



GREATER PITTSBURGH
ARTS COUNCIL
Arts loud and clear



2020 Greater Pittsburgh

CULTURE COUNTS

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





● **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, and 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. This 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.

This 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.

● **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 600 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.

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INTRODUCTION

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, and identifies 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. If you're interested in viewing a more detailed version of this report, a **Culture Counts Technical Report** is available for detailed data on our findings on our website at PittsburghArtsCouncil.org/programs/research.

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



Culture Counts 2020 examines the health of the arts sector using sets of comparisons and indicators. Using 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 nine counties within Southwestern Pennsylvania and among nine benchmark cities nationally, as well as cross-sector comparisons.

This report's comparative information includes data reported by 5,548 cultural organizations in benchmark 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. The report also examines indicators of success in how our arts and culture sector impacts the area's citizens and the economy.

In addition to comparative data, 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 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 nine benchmark locations, in addition to data from Southwestern Pennsylvania.

Cities nationwide:

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

Counties in Southwestern PA:

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

Data Sources

Primary

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

Secondary

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.



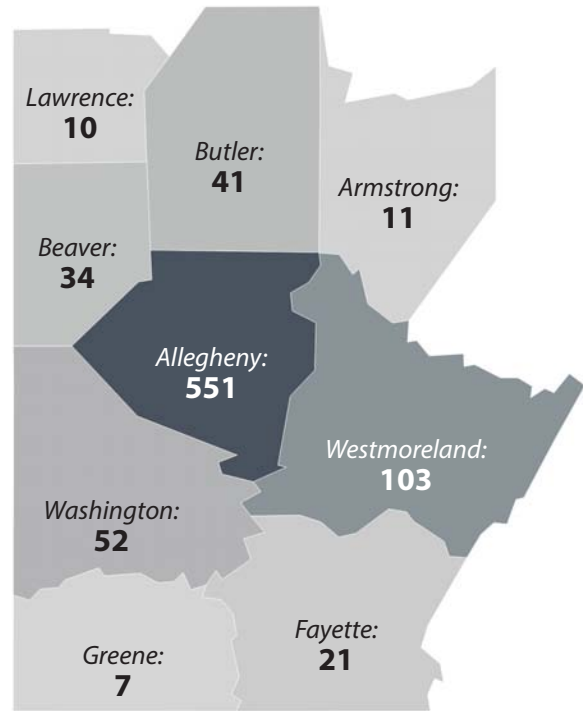
COMPARISONS



1 Comparisons Over Time

ORGANIZATIONS BY COUNTY

Southwestern Pennsylvania seems to be home to fewer arts and culture organizations in 2020 (830) than in 2015 (1,054). This may be due to the fact that some organizations closed or merged over the past five years. However, the changes are much more a result of shifting sample sizes from organizations included in 2015 data. Booster organizations, garden clubs, non-arts schools, etc. were not included in the 2020 sample, in order to facilitate comparisons with benchmark area samples.

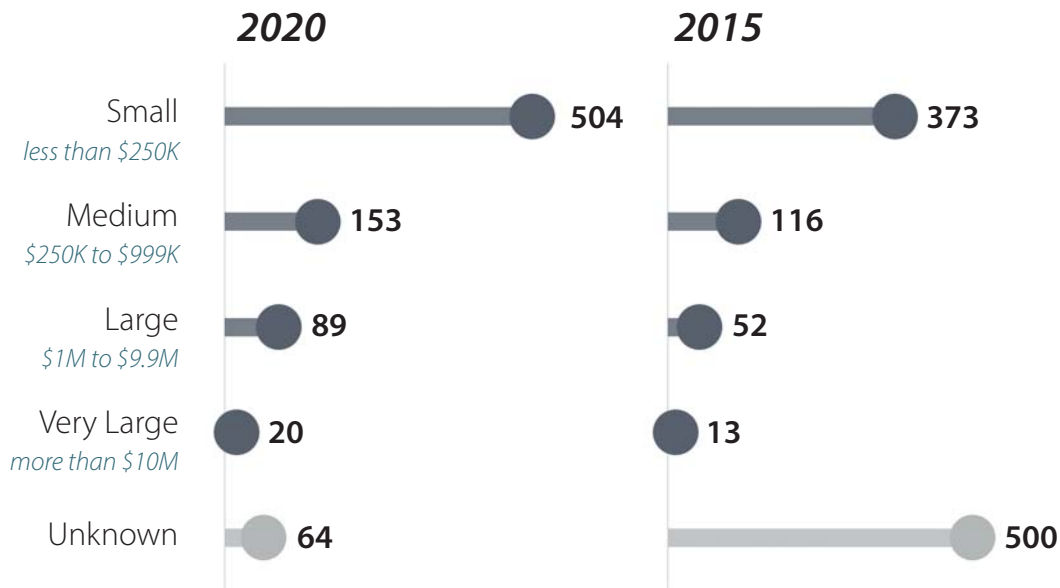


County	2020	2015	% Change
Allegheny	551	668	▼ -18%
Westmoreland	103	125	▼ -18%
Washington	52	70	▼ -26%
Butler	41	55	▼ -25%
Beaver	34	58	▼ -41%
Fayette	21	37	▼ -43%
Armstrong	11	19	▼ -42%
Lawrence	10	20	▼ -50%
Greene	7	2	▲ 250%

SOURCES: SMU DataArts; Greater Pittsburgh Arts Council.

ORGANIZATIONS BY BUDGET SIZE

There were higher numbers and rates of organizations with less than a \$250K budget in the sector today versus 2015 — 504 (61%) vs. 373 (36%) of totals. There were also some increases in numbers and rates in other budget size categories, reflecting, in part, a more thorough capture of budget size data in 2020 than in 2015.



SOURCES: SMU DataArts; Greater Pittsburgh Arts Council.

JOB CREATION

When compared to 2012 data, the impacts of spending by arts and culture organizations and their audiences have increased in recent years.

as of 2017:

32,211 full-time equivalent jobs

+ 57% since 2012

\$641 million in resident household income

+ 56% since 2012

\$115 million in total tax revenues

\$67.4M in local tax revenues

\$47.7M in state tax revenues

+ 57% since 2012

SOURCES: GPAC's Economic Impact reports (2017 & 2012); Americans for the Arts.

ARTS & CULTURE ATTENDANCE

Despite some changes in the supply of arts and culture organizations, arts and culture attendance in Allegheny County **increased** from 5 million in 2015 to 6.8 million in 2020.

2015 Total	5,025,240
2020 Total	6,875,300
Free:	2,234,724
Paid:	4,640,576

This attendance increase occurred despite a lower number of organizations counted in 2020, in part because those not counted generated minimal attendance figures.

By 2020, arts & culture attendance had increased by **37%**, while **two-thirds** of attendees paid for events.

ARTS, CULTURE, & PARKS ATTENDANCE

When including data from parks attendance, numbers for arts and cultural events in the nine Southwestern Pennsylvania counties hit 25.5 million in the last Fiscal Year, compared to 24.8 million.

Free	
2015-16:	18,515,344
2019-20:	20,591,084
Paid	
2015-16:	6,259,172
2019-20:	4,938,088

SOURCES: SMU DataArts; Greater Pittsburgh Arts Council.

2 Comparisons By Sector

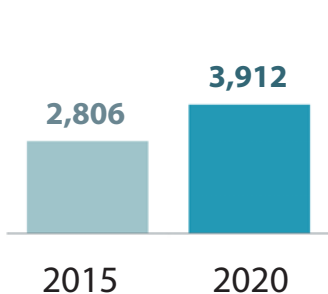
ARTS & CULTURE EMPLOYEES

The arts and culture sector is a very strong economic force for Southwestern Pennsylvania, 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. Employment in the sector has increased in recent years, even though the total count of organizations has decreased. This may be due to the fact that some organizations were not counted in 2020 — many being volunteer-led — while total employment increased among organizations counted in both years.

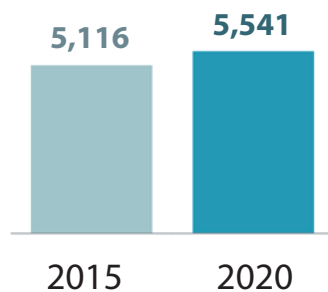
SOURCE: SMU DataArts.



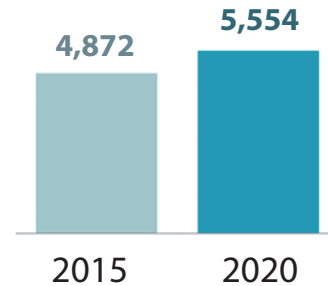
Full-time
permanent & seasonal



Part-time
permanent & seasonal



Contractors



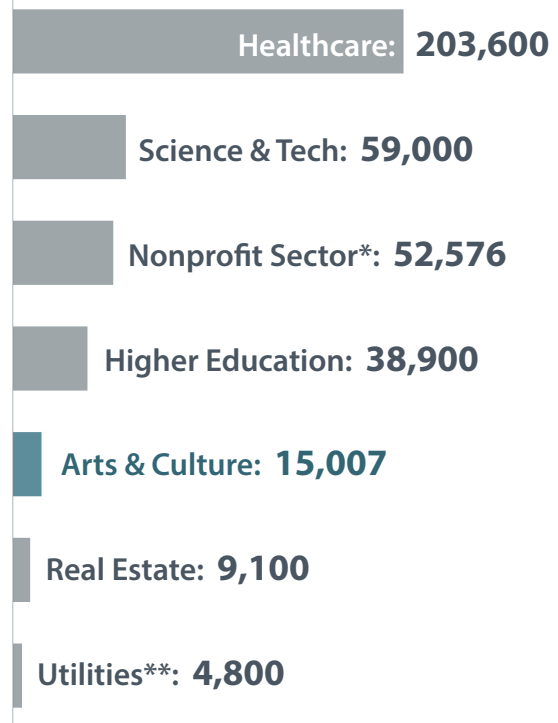
ALLEGHENY NONPROFIT ORGANIZATIONS

The arts and culture sector is a significant regional employer, both within the nonprofit sector and among employment sectors more broadly. These figures represent the **2015 percentages** of organizations in nonprofit sub-sectors in Allegheny County.

Human Services:	34%
Education:	16%
Health:	15%
Community Benefit:	15%
Arts & Culture:	10%
Other:	7%
Animals & Environment:	3%

ALLEGHENY FULL-TIME EQUIVALENT EMPLOYEES

Not surprisingly, the arts and culture sector trails behind healthcare, the overall nonprofit sector, and higher education in full-time equivalent (FTE) employment. At the same time, arts and culture employs more Allegheny County residents than does sectors such as real estate and utilities. These figures represent **2015 counts** of FTE employees in Allegheny County.



SOURCES: Greater Pittsburgh Nonprofit Partnership; Pittsburgh Regional Alliance; Data USA: Allegheny County (2018).

* Excludes Arts & Culture nonprofit jobs
 ** Refers to companies that provide basic amenities, such as water, sewage services, electricity, dams, and natural gas.

ARTS & CULTURE vs. PITTSBURGH SPORTS

Attendance

The arts and culture sector generates higher attendance and revenues than professional sports.

Arts & Culture

2015-2016:	5,025,240
2019-2020:	6,875,300

Total Sports

2015-2016:	3,524,108
2019-2020:	2,877,563

Since 2015-2016, arts & culture attendance is **up by 37%**, while sports attendance is **down by 18%**.

Admission Revenue

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). However, admission revenues for the arts and culture sector are higher than any one of the three local professional sports teams.

Arts & Culture: **\$151 million**

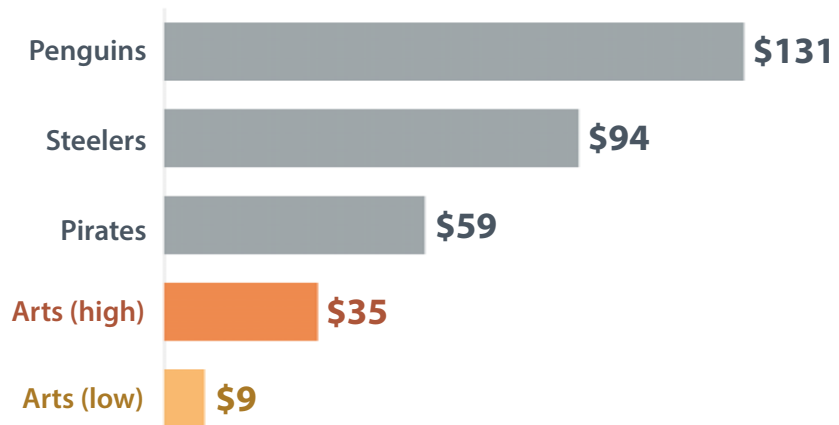
Penguins: **\$100 million**

Pirates: **\$88 million**

Steelers: **\$58 million**

Average Ticket Prices

The average cost of attending arts events in Greater Pittsburgh is a relative bargain compared to sports admissions.



SOURCES: ESPN; SMU DataArts.

3 Comparisons By Locale

Thanks to data from SMU DataArts, we were able to compare data from 5,548 cultural organizations in nine cities.

When compared to some of the largest cities by population among our benchmark locales, Pittsburgh offers comparable access to arts and cultural organizations, if not more, with 551 total organizations. In particular, Pittsburgh ranks high in the number of performing arts organizations with 160 total, as well as attendance figures. In comparison, we rank lower in education and media arts organizations.

Larger metro areas like Washington, DC and San Diego led the way in regards to budget sizes for these organizations, while Pittsburgh ranked in the middle.

Economic impacts of the arts and culture on job creation, household income, and tax revenues is higher in Pittsburgh than in most benchmark areas.

While Pittsburgh ranks 7th in raw number of organizations, it **punches above its weight**, ranking 3rd in number of arts & culture organizations per 100,000 residents.

Arts & Culture Organizations

City	# Orgs
1. Washington, DC	930
2. San Diego, CA	915
3. Philadelphia, PA	744
4. Dallas-Ft. Worth, TX	599
5. Minneapolis, MN	563
6. Cleveland, OH	560
7. Pittsburgh, PA	551
8. Boston, MA	538
9. Columbus, OH	399
10. Baltimore, MD	300

Arts & Culture Organizations per 100K Residents

City	# Orgs
1. San Diego, CA	27.4
2. Cleveland, OH	27.2
3. Pittsburgh, PA	23.7
4. Columbus, OH	18.9
5. Minneapolis, MN	15.5
6. Washington, DC	14.9
7. Philadelphia, PA	12.2
8. Boston, MA	11.0
9. Baltimore, MD	10.7
10. Dallas-Ft. Worth, TX	7.9

SOURCES: SMU DataArts; US Census Bureau (2018).

Analysis by Category

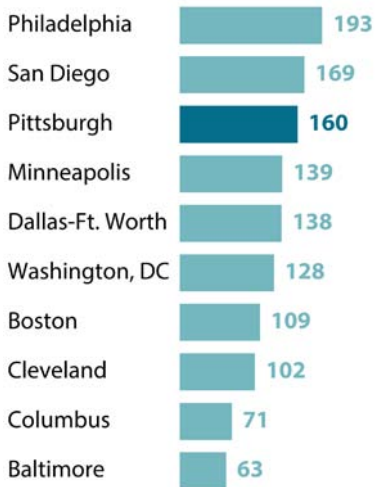
Categories sorted by total number of organizations, in descending order.

SOURCE: SMU DataArts.

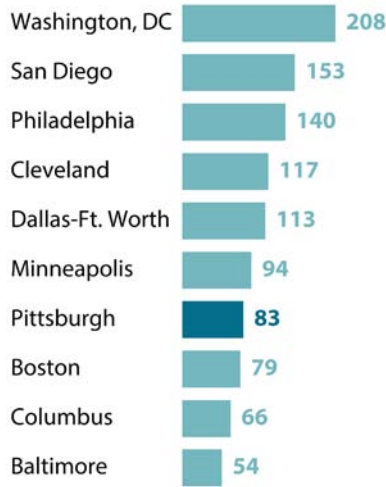
Education



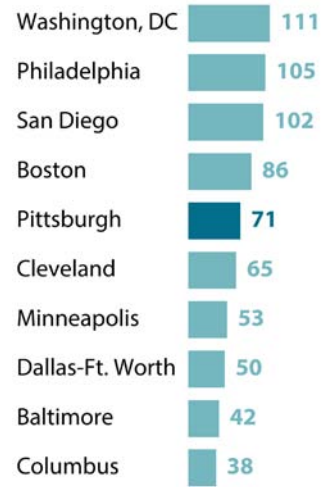
Performing Arts



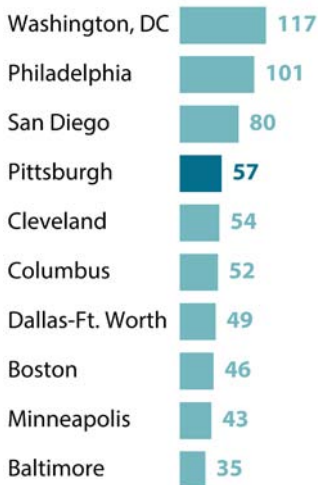
Community Arts



Museums



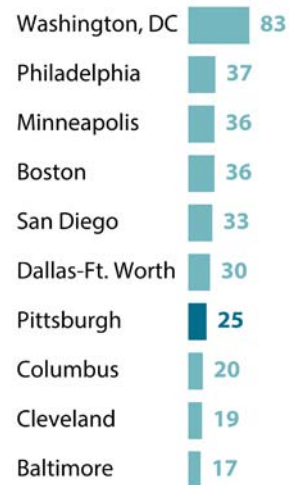
Support & Advocacy



Libraries, Parks, Recreation



Media Arts

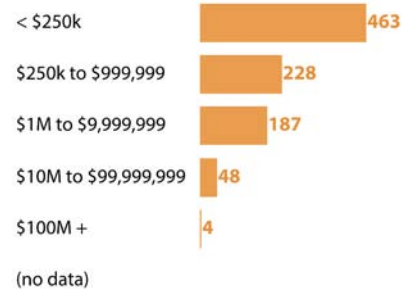


Organizations by Budget Size

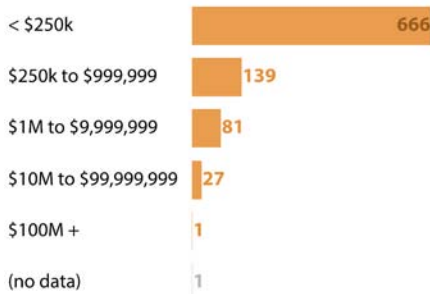
Cities sorted by total number of organizations, in descending order.

SOURCE: SMU DataArts

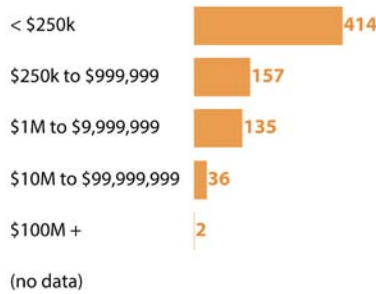
Washington, DC



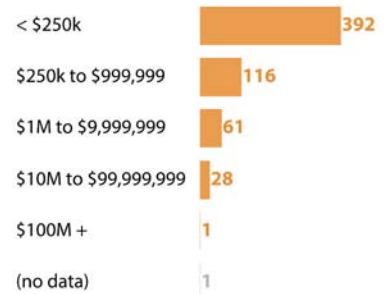
San Diego



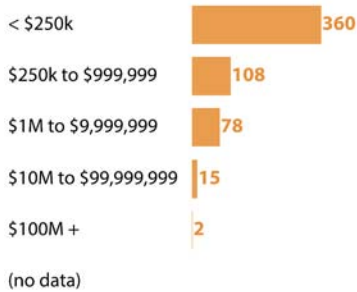
Philadelphia



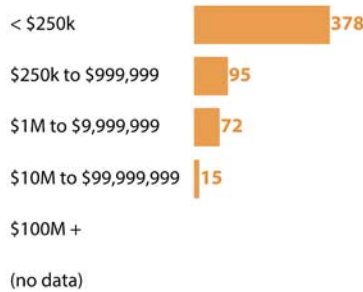
Dallas-Ft. Worth



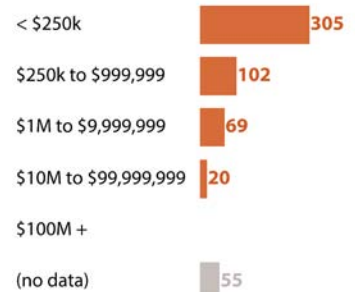
Minneapolis



Cleveland



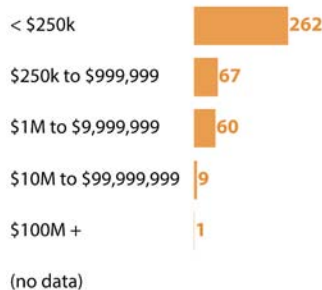
Pittsburgh



Boston



Columbus



Baltimore



ARTS & CULTURE ATTENDANCE BY CITY

Cities have been sorted by the number of free, paid, and total attendees to arts and culture events, in descending order.

	<i>Free</i>	<i>Paid</i>	<i>Total</i>
1. Washington, DC	5,667,696	1. Philadelphia 6,782,578	1. Philadelphia 12,300,902
2. Philadelphia	5,518,324	2. Boston 6,404,883	2. Boston 9,068,093
3. Boston	2,663,210	3. Pittsburgh 4,640,576	3. Washington 8,589,209
4. Pittsburgh 2,234,724		4. San Diego 3,271,552	4. Pittsburgh 6,875,300
5. San Diego 2,048,868		5. Cleveland 3,019,819	5. San Diego 5,320,420
6. Cleveland 1,823,020		6. Washington, DC 2,921,513	6. Cleveland 4,842,839
7. Minneapolis 1,624,696		7. Columbus 2,427,414	7. Minneapolis 3,699,461
8. Baltimore 1,593,386		8. Minneapolis 2,074,765	8. Dallas-Ft. Worth 3,517,330
9. Dallas-Ft. Worth 1,445,280		9. Dallas-Ft. Worth 2,072,050	9. Columbus 3,142,552
10. Columbus 715,138		10. Baltimore 953,923	10. Baltimore 2,547,309

EARNED vs. CONTRIBUTED REVENUE

This is a breakdown of medians for earned revenue, contributed revenue, and total revenue within each city. Cities have been sorted by their median total revenues, in descending order. Each organization's percent value was individually calculated *before* taking the average, and therefore, values may not sum to 100%.

	<i>Median Earned Revenue</i>	<i>E.R. as % of Total Revenue</i>	<i>Median Contributed Revenue</i>	<i>C.R. as % of Total Revenue</i>	<i>Median Total Revenue</i>
1. Washington, DC	\$27,221	16%	\$135,759	79%	\$272,959
2. Boston	\$42,920	33%	\$81,786	57%	\$195,081
3. Baltimore	\$54,818	33%	\$67,850	58%	\$181,669
4. Philadelphia	\$39,514	33%	\$70,622	61%	\$175,640
5. Pittsburgh	\$35,013	35%	\$54,693	59%	\$140,841
6. Minneapolis	\$45,125	42%	\$54,455	53%	\$137,678
7. Dallas-Ft. Worth	\$38,494	42%	\$48,078	48%	\$131,713
8. Columbus	\$33,403	50%	\$42,553	68%	\$117,405
9. Cleveland	\$32,427	34%	\$43,416	59%	\$112,803
10. San Diego	\$30,650	43%	\$36,579	52%	\$91,409

SOURCE: SMU DataArts.



INDICATORS

What do we mean by indicators?

The introduction of “indicators” is new to this current installment of GPAC’s *Culture Counts* reports. The previous section focused on comparisons over time, by geography and by sector. In this section, we wanted to further gauge how the region’s arts and culture sector is meeting its aspirations to effectively serve our communities.



1 Value of Arts Sector to Greater Pittsburgh Citizens

Despite high participation and ratings overall, the region's arts and culture sector ranks lower among Black populations on several measures.

PARTICIPATION

All groups attend arts events, but rates are somewhat lower among Black and African American populations versus White or non-Hispanic populations.

Survey respondents reported the following annual attendance rates:

Black/African American

None:	12.8%
1-2 times per year:	21.0%
3-5 times per year:	28.3%
6-10 times per year:	10.4%
11-20 times:	6.2%
More than 20:	5.8%

White/Non-Hispanic

None:	14.1%
1-2 times per year:	37.3%
3-5 times per year:	26.1%
6-10 times per year:	19.7%
11-20 times:	10.8%
More than 20:	9.4%

QUALITY

Overall ratings of the quality of the region's arts and cultural opportunities are high, but lower among Black populations.

Black/African American

Excellent:	12.9%
Very Good:	34.4%
Good:	35.7%
Fair:	10.8%
Poor:	6.2%

White/Non-Hispanic

Excellent:	23.2%
Very Good:	46.7%
Good:	24.8%
Fair:	4.9%
Poor:	0.4%

OTHER KEY FINDINGS

Not surprisingly, arts attendance and donation rates increase with higher education levels and higher income levels.

More than one-third of Allegheny County residents reported they made a donation to an arts or cultural organization in the past year.

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

2 Cultural Vitality for Artists & Arts Organizations

Despite its vitality in many areas, the region's cultural sector also faces multiple challenges, including diversity, equity, accessibility, and inclusion. For example, diversity of arts and culture organizations by racial identity is essential to a region's cultural vitality.

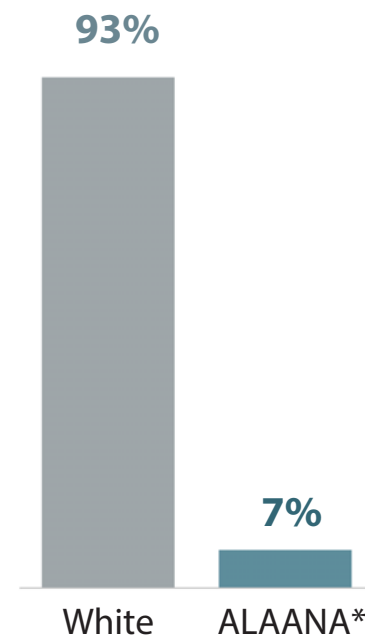
DIVERSITY

The diversity of our region's arts and culture organizations by race does not match our region's population demographics:

- **Leadership:** Only **7%** of Executive Directors/CEOs are ALAANA* vs. the **93%** who are White.
- **Outlook:** **80%** of White organizations see Greater Pittsburgh as a "great" arts region. In contrast, **50%** of Black organizations view it as "great," while only **25%** view it as "supportive" and "collaborative."
- **Time:** **29%** of Black artists said they don't have enough time to practice their art.
- **Funding:** **57%** of Black artists feel access to funding is inequitable in Pittsburgh.

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.

Race of Executive Directors & CEOs



* **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.

INSTITUTIONS

- **Improvements:** Cultural organizations' financial conditions, on average, have improved in recent years, as have their achievement of attendance projections.
- **Organizational Health:** 56.1% of cultural organizations broke even or had a budget surplus last year, and 51.2% met or exceeded audience projections.
- **Benefits:** 82% of organizations offer medical insurance to full-time employees; 32% do so for part-time employees.
- **Salaries:** Artistic Directors, on average, are paid 61% less than arts and culture Development Directors and 200% less than the sector's CEOs.

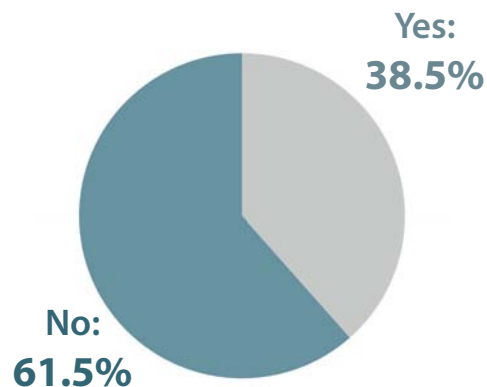
More than half of arts & culture organizations broke even or had a surplus last year, and **more than half** had larger audiences than expected.

INDIVIDUAL ARTISTS

Artists are essential to the region's cultural vitality. Greater Pittsburgh artists support themselves as teaching artists, entrepreneurs, and arts administrators, and fund their projects in many ways.

- **Balance:** However, 61.5% of artists are not satisfied with their work/life balance.
- **Other:** Additional challenges artists face include marketing their art, managing expenses, securing grants and fellowships, and obtaining affordable studio, work, or rehearsal space.

Artists Satisfied with Work/Life Balance



3 Equity & Inclusion

Support systems for equity and inclusion in the cultural sector are strong but need improvement.

FUNDING

Regarding the distribution of arts funds by race, ALAANA organizations are not proportionately represented in their distribution within the Greater Pittsburgh arts sector or demographic percentages of the Greater Pittsburgh population.

- **Disparities:** Allegheny County has an ALAANA population of **21.4%**, while only **18%** of total arts funding goes to ALAANA organizations.
- **Progress:** Over time, percentages of grants received by ALAANA organizations have increased from **21%** in 2012 to **31%** in 2016, whereas percentages of dollars received by race have not (**8%** in 2012 and **10%** in 2016).
- **Other Cities:** Discrepancies are more dramatic in larger cities, such as San Francisco and Washington, DC, than in Pittsburgh.

Grants to ALAANA organizations increased from **21% to 31%**, yet dollars received changed little, going from **8% to 10%**.

IMPROVEMENTS

- **Philanthropic Support:** Some foundations in Greater Pittsburgh are national innovators in advancing Black arts.
- **Documentation:** Allegheny Regional Asset District (RAD) has documented the race and gender of its applicants' staff and board members, which shows that Black percentages are higher for all employees (**9%**) vs. managerial staff (**7%**), while Black board member percentages in 2020 are **10.5%**.
- **Accessibility:** **61.5%** of arts and culture organizations report advancing accessibility in their programs.

SOURCES: Racial Equity & Arts Funding in Greater Pittsburgh (2018), Having Our Say (2018), Greater Pittsburgh Arts Council; Allegheny Regional Asset District.

4

Public Value of K-12 Arts Education

PUBLIC SUPPORT

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.

Further, **9 in 10** believe arts education — including dance, media arts, music, theater, and visual arts — are an important part of the curriculum in elementary school (**94%**), middle school (**94%**), and high school (**93%**). Finally, **89%** agree to the importance to students of out-of-school arts experiences throughout the community — e.g., those that occur in arts organizations, after-school programs, artist studios, and neighborhood venues.

Figures from Greater Pittsburgh polls are consistent with national polling on arts education. Indeed, ratings on the importance of arts education to K-12 schooling are even higher here than nationally — **96%** to **91%**. Further, the Greater Pittsburgh poll presents differences in opinions by race, gender, age, income, education, and income level.

DEMOGRAPHIC COMPARISONS

- **Race:** While ratings of importance are quite high overall, they are even higher among Black populations — **42.6%** considered it “extremely important” vs. **37.1%** among Whites.
- **Education Levels:** Arts education is also valued more among those with lower education levels — **46.1%** of those with a high school education or less rated it “extremely important” vs. **28.3%** of those with a Masters or higher.
- **Income:** Similarly, arts education is valued more among those with lower incomes — **41.8%** rated it “extremely important” among those earning \$25,000 or less vs. **35.8%** among those earning \$100,000 or more.

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*.

5 Sector's Attraction of Visitors & Talent

VISITORS

Arts and cultural activities and events draw visitors to Pittsburgh.

- **Day-Trips:** The Pittsburgh area experienced a **1 million** increase in day-trips in 2017 vs. 2016, the largest such rise in Pennsylvania.
- **Tourism:** Cultural experiences are rated as “very influential” (**45%**) in the choice of the Pittsburgh area as a destination.

45% of tourists said cultural experiences were “**very influential**” in their decision to visit Pittsburgh.

TALENT

The arts and culture sector and its related creative industries retain and attract talent.

- **Attracting Residents:** **78%** of creative artists, despite some reservations, are planning to stay here for the foreseeable future.
- **Creating Jobs:** In 2017, **8%** of Pittsburgh MSA jobs were in Arts, Entertainment, Recreation, Accommodations, and Food Service.

Talent attraction in these industries, according to the Allegheny Conference, would be higher with:

- More opportunities for younger, educated, and skilled individuals in these industries
- Increased resources for new entrepreneurs
- Attractive tax conditions and investment incentives

SOURCES: Pennsylvania Annual Travel Profile (2017), VisitPittsburgh & Longwoods International; Having Our Say (2018), Greater Pittsburgh Arts Council; Outmigration (2019), Allegheny Conference on Community Development.



CASE STUDIES

How did we choose these case studies?

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 created connections with 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 received full benefits.

No longer small but mighty, Attack Theatre is now just “mighty,” says Executive Director Rebecca Humberger.

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 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

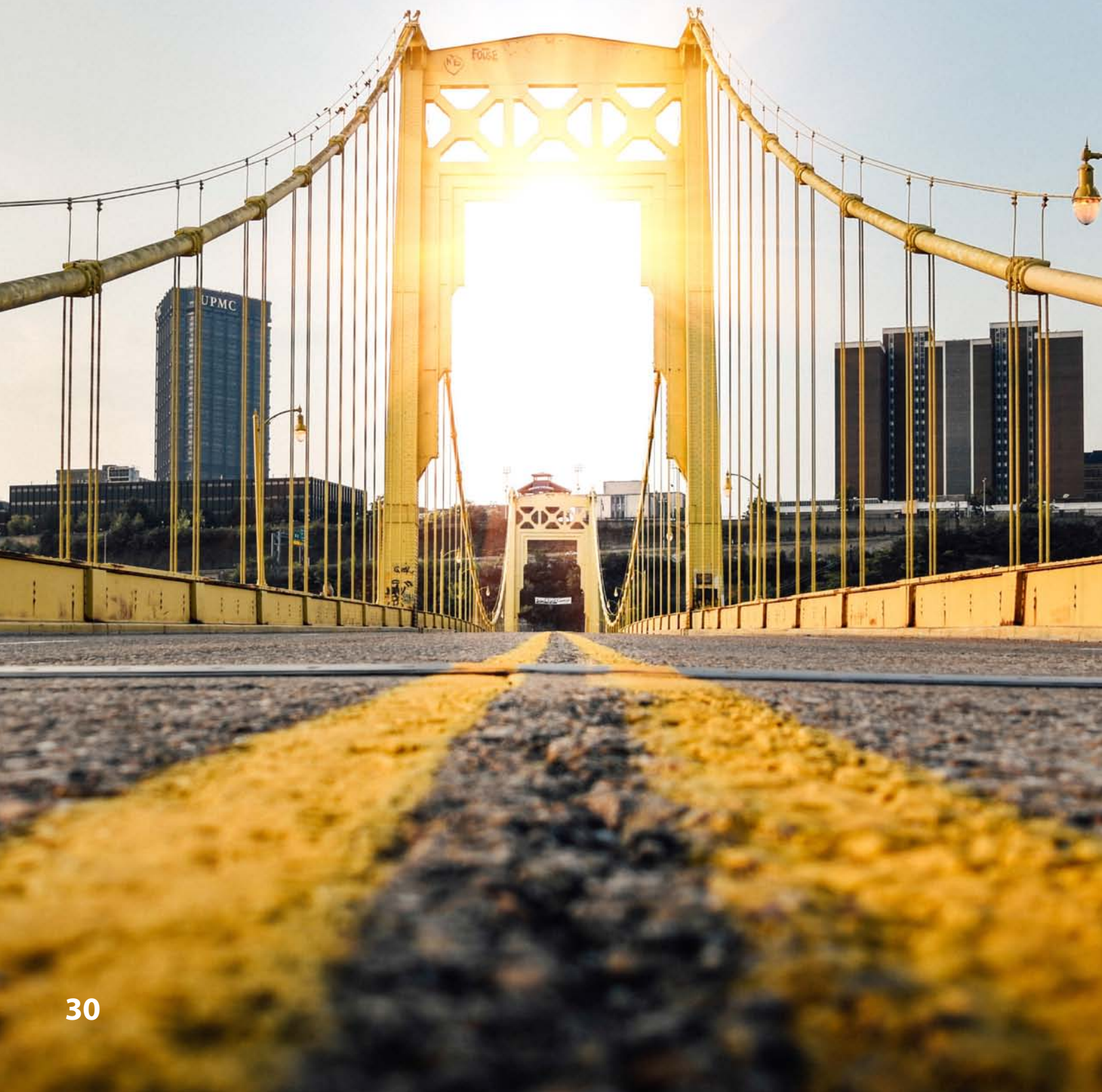
Since 1969, Pittsburgh Ballet Theatre (PBT) has connected its audiences to ballet through mainstage productions, touring performances, community events, and in classrooms around the region. Celebrating its 50th Anniversary Season in 2019-2020, PBT looks toward its future while celebrating its rich artistic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



CONCLUSION



STRENGTHS

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

1. Although the supply of arts and cultural organizations seems to have declined, Pittsburgh's arts and culture sector is overall healthier than other benchmark cities. The region excels in earned income and support from foundations and the public. Economic impacts of the arts and culture sector are also higher in Pittsburgh than in most benchmark areas.
2. Cultural organizations' financial conditions, on average, have improved in recent years, as have their achievement of attendance projections. Pittsburgh's cultural sector generates higher attendance and revenues than its professional sports teams.
3. 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.
4. 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.
5. Arts education is widely viewed as important to the quality of K-12 schooling in our area.

CHALLENGES

However, challenges include:

- Participation rates and ratings of the arts and culture sector are lower among Black and African Americans.
- The distribution of arts funds by race are not proportionately represented within the area's population demographics.
- Over time, percentages of grants received among ALAANA groups have improved, but dollar figures have not.
- The majority of artists are not satisfied with their work/life balance. A majority of Black artists feel that access to funding remains inequitable in Pittsburgh.
- Greater Pittsburgh lags behind benchmark areas in talent attraction to the creative industries.
- Individual giving to the arts in Pittsburgh lags behind rates in benchmark areas.



NEXT STEPS

- Our sector must continue to innovate in support systems and data collection to advance **racial equity** in arts funding.
- Overall, arts and culture funders could benefit from new grant-making **practices and policies**.
- 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 appropriate efforts to improve the **work/life balance** of individual artists.
- The arts and culture sector needs concerted efforts to increase participation rates and ratings **among Black and African Americans**.
- Residents of Greater Pittsburgh must increase **individual giving** to the arts.



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CONTRIBUTORS

From the Greater Pittsburgh Arts Council:

Mitch Swain, CEO
Chloe Brown, Graphic Designer
Kathleen Hill, Research Intern
David B. Pankratz, Research & Policy Director
Kristen Wishon, Director of Communications

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Arts loud and clear

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810 Penn Avenue, Suite 600
Pittsburgh, Pennsylvania 15222

PittsburghArtsCouncil.org

412-391-2060

