



FROM POINTE SHOES TO PIEROGIES:
IMPACTS OF THE ARTS
IN ALLEGHENY COUNTY, PENNSYLVANIA, 2017



Pre-professional division students from Pittsburgh Ballet Theatre School perform George Balanchine's "Serenade," 2017. ©The George Balanchine Trust. Photo by Rich Sofranko.



FROM POINTE SHOES TO PIEROGIES:

IMPACTS OF THE ARTS

IN ALLEGHENY COUNTY, PENNSYLVANIA, 2017



ABOUT GREATER PITTSBURGH ARTS COUNCIL

The Greater Pittsburgh Arts Council (GPAC) works to expand the reach and impact of the region's diverse and vibrant arts and culture community by providing leadership, advocacy, capacity building, and connections. As the leading voice for arts and culture across the Greater Pittsburgh region, GPAC drives the political, financial, and professional support for the sector. Through expert programs, resources and research, GPAC supports and ensures a thriving, innovative, and equitable creative community.

Comprised of over 250 diverse nonprofits and artist members, GPAC strengthens the creative community through grants, workshops, professional development, tools and technical assistance, pro bono legal/professional consulting, and a range of advocacy initiatives. Partnering with state and federal organizations on policy, GPAC positions the arts as an important part of community revitalization, education, social justice, tourism, business and economic development. For more information, please visit pittsburghartscouncil.org.



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

ABOUT THIS REPORT

This report was produced by the Greater Pittsburgh Arts Council (GPAC) in partnership with Americans for the Arts (AFTA). Every four years, AFTA conducts a nationwide Arts & Economic Prosperity study. This report reflects the findings from Arts & Economic Prosperity 5 (AEP5), for which AFTA partnered with 250 partners representing 341 communities, including Allegheny County and the Commonwealth of Pennsylvania.

The findings in this report for Allegheny County are based on FY'15 and '16 data from 194 area arts and culture organizations in all artistic disciplines, and 1,075 audience intercept surveys gathered by 37 of Allegheny County's arts providers. Nationally, AEP5 collected and analyzed data from 14,439 nonprofit arts and cultural organizations and 212,691 cultural attendees. To provide additional context to this report's findings, GPAC added questions to AFTA's basic intercept survey to quantify intrinsic, social and cultural impacts. Pittsburgh Today and DataArts also provided benchmark comparison data. The federal and state AEP5 reports, as well as additional data tables, are available at americansforthearts.org/research.

Mitch Swain, CEO
David Pankratz, principal investigator
Jen Saffron, producer
Martina Gisell, research assistant
Jennifer McNulty, art director/graphic designer

©2017, GREATER PITTSBURGH ARTS COUNCIL



TABLE OF CONTENTS

4	ABOUT GREATER PITTSBURGH ARTS COUNCIL & THIS REPORT
7	INTRODUCTION
8	REPORT METHODOLOGY
11	PRIMARY FINDINGS
12	ECONOMIC IMPACTS: COUNTY, STATE, NATIONAL
15	ALLEGHENY COUNTY'S ARTS & CULTURE SECTOR
16	STRENGTHS & CHALLENGES
18	FOUNDATIONS OF ECONOMIC IMPACTS
19	HOW ECONOMIC IMPACTS WORK
20	SPENDING BY AUDIENCES & TOURISTS
22	IMPACTS: JOBS, HOUSEHOLD INCOME, TAX REVENUES
25	BENCHMARKS & NATIONAL COMPARISONS
26	FIVE STORIES OF IMPACT
32	TESTIMONIALS
35	CONCLUSIONS & NEXT STEPS
36	ACKNOWLEDGEMENTS



THE ARTS TRANSFORM LIVES AND COMMUNITIES.

Silent Disco Party in the Hall of Sculpture,
Carnegie Museum of Art, part of the Third
Thursdays event, 2016. *Photo by Bryan Conley.*

For a city our size, Pittsburgh punches above its weight—we're the city of champions, and not just in sports. We're proud that this **Arts & Economic Prosperity report reveals Pittsburgh as No. 1 in both expenditures and jobs in the arts** compared to cities like Nashville, Charlotte, and Portland.

Pittsburgh's arts community has been an integral part of the city since industrial times, with the legacy of former visionaries such as Andrew Carnegie and the Heinz family who knew why investing in arts and culture was so important. Today's leaders also know that investing in the arts means investing in our people. Audiences invest, too—by seeking out artistic experiences that enrich their lives, socially, artistically, and culturally. This report is proof of these worthy investments, ones with great returns.

We look forward to continuing the important work of supporting our region's creative industry, using this report as the backbone of the advocacy and policy work necessary to secure the region's cultural vibrancy. We encourage you to use this data in speeches, grant proposals, and discussions with elected officials, sharing the magic and power of the arts as a key part of what makes Pittsburgh great. Special thanks to the hundreds of arts organizations that completed thousands of surveys from their audience members—without them, and without the vision of Americans for the Arts, this report would not be possible.

— **Mitch Swain**, *CEO, Greater Pittsburgh Arts Council*



Every morning across America, 4.6 million people make their way to their jobs in the arts. In Allegheny County, that means more than 32,211 people, representing one third of all arts-related jobs in Pennsylvania. Annually, this represents a combined household income of \$641 million. The arts contributed \$115 million last year in tax revenue for Allegheny County—up from \$75 million in 2013—representing significant contributions to the critical infrastructure of the region and to Greater Pittsburgh's renewal.

The arts are an important part of the new face of Pittsburgh—an industry that converges with more sectors than perhaps any other: education, tourism, economic development, community revitalization, healthcare, and even veterans programs. **This report tells the story of the transformative nature of the arts, not just in terms of dollars but in terms of social and public benefits that positively impact the places in which we live, work and play.**

— **Sandra Solomon**, *Chair, Board of Directors, Greater Pittsburgh Arts Council; President, Sandra Solomon Associates, Inc.*

To represent Allegheny County's arts and culture sector in the AEP5 report, Greater Pittsburgh Arts Council (GPAC) partnered with Americans for the Arts (AFTA). Allegheny County was one of the nation's 341 participating study regions.

In gathering data for the study, which includes detailed budget and attendance data from arts and culture organizations in the county, AFTA and GPAC partnered with DataArts. Data was secured for 194 out of 668 possible arts and culture organizations, mostly from DataArts profiles completed when these area arts and culture organizations apply for grants. GPAC also made special efforts to collect data from organizations without a DataArts profile, often smaller organizations and/or organizations that serve people of color.

Another data-gathering strategy involved "audience-intercept surveying." Randomly-selected respondents shared expense information on activities related to attending an arts events, such as meals, souvenirs, transportation, and lodging. In Allegheny County, a total of 1,075 valid and usable audience-intercept surveys were collected from attendees at performances, events, and exhibitions of 37 arts and culture organizations during 2015 and 2016.

To derive reliable economic impact data, input-output analysis was used to measure the impact of expenditures by area nonprofit arts and culture organizations and their audiences. The method traces how many times a dollar is re-spent within a local economy before it "leaks out," quantifying impacts of each round of spending. **For Allegheny County, project economists customized an input-output model based on the local dollar flow between industries within Allegheny County's economy.** The model drew on data from employment, income, government revenues provided by the U.S. Department of Commerce, and local tax data (sales taxes, property taxes, and miscellaneous local taxes).


For more information on AEP5's methodology, visit artsusa.org.



Allegheny County's Customized Economic Impact Calculator

Are you curious about the economic impacts of your organization? At GPAC's request, Americans for the Arts devised a customized economic impact calculator for use by arts and culture organizations in Allegheny County. Also featured in AEP4, the calculator has been used by local arts leaders in reports to board members and constituents, grant applications, and to track achievement of success indicators as part of strategic planning processes. All that is required is the input of most recent figures on organizational spending and audience attendance. The calculator then yields findings on the full-time jobs, household income, and state and local tax revenues generated by your organization.

Here is a link to the calculator:
americansforthearts.org/sites/default/files/aep5/calculators/AlleghenyPA/calculator.html



THE ARTS BRING PEOPLE TOGETHER.

Pittsburgh Concert Chorale Festival
of Choirs at Carnegie Music Hall,
2016. Photo courtesy of Pittsburgh
Concert Chorale.

A photograph of a man with a mustache, wearing a red short-sleeved shirt with white decorative stitching, looking down at a sketchpad he is holding. To his right, another man with glasses and a teal shirt is looking at the sketchpad. The background is a wall covered in numerous small, framed, colorful drawings, including depictions of fish, a boat, and abstract figures. The scene is brightly lit, suggesting an indoor art installation or gallery space.

ART SPURS INVESTMENT.

Spanish artist Marcel-lí Antúnez Roca shares his sketchpad with Mark Freeman in front of his art installation for the Re:NEW Festival, 2016. Photo by Jen Saffron.

The Arts:

An Economic Engine for Allegheny County

ANNUAL TOTAL ECONOMIC IMPACT

= **\$2.38 billion**

\$1.06 billion + \$1.32 billion = \$2.38 billion

Direct expenditures of \$1.06 billion by arts and culture organizations and their audiences trigger indirect spending of \$1.32 billion. The total of \$2.38 billion generates jobs, household income, and tax revenues.

Direct expenditures: **\$1.06 billion**

ORGANIZATIONS **\$550 million**

AUDIENCE **\$510 million**

Direct expenditures are the initial spending by arts organizations and audiences. **EXAMPLE:** A nonprofit theater creates and sustains jobs via expenditures to its employees in the form of regular paychecks.

Indirect expenditures: **\$1.32 billion**

ORGANIZATIONS **\$578 million**

AUDIENCE **\$738 million**

Indirect expenditures represent economic activity generated by arts spending throughout the region's economy. **EXAMPLE:** After a show, arts patrons go to a restaurant whose owner, in turn, hires more restaurant staff with dollars earned from arts attendees.

Economic Impact Beyond Dollars:

Volunteerism

Volunteers also have an enormous impact on the viability of the arts in Allegheny County. Volunteers include unpaid professional staff (e.g., executive and program staff, board/commission members), artistic volunteers (e.g., artists, choreographers, designers), clerical volunteers, and service volunteers (e.g., ticket takers, docents, ushers, gift shop volunteers).

During 2015, 16,584 volunteers donated a total of 796,073 hours to the 194 organizations in this study. This represents a donation of time with an estimated aggregate value of \$18,755,480, based on the Independent Sector estimate volunteer hour of \$23.56.

The Value of

In-Kind Contributions

In-kind contributions are non-cash donations such as materials (e.g., office supplies from a local retailer), facilities (e.g., office or performance space), and services (e.g., printing from a local printer). These contributions can be received from a variety of sources including corporations, individuals, local and state arts agencies, and government agencies.

In 2015, arts and culture organizations in Allegheny County received in-kind contributions with an aggregate value of \$7,029,670.

ECONOMIC IMPACTS: COUNTY, STATE, NATIONAL



Allegheny County

Full-time equivalent jobs: **32,211***

ARTS & CULTURE **5,737**

OTHER INDUSTRIES **26,474**

More than 4 out of 5 jobs generated by arts and culture are in other industries.

Resident household income:

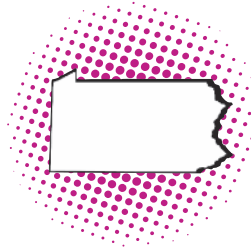
\$641 million

Tax revenue: **\$115 million**

in revenue to the county

LOCAL **\$67.4 million**

STATE **\$47.7 million**



Commonwealth of Pennsylvania

Full-time equivalent jobs: **100,114**

Resident household income:

\$2.2 billion

Tax revenue: **\$402.1 million**

in revenue to the commonwealth

LOCAL **\$178.5 million**

STATE **\$223.6 million**



Nationwide

Full-time equivalent jobs: **4.6 million**

Resident household income:

\$96.07 billion

Tax revenue: **\$27.5 billion**

in revenue to the federal government

ORGANIZATIONS **\$11.9 billion**

AUDIENCE **\$15.6 billion**

* *In the 2013 AEP4 Report, the impacts were:*

Full-time equivalent jobs: **20,550**

Resident household income: **\$410 million**

Tax revenues: **\$74 million**

Commonwealth of Pennsylvania
total expenditures: **\$3.4 billion**

Nationally, the nonprofit arts industry generated **\$166.3 billion** of economic activity in 2015—**\$63.8 billion** in spending by arts and cultural organizations and an additional **\$102.5 billion** in event-related expenditures by arts audiences.

The model input-output used to generate AEP5 economic impact findings can be quite a bit different from the model used for the 2013 study. So, an increase or decrease in the economic impact findings may be a function of changes in the local and/or state economy as well as changes in the nonprofit arts and culture sector. Also, the number of participating organizations changes from study to study.

A woman with long dark hair, wearing a patterned sleeveless top and dark pants, is walking towards the camera in the center of a long, arched tunnel. The tunnel's interior is illuminated with vibrant, multi-colored light bands in shades of red, orange, yellow, and blue, creating a rainbow-like effect. The walls and ceiling of the tunnel are made of a metallic, ribbed material. The floor is a smooth, light-colored concrete.

ARTS & CULTURE DRIVE TOURISM.

A Re:NEW Festival attendee walks through *Hull*, a light installation by artist Ian Brill, 2016. *Photo by Jen Saffron.*

A family in Children's Museum of Pittsburgh's
MAKESHOP, 2011. Photo by Anthony Musmano.

THE ARTS SUPPORT FAMILIES.



Size and scope of the arts in Allegheny County by...

... discipline

228	Performing Arts (34%)
224	Museums, Visual Arts, Historic, Scientific (33%)
97	Community Arts (15%)
51	Support & Advocacy Organizations (8%)
45	Media Arts (7%)
21	Education (3%)
2	Other

... operating budget

242	<\$250,000 (36%)
81	\$250,000 – \$999,000 (12%)
44	\$1,000,000 – \$9,900,000 (7%)
13	>\$10,000,000 (2%)

for organizations with DataArts profiles

... employees and volunteers in the arts

Total Employees: **11,632**

4,828	Part Time (42%)
4,093	Contractors (35%)
2,711	Full Time (23%)

Total Volunteers: **37,267**

... attendance at arts events (2015)

Total: **24,121,253**

18,263,394	Free (76%)
5,857,859	Paid (24%)

... creative industries

3,151 arts-related businesses in Allegheny County employ **14,627** people.

Creative industries are arts-related businesses that range from nonprofit museums, symphonies, and theaters, to for-profit film, video, architecture, and design companies.

Total number of arts organizations:

668 in 2016
(737 in 2010)

Reasons for decrease include impacts of recession and consolidation of organizations.

STRENGTHS & CHALLENGES

A number of factors provide **STRENGTHS** to the arts in this region, leading to positive economic, social, and cultural benefits:

Public Funding

Our region ranked **No. 2** out of 11 benchmark areas in per capita funding from government sources. (Allegheny Regional Asset District (RAD) funds account for 71% of all public support for the area arts and culture sector.)

The percentage of RAD funds dedicated to arts and culture rose from 10.21% in 2011 to **12%** in 2017.

Corporations

Pittsburgh was one of only two of 11 benchmark areas that saw donations rise over the past five years.

(17%)

Finances

In 2016, **60%** of area cultural organizations broke even or had a surplus.

Foundations

Among the 11 benchmark areas, Pittsburgh ranks **No. 2** in per capita funding from foundations.

Artists

Individual artists are able to make a living here, drawing on diverse sources of income, and they fund their artistic projects using many tools.

Access and Equity

59% of area arts and culture organizations have created accessibility, equity, and inclusion plans.

Partnering by Area Arts & Culture Organizations

69% partner with other arts and culture organizations.

50% partner with organizations outside arts and culture.

Audience Attendance

Over the past 5 years, attendance increased **7.9%**.

In 2016, **55%** of local organizations met or exceeded their audience attendance projections.

Artists

Artists experience high levels of dissatisfaction with their art work/non-art work balance; current financial status; and access to grant opportunities.

Black artists have even higher levels of dissatisfaction on the above measures; gave Pittsburgh low ratings as a place to live and work; are less optimistic about their futures here; and a majority find the arts community unwelcoming.

The arts and artists in Allegheny County also face a range of CHALLENGES:

Organizations

There are persistent issues of racial inequity and unequal access to resources.

20.5% decline in individual giving to the arts sector over past five years.

On average, arts organizations have seen only modest increases in earned income in recent years.

While there have been average increases in arts employment, the majority of the increase is in part-time employment.

FOUNDATIONS OF ECONOMIC IMPACTS

Economic impacts do not just happen, but are rooted in other values that arts participants seek and experience—intrinsic, social, cultural, and community values. These experiences create a spectrum of value that build on and complement each other,* culminating in significant economic impacts. **Without positive artistic experiences that also have social and cultural dimensions, the potential for subsequent economic impacts would be diminished.**

GPAC gathered data on these issues from the 1,075 arts participants who completed the main audience intercept survey AFTA designed. GPAC expanded the survey beyond economic data to focus on issues in three main categories:

1) **Artistic Experience:** *the degree to which respondents felt about the arts event; how did respondents feel about the arts event they attended? Did they feel absorbed, have a strong emotional response, feel artistically engaged, and/or start to think differently?*

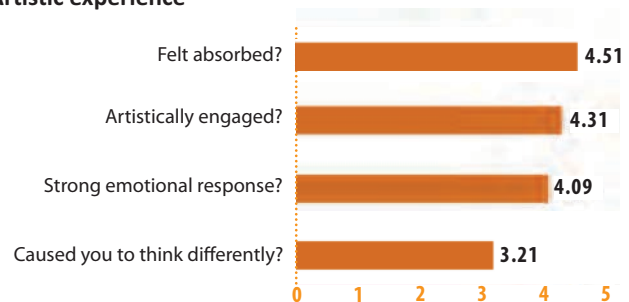
2) **Social Engagement:** *the extent to which respondents' attendance helped them form a closer connection among fellow attendees, friends, and family members?*

3) **Community Connections/Cultural Identity and Heritage:** *whether, and to what degree, the arts event related to attendees' community and their cultural identity and heritage.*

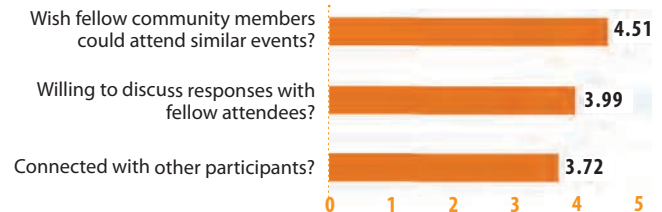
We also asked respondents to rate the importance of access to K-12 arts education and whether an admissions tax would reduce their frequency of participating in the arts.

Respondents' average score for each question on a scale of 1 to 5, by category:

Artistic experience



Social engagement



Cultural Identity & Heritage



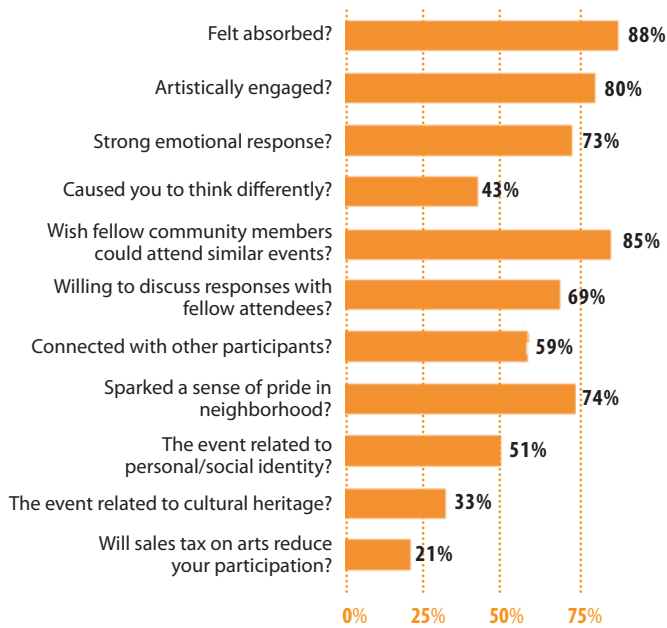
K-12 Arts Education



* See Alan Brown, "An Architecture of Value."

HOW ECONOMIC IMPACTS WORK

Percent of respondents who rated survey questions either 4 or 5 on a "1 to 5" / "not at all" to "very much" scale:



Key Findings

Large majorities of respondents 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.
- Attending arts events sparked a sense of pride in their neighborhood.
- Wishing their fellow community members were able to attend similar arts events.
- Viewing K-12 arts education for young people as extremely important.

Spending by area arts and culture organizations has a significant impact on the economy of Allegheny County and beyond. The 194 nonprofit arts and culture organizations participating in the study pay their employees' salaries and benefits, buy or rent physical space and maintain it, purchase office supplies, market and generate publicity for their events, hire contractors, and pay for a wide array of professional services.

\$550 million from direct expenditures

Dollars from this spending are injected directly into the regional economy, and are crucial to the livelihood of area workers and the success of businesses, large and small.

Organization expenses by category:

Personnel expenses:

(staff, employees, contractors and artists)

\$284 million

Programmatic, production, and overhead expenses:

\$218 million

Facility expenses:

\$48 million

SPENDING BY AUDIENCES & TOURISTS

The nonprofit arts and culture industry, more so than most industries, leverages a significant amount of event-related spending. For example, when patrons attend a cultural event, they may pay to park their car, purchase dinner at a restaurant, shop in nearby stores, eat dessert after the show, and pay a babysitter upon their return home. Attendees from out of town often spend the night in a hotel.

Audiences in Allegheny County spend an average of \$30.64 per person above and beyond the cost of a ticket. Cultural tourists who visit here from outside the county spend 83% more per event than do local residents—\$47.61 per person vs. \$25.99 per person.

The 194 participating nonprofit arts and cultural organizations reported that the aggregate attendance to their events was \$16.6 million during 2015. Event-related spending by these attendees totaled \$509.5 million in Allegheny County during fiscal year 2015, excluding the cost of event admission.*

The economic impact of \$509.5 million in audience expenditures translates into 15,693 jobs, \$249 million in household income, and tax revenues—\$24,892,000 in local tax revenues, and \$39,798,000 in state taxes.

Meals/drinks, before/after event:
\$240.3 million

Gifts and souvenirs:
\$63.2 million

Local transportation:
\$57.5 million

Overnight lodging:
\$57.4 million

Refreshments and/or snacks:
\$49.3 million

Clothing and accessories:
\$26.4 million

Other:
\$9.5 million

Event-related child care:
\$5.9 million



Demographic Trends Among Cultural Attendees

Age

RESIDENTS: Most attendees are between 18-34 years old (23%) and 65 or older (28%).

NONRESIDENTS: Most attendees are between 55-64 years old (29%) and 65 or older (26%).

Educational Attainment**

RESIDENTS: 0.5% less than high school, 7% high school, 39% college, and 53% masters/doctoral degree.

NONRESIDENTS: 1.3% less than high school, 12% high school, 42% college, and 45% masters/doctoral degree.

Annual Household Income

RESIDENTS: 20% of the attendees earn less than \$40,000, 27% more than \$120,000.

NONRESIDENTS: 18% of the attendees earn less than \$40,000, 29% more than \$120,000.

**Admissions paid by audiences are excluded from the audience spending analysis in order to avoid the potential for double-counting dollars.*

***College includes 2-year college/technical/associates degree and 4-year college.*





CREATIVITY MEANS JOBS.

A string quartet performs at the Carnegie Museum of Art Third Thursday event, 2016. Photo by Bryan Conley.

IMPACTS: JOBS, HOUSEHOLD INCOME, TAX REVENUES

Jobs

Spending by arts and culture organizations and their audiences translates into full-time jobs and contract work for independent artists, designers, musicians, fundraisers, marketers, accountants, financial advisors, real estate agents, educators, engineers, healthcare professionals, and chefs, among many other occupations.

32,211 Full-time equivalent jobs (FTEs)

FTEs describe the total amount of time per average day that full-time, half-time, and other employees are employed, and not the total number of employees.

ORGANIZATIONS **16,518**

AUDIENCES **15,693**

Jobs generated from direct and indirect expenditures:

ARTS & CULTURE **5,737**

OTHER INDUSTRIES **26,474**

4 out of 5 jobs generated by arts and culture are in other industries.

Household Income

Each year in Allegheny County, employees in the arts and culture industry earn a combined **\$641 million** in household income.

ORGANIZATIONS **\$391,241,000**

AUDIENCES **\$249,285,000**



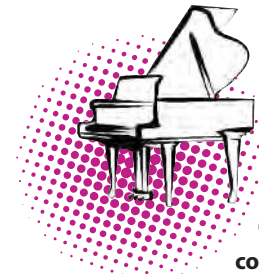
WHAT CAN \$641



7,541,176

pairs of ballet
pointe shoes

(*\$85 per pair*) source:
Pittsburgh Ballet Theatre



9,290 Steinway
concert grand pianos

(*\$69,000 per piano*)



4,273,333

Annual Family Memberships
to Carnegie Museums
of Pittsburgh

(*\$150 per membership*)



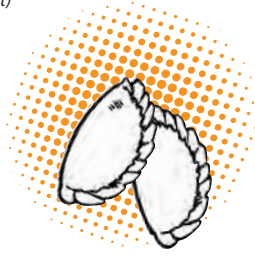
Two years of smart
phone bills for

854,667 customers

(*\$750 for 24 months*) source:
Forbes.com



133,396 Season Tickets to 43
home games of the Pittsburgh
Penguins in section 109
(\$4,805.25 per season ticket)



681,914,894 pierogies
*(That's 555 pierogies per person
in Allegheny County!)**

MILLION BUY?



**Annual
unlimited ride passes
on Port Authority Transit
for 597,699 riders**
(\$1,072.50 per pass)



**Annual Netflix
premium subscriptions for
4,451,389 customers**
(\$144 per subscription, before taxes)



**A year of groceries
for 156,000 families**

*source: Consumer Expenditure
Survey, U.S. Bureau of Labor
Statistics, August, 2016*

*Data Sources: Consumer Expenditure Survey,
U.S. Bureau of Labor Statistics, August, 2016*

**Based on the average price for potato and
cheese pierogi at five popular Pittsburgh
pierogi purveyors. \$0.94 average per pierogi,
and the population of Allegheny County (US
Census, 2016 ACS)*

State and Local Tax Revenues Generated

The **\$115 million** in tax
revenue generated annu-
ally by the arts and culture
sector in Allegheny County
could itself be a source of
job creation and retention.

Local: \$47.7 million

ORGANIZATIONS **\$22.8 million**

AUDIENCES **\$24.9 million**

State: \$67.4 million

ORGANIZATIONS **\$27.6 million**

AUDIENCES **\$39.8 million**

WHAT CAN \$115 MILLION PAY FOR?

**1 year's salary
for 2,061 public employees.**

*(elementary and secondary school teachers,
librarians, fire fighters, and police officers).**

** Source: U.S. Department of Labor, Occupational Em-
ployment Statistics, May 2016 Metropolitan and Non-
metropolitan Area Occupational Employment and
Wage Estimates, Pittsburgh, PA.*



THE ARTS INSPIRE DIALOGUE.

Off the Wall Productions' "4.48 Psychosis" at Carnegie Stage Theater, 2017. Photo by Heather Mull Photography.

BENCHMARKS & NATIONAL COMPARISONS

A

llegheny County is one of 341 study regions that participated in the Americans for the Arts' Arts & Economic Prosperity 5 (AEP5) research study. Participants include 228 cities and counties, 81 multi-city or multi-county region, 20 states, and 12 cultural districts.

So, how do we stack up? When it comes to arts and culture expenditures, Greater Pittsburgh ranks at or near the top among its benchmark regions.

Allegheny County is regularly compared with benchmark regions, counties, and cities with which it shares economic, demographic, historical, social, and cultural features. Only regions that participated in AEP5 are included. Some of them are cities; others are counties, depending on who participated in the study.

Expenditures by Arts & Culture Organizations and their Audiences

in comparable regions

REGIONS	TOTAL DIRECT SPENDING	ORGANIZATIONAL SPENDING	AUDIENCE SPENDING
Pittsburgh <i>(Allegheny County)</i>	\$1,059,384,911	\$549,874,646	\$509,510,265
Baltimore	\$606,008,412	\$326,333,152	\$279,675,260
St. Louis	\$590,934,189	\$363,745,576	\$227,188,613
Minneapolis	\$540,679,591	\$323,394,524	\$217,285,067
Indianapolis	\$440,530,109	\$227,293,491	\$213,236,618
Nashville	\$429,340,841	\$178,780,284	\$250,560,557
Columbus	\$412,259,509	\$222,477,493	\$189,782,016
Charlotte	\$332,385,209	\$165,862,764	\$166,522,445
Portland	\$330,402,755	\$214,420,434	\$115,982,321
Kansas City	\$276,098,121	\$179,536,915	\$96,561,206

Economic Impact on Jobs, Household Incomes, Tax Revenues

local and state

REGIONS	JOBS	HOUSEHOLD INCOME	TAX REVENUES
Pittsburgh <i>(Allegheny County)</i>	32,211	\$640,526,000	\$115,121,000
St. Louis	19,129	\$476,226,000	\$57,696,000
Minneapolis	15,264	\$381,858,000	\$57,804,000
Baltimore	15,052	\$392,817,000	\$54,474,000
Columbus	14,980	\$373,393,000	\$46,774,000
Indianapolis	14,729	\$361,653,000	\$47,733,000
Nashville	14,277	\$309,406,000	\$51,112,000
Portland	11,505	\$268,293,000	\$27,642,000
Charlotte	10,340	\$242,047,000	\$29,498,000
Kansas City	8,970	\$253,634,000	\$24,570,000

CONTINUED >>

BENCHMARKS & NATIONAL COMPARISONS

Allegheny County makes top ten lists for nonprofit industry expenditures and jobs generated (arts and non-arts) even among regions with larger populations.

Top 10 Total Spending

Greater Washington, D.C.	\$3,750,332,794
Chicago	\$3,211,736,053
Philadelphia (city & county)	\$1,614,100,129
Dallas/Fort Worth	\$1,473,366,015
San Francisco	\$1,448,353,608
Miami-Dade County	\$1,430,512,813
Boston	\$1,354,137,061
Greater Houston	\$1,117,403,061
San Diego	\$1,099,934,358
Pittsburgh (Allegheny County)	\$1,059,384,911

Top 10 Jobs

Chicago	85,248
Greater Washington, D.C.	59,423
Dallas/Fort Worth	52,848
Boston	45,889
Miami-Dade County	40,944
San Francisco	39,699
Philadelphia (city & county)	37,590
San Diego	35,914
Pittsburgh (Allegheny County)	32,211
Greater Houston	25,817

FIVE STORIES OF IMPACT

The arts create artistic, social, and cultural value, and hence economic impacts, in many contexts. The following case studies of arts organizations, chosen because they reflect the range and diversity of Allegheny County's arts sector, collectively illustrate how these values and impacts interconnect and reinforce each other.

Contemporary Craft
New Horizon Theater
Pittsburgh Opera
Mon River Arts
City Theatre




Contemporary Craft

has been the cultural anchor of Pittsburgh's Strip District since 1986. It has engaged visitors through major social justice exhibitions, including *Enough Violence: Artists Speak Out*, and *Mindful: Exploring Mental Health Through Art*. Contemporary Craft also provides a free public gathering place for community partners. With forthcoming development of residential and business spaces in the Strip District, Contemporary Craft will attract thousands of additional visitors in coming years, while remaining **a place for creative transformation** at the heart of this unique urban environment. Annually, Contemporary Craft generates 59 jobs, \$1.17 million in household income, and \$209,249 in tax revenues.

★ Visit contemporarycraft.org

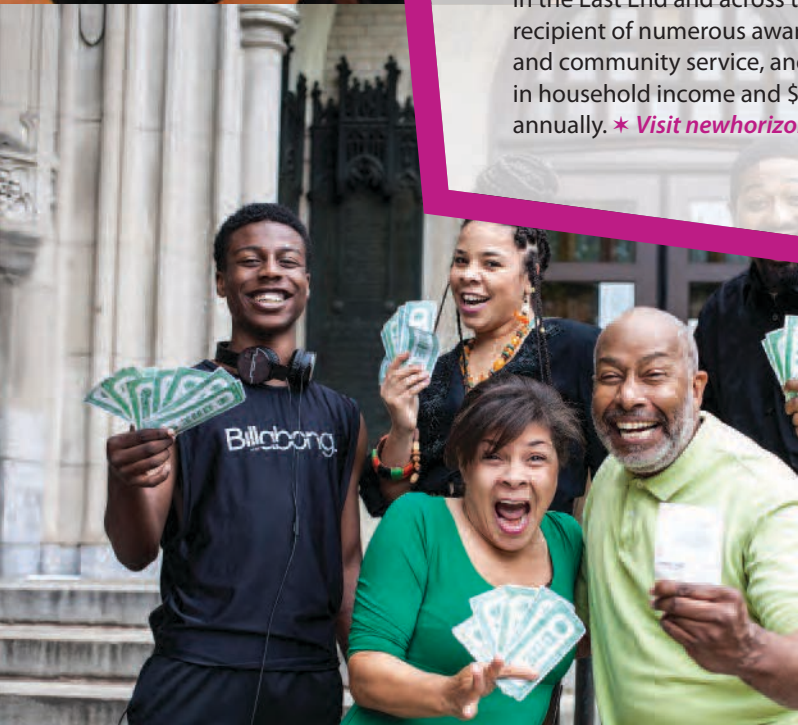
Clockwise from top: Summer artist residency, 2017, with artist Ryder Henry. Photo by Stephanie Sun; Metalwork workshop, 2015. Photo by Noah Purdy. Wordcloud from the Mindful exhibition, 2015. Photo by Brian Cohen.

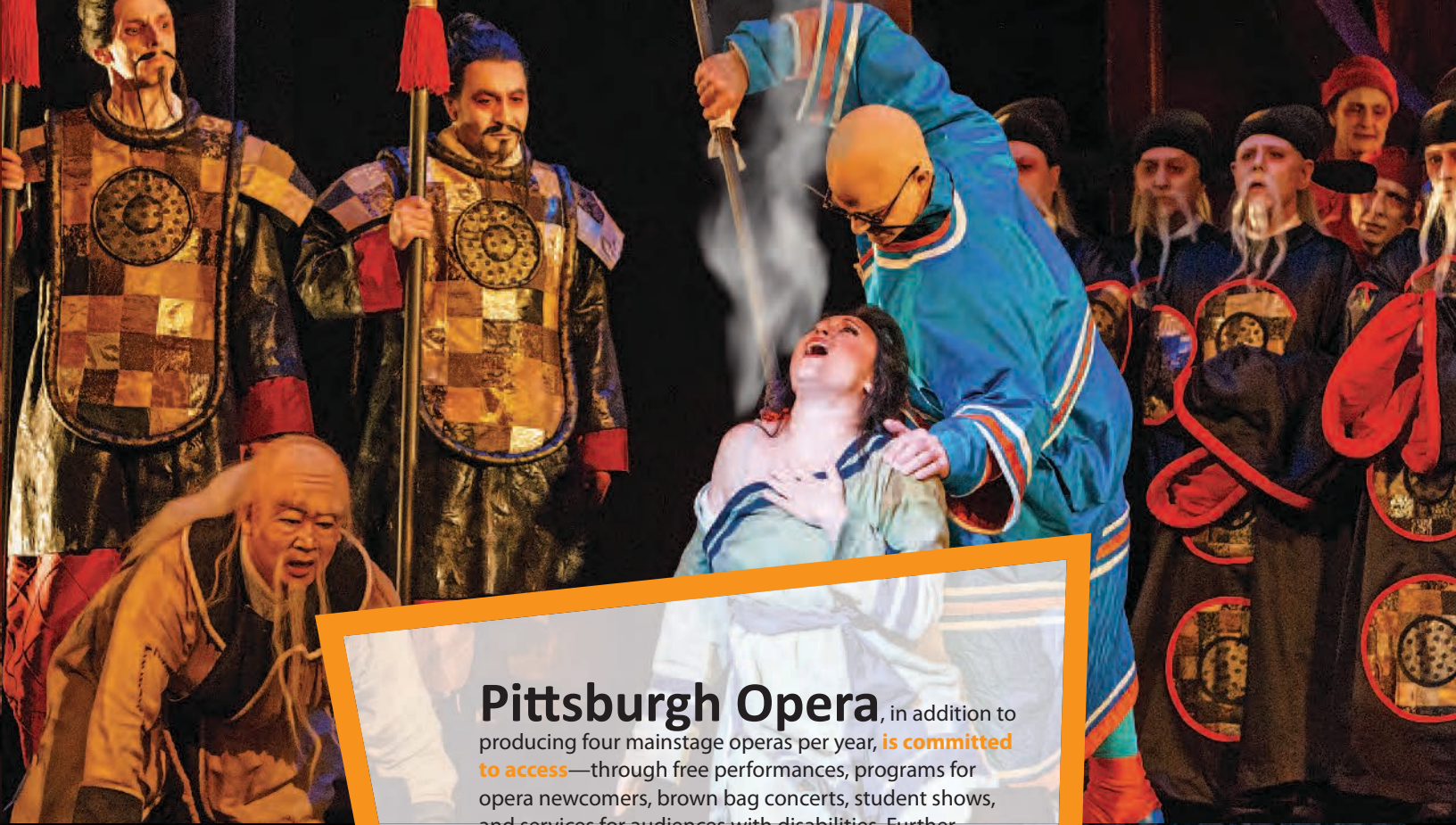


Clockwise from top: Scene from *Old Settler*, 2016. Scene from *The Meeting*, 2015. Scene from *Lotto*, 2017. All photos by Lioness Photography.

New Horizon Theater

(NHT) is celebrating its 25th anniversary and a quarter century of meeting its mission to produce high-quality cultural events **reflecting African-American points of view**. Through its five-event seasons of historical plays, dramas, and comedies, NHT provides opportunities for ethnic performers and writers to further their professional development, while also reaching underserved families and seasoned theatergoers. NHT is a source of community pride for the Homewood neighborhood, and serves populations in the East End and across the City. NHT is the recipient of numerous awards for its productions and community service, and also yields \$202,691 in household income and \$15,249 in tax revenues annually. * Visit newhorizontheater.org





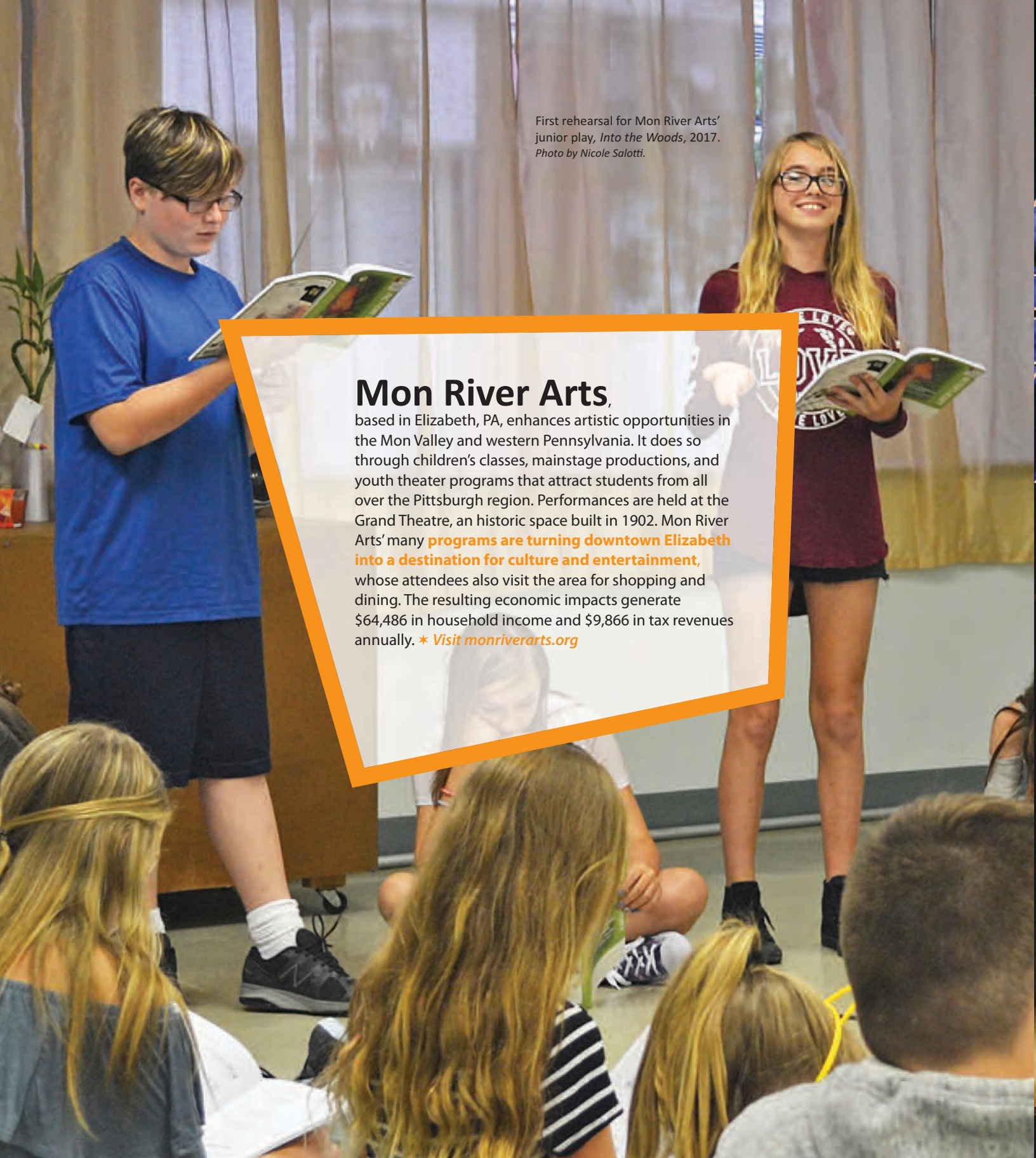
Pittsburgh Opera

, in addition to producing four mainstage operas per year, **is committed to access**—through free performances, programs for opera newcomers, brown bag concerts, student shows, and services for audiences with disabilities. Further, Pittsburgh Opera generates 281 jobs, \$6.3 million in household income, and \$907,791 in tax revenues. As an artistic innovator, this year Pittsburgh Opera premiered *The Summer King*—the story of Pittsburgh native and Negro Leagues baseball great Josh Gibson. The production, which received rave reviews from audiences and ticket buyers, illustrated the capacity of opera to address themes of social justice and civil rights.

* Visit pittsburghopera.org

Top: Scene from Turandot by Giacomo Puccini, 2016. Bottom: Scene from Salome, by Richard Strauss, 2016. Photos by David Bachman for Pittsburgh Opera.





First rehearsal for Mon River Arts' junior play, *Into the Woods*, 2017.
Photo by Nicole Salotti.

Mon River Arts,

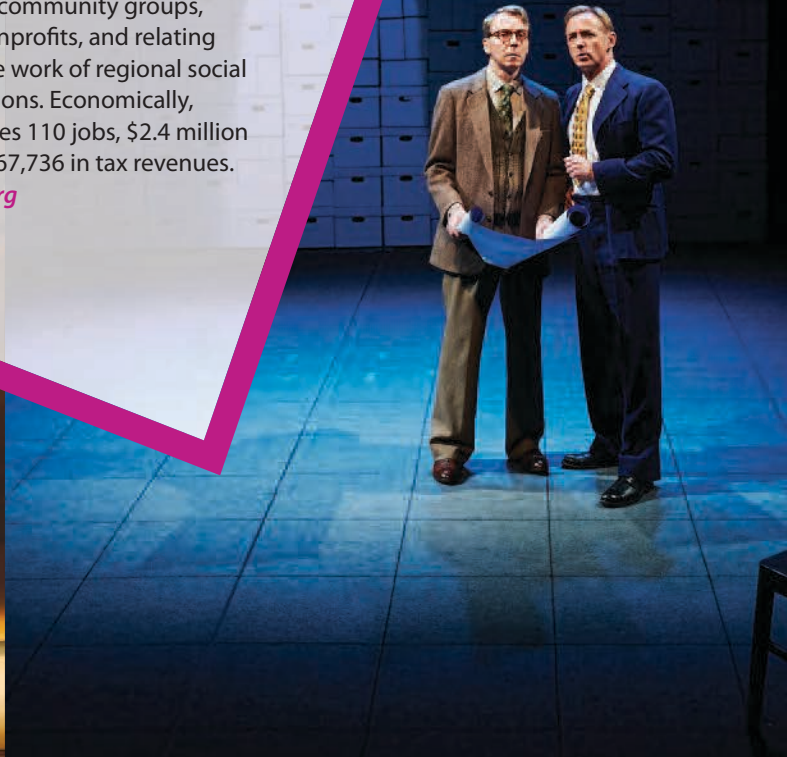
based in Elizabeth, PA, enhances artistic opportunities in the Mon Valley and western Pennsylvania. It does so through children's classes, mainstage productions, and youth theater programs that attract students from all over the Pittsburgh region. Performances are held at the Grand Theatre, an historic space built in 1902. Mon River Arts' many **programs are turning downtown Elizabeth into a destination for culture and entertainment**, whose attendees also visit the area for shopping and dining. The resulting economic impacts generate \$64,486 in household income and \$9,866 in tax revenues annually. ★ [Visit monriverarts.org](http://monriverarts.org)



*Clockwise from top: Scene from **Wild With Happy** by Colman Domingo, featuring Monteze Freeland, Corey Jones, Jason Shavers, and C. Kelly Wright, 2017. Scene from **Some Brighter Distance** (World Premiere) by Keith Reddin featuring Jonathan Tindle and David Whalen, 2016. Scene from **The Guard** by Jessica Dickey, featuring Raphael Nash Thompson, 2017. All photos by Kristi Jan Hoover.*

Works on **City Theatre** stages reflect the diversity of the world in which it exists. Over the past three seasons, City Theatre achieved gender parity among featured writers. Last season, 46% of main stage roles were performed by artists of color. Surveys demonstrate that **audiences think differently** as a result. City Theatre is also a community hub, providing space for community groups, partnering with dozens of nonprofits, and relating the themes of its shows to the work of regional social and human service organizations. Economically, City Theatre annually generates 110 jobs, \$2.4 million in household income, and \$367,736 in tax revenues.

★ [Visit citytheatrecompany.org](http://citytheatrecompany.org)



TESTIMONIALS

The arts impact many sectors throughout Allegheny County. Here are viewpoints from various leaders in government, business, tourism, education and neighborhood development.



A strong, vibrant arts and culture sector is important for our regional economy and invaluable to civic life. Arts and culture programs benefit every neighborhood in the city. As a State Representative, I will remain dedicated to improving communities through the arts as long as I am privileged to serve.

— **Jake Wheatley, Jr.**
Pennsylvania State Representative, 19th Legislative District



The Pittsburgh Public Schools Arts Education Department is committed to aiding in the improvement of student achievement, attendance and graduation rates, while simultaneously assisting our students to think creatively and critically like artists and educated consumers of the arts to ensure involvement in the arts for life.

— **Kymerly M. Cruz**
Senior Program Officer, Arts Education, Pittsburgh Public Schools



Bringing more of the Pittsburgh region's vibrant arts and culture into the airport is something we continue to focus on. Our Art in the Airport program is a key part of that and receives recognition from visitors from all over the world. Partnering with our region's cultural assets, like the Greater Pittsburgh Arts Council, enhances the traveling experience for millions of passengers each year.

— **Christina Cassotis**
Chief Executive Officer, Allegheny County Airport Authority



It's without doubt that Pittsburgh's neighborhoods wouldn't be as vibrant and welcoming without our artists. Public art, museums, creative businesses, theaters, and of course our Cultural District play a vital role in the story of Pittsburgh's renewal as a thriving city that recognizes its past and embraces its future.

— **William Peduto**
Mayor, City of Pittsburgh



We understand the critical importance art and culture play in uplifting the people and places within our neighborhoods. It's the force behind meaningful community engagement, it deepens connections amongst residents and heightens economic activity along business corridors. Artists, creatives and cultural institutions are essential elements of a healthy neighborhood.

— **Presley Gillespie**
President,
Neighborhood Allies




The arts sector in Allegheny County is a very necessary part of so many lives. It not only enhances the cultural experiences of those who participate as artists and appreciators, it also provides income for those who teach, make, administer, and are passionate about the arts.

— **Amber Epps**
Commercial District
Manager, Bloomfield-
Garfield Corporation



Allegheny County is part of a vibrant, growing region with something for everyone. Its well-known cultural districts, museums, parks and historical sites are an important part of that identity. Arts and culture organizations impact our quality of life, but also our economy. Thanks to this report, we know that the arts generate \$115 million annually for the county. Having a strong arts community also translates to over 32,000 jobs in our community, sustainable household incomes, and broader public benefits for the residents.

— **Rich Fitzgerald**
County Executive,
Allegheny County

A photograph of a group of dancers in a studio. The central figure is a woman with her hair pulled back, wearing a light pink, ribbed, sleeveless top with a cutout at the waist. She is looking to her right with a focused expression. Her arms are raised, and her hands are in a specific pose. In the background, other dancers are visible, some with their arms raised, creating a sense of movement and energy. The lighting is dramatic, highlighting the dancers against a dark background.

THE ARTS HONOR TRADITIONS.

A

Conclusion 1:

Arts and culture in Allegheny County generate significant economic impacts for the region in the form of new jobs, increased household incomes, and expanded tax revenues, all at rates higher than most of our comparative benchmark regions. Further, there is evidence that these impacts have increased significantly since the publication of the previous Arts and Economic Prosperity report (2013).

Conclusion 2:

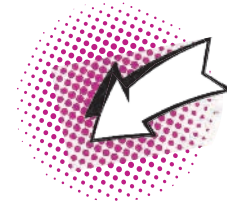
Without the provision of positive artistic experiences that include social and cultural dimensions, as well as access to K-12 arts education, the potential for subsequent economic impacts would be diminished.

Conclusion 3:

Earned and contributed revenues from all sources, especially from individual giving, are essential components of our region's cultural vitality and hence the economic impacts of the arts and culture sector.

Conclusion 4:

The arts and culture sector faces challenges to its vitality and hence its economic impacts going forward, including the need for audience development, an uncertain political environment, sustained support from public funding sources, and persistent challenges to achieving racial equity in the arts.



Next steps...

- *Work with local and state elected officials, economic development agencies, and civic and business associations to further position the arts and culture sector as a key economic and social asset for our communities.*
- *Track trends in arts audience development and earned and contributed support.*
- *Facilitate public conversations about the meaning and implications of these trends for the sector.*
- *Propose and advocate for new and improved new local, state, and federal policies which provide operating income and other funding to the arts and culture sector.*
- *Conduct further research to trace connections between the artistic, social, and community benefits of the arts as pre-conditions to economic impacts.*
- *Document the role of place-based development in the economic impacts of the arts.*

ACKNOWLEDGEMENTS

Participants

In Allegheny County, 37 arts and culture organizations administered the project's intercept survey of event attendees, yielding 1,075 completed, useable surveys. One set of survey questions was devised by Americans for the Arts (AFTA) and were used by all 371 locales nationwide participating in the project. These questions focused on ancillary spending associated with event attendance—food, parking, souvenirs, etc. The Greater Pittsburgh Arts Council added another set of questions to the basic AFTA survey, with a focus on the intrinsic, social, and cultural benefits of arts participation.

A total of 194 Allegheny County arts and culture organizations provided two data points each to this study: 1) annual organizational spending, and 2) annual attendance figures. Many of these figures were included in the DataArts profiles annually completed by grant-seeking organizations in Pennsylvania and 15 other states. But some smaller organizations do not create DataArts profiles. GPAC sought out such organizations to gather those two data points for this study to help ensure a representative list of participating organizations.


The surveying organizations were: *Assemble, Attack Theatre, City of Asylum, Belle Voci, Calliope House, Carnegie School of Music, Chamber Music Pittsburgh, City Theatre Company, Contemporary Craft, Heinz History Center, Kelly Strayhorn Theater, Kinetic Theater, The Mattress Factory, Mon River Arts, Neu Kirche Contemporary Art Center, New Horizon Theater, Off the Wall Productions, Pittsburgh Festival Opera, Pittsburgh Arts and Lectures, Pittsburgh Classical Guitar Society, Pittsburgh Lesbian and Gay Film Festival, Pittsburgh Opera, Pittsburgh Philharmonic, Pittsburgh Youth Symphony Orchestra, Quantum Theatre, Renaissance City Wind Music Society, River City Brass, Silver Eye Center for Photography, St. Agnes Center/Carlow University, Sweetwater Center for the Arts, Texture Contemporary Ballet, Three Rivers Young People's Orchestra, The Andy Warhol Museum, and University of Pittsburgh Stages.*



In addition to the arts and culture organizations that provided data points for this study, GPAC acknowledges and thanks the many partners without which this study, its publication, and dissemination would not have been possible:

- *Americans for the Arts' Ben Davidson and Randy Cohen*
- *DataArts (Cultural Data Project)*
- *Citizens for the Arts in Pennsylvania*
- *Martina Gesell, project research assistant, and Jennifer McNulty, graphic designer*
- *Pittsburgh Musical Theater and the August Wilson Center for African American Culture, hosts for GPAC's report release events on September 26 and October 12, 2017*
- *Project interns from Carnegie Mellon University's Master of Arts Management program: Daniel Fonner, Frejya Wang, Ruiyu Xu, and Anna Okuda*
- *Allegheny County leaders who offered testimonials on the impacts of the arts: Christina Cassotis, CEO, Allegheny County Airport Authority; Kymberly Cruz, senior program officer, arts education, Pittsburgh Public Schools; Amber Epps, commercial district manager, Bloomfield-Garfield Corporation; Rich Fitzgerald, county executive, Allegheny County; Presley Gillespie, president, Neighborhood Allies; Mayor William Peduto, City of Pittsburgh; Representative Jake Wheatley, Jr., (PA-19)*
- *The Pittsburgh Arts Research Committee, a GPAC affinity group*
- *The staff of the Greater Pittsburgh Arts Council and GPAC's Board of Directors, under the guidance of current board chair, Sandra Solomon*

GPAC gratefully thanks the individuals, members, business supporters and major funders for their generous support, including the Allegheny Regional Asset District, Dollar Bank, FISA Foundation, The Fine Foundation, Giant Eagle, The Grable Foundation, The Heinz Endowments, Highmark, Hillman Foundation, National Endowment for the Arts, PA Council on the Arts, The Pittsburgh Foundation, and UPMC Health Plan.



Cell Phone Disco, LED light installation by Informationlab (Auke Touwslager, Ursula Lavrencic) and Aleš Vrhovc, Janez Jazbar and Robert Unetich, commissioned by the Pittsburgh Cultural Trust in 2010. *Photo by Joey Kennedy.*

CULTURE PROMOTES CONNECTIONS.

Hidden in the Obvious, sculpture by Stanley Boyd Spotts, Hartwood Acres Park. Photo courtesy of Allegheny County.

ART LEAVES ITS MARK.





Pre-professional division students from Pittsburgh Ballet Theatre School perform George Balanchine's "Serenade," 2017. ©The George Balanchine Trust. Photo by Rich Sofranko.



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

A PUBLICATION OF THE GREATER PITTSBURGH ARTS COUNCIL

810 PENN AVENUE, SUITE 600
PITTSBURGH, PENNSYLVANIA 15222
412.391.2060

www.pittsburghartsCouncil.org
facebook: [pittsburghartsCouncil](https://www.facebook.com/pittsburghartsCouncil)
twitter: [@pghartsCouncil](https://twitter.com/pghartsCouncil)

