696	43.92%	3,699,461
<b>Philadelphia</b>	6,782,578	55.14%	5,518,324	44.86%	12,300,902
<b>Pittsburgh</b>	<b>4,640,576</b>	<b>67.50%</b>	<b>2,234,724</b>	<b>32.50%</b>	<b>6,875,300</b>
<b>San Diego</b>	3,271,552	61.49%	2,048,868	38.51%	5,320,420
<b>Washington, DC</b>	2,921,513	34.01%	5,667,696	65.99%	8,589,209
<b>Grand Total</b>	<b>29,928,497</b>	<b>56.44%</b>	<b>23,099,618</b>	<b>43.56%</b>	<b>53,028,115</b>

Source: SMU Data Arts

### 3. Employment:

Bearing the adjusted sample sizes in mind, below are the available employment numbers for organizations in our benchmark locales and Pittsburgh. Adjusted sample sized are available in Appendices at Table B.II.

Please note that Table B.7: Number of Artists in Each Sector is not considered an additional employment number. It is identifying how many artist jobs are in each listed job category.

Table B.5: Full-time Jobs, Part-time Jobs, and Independent Contractor Positions:

	Permanent, Full-Time	Seasonal, Full-Time	Permanent, Part-Time	Seasonal, Part-Time	Independent Contractors
<b>Baltimore</b>	1,674	121	1,274	365	3,397
<b>Boston</b>	3,710	452	2,297	2,902	6,152
<b>Cleveland</b>	2,198	196	1,576	918	7,218
<b>Columbus</b>	1,021	102	917	545	6,439
<b>Dallas-Ft. Worth</b>	1,053	52	632	658	9,886
<b>Minneapolis</b>	1,611	586	2,012	1,221	10,214
<b>Philadelphia</b>	4,543*	791	3,657	3,929	10,398
<b>Pittsburgh</b>	3,233	566	3,319	1,989	5,024
<b>San Diego</b>	2,123	388	1,514	1,340	4,669
<b>Washington, DC</b>	4,528**	586	2,171	1,216	7,372

Source: SMU Data Arts

\* = Philadelphia's "American Historical Theatre Inc." had 24,000 full-time positions. This organization was identified as an outlier and removed from the sample.

\*\* = Washington, DC's "AppleTree Education had 6,287,636 full-time position. This organization was identified as an outlier and removed from the analysis.

Table B.6: Interns and Volunteers:

	Interns and Apprentices	Full-Time Volunteers	Part-Time or One-Time Volunteers
<b>Baltimore</b>	724	304	11,546
<b>Boston</b>	782	229	13,051
<b>Cleveland</b>	817	364	20,983
<b>Columbus</b>	361	85	11,976
<b>Dallas-Ft. Worth</b>	225	413	8,256
<b>Minneapolis</b>	607	223	15,949
<b>Philadelphia</b>	1,562	624	43,361
<b>Pittsburgh</b>	642	5,309	26,546
<b>San Diego</b>	939	336	52,996
<b>Washington, DC</b>	1,091	120,381	24,374

Source: SMU Data Arts

Table B.7: Number of Artists in Each Sector

	Artists/Full-Time Jobs	Artists/Part-Time Jobs	Artists/Independent Contractors
<b>Baltimore</b>	138	391	1,579
<b>Boston</b>	280	1,325	3,187
<b>Cleveland</b>	345	465	3,935
<b>Columbus</b>	137	312	3,599
<b>Dallas-Ft. Worth</b>	139	379	3,279
<b>Minneapolis</b>	721	1,161	8,122
<b>Philadelphia</b>	503	1,319	4,666
<b>Pittsburgh</b>	235	593	3,209
<b>San Diego</b>	241	239	2,974
<b>Washington, DC</b>	317	796	4,269

Source: SMU Data Arts

#### **4. Organizational Expenses:**

Below are the average expense values for 2,233 reporting organizations. They are grouped into three separate categories, including program, fundraising, and general administration, as well as their total. The data are first reported in their raw totals and their percent values in two separate tables.

The breakdown of reporting organizations for this section is available in Appendix, Table B.III.

*Table B.8 – Average Spending on Expenses Grouped by Locale (USD)*

	<b>Program Expenses</b>	<b>Fundraising Expenses</b>	<b>General Administration Expenses</b>	<b>Total Expenses</b>
<b>Baltimore</b>	\$ 1,623,846	\$ 129,289	\$ 413,162	\$ 2,142,395
<b>Boston</b>	\$ 4,050,806	\$ 388,991	\$ 1,044,212	\$ 5,458,749
<b>Cleveland</b>	\$ 1,731,985	\$ 191,934	\$ 441,520	\$ 2,330,451
<b>Columbus</b>	\$ 1,058,736	\$ 81,829	\$ 355,877	\$ 1,479,675
<b>Dallas-Ft. Worth</b>	\$ 1,835,727	\$ 242,200	\$ 383,076	\$ 2,431,163
<b>Minneapolis</b>	\$ 1,683,811	\$ 120,505	\$ 309,988	\$ 2,112,100
<b>Philadelphia</b>	\$ 1,988,297	\$ 212,813	\$ 391,861	\$ 2,566,172
<b>Pittsburgh</b>	\$ 1,771,289	\$ 126,802	\$ 946,191	\$ 2,829,019
<b>San Diego</b>	\$ 1,409,209	\$ 125,965	\$ 658,495	\$ 2,179,750
<b>Washington, DC</b>	\$ 2,254,436	\$ 153,660	\$ 490,412	\$ 2,886,729

Source: SMU Data Arts

*Table B.9 – Average Spending on Expenses Grouped by Locale (% of Total Expense Spending)*

	Program Expenses	Fundraising Expenses	General Administration Expenses
<b>Baltimore</b>	74%	5%	21%
<b>Boston</b>	73%	7%	20%
<b>Cleveland</b>	76%	5%	18%
<b>Columbus</b>	75%	4%	21%
<b>Dallas-Ft. Worth</b>	79%	6%	14%
<b>Minneapolis</b>	79%	6%	16%
<b>Philadelphia</b>	72%	6%	22%
<b>Pittsburgh</b>	70%	6%	24%
<b>San Diego</b>	74%	7%	19%
<b>Washington, DC</b>	77%	5%	18%

Source: SMU Data Arts

Below are the median expense values for 2,233 reporting organizations. The stark differences in the averages and medians shows how pliable our measures are towards large cultural institutions. As with the average values, the data are first reported in their raw totals, then by their percent values. It is interesting to note that these figures are similar in all locales.

*Table B.10 – Median Spending on Expenses Grouped by Locale (USD)*

	Program Expenses	Fundraising Expenses	General Administration Expenses	Total Expenses
<b>Baltimore</b>	\$ 125,627	\$ 6,720	\$ 36,959	\$ 178,639
<b>Boston</b>	\$ 484,617	\$ 384,589	\$ 123,879	\$ 734,756
<b>Cleveland</b>	\$ 182,491	\$ 16,123	\$ 35,958	\$ 240,351
<b>Columbus</b>	\$ 96,948	\$ 1,725	\$ 21,589	\$ 146,600
<b>Dallas-Ft. Worth</b>	\$ 216,051	\$ 11,772	\$ 43,778	\$ 293,131
<b>Minneapolis</b>	\$ 287,400	\$ 15,505	\$ 47,523	\$ 234,503
<b>Philadelphia</b>	\$ 153,560	\$ 15,193	\$ 43,917	\$ 234,503
<b>Pittsburgh</b>	\$ 117,280	\$ 6,711	\$ 30,375	\$ 171,950
<b>San Diego</b>	\$ 170,378	\$ 8,771	\$ 44,049	\$ 242,257
<b>Washington, DC</b>	\$ 270,816	\$ 11,000	\$ 44,634	\$ 313,426

Source: SMU Data Arts

*Table B.11 – Median Spending on Expenses Grouped by Locale (% of Total Expense Spending)*

	Program Expenses	Fundraising Expenses	General Administration Expenses
<b>Baltimore</b>	79%	2%	15%
<b>Boston</b>	76%	6%	17%
<b>Cleveland</b>	79%	4%	14%
<b>Columbus</b>	80%	0%	15%
<b>Dallas-Ft. Worth</b>	81%	4%	13%
<b>Minneapolis</b>	80%	5%	13%
<b>Philadelphia</b>	75%	5%	17%
<b>Pittsburgh</b>	78%	3%	15%
<b>San Diego</b>	80%	3%	12%
<b>Washington, DC</b>	83%	2%	12%

Source: SMU Data Arts

### **5. Contributed v. Earned Revenue:**

The following table shows a breakdown of average and median earned revenue (E.R.), contributed revenue (C.R.), and total revenue within each locale.

This analysis combines SMU DataArts and NCCS/IRS data, which provided access to 6,761 organizations in the benchmark locales and Pittsburgh. Percent columns are not calculated by dividing “average earned revenue” over “average total revenue.” Instead, each organization’s percent value was individually calculated before taking the average.

The composition of the available sample data for this section can be found in the Appendix under Table B.IV.

*Table B.13 – Average Earned Revenue, Contributed Revenue and Total Revenue Grouped by Locale (USD)*

City	Avg. Earned Revenue	E.R. as % of Total Revenue	Avg. Contributed Revenue	C.R. as % of Total Revenue	Average Total Revenue
Baltimore	\$ 1,254,101	42%	\$ 1,248,036	55%	\$ 2,673,692
Boston	\$ 6,364,292	40%	\$ 1,625,639	55%	\$ 8,473,965
Cleveland	\$ 726,228	49%	\$ 726,652	46%	\$ 1,714,686
Columbus	\$ 1,419,451	50%	\$ 565,296	54%	\$ 2,013,233
Dallas-Ft. Worth	\$ 915,098	38%	\$ 1,239,958	56%	\$ 2,236,185
Minneapolis	\$ 3,043,395	45%	\$ 1,146,313	52%	\$ 4,194,144
Philadelphia	\$ 1,679,328	39%	\$ 963,115	56%	\$ 2,930,553
Pittsburgh	\$ 740,948	43%	\$ 968,326	54%	\$ 1,879,897
San Diego	\$ 851,117	45%	\$ 658,435	52%	\$ 2,339,563
Washington, DC	\$ 1,102,142	30%	\$ 2,310,271	66%	\$ 3,581,086

Source: SMU Data Arts

*Table B.14 – Median Earned Revenue, Contributed Revenue and Total Revenue Grouped by Locale (USD)*

City	Med. Earned Revenue	E.R as % of Total Revenue	Med. Contributed Revenue	C.R as % of Total Revenue	Median Total Revenue
Baltimore	\$ 54,818	33%	\$ 67,850	58%	\$ 181,669
Boston	\$ 42,920	33%	\$ 81,786	57%	\$ 195,081
Cleveland	\$ 32,427	34%	\$ 43,416	59%	\$ 112,403
Columbus	\$ 33,403	50%	\$ 42,553	68%	\$ 117,405
Dallas-Ft. Worth	\$ 38,494	42%	\$ 48,078	48%	\$ 131,713
Minneapolis	\$ 45,125	42%	\$ 54,455	53%	\$ 137,678
Philadelphia	\$ 39,514	33%	\$ 70,622	61%	\$ 175,640
Pittsburgh	\$ 35,013	35%	\$ 54,693	59%	\$ 140,841
San Diego	\$ 30,650	43%	\$ 36,579	52%	\$ 91,409
Washington, DC	\$ 27,221	16%	\$ 135,759	79%	\$ 272,959

Source: SMU Data Arts



## 6. Sources of Contributed Revenue:

Below is a breakdown of averages and medians for sources of contributed revenue within each city. The table presents percent comparisons for each category and city. For example, on average, organizations in Baltimore receive 24% of their contributed income from Individuals.

Based on the available data, Pittsburgh's rankings in the percentages of total contributed revenues by source are: Individual (#8 of 10), Corporate (#10 of 10), Foundations (#1 of 10), Board (#2 of 10), County (#2 of 10), State (#4 of 10), and Federal (#9 of 10).

As with past calculations, the individual values are not meant to sum to 100%. They are reflective of the average taken of individual organizations' contributions.

The composition of the available sample data for this section can be found in the Appendix under Table B.V.

*Table B.15 – Sources of Contributed Revenue Grouped by Locale (Average %s)*

	Individual Support	Corporate Support	Foundation Support	Board Support	City Government	County Government	State Government	Federal Government	Tribal Organization
<b>Baltimore</b>	24%	9%	26%	10%	8%	3%	14%	6%	-
<b>Boston</b>	27%	6%	22%	13%	2%	0%	6%	2%	-
<b>Cleveland</b>	19%	7%	27%	6%	2%	10%	6%	1%	-
<b>Columbus</b>	18%	8%	11%	6%	16%	3%	7%	2%	-
<b>Dallas-Ft. Worth</b>	26%	7%	18%	10%	18%	0%	2%	0%	-
<b>Minneapolis</b>	23%	6%	25%	6%	3%	2%	18%	2%	-
<b>Philadelphia</b>	18%	6%	31%	8%	11%	0%	4%	2%	0%
<b>Pittsburgh</b>	19%	4%	37%	11%	3%	8%	4%	1%	-
<b>San Diego</b>	25%	7%	14%	7%	20%	5%	4%	1%	0%
<b>Washington, DC</b>	22%	6%	19%	9%	18%	0%	3%	3%	-

Source: SMU Data Arts

*Table B.16 – Sources of Contributed Revenue Grouped by Locale (Median %s)*

	Individual Support	Corporate Support	Foundation Support	Board Support	City Government	County Government	State Government	Federal Government	Tribal Organization
<b>Baltimore</b>	19%	1%	14%	4%	-	-	6%	-	-
<b>Boston</b>	21%	1%	12%	6%	0%	-	2%	-	-
<b>Cleveland</b>	12%	1%	20%	2%	-	7%	-	-	-
<b>Columbus</b>	12%	1%	5%	1%	7%	-	1%	-	-
<b>Dallas-Ft. Worth</b>	20%	2%	11%	4%	10%	-	-	-	-
<b>Minneapolis</b>	16%	1%	20%	2%	-	-	11%	-	-
<b>Philadelphia</b>	11%	0%	22%	3%	3%	-	0%	-	-
<b>Pittsburgh</b>	11%	-	34%	3%	-	-	-	-	-
<b>San Diego</b>	18%	1%	5%	2%	11%	1%	-	-	-
<b>Washington, DC</b>	13%	1%	9%	2%	4%	-	-	-	-

Source: SMU Data Arts

## **7. Economic Impacts**

GPAC's 2017 *Economic Impact* report shows these impacts of spending by arts and culture organization and their audiences:

- 32,211 full-time equivalent (FTE) positions
- \$641 million in resident household income
- \$115 million in total tax revenues: local tax revenues (\$67.4 million) and state tax revenues (\$47.7 million).

In comparison, GPAC's 2015 *Economic Impact* report shows how the impact of the arts and culture sector has grown in recent years:

- 20,550 FTEs
- \$410 million in resident household income
- \$74 million in total tax revenues

Note: The impacts of arts and culture spending on job creation, household income, and tax revenues is higher in Allegheny County than in benchmark locales in both *Culture Counts 2020* and *From Pointe Shoes to Pierogies* (2017) – Baltimore, Columbus, and Minneapolis – as well as all benchmark areas cited only in the 2017 report – St. Louis, Indianapolis, Nashville, Portland, Charlotte, and Kansas City. You can see these figures on page 25 of *From Pointe Shoes to Pierogies: Impacts of the Arts in Allegheny County, Pennsylvania 2017*.

## C. By Sector

The arts and culture sector is a very strong economic force for the Southwestern PA region, along with other sectors in a diversified economy. These strengths are reflected in the numbers of jobs, attendance figures, prices, and the admission revenues of diverse sectors.

### 1. Numbers of Arts and Culture Jobs

#### **About the Numbers:**

It is highly likely that people are working more than one job in the sector due to the prevalence of independent contractor positions. Therefore, we speak of “number of jobs” rather than “number of people employed by the arts.”

Also, the first seven categories in C.1 include employees *and* artists. The last three categories simply highlight how many artists exist in each of those categories. They are not meant to be combined.

*Table C.1 – Number of Reported Jobs in the Sector in 2019*

Job Category	# of Jobs	% of Total
Full-Time – Permanent	3,325	22.2%
Full-Time – Seasonal	587	4.0%
Part-Time – Permanent	3,528	23.5%
Part-Time – Seasonal	2,013	13.4%
Independent Contractors	5,554	37.06%
Interns/Apprentices	701	-
Full-Time Volunteers	5,350	-
Part-Time/One-Time Volunteers	28,926	-
Full-Time Employees/Artists	257	-
Part-Time Employees/Artists	692	-
Independent Contractors/Artists	949	-
<b>TOTAL JOBS (Top Five Categories)</b>	<b>15,007</b>	<b>100.00%</b>

Source: SMU Data Arts

*Table C.2 – Number of Reported Jobs in the Sector in 2015*

Job Category	# of Jobs	% of Total
Full-Time	2,806	22%
Part-Time	5,116	40%
Contractors	4,872	38%
TOTAL	12,794	-

Source: SMU Data Arts

### **Conclusions:**

Total employment in the sector has increased in the past years in all categories — full-time, part-time, and contractors. The 2015 *Culture Counts* report raised questions about the reliance in the sector on part-time employees. But, actually, percentages of part time employees actually declined slightly over the past five years.

Also, the arts and culture sector is a magnet for volunteer participation. The 2015 *Culture Counts* reported 39,393 volunteers, while the figures from our 2017 *Economic Impact Report* cited 37,267 volunteers. However, voluntarism was measured differently for this report. In Southwestern PA, volunteers gave 1,166,267 hours of their time to help arts and culture organizations.

## **2. Number of Jobs Across Sectors**

### **About the Numbers:**

Unfortunately, the most recent figures on employment in the nonprofit sector are from 2015 and only include Allegheny County. This reported data also uses different sub-categories: direct nonprofit jobs (75,092) and indirect and induced jobs (31,300). What's more, the nonprofit sector as a whole in Allegheny County generated \$377 million in state and local taxes.

These figures represent the following nonprofit sub-sectors in these proportions: Human Services (34%), Education (16%), Health (15%), Community Benefit (15%), Arts & Culture (10%), Animals & Environment (3%).

### **Job Creation by Sector in Greater Pittsburgh:**

- Arts & Culture: 15,007
- Nonprofit Sector: 67,583
- Higher Education: 38,900
- Healthcare: 203,600

**SOURCES:** Greater Pittsburgh Nonprofit Partnership and Pittsburgh Regional Alliance.

## Arts & Culture v. Pittsburgh Sports:

The arts and culture sector generated higher attendance and revenues than professional sports. Ranks are meant to be read as 27<sup>th</sup> out of 30 teams in league.

*Table C.3 – Attendance, Rank and # of Events for Pittsburgh Arts and Sports (2015 and 2019)*

	2020			2015		
	Attendance	Rank in League	# of Games	Attendance	Rank in League	# of Games
<b>Arts and Culture</b>	6,875,300			5,025,240		
<b>Pirates</b>	1,491,659	27/30	81	2,249,021	18/30	80
<b>Penguins</b>	761,203	8/31	41	760,584	25/30	41
<b>Steelers</b>	624,701	24/30	10	624,701	16/32	8
<b>Sports – ALL</b>	2,877,563			3,524,108		

Sources: ESPN and SMU DataArts

Attending arts events in Greater Pittsburgh is a relative bargain compared to sports admissions. Below are the average ticket prices for the listed sectors. Please note: Arts and Culture’s average ticket price was calculated by taking the average of the following SMU DataArts categories: \$34.77 (high-range tickets) and \$9.16 (low-range tickets).

*Table C.4 – Average Ticket Prices and Total Revenue for Pittsburgh Arts and Sports USD (2019)*

	Average Ticket Price	Total Revenue
<b>Arts and Culture</b>	\$21.97	\$151,256,600
<b>Pirates</b>	\$59.00	\$88,007,881
<b>Penguins</b>	\$131.00	\$58,447,026
<b>Steelers</b>	\$93.56	\$99,717,593
<b>Sports – ALL</b>	-	\$242,172,500

Sources: ESPN and SMU DataArts

The total admission revenues of the arts and culture sector falls short of the combined revenues of the region’s three professional sports teams (\$246,172,500). Admission revenues for the arts and culture sector, though, are higher than any one of the three local professional sports teams, individually.

## IV. Case Studies

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These Pittsburgh-area arts and culture organizations may vary in size, cultural tradition, and artistic discipline, but each illustrates a story of resilience and adaptation. These case studies highlight notable journeys of development since our last report in 2015.

### THE AFRO-AMERICAN MUSIC INSTITUTE

Since its 1982 founding by Dr. James and Pamela Johnson, the Afro-American Music Institute (AAMI) has served diverse students seeking to learn music from an Afro-American perspective. Its current Homewood location features renovated spaces for the AAMI Boys Choir and AAMI ensembles, plus space for the Summer Youth Intensive Camp.

Building on this foundation, since 2015 AAMI has expanded its scope in several ways. It upgraded its facility for rehearsals and performances with support from local foundations. The Institute has also strengthened fundraising and board operations via the Bloomberg Philanthropies Arts Innovation and Management Initiative. AAMI's recent priority on partnerships has brought connections to the University of Pittsburgh, the Frick Pittsburgh, and touring jazz musicians, and has thereby increased its media visibility.

Future plans for the Institute include becoming an international model for Afro-American music education. In doing so, they plan to identify new funding sources and create a solid succession plan for future leadership.

### ATTACK THEATRE

Attack Theatre has fused modern dance, original live music, and interdisciplinary art forms to create engaging dance performances for the past 25 years. Since 2015, the company has undergone unprecedented growth – a doubled budget, a 120% increase in engagements, 90 employed artists, and 16 full-time staff who receive full benefits.

No longer small but mighty, Attack Theatre is now just “mighty,” says Executive Director Rebecca Himberger. She traces this growth to a capitalization program, which led to a much stronger business model. Attack Theatre's unwavering commitment to integrating movement into learning environments is strengthened through its Summer Dance Intensive for teaching artists. Over the next five years, the company will strive to remain relevant and resilient while continuing to serve Pittsburgh and to deepen roots in a local neighborhood.

## **SILVER EYE CENTER FOR PHOTOGRAPHY**

Silver Eye Center for Photography shares the work of a diverse range of contemporary artists through its original exhibitions, workshops and tutoring, and digital learning lab. However, in 2014, Silver Eye was “near death,” according to Executive Director David Oresick.

After a transition in leadership and strategic vision, Silver Eye was able to adjust its path and completed a successful capital campaign, allowing the Center to move from Pittsburgh’s South Side to a larger, more flexible space on Penn Avenue in Garfield. Silver Eye now focuses primarily on contemporary photography and shifted its resources away from summer camps.

Its challenges are not uncommon to other arts and culture nonprofits, including establishing a continued increase in earned income, building its board, and fundraising. While proud of its scrappy past, Silver Eye hopes to professionalize further over the next five years through competitive salaries and a “humanizing” work-life balance for its employees.

## **PITTSBURGH BALLET THEATRE**

Since 1969, Pittsburgh Ballet Theatre (PBT) has connected its audiences to ballet through mainstage productions, touring performances, community events, and in classrooms around the region. Celebrating its 50th Anniversary Season in 2019-2020, PBT looks toward its future while celebrating its rich artistic past.

In the past five years, PBT has eliminated its long-term debt, expanded its Strip District campus, joined other prominent ballet companies in The Equity Project to increase diversity in dance, and expanded its already vast repertoire. In 2019, PBT launched an appeal to sustain performances with live music and will have welcomed a new artistic director in 2020. The new Loti and Leon Falk Building, gifted to PBT in 2020, will help ensure a space for the art form for decades to come.

# V. Indicators and Measures

## MEASURE #1: The value and impacts of the arts to the citizens of Greater Pittsburgh.

### 1.1 Indicator: Arts Activities and Opinions of General Public

*Metric: The number of times residents have attended an arts event in the past year.*

All groupings attend arts events, but rates are somewhat lower among African Americans, though attendance at public arts events does not cover other forms of participatory engagement with the arts and artmaking. Also, attendance rates are slightly higher among males, vary without much pattern by age, and increase with higher education levels and higher income levels.

*Table 1.1.1 – Arts Attendance by Allegheny County Residents*

	Category	None	1-2 Times	3-5 Times	6-10 Times	11-20 Times	20+ Times
	Allegheny County	13.3%	23.1%	26.0%	18.4%	10.1%	9.1%
Race	White/Non-Hispanic	12.8%	21.0%	26.3%	19.7%	10.8%	9.4%
	Black/African American	14.1%	37.3%	26.1%	10.4%	6.2%	5.8%
Sex	Male	11.3%	24.5%	23.6%	18.1%	13.1%	9.3%
	Female	14.9%	21.1%	28.3%	18.9%	7.5%	9.2%
Age	18-29	1.80%	12.0%	21.9%	32.9%	13.6%	17.8%
	30-44	8.80%	22.6%	24.4%	19.8%	13.4%	11.0%
	45-64	16.20%	30.9%	28.5%	12.7%	6.8%	4.9%
	65+	21.50%	18.7%	26.1%	14.8%	11.0%	7.9%
Education	High School or less	27.6%	28.7%	28.8%	9.7%	2.9%	2.3%
	Some College	11.0%	26.6%	22.5%	19.5%	7.7%	12.7%
	Bachelors	3.6%	17.1%	30.4%	24.4%	13.3%	11.1%
	Masters or higher	3.2%	15.2%	19.4%	24.4%	23.2%	14.6%
Income	Under \$25,000	19.4%	27.0%	24.3%	11.5%	8.9%	8.9%
	\$25,000-\$49,000	19.0%	20.9%	24.1%	16.5%	9.4%	10.2%
	\$50,000-\$74,999	14.8%	31.9%	26.4%	14.5%	8.7%	3.8%
	\$75,000-\$99,999	10.7%	21.3%	26.9%	20.8%	10.2%	10.2%
	\$100,000+	3.0%	18.3%	27.6%	27.6%	12.1%	11.5%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh



## 1.2 Indicator: Donations by the General Public to the Arts and Culture

*Metric: The number of times residents have made a donation to an arts or cultural organization in the past year.*

- Overall, more than one-third of residents made a donation to the arts and culture sector in the past year – a strong figure that signals room for expansion of individual giving, an ongoing Greater Pittsburgh challenge.
- Donors tend to be predominantly White, male, and slightly older.
- Donations, not surprisingly, seem to increase with age, education, and income.

*Table 1.2.1 – Arts Donations Made by Allegheny County Residents*

	Category	Yes	No
	Allegheny County	38.7%	61.3%
Race	White/Non-Hispanic	40.1%	59.9%
	Black/African American	31.1%	68.9%
Sex	Male	48.9%	51.1%
	Female	29.8%	70.2%
Age	18-29	33.2%	66.8%
	30-44	42.9%	57.1%
	45-64	35.3%	64.7%
	65+	47.4%	52.6%
Education	High School or less	24.8%	75.2%
	Some College	37.6%	62.4%
	Bachelors	43.7%	56.3%
	Masters or higher	60.8%	39.2%
Income	Under \$25,000	24.3%	75.7%
	\$25,000-\$49,000	34.7%	65.3%
	\$50,000-\$74,999	38.6%	61.4%
	\$75,000-\$99,999	43.7%	56.3%
	\$100,000+	49.9%	50.1%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh

### 1.3 Indicator: Public Opinions of Arts Opportunities in Greater Pittsburgh

*Metric: Ratings of the overall quality of the region’s arts and cultural opportunities by area citizens.*

- Overall ratings of the quality of the region’s opportunities are quite high, but lower among Black and African American populations.
- There’s little difference by gender or by age.
- Ratings are higher by education level, but they’re relatively even by income levels. In other words, there are disparities by race, but not by class.

*Table 1.3.1 – Residents’ Ratings of the Quality of the Arts in Allegheny County*

	Category	Poor	Fair	Good	Very Good	Excellent
	Allegheny County	1.1%	5.9%	26.6%	44.8%	21.6%
Race	White/Non-Hispanic	0.4%	4.9%	24.8%	46.7%	23.2%
	Black/African American	6.2%	10.8%	35.7%	34.4%	12.9%
Sex	Male	1.5%	5.2%	26.6%	45.0%	21.7%
	Female	0.8%	6.7%	26.9%	44.0%	21.6%
Age	18-29	1.20%	9.1%	32.6%	36.8%	19.8%
	30-44	1.60%	3.5%	29.7%	46.6%	15.2%
	45-64	0.10%	4.8%	25.0%	47.4%	22.7%
	65+	0.20%	6.5%	21.8%	45.9%	25.6%
Education	High School or less	1.6%	7.6%	31.7%	42.8%	16.3%
	Some College	2.1%	5.6%	26.6%	41.4%	24.3%
	Bachelors	0.0%	5.8%	24.5%	46.6%	23.2%
	Masters or higher	0.3%	2.9%	19.7%	51.3%	25.8%
Income	Under \$25,000	3.6%	7.9%	26.0%	41.2%	20.4%
	\$25,000-\$49,000	0.6%	5.6%	29.9%	41.4%	22.6%
	\$50,000-\$74,999	2.0%	3.5%	30.4%	45.5%	18.6%
	\$75,000-\$99,999	0.0%	5.6%	23.7%	49.0%	21.7%
	\$100,000+	0.0%	7.2%	21.4%	46.9%	24.4%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh

## MEASURE #2: The cultural vitality of the Greater Pittsburgh region and its impacts.

### 2.1 Indicator: Scope of Arts Sector

Pittsburgh’s arts and culture sector is facing an array of challenges: individual giving and major gifts; long-term sustainability; diversity, equity, accessibility, and inclusion (DEAI) with boards, staff, and audiences; contributed and earned income; and, community connections.

Table 2.1.1 – Financial Conditions for Greater Pittsburgh Arts Organizations in 2018

	1-10% Deficit	“Broke-Even”	1-10% End-of-Year Surplus	11-25% Surplus
<b>Percentage of Organizations Reporting...</b>	7.32%	23.17%	32.39%	6.10%

Organizations in 2018 reported somewhat better financial conditions than in 2016.

Organizations were also asked to report on how their attendance projections were standing up to their actual numbers:

Table 2.1.2 - Attendance Projections and Actuals for Greater Pittsburgh Arts Organizations in 2018

	Much Lower	Somewhat Lower	As Projected	Somewhat Higher	Much Higher
<b>Percentage of Organizations Reporting [...] Attendance Levels.</b>	3.66%	14.63%	26.83%	24.39%	9.76%

Arts organizations reported several innovations in organizational practices:

- established arts and/or non-arts partnerships (78.79%),
- advancing DEAI with boards/staff/audiences (65.15%),
- utilized SMU DataArts tools in decision-making (46.97%), and
- engaged in advocacy at local, state, and/or federal levels.

80% of White/Non-Hispanic organizations see Greater Pittsburgh as a “great” arts region, in contrast to 50% of Black/African American organizations.

Further, only 25% of Black/African American organizations saw the area arts community as “supportive” and “collaborative,” while 50% of them saw the arts community as “cliquish.”

**SOURCE:** *Having Our Say*, GPAC, 2019.

## **2.2 Indicator: Economic Health of the Arts & Culture Sector**

*Metric: Wages and benefits for full-time employees and part-time employees in area arts and culture organizations.*

### **Salaries**

Only 7% of ED/CEO's are ALAANA vs. 93% are White/Non-Hispanic. The average salaries of Artistic Directors are much lower than those of EDs and Development Directors, and lower than all other categories of senior management.

Table 2.2.1 – Average Salary of Director Positions for Greater Pittsburgh Arts Organizations

	<b>Average Salary</b>
<b>ED/CEO</b>	\$126,796
<b>Artistic Director</b>	\$58,672
<b>Program Director</b>	\$86,312
<b>Education Director</b>	\$61,500
<b>Development Director</b>	\$95,813
<b>Marketing Director</b>	\$64,834
<b>Communications Director</b>	\$64,765

EDs and CEOs are predominantly male (57% male, 43% female). Male CEOs also make more, on average, than their female counterparts (\$133,334 male, \$118,080 female).

73% of arts and culture organizations are planning salary increases in the next year. They will do so via a mix of methods: merit pay (45%), across-the-board increases (42%), and cost of living increases (24%). Only 6% plan salary increases to redress equity pay issues by gender or race.

### **Benefits:**

82% of organizations offer medical insurance to full-time employees, while only 32% do so for part-time employees. 61% of full-time employees and 32% of part-timers receive retirement benefits. Both full-time and part-time employees commonly receive paid time-off for vacation, illness, holidays, and personal days.

Rates of other forms of insurance offered to full-time employees:

- Dental - 73%
- Vision - 73%
- Life – 55%
- Short-term disability - 52%

A minority of organizations (37%) plan to increase medical benefits next year.

*SOURCE: Wages, Benefits, and the Arts in Greater Pittsburgh, GPAC, 2019.*

## **2.3 Indicator: Audience Attendance and Spending**

### **Metric: Attendance numbers in Greater Pittsburgh**

Overall, attendance numbers for the arts and culture sector in Southwestern PA hit nearly 25.5 million in the most recent Fiscal Year.

- Free: 20.5 Million (20,591,084)
- Paid: 5 Million (4,938,088)

The free attendance numbers were largely driven by the Allegheny County Parks with 18,356,360 in free attendance. Adjusted totals, without parks attendance, are:

- Free: 2.3 Million (2,234,724)
- Paid 4.6 Million (4,640,576)

Attendance figures in 2015-16, including parks, were approximately 25 million. Overall, there's a half-million increase in attendance in 2020. Increases in free attendance numbers largely offset the decline in paid attendance numbers. Specific 2015-16 figures include:

- Free: 18,515,344 (74.7%)
- Paid: 6,259,172 (25.3%)

**SOURCE:** SMU DataArts

### **Metric: Spending associated with attendance.**

- \$30.64: average spent per person beyond ticket costs (meals/drinks, gifts/souvenirs, local transportation, lodging, refreshments, clothing, childcare, etc.)
- \$25.99: average spent by Allegheny County residents
- \$47.61: average spent by cultural tourists and visitors to Greater Pittsburgh

**SOURCE:** *From Pointe Shows to Pierogies: Impacts of the Arts in Allegheny County*, GPAC, 2017.

## **2.4 Indicator: Economic Impacts in Allegheny County**

Economic impact measures the ripple effects on the economy of annual spending by arts and culture organizations and their audiences.

- **Measures:**
  - Job creation - Full-time Equivalent (FTE) jobs created: 32,211—more than 4 out of 5 jobs are in multiple sectors outside the arts and culture
  - Resident household income generated: \$641 million
  - Tax revenues generated for the county: \$115 million
  - Local tax revenues: \$67.4 million, State tax revenues: \$47.7 million

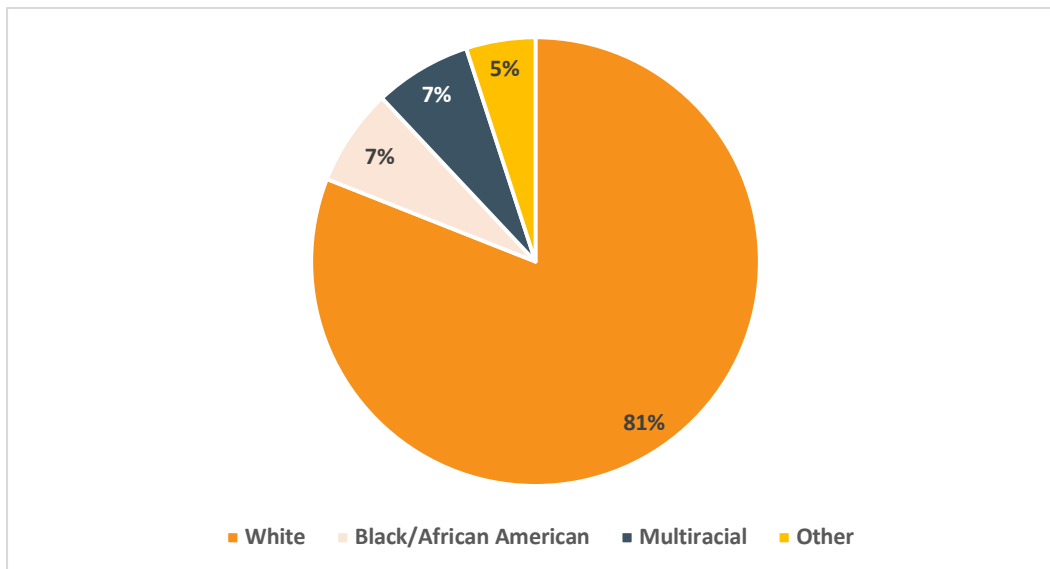
- Pre-conditions
  - One premise of GPAC’s economic impact reports is that without positive artistic experiences for audiences that also have social and cultural dimensions, the potential for subsequent economic impacts is limited. On such measures, large majorities of area arts attendees surveyed reported:
    - Feeling strongly absorbed in arts experiences, many of which elicited strong emotional responses,
    - Connecting socially with other attendees and being willing to discuss the arts event with them, and
    - Attending arts events sparked a sense of pride in their neighborhoods.
  
- Support systems
  - Another premise of GPAC’s economic impact research is that strong support systems are needed to generate a rich, diverse supply of arts opportunities that can be meaningful for audiences, which in turn lead to audience spending and economic ripple effects.

*SOURCE: From Pointe Shows to Pierogies: Impacts of the Arts in Allegheny County, GPAC, 2017.*

## **2.5 Indicator: Artist Demographics in Southwestern PA**

There are approximately 1,534 artists in Southwestern PA counties, according to GPAC data. This is likely to be a more complete count of artists than the SMU DataArts figures.

Chart 2.5.1 – Artists by Race in Southwestern PA



## **2.6 Indicator: The Working Lives of Artists**

Artists in Southwestern PA have identified the following challenges in their careers:

- securing grants/fellowships/donations,
- marketing/promotion of their art,
- managing expenses, and
- finding affordable studio/work/rehearsal space.

Individual artists are also teaching artists (40.5%), entrepreneurs (23%), activists (21.5%), and/or arts administrators (18.5%). Artists employ many means to fund their projects—self-funding, fees for service, contracts, and family.

However, majorities of artists are not satisfied with their work/life balance. Among White/Non-Hispanic artists, 38.6% are somewhat dissatisfied, while 42.86% of Black/African American artists are somewhat dissatisfied; 21.43% of Black/African American artists and 20.17% of White/Non-Hispanic artists are very dissatisfied.

- 28.7% of Black and African American artists said they didn't have enough time to do their art (1-10 hours a week)—19.29% of White or Non-Hispanic artists reported the same.
- 57.15% of Black and African American artists feel access to funding is inequitable, as compared to 12.15% of White or Non-Hispanic artists.

SOURCE: *Having our Say*, GPAC, 2019.

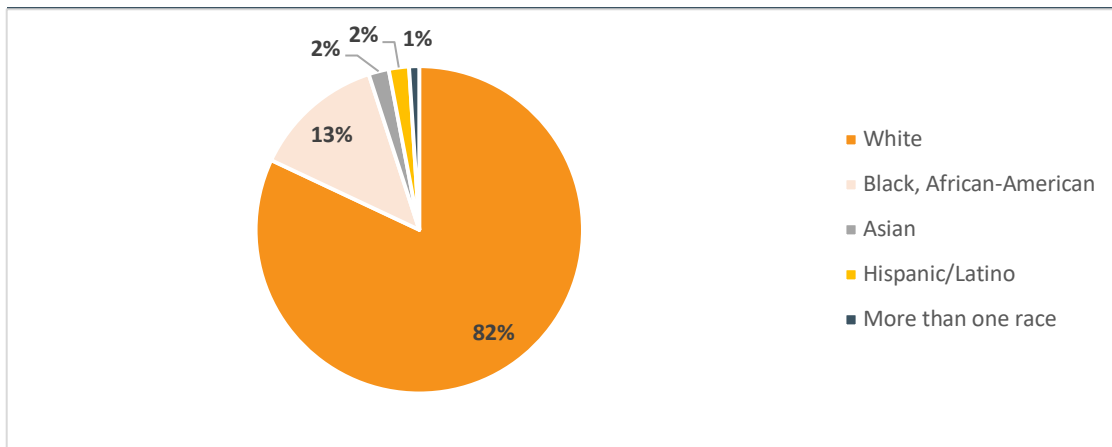
## **MEASURE #3: The ways in which the arts sector models equity and inclusion practices for the region.**

### **3.1 Indicator: Grant Distribution in Southwestern PA**

Metric: Numbers of Organizations by Racial Identity

- GPAC's 2018 report, *Racial Equity & Arts Funding in Greater Pittsburgh*, identified 218 arts organizations in Greater Pittsburgh who had received public and/or private grants over the past decade, which were then categorized by race, according to numerous criteria.

Chart 3.1.1 - Greater Pittsburgh Organizations Receiving Grants within the Last Decade



This diversity, however, does not match the demographics of 1) Allegheny County or the 2) City of Pittsburgh:

Table 3.1.1 – Racial Demography of Allegheny County v. Racial Demography of Pittsburgh

	Allegheny County	City of Pittsburgh
<b>White/Non-Hispanic</b>	78.6%	67%
<b>Black/African American</b>	13.4%	22%
<b>Asian</b>	3.7%	6%
<b>Hispanic/Latino(x)</b>	2%	2%
<b>More than one race:</b>	2.1%	3%

Metric: Funding for ALAANA and White/Non-Hispanic arts organizations

Between 2003-17, totals for the combined public and private grants received by organizations were:

Table 3.1.1 – Racial Demography of Grants and Grants Dollars Received in Pittsburgh (2003-17)

	White (%)	ALAANA (%)	Total
<b>Number of Grants (N)</b>	84%	16%	7,856
<b>Number of Grants Dollars</b>	86%	14%	\$351,993,256

These figures show that in the distribution of arts funds by race, ALAANA organizations are not proportionately represented in the percentages of their distribution within the Greater Pittsburgh arts sector and the demographic percentages of the Greater Pittsburgh population.

The above figures were aggregated over fourteen years. Have these percentages changed over time? By individual year? The following data highlight both measures – annual number of public and private grants and total numbers of grant dollars by race – for each year between 2012 to 2016.



Chart 3.1.2 - Number of Grants Received (by % of Total Grants by Year)

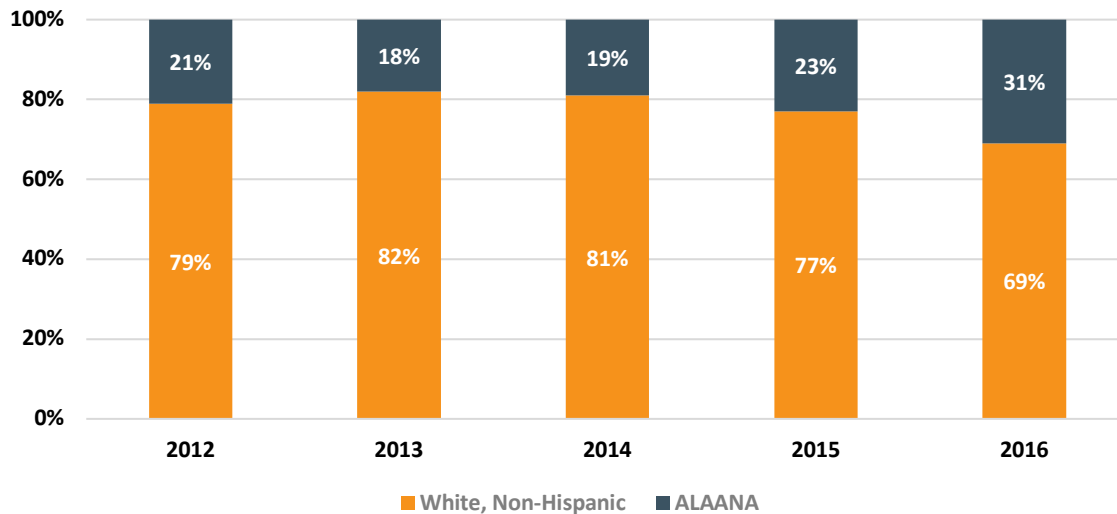
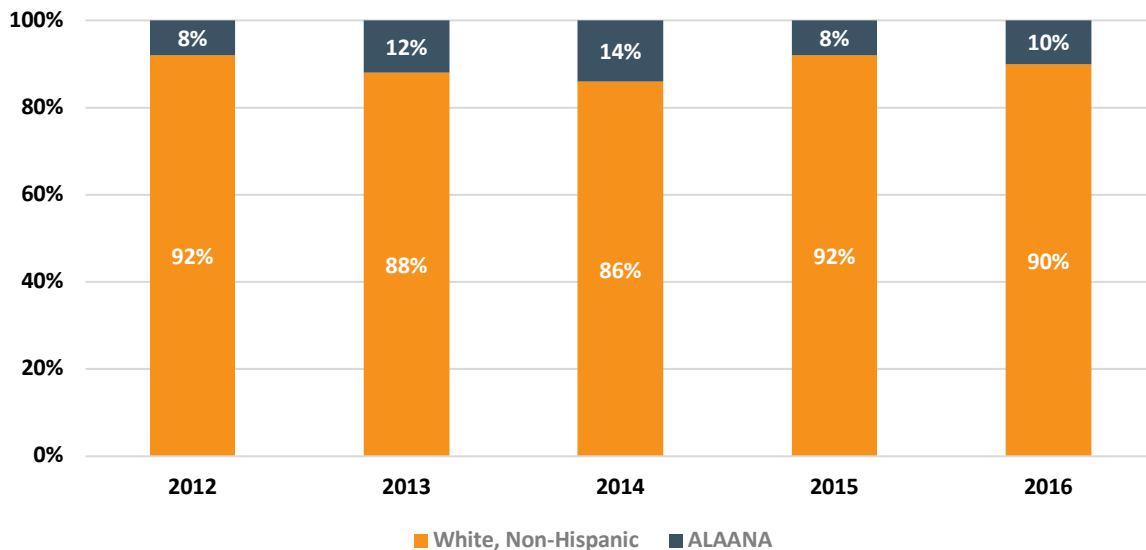


Chart 3.1.3 - Number of Grant Dollars Received (by % of Total Grants by Year)



Percentages of grants received by ALAANA organizations have indeed increased over time, whereas percentages of dollars received by race have not. These percentages vary by individual funder, which are detailed at length in the original report.

A 2017 report of the Helicon Collaborative—*Not Just Money: Equity Issues in Philanthropy*—confirms GPAC’s conclusion that the amount of funds distributed to Greater Pittsburgh arts organizations did not proportionately reflect the racial proportions in their arts communities. However, discrepancies are more dramatic in larger cities such as Los Angeles, San Francisco, New York City, and Washington, DC, places where large-budget institutions draw notably high amounts of foundation support.

Table 3.1.2 – Disparities between City Population Proportions and Foundations Funds Received (2017)

	ALAANA % of City Population	% of Foundation Funds Distributed to ALAANA Arts Organizations
Chicago	18%	14%
Detroit	19%	19%
Los Angeles	24%	13%
Minneapolis-St. Paul	17%	10%
New York City	22%	10%
Philadelphia	13%	8%
Pittsburgh	12%	9%
San Francisco	32%	12%
Washington, DC	31%	9%

Source: Helicon Collaborative

While not as problematic as in some areas, arts funders in the Greater Pittsburgh could benefit from new grant-making practices and policies. GPAC’s 2018 *Racial Equity & Arts Funding* report provided this baseline of grant-making practices and policies among private funders in Greater Pittsburgh:

- 33% of foundations support community development initiatives with arts components, and 33% also have special programs for ALAANA organizations.
- As for grant-making processes, 17% reach out to under-served communities to build awareness of grant opportunities.
- More than 50% of funders do not use independent review panels in helping to make arts funding decisions, while 17% seek advisory panels that reflect the area’s demographics, and 17% seek diverse panels that have a racial balance which reflects community demographics.

### 3.2 Indicator for Racial Equity in arts and culture organizations:

Metric: Representation by Race and Gender in the Staffs and Boards of Organizational Arts and Culture Grantees

Allegheny RAD requires grantees to gather these data as part of the application process. They also require applicants to not only adopt a diversity plan but to provide evidence that the plan is being implemented.

Key findings include:

- Overall, Black and African American percentages are higher in the “All Employees” category vs. among managerial staff or board members.
- There is some variation in percentages on an annual basis, notably in 2019. Still, there seem to be no major trend lines by race between 2017 and 2020.

Table 3.2.1 – Demographics: All Employees 2020 (N=4,762)

	Male	Female	Total
White/Non-Hispanic	35.9%	50.4%	86.3%
Black/African American	4.1%	4.9%	9.0%
Other	1.9%	2.9%	4.7%
<b>Total</b>	<b>47.6%</b>	<b>53.4%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.2 – Demographics: Managerial Staff 2020 (N=1,431)

	Male	Female	Total
White/Non-Hispanic	34.6%	53.2%	87.7%
Black/African American	2.8%	4.2%	7.0%
Other	1.7%	3.6%	5.3%
<b>Total</b>	<b>39.1%</b>	<b>60.9%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.3 – Demographics: Members of the Board of Directors 2020 (N=1,753)

	Male	Female	Total
White/Non-Hispanic	46.2%	39.7%	86.0%
Black/African American	4.6%	5.9%	10.5%
Other	1.9%	1.7%	3.6%
<b>Total</b>	<b>54.0%</b>	<b>46.0%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.4 – Demographics: All Employees 2019 (N=4,853)

	Male	Female	Total
White/Non-Hispanic	36.5%	48.4%	84.9%
Black/African American	4.6%	4.3%	8.9%
Other	1.8%	2.7%	4.5%
<b>Total</b>	<b>42.8%</b>	<b>57.2%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.5 – Demographics: Managerial Staff 2019 (N=3,743)

	Male	Female	Total
White/Non-Hispanic	52.8%	24.0%	76.8%
Black/African American	12.8%	8.3%	21.1%
Other	0.7%	1.3%	3.5%
<b>Total</b>	<b>66.4%</b>	<b>33.6%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.6 – Demographics: Members of the Board of Directors 2019 (N=1,828)

	Male	Female	Total
White/Non-Hispanic	47.3%	39.2%	86.5%
Black/African American	4.6%	5.5%	10.1%
Other	1.9%	1.6%	2.0%
<b>Total</b>	<b>53.6%</b>	<b>46.4%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.7 – Demographics: All Employees 2018 (N=4,637)

	Male	Female	Total
White/Non-Hispanic	38.6%	50.8%	89.4%
Black/African American	3.3%	3.4%	6.7%
Other	2.5%	1.5%	4.0%
<b>Total</b>	<b>44.4%</b>	<b>55.7%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.8 – Demographics: Managerial Staff 2018 (N=1,266)

	Male	Female	Total
White/Non-Hispanic	32.9%	54.7%	87.6%
Black/African American	2.8%	3.9%	6.7%
Other	1.7%	3.9%	5.6%
<b>Total</b>	<b>37.5%</b>	<b>62.5%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.9 – Demographics: Members of the Board of Directors 2018 (N=1,839)

	Male	Female	Total
White/Non-Hispanic	50.8%	37.8%	88.7%
Black/African American	3.9%	4.7%	8.6%
Other	1.6%	1.4%	2.9%
<b>Total</b>	<b>56.1%</b>	<b>43.9%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.10 – Demographics: All Employees 2017 (N=5,106)

	Male	Female	Total
White/Non-Hispanic	36.0%	47.9%	83.9%
Black/African American	5.7%	6.0%	11.7%
Other	1.9%	2.5%	4.4%
<b>Total</b>	<b>43.6%</b>	<b>56.4%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.11 – Demographics: Managerial Staff 2017 (N=1,280)

	Male	Female	Total
White/Non-Hispanic	30.6%	60.0%	90.6%
Black/African American	3.4%	5.5%	8.9%
Other	0.2%	0.3%	0.5%
<b>Total</b>	<b>34.2%</b>	<b>65.8%</b>	<b>100.0%</b>

Percentages were rounded to the first decimal place in original report.

Table 3.2.12 – Demographics: Members of the Boards of Directors 2017 (N=1,845)

	Male	Female	Total
White/Non-Hispanic	50.9%	37.8%	88.7%
Black/African American	4.2%	4.7%	8.9%
Other	1.2%	1.2%	2.4%
<b>Total</b>	<b>56.3%</b>	<b>43.7%</b>	<b>100.0%</b>

*Percentages were rounded to the first decimal place in original report.*

### **3.3 Indicators (for Accessibility in arts and culture organizations):**

According to GPAC's 2018 report *Having Our Say*, 61.5% of arts and culture organizations have created a written policy or taken other steps to advance accessibility to their programs and activities, an uptick from 2016.

Further, GPAC has worked to increase the capacities of organizations to serve and engage individuals with disabilities. Below are the numbers for GPAC's access initiative work from Jan. 2011 to Jan. 2019:

- 55 workshops, trainings, meetings
- More than 100 organizations participating
- 1,635 attendees
- More than 170 Arts and Accessibility Peers, an affinity network of arts administrators working on accessibility issues and hosted by GPAC
- 37 presenters with disabilities
- More than 100 access peers went to the Kennedy Center's Leadership Exchange in Arts and Disability (LEAD) through GPAC scholarships

Of future interest are data on recent increases, if any, in:

- funder support for artists with disabilities.
- individuals with disabilities on boards and among staff members, and
- implementation of equitable hiring practices.

A challenge with board, staff, and hiring practices is that you cannot compel people to disclose disabilities to their employers, or organizations on whose boards they serve or if they volunteer. If people do disclose or have obvious disabilities, organizations are reluctant to share that information. As for funder support for artists with disabilities, on a national basis, the Ford Foundation is working hard to create an infrastructure to support artists with disabilities.

## **MEASURE #4: The provision of quality K-12 arts education in the school districts of Greater Pittsburgh.**

### **4.1 Indicator: Public Opinions of Arts Education**

Overall, ratings of the importance of arts education to K-12 schooling are even higher in Greater Pittsburgh than nationally—96% to 91%. (Data is available on the next page.)

Opinions of the importance of arts education in Allegheny County schools:

- There is only a slight difference between males and females.
- All ages say arts education is important, but younger cohorts seem to particularly believe so.
- Arts education is valued more among those with lower education levels and with lower incomes.

*SOURCES: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh Americans Speak Out the Arts, Americans for the Arts, 2018.*

## **MEASURE #5: The role of the arts and culture sector in the attraction of visitors and talent to the region.**

### **5.1 Indicator: Tourism**

In 2017, 20.4 million day-trip travelers to the Commonwealth visited the Pittsburgh region, second only to the Philadelphia region's 27.9 million visitors. In fact, the Pittsburgh area experienced a 1 million rise in day-trips in 2017 vs. 2016, the largest such rise in PA. Travelers to the Pittsburgh area visited from many states, the majority include: other areas in PA (27%), Ohio (14%), New York (9%), Maryland (6%), Virginia (5%), Florida (5%), West Virginia (4%), New Jersey (4%), and Michigan (3%).

Primary reasons for visiting the Pittsburgh area, by percentage of visits, are to visit Pittsburgh itself (41%), attend professional sports events (15%), or visit the Duquesne Incline (11%), Carnegie Museums (10%), Pittsburgh Cultural District (9%), Kennywood (8%), Andy Warhol Museum (7%), Pittsburgh Zoo & PPG Aquarium (7%), Fort Pitt Museum (6%), and the Children's Museum of Pittsburgh (5%).

Along with other factors, "lots of cultural experiences" is rated as very influential in the choice of the Pittsburgh area as a destination:

- Feeling safe at destination (73%)
- Affordable attractions (62%)
- Convenient access by car (58%)
- Lots of things for adults to see and do (56%)
- Family or friends in the region (53%)
- Fun city environment (52%)
- Unique food scene (51%)
- Lots of cultural things to experience (45%)
- Availability of mid-range accommodations (43%)
- Lots of historic things to experience (42%)

*SOURCE: Longwoods International, Pennsylvania Annual Travel Profile 2017 (provided by VisitPittsburgh).*

Table 4.1.1 – Public Opinions on Arts Education

	Category	Not Important	Somewhat Important	Very Important	Extremely Important
	Allegheny County	3.2%	22.7%	38.2%	26.0%
Race	White/Non-Hispanic	3.3%	23.4%	37.1%	36.2%
	Black/African American	2.5%	17.7%	42.6%	37.1%
Sex	Male	3.8%	23.8%	40.7%	31.6%
	Female	2.2%	21.6%	35.6%	40.7%
Age	18-29	2.9%	12.0%	39.1%	46.1%
	30-44	2.2%	15.6%	39.5%	42.8%
	45-64	3.0%	27.7%	36.5%	32.7%
	65+	4.3%	27.3%	40.0%	28.3%
Education	High School or less	2.9%	12.0%	39.1%	46.1%
	Some College	2.2%	15.6%	39.5%	42.8%
	Bachelors	3.0%	27.7%	36.5%	32.7%
	Masters or higher	4.3%	27.3%	40.0%	28.3%
Income	Under \$25,000	4.3%	18.1%	35.9%	41.8%
	\$25,000-\$49,000	3.1%	21.7%	35.8%	39.5%
	\$50,000-\$74,999	4.0%	27.5%	41.6%	26.9%
	\$75,000-\$99,999	5.1%	15.7%	42.1%	37.1%
	\$100,000+	1.5%	23.9%	38.8%	35.8%

Source: Pittsburgh Regional Quality of Life Survey, 2018. Center for Social & Urban Research, University of Pittsburgh

## 5.2 Indicator: Talent

### Metric: Artist satisfaction with work lives.

Majorities of artists are not satisfied with their work/life balance; among White/Non-Hispanic artists, 38.6% are somewhat dissatisfied, while 42.86% of Black/African American artists are somewhat dissatisfied. Worse still, 21.43% of Black/African American artists and 20.17% of White/Non-Hispanic artists are very dissatisfied.

71.43% of Black and African American artists are either somewhat or very dissatisfied with their current financial situations, while 41.43% of White or Non-Hispanic artists say the same.

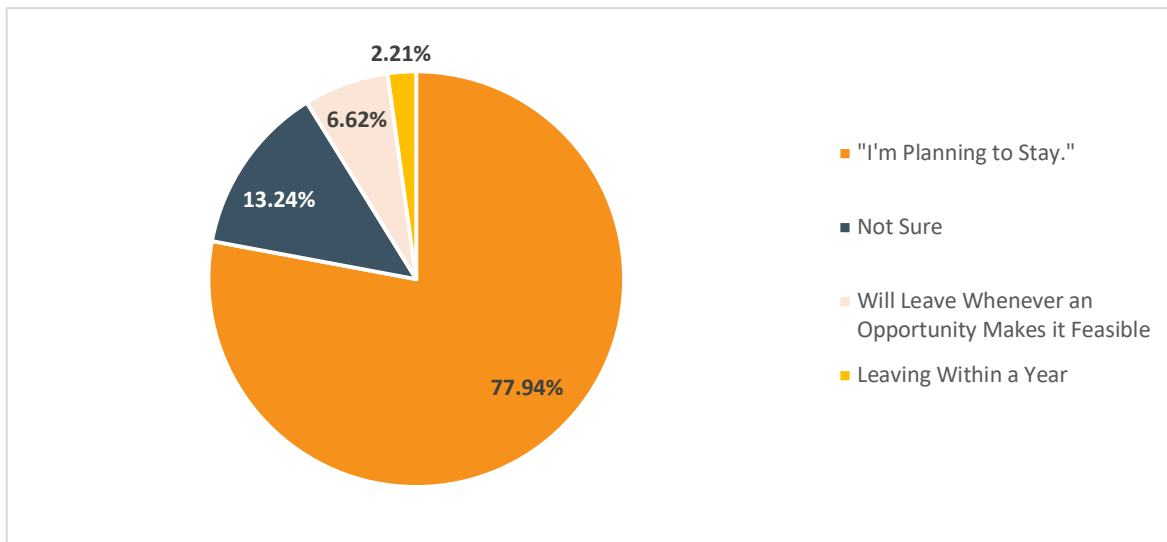
### Metric: Artist choices to stay, live, and work in Greater Pittsburgh.

The average rating of Greater Pittsburgh as a place to work was of 6.10 (out of 10.0). Black/African American artists rating of the area as a place to "live" was lower than White/Non-Hispanic artists' average rating of 7.75. White/Non-Hispanic artists' rating of Greater Pittsburgh (7.08%) as a place to "play" is slightly higher than the rating of Black and African American artists (6.40).

77.78% of all artists see Greater Pittsburgh as a great arts region; only 50% of Black/African American artists feel the same.

In some contrast to some other findings, 70% of Black/African American artists expressed optimism about their futures as artists in Greater Pittsburgh. This figure was only slightly lower than the 76.84% of White/Non-Hispanic artists who expressed similar optimism.

Chart 5.2.1 – Artist responses to "Are you planning to stay here or leave?"



SOURCE: *Having Our Say*, GPAC, 2019.



### 5.3 Indicator: The Arts, Culture, and Attraction of Creative Workers to Greater Pittsburgh

In 2017, 8.4% of Pittsburgh jobs were in the following industries: 1) Arts, Entertainment, Recreation and 2) Accommodations and Food Service. Between 2011 and 2017, that percentage declined -1.5%.

Table 5.3.1 – Changes in Jobs and Industries Observed in Benchmark Locales between 2011 and 2017

	Change in Total Jobs	Change in Industries*
<b>Baltimore</b>	6.8%	-1.5%
<b>Cleveland</b>	4.8%	12.4%
<b>Columbus</b>	17.3%	4.8%
<b>Philadelphia</b>	7.4%	20.0%
<b>Pittsburgh</b>	4.3%	8.8%
<b>Washington D.C.</b>	12.0%	23.2%
<b>U.S. Overall</b>	10.4%	14.0%

Industries of interest were 1) Arts, Entertainment and Recreation and 2) Accommodations and Food Service. Changes were aggregated.

Why are the growth rates in Greater Pittsburgh lower when compared with benchmark areas? Why do individuals in the creative industries either leave Greater Pittsburgh or not move here in the first place, despite our region’s many assets and advantages? Hypotheses are:

- Fewer opportunities for younger, educated, and skilled individuals in these industries.
- Relative lack of freedom and resources for new entrepreneurs.
- Unattractive tax conditions or incentives.

**SOURCE:** Anna Kolesnikova, *Socio-Economic Comparisons of the Pittsburgh Metropolitan Statistical Area and Other Regions re: Outmigration: A report to the Allegheny Conference on Community Development, June 30, 2019.*

## VI. Conclusions and Next Steps

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### Our region's arts and culture sector is healthy in these ways:

- Although the supply of arts and cultural organizations seems to have declined, Greater Pittsburgh's arts and culture sector is healthier overall than other benchmark locales. The region excels in generating earned income and receiving support from foundations and county government. The economic impact of the arts and culture sector is also higher in Pittsburgh than in most benchmark areas.
- Cultural organizations' financial conditions, on average, have improved in recent years, as have their attendance rates and achievement of attendance projections. Pittsburgh's cultural sector generates higher attendance and revenues than its professional sports teams.
- Among Pittsburgh-area citizens overall, cultural participation ratings are high. Similarly, tourists to Pittsburgh rate "cultural experiences" high in influencing their choice to visit the Pittsburgh area.
- Over time, percentages of grants received by ALAANA organizations have increased, and discrepancies by race are more dramatic in larger cities than Pittsburgh. Some funders in Greater Pittsburgh are national innovators in advancing ALAANA arts and in collecting demographic data on grantees.
- Arts education is widely viewed as important to the quality of K-12 schooling in our area.

### However, the area's arts and culture sector also faces challenges:

- Participation rates in and ratings of the sector are lower among Black and African American populations.
- The distributions of arts funds received by ALAANA groups are not proportionately represented within the area's population demographics.
- Over time, percentages of grants received by race have improved, but dollar figures have not.
- The majority of artists are not satisfied with their work/life balance.
- Individual giving in Greater Pittsburgh is less than that found in benchmark areas.
- A majority of Black and African American artists here feel that access to funding remains inequitable.
- The average salaries of Artistic Directors in the region are less than those of others in senior management.
- Greater Pittsburgh trails benchmark locales in talent attraction to the creative industries.

**Moving forward, stakeholders in Greater Pittsburgh can take the following steps to safeguard the health and vibrancy of the arts and culture sector:**

- The diversity of our region’s arts and culture organizations should better reflect population demographics.
- Our sector must continue to innovate in support systems and data collection to **advance racial equity in arts funding.**
- The arts and culture sector must make concerted efforts to **increase participation rates and ratings among Black and African American citizens.**
- Overall, arts and culture funders could benefit from **new grant-making practices and policies.**
- Residents of Greater Pittsburgh must **increase individual giving** to the arts.
- **Commitments to K-12 arts education** should match the importance given to it by area citizens.
- Tourism advocates should continue to **position arts and culture as a significant draw for tourism** to the area.
- Accelerate the identification of effective efforts **to improve the work/life balance of individual artists.**

## VII. Appendices

### B. By Locale:

Table B.I: Number of Arts and Culture Organizations by Locale – Available Admissions and Attendance Data

City	# of Orgs Reporting Attendance - TOTAL	# of Orgs Reporting Free Attendance	# of Orgs Reporting Paid Attendance
Philadelphia	242	225	198
San Diego	128	121	115
Washington, DC	127	119	107
Cleveland	126	121	104
Pittsburgh	118	111	112
Minneapolis	99	93	84
Boston	90	83	82
Dallas-Ft. Worth	78	75	73
Baltimore	66	62	56
Columbus	65	60	59
<b>Total</b>	<b>1,021</b>	<b>959</b>	<b>878</b>

Table B.II: Number of Arts and Culture Organizations by Locale – Available Employment Data

City	Independent Contractors	Permanent, Full-Time Employees	Permanent, Part-Time Employees
Baltimore	106	106	100
Boston	136	146	126
Cleveland	179	176	149
Columbus	110	100	89
Dallas-Ft. Worth	91	85	74
Minneapolis	156	153	138
Philadelphia	374	350	310
Pittsburgh	210	204	185
San Diego	188	174	151
Washington, DC	277	261	229
<b>Total</b>	<b>1,617</b>	<b>1,551</b>	<b>1,366</b>

Table B.III: Number of Arts and Culture Organizations by Locale – Available Expenses Data:

City	Number of Organizations Reporting Categorized Expense Data
Baltimore	119
Boston	154
Cleveland	192
Columbus	122
Dallas-Ft. Worth	105
Minneapolis	164
Philadelphia	405
Pittsburgh	216
San Diego	208
Washington, DC	287
<b>Total</b>	<b>2,233</b>

Table B.IV: Number of Arts and Culture Organizations by Locale – Available Contributed v. Earned Revenue Data:

City	Number of Organizations Reporting
Baltimore	300
Boston	538
Cleveland	560
Columbus	399
Dallas-Ft. Worth	599
Minneapolis	563
Philadelphia	744
Pittsburgh	767
San Diego	915
Washington, DC	930
<b>Total</b>	<b>6,761</b>

Table B.V: Number of Arts and Culture Organizations by Locale – Available Contributed Revenue Source  
Data:

	Individual Support	Corporate Support	Board Support	Foundation Support	City Government	County Government	State Government	Federal Government	Tribal Organization	TOTAL
<b>Baltimore</b>	115	89	98	104	75	59	90	49	28	<b>119</b>
<b>Boston</b>	150	121	132	129	105	48	134	83	46	<b>151</b>
<b>Cleveland</b>	177	149	156	174	83	150	124	72	52	<b>192</b>
<b>Columbus</b>	110	89	90	99	96	44	82	47	38	<b>121</b>
<b>Dallas-Ft. Worth</b>	102	86	85	94	89	41	63	44	35	<b>104</b>
<b>Minneapolis</b>	160	138	138	152	108	89	138	98	77	<b>164</b>
<b>Philadelphia</b>	367	294	329	350	314	126	276	182	123	<b>402</b>
<b>Pittsburgh</b>	190	157	156	186	102	147	142	100	72	<b>216</b>
<b>San Diego</b>	183	154	159	158	175	152	120	86	62	<b>206</b>
<b>Washington, DC</b>	266	208	234	233	224	102	113	151	89	<b>286</b>

# VIII. Contributors and Acknowledgements

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## Contributors from the Greater Pittsburgh Arts Council:

- Mitch Swain, CEO
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