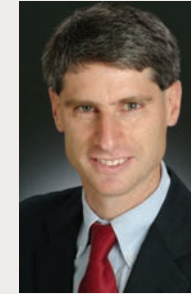


ARTS
CULTURE
+ ECONOMIC
PROSPERITY

IN GREATER PHILADELPHIA



West Oak Lane Jazz Festival / R. Kennedy for GPTMC



Letter from the Cultural Alliance

In my inaugural presentation as President of the Alliance, at our Annual Meeting in 2010, I talked about the importance of “Data + Stories = Proof”. With this latest report we present the most compelling data yet – that the cultural sector is a significant economic driver, pumping billions into local economies, neighborhoods and paychecks. Combined with your stories and inspiration, we have compelling proof of the value of arts and culture to our region and to our residents and visitors.

This report would not have been possible without the critical support of the 345 participating organizations, organizational data from the Pennsylvania Cultural Data Project and the 13 surveyors who fanned out across the region over the last nine months to survey audiences. Our special thanks to Americans for the Arts, which calculated many of the findings as part of its national report, *Arts and Economic Prosperity IV*.

We are also grateful to our supporters and sponsors, including the William Penn Foundation, Bank of America and Pennsylvania Council on the Arts. I also want to express special thanks to our staff who guided the work through its inception and development.

This report reflects the Alliance’s new Creating Change initiative. In the coming years we will provide the hard data and analysis our members and supporters need. We believe that research has a vital role to play in a re-envisioning of Philadelphia’s cultural and civic experience. Working together, we can ensure that arts and culture is viewed as an investment, not an amenity, and that Greater Philadelphia is universally recognized as a world-class region defined by its rich and vibrant cultural life.

Tom Kaiden
President
Greater Philadelphia Cultural Alliance



Letter from Bank of America

Bank of America is pleased to sponsor *Arts, Culture and Economic Prosperity in Greater Philadelphia*. At Bank of America, we understand the importance of cultural and civic investment. Our commitment is based in the belief that a strong and thriving cultural community not only enriches civic life, but also plays an important economic role in helping to spur urban renewal, attract new businesses, draw tourism and spark innovation. The vibrant cultural sector in the Philadelphia region continues to have a significant impact on our community and regional economy, and with this report, that impact is very evident.

Our support for this report is part of Bank of America’s larger investment in arts and culture throughout the United States. Building on a long-standing tradition of investing in the communities it serves, Bank of America is delivering on a 10-year goal to donate \$2 billion to nonprofit organizations engaged in improving the health and vitality of their neighborhoods. We continue to demonstrate our support and enthusiasm for arts and culture through our philanthropy, sponsorships and other innovative partnerships. For example, our Museums on Us® program provides Bank of America and Merrill Lynch

cardholders with monthly free access to more than 150 of our country’s greatest museums, zoos, science centers and botanical gardens. Additionally, Bank of America continues its Art in our Communities® program where works from our collection are shared with museums across the globe. The program provides museums and nonprofit galleries the opportunity to borrow complete exhibitions at no cost while enabling us to share these works with a much broader public.

In recognizing the important role arts and culture plays on our regional well-being and economic prosperity, Bank of America also takes pride in the strong relationships and partnerships we have with some of the organizations leading the sector. Congratulations to the Greater Philadelphia Cultural Alliance and to the hundreds of cultural organizations who participated and contributed to the findings in this important research report.

We look forward to the coming years and to the competitive advantage afforded our Greater Philadelphia region through its vibrant, rich and diverse culture.

Tom Woodward
Market President, Pennsylvania
Bank of America



**JOSE GARCES,
EXECUTIVE CHEF
AND OWNER,
GARCES GROUP**

“Philadelphia’s vibrant arts culture and thriving restaurant scene are no accident. Ours is a city that takes its role as audience seriously and is both appreciative of innovation and also utterly honest and generous with their feedback. It’s a tremendous place to be if you’re involved in a creative field, and one with a great deal of interaction between dining and the arts.”

CONTENTS

ABOUT THIS REPORT

The findings in this report are based upon spending information collected from 345 arts and cultural organizations and 2,039 audience surveys in Southeastern Pennsylvania. This effort was part of the Cultural Alliance’s participation, with 181 other communities, in Americans for the Arts’ national *Arts and Economic Prosperity IV* study. The Cultural Alliance is the local partner for the Southeastern Pennsylvania and City of Philadelphia editions, which provide the basis for this report.

Arts and culture is important to the residents of Southeastern Pennsylvania for many reasons — it enhances education, draws communities together, and makes life more fun. In addition, arts and culture positively impacts the economy of the region in significant ways. This economic impact is explored in detail in this report.

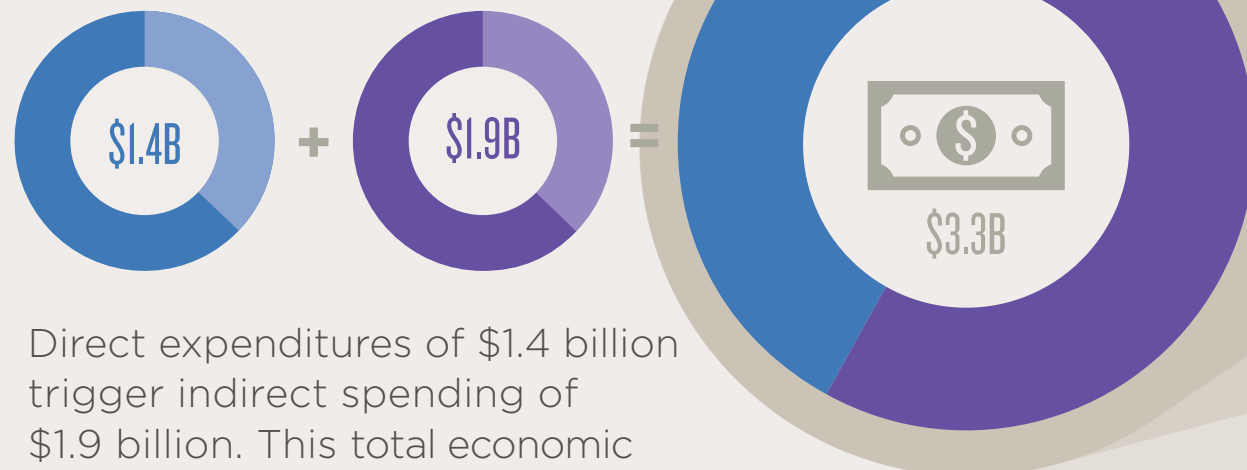
AN ECONOMIC ENGINE	4
ORGANIZATIONAL SPENDING	6
AUDIENCE SPENDING	7
FOLLOW THE MONEY	8
EMPLOYMENT IMPACT	10
BUSINESS IMPACT	11
HOUSEHOLD INCOME	12
DISCIPLINES	16
REGIONAL COMPARISONS	18
CITY COMPARISONS	20
ABOUT OUR AUDIENCES	22
IN CONCLUSION	24
METHODOLOGY	26
PARTICIPATING ORGANIZATIONS	28
PARTNER ORGANIZATIONS	30
ACKNOWLEDGMENTS	31
ABOUT THE ALLIANCE	32

Arts + Cultural Organizations and Their Audiences

AN ECONOMIC ENGINE FOR THE PHILADELPHIA REGION

TOTAL ECONOMIC IMPACT

\$3.3 BILLION



Direct expenditures of \$1.4 billion trigger indirect spending of \$1.9 billion. This total economic impact of \$3.3 billion generates jobs, household income and tax revenue.

DIRECT EXPENDITURES

\$1.4 BILLION

ORGANIZATIONS:	\$875 million
AUDIENCES:	\$521 million

INDIRECT EXPENDITURES

\$1.9 BILLION

ORGANIZATIONS:	\$1,208 million
AUDIENCES:	\$655 million



FULL-TIME EQUIVALENT JOBS

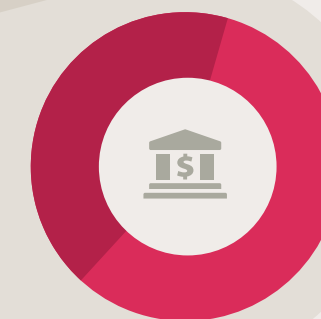
44,000

ARTS + CULTURE:	7,600
OTHER INDUSTRIES:	36,100



RESIDENT HOUSEHOLD INCOME

\$1.04 BILLION



TAX REVENUE

\$169 MILLION

STATE:	\$95 million
LOCAL:	\$74 million

DIRECT EXPENDITURES

The first round of spending by organizations and audiences.

EXAMPLE: An organization creates jobs through its expenditures in the form of paychecks to its own employees.

INDIRECT EXPENDITURES

Economic activity generated as cultural dollars make their way through the region's economy.

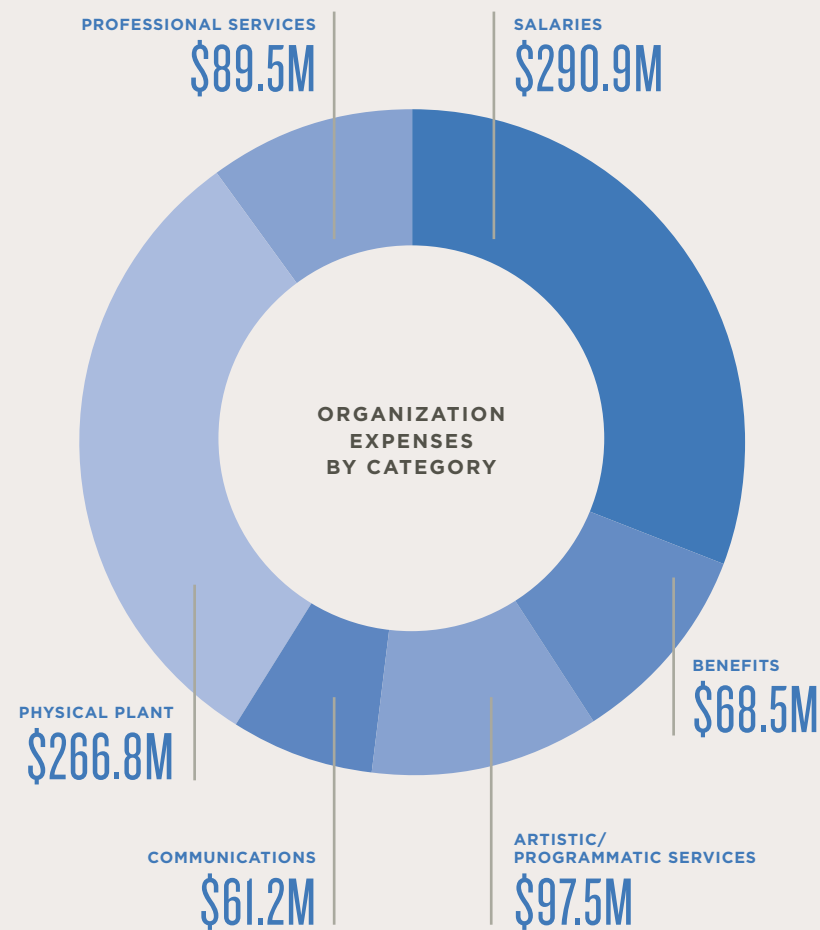
EXAMPLE: A restaurant owner hires a contractor to make repairs, with money made from cultural attendees.

ORGANIZATIONAL SPENDING

Arts and culture has a substantial impact on Philadelphia’s regional economy. The 345 nonprofit arts and cultural organizations in this report pay salaries, buy or rent property, purchase office supplies, hire contractors and pay for a myriad of professional services.

For example, cultural organizations spend \$34 million to put on productions and exhibits, \$23 million for repairs and maintenance and \$24 million to market their events and shows.¹ This money is directly injected into the larger economy and is crucial to local workers and businesses.

\$875 MILLION
FROM DIRECT EXPENDITURES



AUDIENCE SPENDING

Above and beyond the cost of a ticket, cultural attendees spend an average of \$30 per person, per event.² A portion of this money is spent on concessions and souvenirs, but most is spent outside cultural venues.

MEALS BEFORE/AFTER EVENT	\$237.8M
OVERNIGHT LODGING	\$84.3M
GROUND TRANSPORTATION	\$65.7M
REFRESHMENTS/SNACKS DURING EVENT	\$53.5M
SOUVENIRS + GIFTS	\$46.3M
CLOTHING + ACCESSORIES	\$16.2M
OTHER	\$13.4M
EVENT-RELATED CHILDCARE	\$4.0M

\$521 MILLION
FROM DIRECT EVENT-RELATED EXPENDITURES

The crowds that stream in and out of theaters, historic sites, performance venues and museums fill our cafes and restaurants. They generate an intricate web of ancillary spending that transforms neighborhoods, revitalizes Main Streets and helps to create entirely new retail corridors.

FOLLOW THE MONEY

as these three typical groups of attendees add their cultural dollars to our region's economy. You can see how even just a portion of their spending can ripple through the economy, ringing cash registers far from the original point of purchase.

AUDIENCE SPENDING BY ATTENDEE TYPE ³	
OVERNIGHT VISITORS	\$143.0M
DAY-TRIPPERS	\$85.8M
RESIDENTS	\$292.3M



The Feldmans [OVERNIGHT VISITORS]

The Feldmans are in town for a weekend away, which includes dinner at a restaurant, a show at the theater and cocktails at a Center City bar before heading back to the **HOTEL** for the evening.



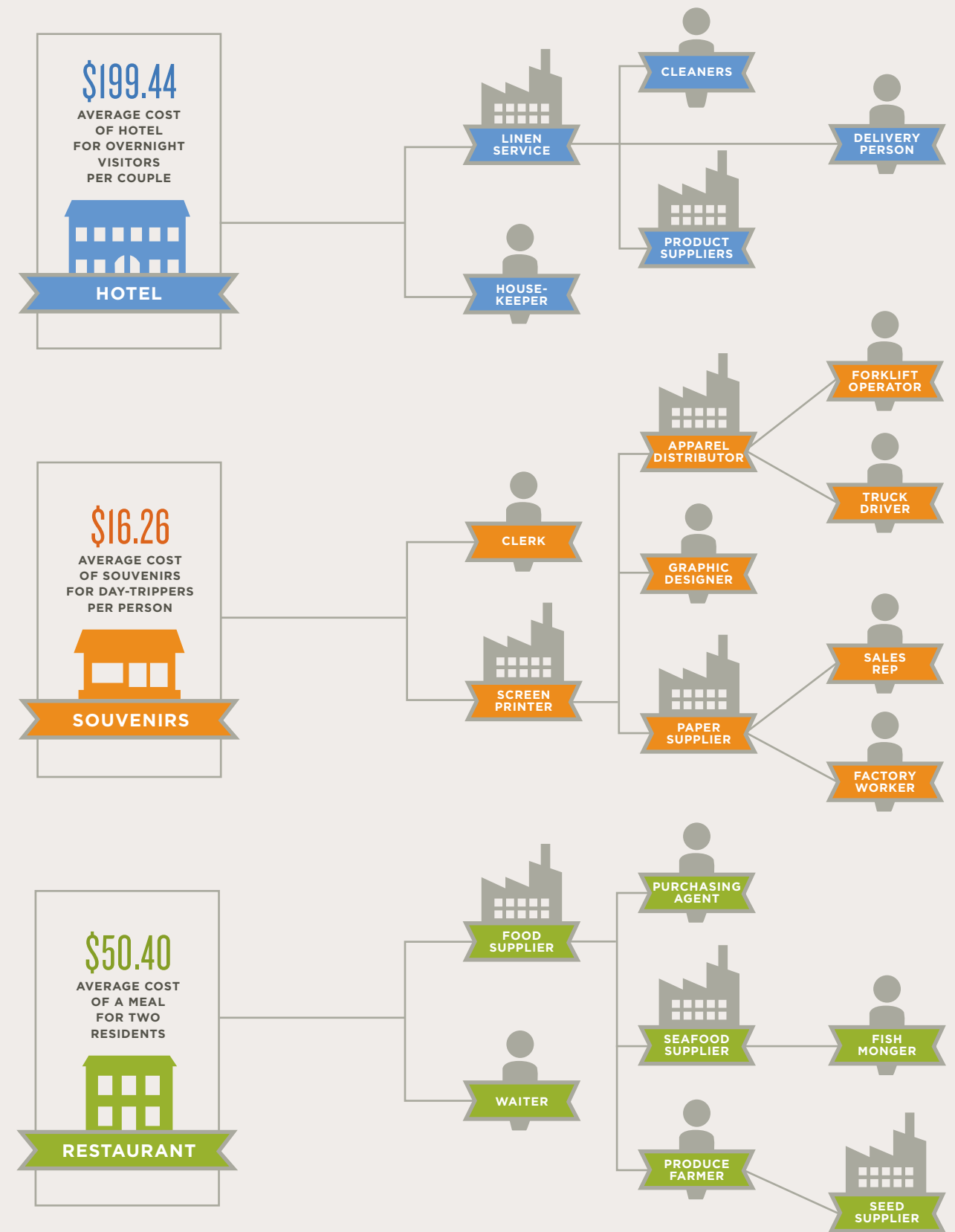
The Kims [DAY-TRIPPERS]

The Kims hop on the trolley to take 4-year old Carolina and 10-year old Damon on their annual spring trip to the zoo. To remember the occasion, the Kims buy t-shirts of the children's favorite animals as **SOUVENIRS**.



Rachel + Malik [RESIDENTS]

This weekend is First Friday, so Rachel and Malik get a babysitter and plan for a night attending art openings around the Old City followed by dinner and drinks at a new **RESTAURANT**.



EMPLOYMENT IMPACT

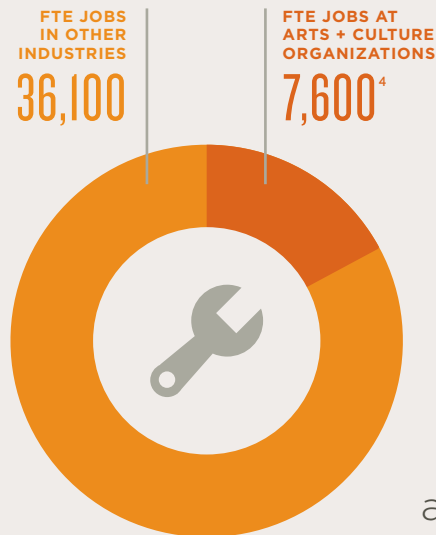
Arts and culture benefits workers and businesses in every industry and every community. These are jobs that provide paychecks not just to cultural staffers, but also to independent artists, designers and musicians; marketers, accountants and consultants; construction workers and contractors; and chefs, bartenders and hotel managers.

44,000
FULL-TIME EQUIVALENT JOBS

WHAT IS A FULL-TIME EQUIVALENT JOB?

Jobs in this report are calculated as FTE, or Full-Time Equivalent. One FTE job is generally equal to a 40-hour work week for one employee, or two half-time jobs, or four quarter-time jobs.

In arts and culture as in many industries, not all jobs are full-time. A small museum may employ an accountant part-time, or an actor may work in three shows for three theaters over the course of the year. For details about part-time employment in arts and culture, see the Cultural Alliance's *2011 Portfolio* report.



4 OUT OF 5
jobs generated by arts and culture are in other industries.

JOBS GENERATED

FROM	DIRECT	INDIRECT	TOTAL
ORGANIZATIONS' SPENDING	10,200	20,100	30,300
AUDIENCES' SPENDING	9,100	4,300	13,400
TOTAL SPENDING	19,300	24,400	43,700

BUSINESS IMPACT

Arts and cultural organizations are important regional or neighborhood anchors that hire locally and support surrounding businesses. The economic model for this report allows us to track the ultimate destination of expenditures made by arts and cultural organizations and audiences. The chart below shows the industries in the region that benefit from direct and indirect expenditures and to what degree.⁵



INDUSTRIAL ACTIVITY IN SOUTHEASTERN PA

from Direct & Indirect Expenditures by Arts + Cultural Organizations and Their Audiences

FINANCE, INSURANCE + REAL ESTATE	\$287.2M
ACCOMMODATION + FOOD SERVICES ⁶	\$282.4M
MANAGEMENT + BUSINESS SUPPORT	\$273.6M
MANUFACTURED PRODUCTS ⁷	\$269.3M
ENTERTAINMENT + RECREATION	\$137.9M
EDUCATIONAL + HEALTH SERVICES	\$136.9M
RETAIL TRADE	\$102.6M
PUBLISHING + INFORMATION SERVICES	\$69.7M
WHOLESALE TRADE	\$62.5M
PROFESSIONAL, SCIENTIFIC + TECH SERVICES	\$59.0M
OTHER SERVICES (EXCEPT GOVERNMENT)	\$57.6M
TRANSPORTATION + WAREHOUSING	\$53.2M
FOOD + FOOD PRODUCTS	\$43.6M
UTILITIES + CONSTRUCTION	\$42.4M
EQUIPMENT RENTAL + LEASING	\$16.7M
AGRICULTURE	\$3.2M
MINING	\$2.8M
GOVERNMENT	\$0.3M

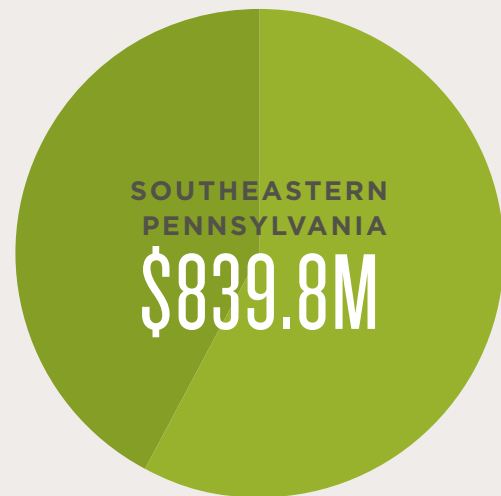
HOUSEHOLD INCOME

The jobs created by arts and culture return \$1.04 billion back to our communities as household income.⁸ This is money in the pockets and checkbooks of our region's residents that is used to buy groceries, pay rent and utilities, and start new businesses.

\$1.04 BILLION
IN HOUSEHOLD INCOME

WHAT IS HOUSEHOLD INCOME?

Most people receive their income as salaries, but Household Income also includes other funds, such as business profits, investment dividends and fees.



+



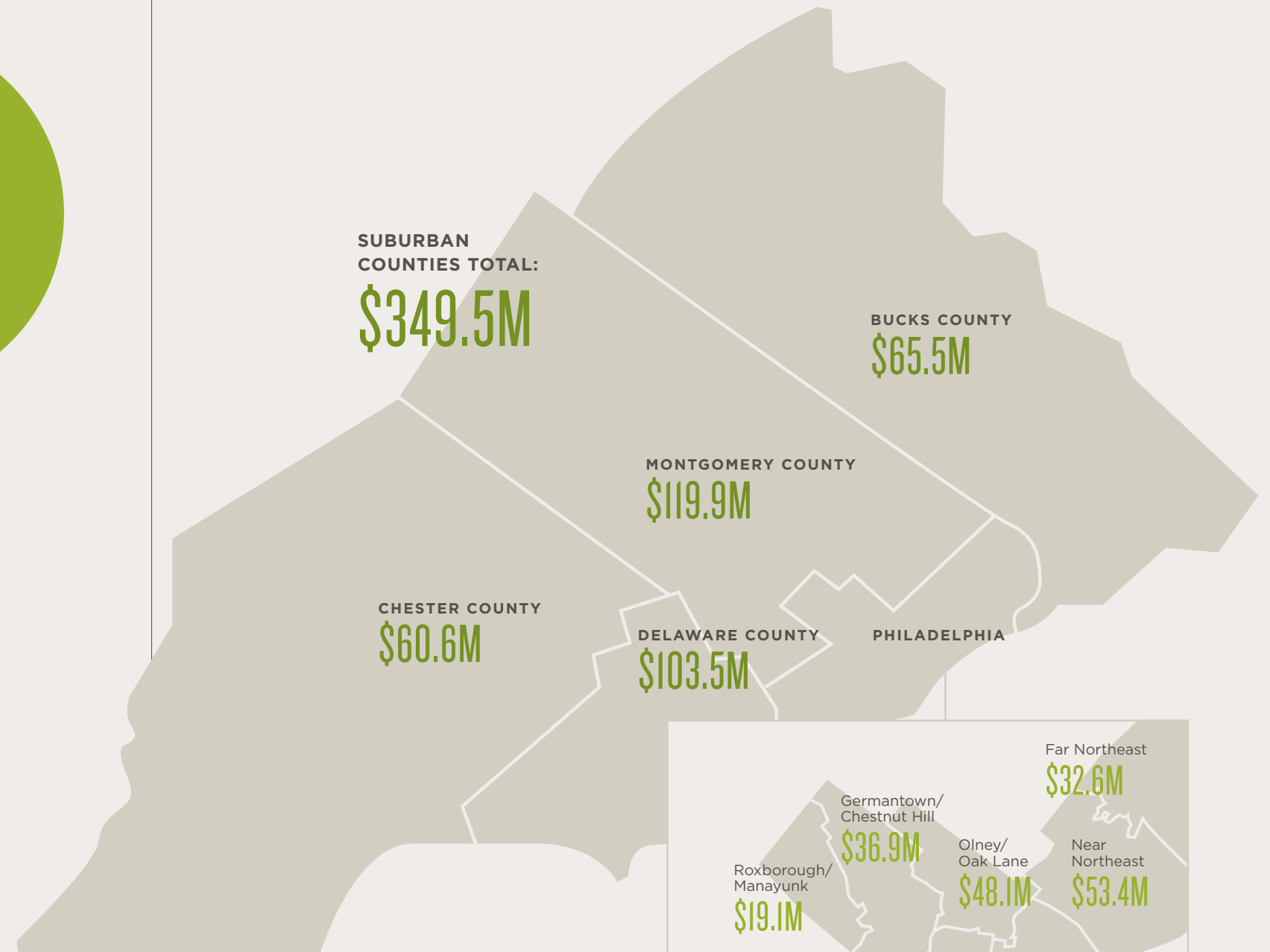
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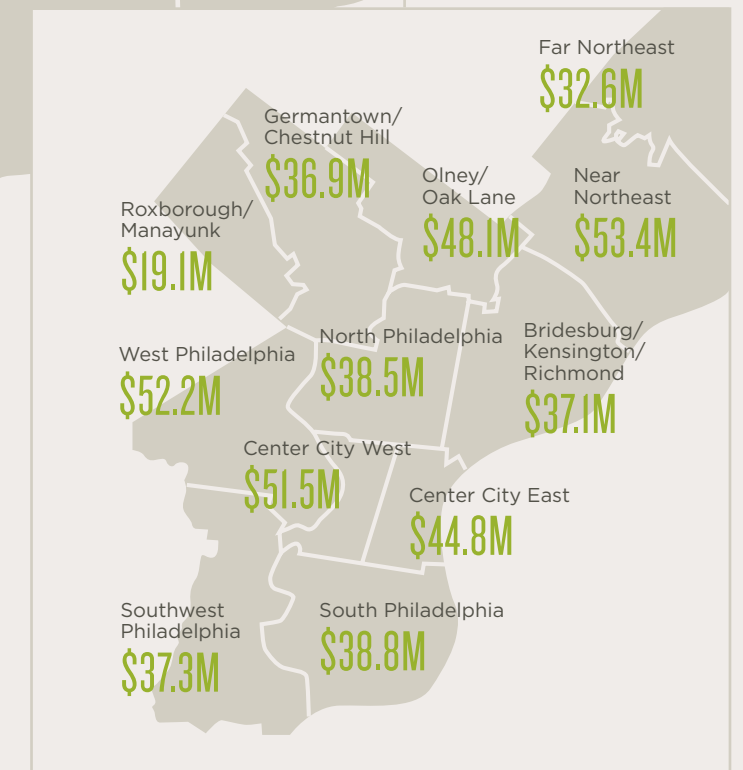


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PHILADELPHIA TOTAL⁹:

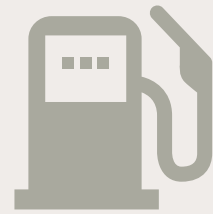
\$490.3M



WHAT CAN \$1.04 BILLION BUY FOR FAMILIES IN THE REGION?

\$1.04 billion sounds like a lot of money, and it is! Let's see what local families that work in industries connected with arts and culture in our region can purchase with this income.¹⁰

1 YEAR'S WORTH OF:



GAS FOR
577,000
FAMILIES

OR



CLOTHING FOR
572,000
FAMILIES



GROCERIES FOR
281,000
FAMILIES

OR



HOUSE PAYMENTS FOR
127,000
FAMILIES

OR



129,966,625
CHEESESTEAKS

(REGULAR STEAK, AMERICAN,
PROVOLONE OR WHIZ + ONIONS)*

THAT'S 32 1/3 CHEESESTEAKS FOR
EACH RESIDENT OF SOUTHEASTERN PA!

* Based on the average price for regular steak with cheese and onions at four popular cheesesteak venues

DISCIPLINES

Organizations in Southeastern Pennsylvania offer a vast range of arts and cultural offerings. We group organizations into 11 Disciplines and 4 broader Organization Types.¹¹



Calculate your cultural organization's economic impact at

philaculture.org/impact

MUSEUMS, VISUAL ARTS, HISTORIC AND SCIENTIFIC

	# OF ORGANIZATIONS IN STUDY	TOTAL DIRECT EXPENDITURES	FULL-TIME EQUIVALENT JOBS GENERATED	TOTAL TAX REVENUE GENERATED (local + state)	TOTAL ECONOMIC IMPACT
MEDIA ARTS	20	\$69.2M	2,200	\$8.4M	\$163.4M
MUSEUMS, GALLERIES + VISUAL ARTS	34	\$255.8M	8,000	\$31.0M	\$604.1M
SCIENCE + NATURE	10	\$278.4M	8,700	\$33.8M	\$658.1M
HISTORY	46	\$257.8M	7,300	\$32.5M	\$616.0M
SUBTOTAL	110	\$861.1M	26,200	\$105.6M	\$2.0B

PERFORMING ARTS

	# OF ORGANIZATIONS IN STUDY	TOTAL DIRECT EXPENDITURES	FULL-TIME EQUIVALENT JOBS GENERATED	TOTAL TAX REVENUE GENERATED (local + state)	TOTAL ECONOMIC IMPACT
DANCE	45	\$26.1M	800	\$3.1M	\$61.5M
THEATER	41	\$75.1M	2,400	\$9.1M	\$177.4M
MUSIC	58	\$103.0M	3,300	\$12.3M	\$242.2M
OTHER PERFORMING ARTS ¹²	14	\$82.5M	2,700	\$9.8M	\$194.0M
SUBTOTAL	158	\$286.8M	9,200	\$34.4M	\$675.1M

COMMUNITY ARTS + EDUCATION

COMMUNITY ARTS + CULTURE	35	\$33.1M	1,000	\$4.1M	\$78.3M
EDUCATION + INSTRUCTION	31	\$199.8M	6,800	\$23.3M	\$466.5M
SUBTOTAL	66	\$232.8M	7,800	\$27.3M	\$544.8M

SUPPORT

COUNCILS, SERVICES + SUPPORT	11	\$14.9M	500	\$1.8M	\$16.7M
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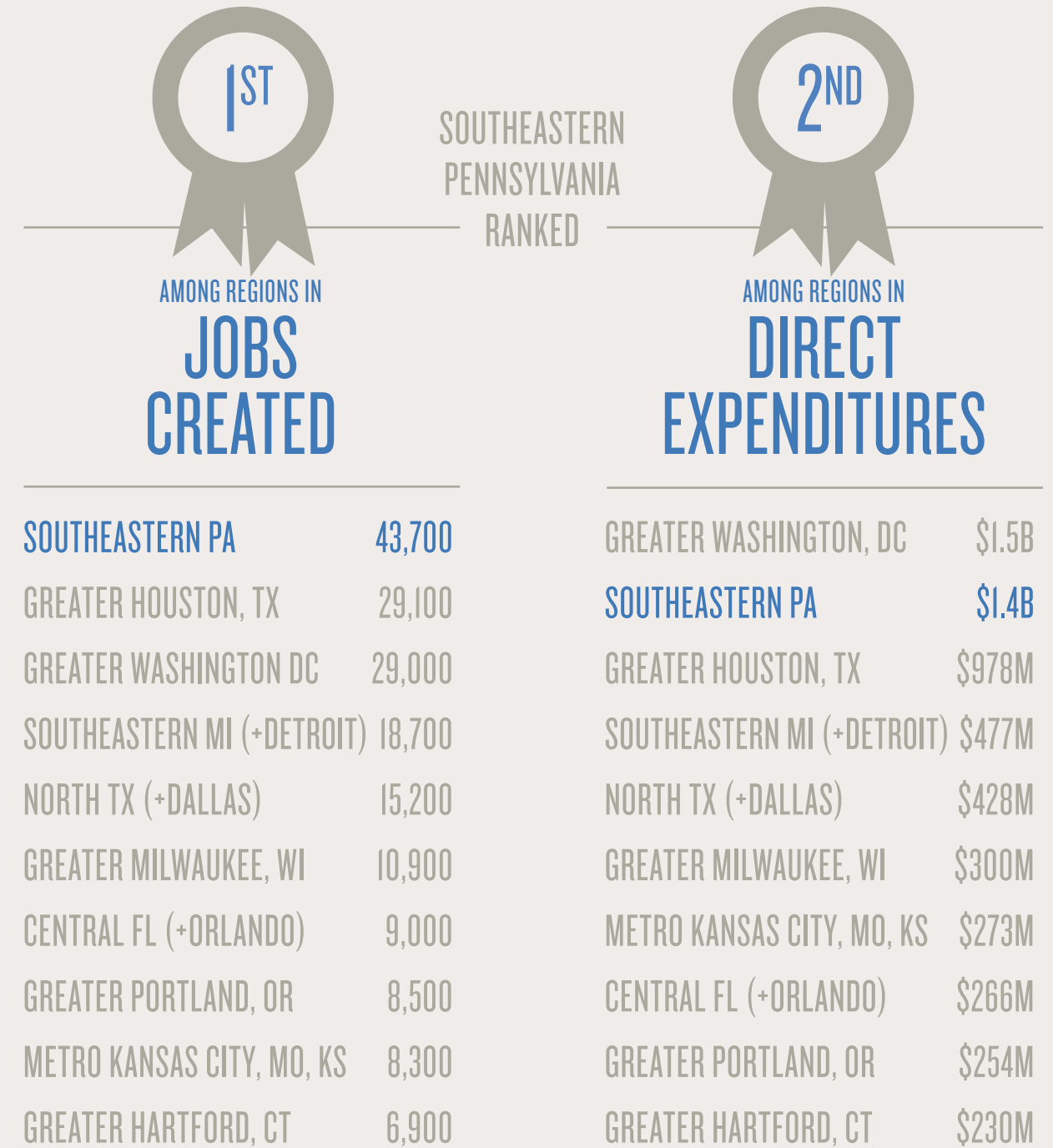
REGIONAL COMPARISONS

When it comes to job creation and economic vitality, Southeastern Pennsylvania’s cultural sector ranks among the top regions in America.

ECONOMIC IMPACT OF ARTS + CULTURE IN REGIONS

WITH POPULATIONS OVER 1 MILLION, BY PER-CAPITA EXPENDITURES

REGIONS OVER 1 MILLION	PER-CAPITA DIRECT EXPENDITURES ¹³	JOB'S GENERATED PER 1,000 RESIDENTS ¹⁴	TOTAL FTE JOBS GENERATED
GREATER WASHINGTON, DC REGION, DC, MD, VA	\$394	7.6	29,000
SOUTHEASTERN PENNSYLVANIA	\$348	10.9	43,700
GREATER HARTFORD AREA, CT	\$224	6.7	6,900
GREATER HOUSTON AREA, TX	\$174	5.2	29,100
METROPOLITAN KANSAS CITY AREA, MO, KS	\$159	4.8	8,300
GREATER PORTLAND AREA, OR	\$154	5.2	8,500
GREATER MILWAUKEE AREA, WI	\$148	5.4	10,900
SOUTHEASTERN MICHIGAN REGION (INCL. DETROIT), MI	\$99	3.9	18,700
NORTH TEXAS REGION (INCL. DALLAS), TX	\$73	2.6	15,200
CENTRAL FLORIDA REGION (INCL. ORLANDO), FL	\$71	2.4	9,000



CITY COMPARISONS

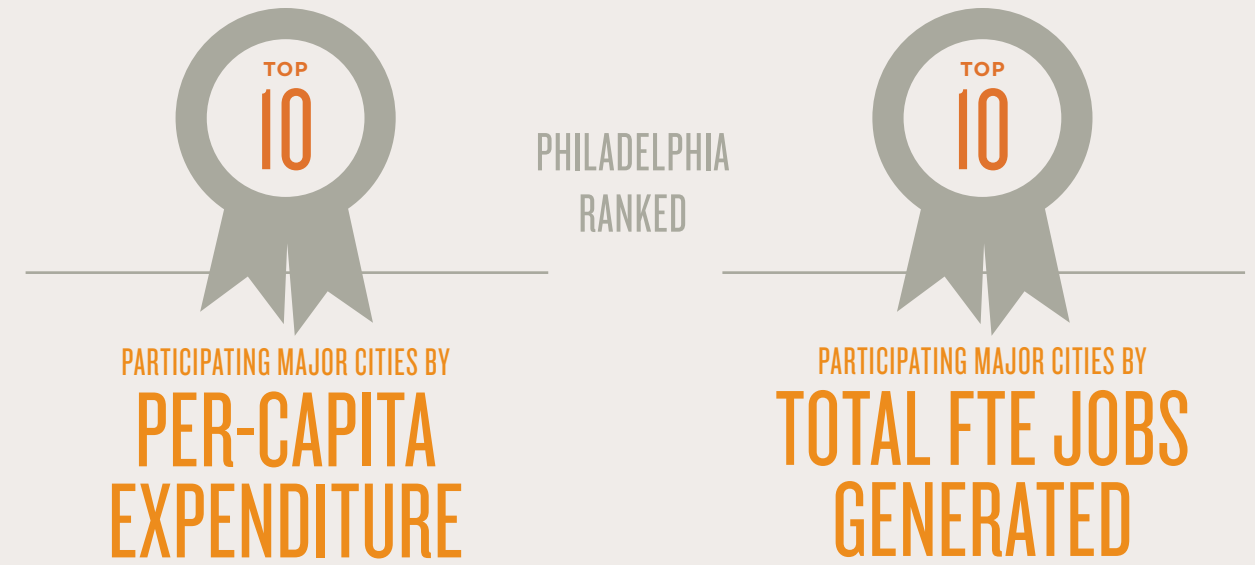
We can also see how Philadelphia compares to its peer cities. By almost any measure, Philadelphia ranks highly when it comes to arts and culture's contribution to the economy.

ECONOMIC IMPACT OF ARTS + CULTURE IN MAJOR CITIES¹⁵

BY PER-CAPITA EXPENDITURES

CITIES	PER-CAPITA DIRECT EXPENDITURES ¹⁶	JOB'S GENERATED PER 1,000 RESIDENTS ¹⁷	TOTAL FTE JOBS GENERATED
WASHINGTON, DC	\$1,806	24.3	14,600
SAN FRANCISCO, CA	\$871	24.2	19,700
PHILADELPHIA, PA	\$805	19.3	29,800
CHICAGO, IL	\$770	21.2	60,500
SEATTLE, WA	\$748	18.1	10,800
BALTIMORE, MD	\$609	14.9	9,500
PITTSBURGH, PA*	\$563	16.9	20,500
ATLANTA, GA	\$558	17.5	9,400
SAN DIEGO, CA	\$520	15.9	20,400
INDIANAPOLIS, IN	\$475	16.2	13,100
ST. LOUIS, MO*	\$432	14.1	19,000
MIAMI, FL*	\$430	11.9	29,800
LOS ANGELES, CA	\$361	9.7	37,400
AUSTIN, TX	\$312	9.7	7,300
DALLAS, TX	\$252	8.8	11,200
CHARLOTTE, NC*	\$222	6.8	6,200
HOUSTON, TX*	\$213	4.8	19,700
COLUMBUS, OH*	\$197	7.4	8,500
PHOENIX, AZ	\$192	6.1	9,600
RALEIGH, NC*	\$185	7.4	6,600
ALBUQUERQUE, NM	\$176	7.0	3,700
MEMPHIS, TN*	\$136	4.2	3,900
SAN JOSE, CA	\$129	3.0	2,800
SAN ANTONIO, TX	\$100	3.8	5,100
TUCSON, AZ*	\$86	2.6	2,600
SACRAMENTO, CA*	\$80	3.2	4,400
FORT WORTH, TX*	\$47	1.7	3,000
RIVERSIDE, CA*	\$41	1.2	2,500
LAS VEGAS, NV*	\$30	0.8	1,500

* Includes surrounding county



PARTICIPATING MAJOR CITIES BY PER-CAPITA EXPENDITURE

WASHINGTON, DC	\$1,806
SAN FRANCISCO, CA	\$871
PHILADELPHIA, PA	\$805
CHICAGO, IL	\$770
SEATTLE, WA	\$748
BALTIMORE, MD	\$609
PITTSBURGH, PA	\$563
ATLANTA, GA	\$558
SAN DIEGO, CA	\$520
INDIANAPOLIS, IN	\$475

PARTICIPATING MAJOR CITIES BY TOTAL FTE JOBS GENERATED

CHICAGO, IL	60,500
LOS ANGELES, CA	37,400
PHILADELPHIA, PA	29,800
MIAMI, FL	29,800
PITTSBURGH, PA	20,500
SAN DIEGO, CA	20,400
SAN FRANCISCO, CA	19,700
HOUSTON, TX	19,700
ST. LOUIS, MO	19,000
WASHINGTON, DC	14,600

ABOUT OUR AUDIENCES

Our audience survey asked 2,000+ attendees a number of questions about themselves¹⁸ — where they were from, why they visited the region and whether they vote.¹⁹

29%

OF ATTENDEES COME FROM OUTSIDE THE REGION

SPENDING BY AUDIENCE MEMBERS

AVERAGE AMOUNT SPENT BY RESIDENTS	\$24 per person
AVERAGE AMOUNT SPENT BY VISITORS	\$45 per person

REASON FOR VISITING GREATER PHILADELPHIA?

TO ATTEND THIS ARTS/CULTURAL EVENT	44%
ON VACATION/HOLIDAY	40%
VISIT FRIENDS AND/OR RELATIVES	6%
BUSINESS OR COMBINATION OF BUSINESS & LEISURE	4%
OTHER/MISCELLANEOUS	6%

70%

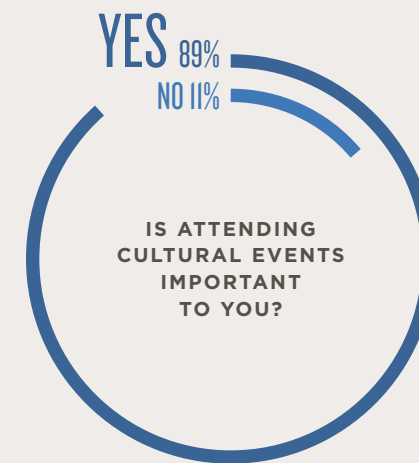
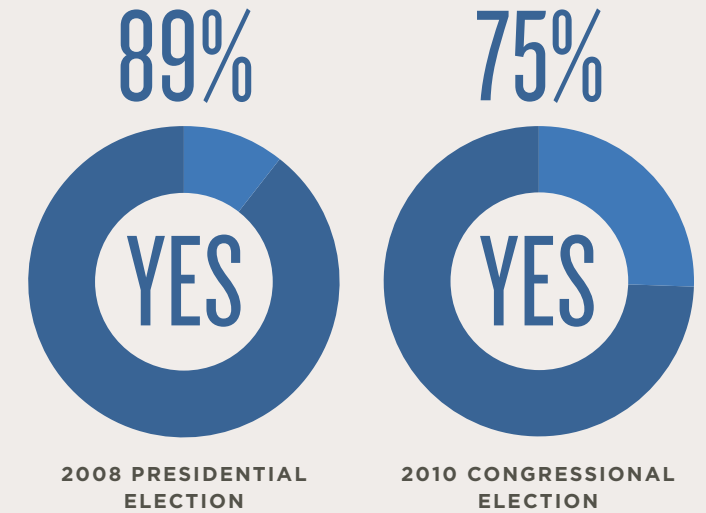
OF VISITORS WOULD HAVE STAYED HOME OR GONE ELSEWHERE WERE IT NOT FOR THIS EVENT

ATTENDEES STAYING OVERNIGHT



OVERNIGHT STAYS	VISITORS	RESIDENTS	ALL ATTENDEES
0 NIGHTS	62%	90%	82%
1 NIGHT	18%	5%	9%
2 NIGHTS	10%	2%	5%
3 OR MORE NIGHTS	11%	2%	5%

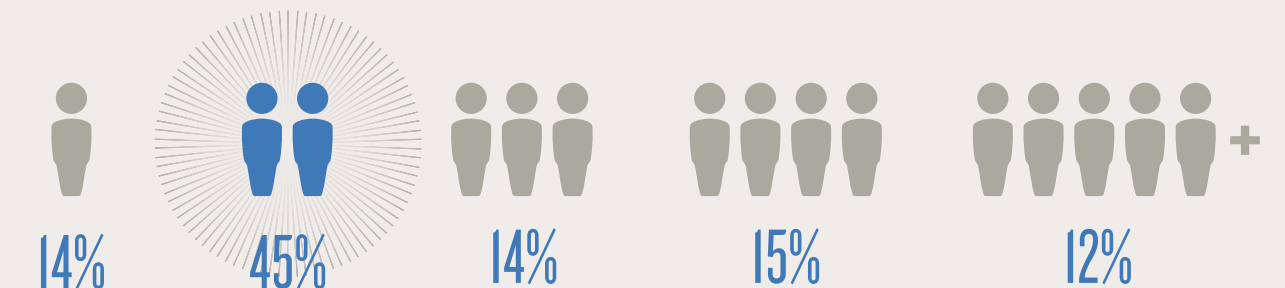
DO YOU VOTE?



ON AVERAGE, HOW FREQUENTLY DO YOU ATTEND CULTURAL EVENTS?

AT LEAST ONCE A WEEK	12%
AT LEAST ONCE A MONTH	48%
AT LEAST ONCE A YEAR	36%
NEVER / ALMOST NEVER	4%

ATTENDEES BY SIZE OF GROUP



IN CONCLUSION

I. ARTS + CULTURE MEANS JOBS.

Through both direct and indirect spending, Greater Philadelphia's arts and cultural organizations and our audiences have a total economic impact of \$3.3 billion, providing residents with 44,000 jobs. This economic activity also helps generate more than \$169 million in tax revenues for state and local coffers — money that is leveraged to pay for other vital services, including teachers, police, firefighters and transportation.

2. PHILADELPHIA IS OUTPERFORMING THE COUNTRY AS A WHOLE.

Our region's cultural sector is ranked first for job creation, providing 10.9 jobs per thousand residents — nearly double the national average. Southeastern Pennsylvania ranks second for per-capita cultural spending, and we far exceed the national average for percentage of attendees who are visitors (29% to 21%). Arts and culture is a unique competitive advantage for this region — one that can be leveraged by civic, business and policy leaders to ensure greater prosperity and economic growth for our region's citizens.

Arts and culture is a vital regional asset that touches every life in Greater Philadelphia. Together we need to ensure its vibrancy, not just as an industry, but as a key to growing our economy, educational outcomes, sense of place and quality of life.

3. GREATER PHILADELPHIA'S BUSINESS COMMUNITY THRIVES WITH A STRONG AND VIBRANT CULTURAL SECTOR.

Cultural organizations buy and hire locally, and audiences spend their money at businesses close to those venues, events and attractions. These cultural dollars then ripple through our economy, benefiting a diversity of industries throughout the entire region. Beyond the \$1.4 billion in direct spending by cultural organizations and their audiences, another \$1.9 billion of indirect spending is generated. This spending benefits an array of related sectors including Manufacturing, Finance, Insurance, Real Estate, Hospitality and Retail.

4. ARTS + CULTURE REVITALIZES NEIGHBORHOODS AND MAKES OUR COMMUNITIES STRONGER.

Throughout our region — in technology corridors, county seats, inner-ring suburbs and urban neighborhoods — culture provides the civic glue. Art galleries, cultural organizations and community partners are helping to create unique and eclectic retail and food hubs, revitalizing Main Streets and providing healthy outlets for our youth.

5. CULTURAL DOLLARS SUPPORT FAMILIES AND INDIVIDUALS THROUGHOUT THE ENTIRE REGION.

Spending by organizations and audiences travels far from the original point of purchase. Its impact is diverse and its benefits widely distributed. Jobs are created across nearly every industry, with over \$1 billion in household income generated for our region's residents. This money buys groceries, pays rent and utilities, pays school tuition and starts new businesses.



The Barnes Foundation

METHODOLOGY

This is the second edition of *Arts, Culture and Economic Prosperity in Greater Philadelphia*; the first was published in 2007. While the basic methodology used to derive the outputs is the same for both reports, we discourage drawing conclusions from direct comparisons between the data in this report and the 2007 edition, because there are differences in the organizations participating in the two reports.

DATA COLLECTION

Analyzing the economic impact of arts and culture organizations for this report required collecting detailed information on (1) data from arts and cultural organizations and (2) spending by audience members.

(1) Data from Arts and Cultural Organizations

Information on spending, employment, attendance, and other relevant areas was provided by organizations through the Pennsylvania Cultural Data Project (CDP; please see Partner Organizations for details). An extensive process of organization recruitment was undertaken in fall 2011. All Greater Philadelphia Cultural Alliance members and other organizations known to the Cultural Alliance were asked to submit their data through the Pennsylvania CDP.

345 organizations in Southeastern Pennsylvania provided data for this study. Only "Review Complete" CDP data — that is, data that have been through a thorough error-checking process — were used for this report. All data are from Fiscal Year 2010. The organizations in this report represent approximately 90% of the total economic activity of the nonprofit arts and cultural sector in Southeastern Pennsylvania.

(2) Spending by Audience Members Surveyors collected 2,039 audience spending surveys from patrons at 78 arts and cultural events held by 53 organizations throughout 2011. Surveying was conducted at a wide variety of events and organizations, on

weekends and weekdays, and at both paid and free events (please see Participating Organizations for details). All surveys were anonymous. Organizations were placed into six cohorts based on attendance and location. Audience surveys were collected in proportion to each cohort's share of overall audience figures for the sector. To prevent surveying bias, every three months organizations were anonymously and randomly selected from each cohort for audience surveying.

Surveying in 2011 presented a number of challenges worth noting. Overall, surveyors for this study more frequently reported audience members declining to take the survey than in the past. This is consistent with reports from other participating communities and, indeed, with survey trends over the last several decades (a 2006 special edition of *Public Opinion Quarterly* (70:5) addresses the issue of declining survey participation in detail). Overall, this trend is not seen as invalidating survey results.

In addition, the weather in summer 2011 presented additional challenges for surveying. July 2011 was the hottest month on record for the region (average daily high: 92 degrees), followed by the wettest month on record in August 2011 (16 rainy days and over 19 inches of rain). For the first time, surveying was cancelled due to rain-forced closure of facilities. (Weather figures: National Weather Service at the Franklin Institute.) It is also believed that tourism and visitation to the region was affected by the Debt Renewal Crisis during July and August. During this time, consumer confidence dropped significantly (University of Michigan Consumer Sentiment Index), and the Dow Jones Industrial Average dropped almost 2,000 points (Dow Jones). July and August are normally peak months for tourism for the region. The Greater Philadelphia Tourism Marketing Corporation and other local partners reported that

tourism figures for summer 2011 were lower than normal. A number of other participating communities located in the Mid-Atlantic and Northeast regions experienced similar effects. While it would likely be possible to use accepted statistical methods to generate estimates of Audience Spending for a "normal year," adjusting for weather and attendance patterns, this report measures only spending that can be measured directly through surveys. Given the above factors, we believe that the Audience Expenditures in general and Hotel Expenditures in particular are lower than would be the case in a "normal year." As such, if anything, the economic impact findings are conservative.

ECONOMIC ANALYSIS

Economic modeling for this project was developed by economists at the Georgia Institute of Technology. A consistent modeling process was used for all 182 communities that participated in *Arts and Economic Prosperity IV* across the country. Detailed expenditure data was collected from 9,721 nonprofit arts and culture organizations and 151,802 of their attendees. The project economists constructed input-output models for each study region to provide specific and reliable economic impact data about the nonprofit arts and culture industries, specifically full-time equivalent jobs, household income, and local and state government revenue. This allows the uniqueness of each economy to be reflected in the findings.

To derive the most reliable economic impact data, input-output analysis is used to measure the impact of expenditures by nonprofit arts and culture organizations and their audiences. This is a highly regarded type of economic analysis that has been the basis for two Nobel Prizes in economics. The models are systems of mathematical equations that combine statistical methods

and economic theory in an area of study called econometrics. The analysis traces how many times a dollar is re-spent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for this study because it can be customized specifically to each community, region, or state.

An input-output model was customized for both Philadelphia and Southeastern Pennsylvania based on the local dollar flow between 533 finely detailed industries within these areas. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, Regional Economic Information System, and Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and culture organizations and their audiences.

The basic purchase patterns for 533 local industries are derived from a similar table for the U.S. economy for 2007 (the latest detailed data available from the U.S. Department of Commerce). The table is first reduced to reflect the unique size and industry mix of the local economy, based on data from County Business Patterns and the Regional Economic Information System of the U.S. Department of Commerce. It is then adjusted so that only transactions with local businesses are recorded in the inter-industry part of the table. This technique compares supply and demand and estimates the additional imports or exports required to make total supply equal total demand. The resulting table shows the detailed sales and purchase patterns of the local industries. The 533-industry table is then aggregated to reflect the general activities of 38 industries plus local households, creating a total of 39 categories.

ADDITIONAL ANALYSIS

In this report, the sections mapping and illustrating Household Income, the Disciplines section and the Business Impact section are additional analyses performed by the Greater Philadelphia Cultural Alliance, based on the analyses received from Americans for the Arts and described previously. Geographic breakdowns are based on data from the U.S. Census's Longitudinal Employer-Household Dynamics program. "Labor shed reports" provide counts and percentages of where workers live who are employed in the selected county or area (for Philadelphia, zip code analyses were amalgamated into more generalized regions). Breakdown by Discipline is based on ratios from Americans for the Arts for calculating economic impact in Southeastern Pennsylvania. The Business Impact section amalgamates data from the 38 industries as reported by Americans for the Arts into 18 categories, primarily for reasons of space and readability. Any errors or omissions in these sections lie solely with the Greater Philadelphia Cultural Alliance.

END NOTES

- 1 Data about organizational expenditures from the Pennsylvania Cultural Data Project FY2010 Profiles used for this report, spending categories from CDP amalgamated by the Greater Philadelphia Cultural Alliance into these six categories: **Salaries:** Salaries and commission; salary, commission. **Benefits:** payroll taxes, health care benefits, disability, workers compensation, pension, other benefits. **Professional services:** accounting, advertising/marketing, audit, bank fees, conferences & meetings, fundraising — other, fundraising professionals, honoraria, interest, investment, legal, professional development, professional fees — other, public relations. **Artistic/programmatic services:** artist commissions, artists & performers-non-salaried, collections conservation, collections management, grant-making, touring. **Physical plant:** building, grounds maintenance, catering/hospitality, cost of sales, depreciation, equipment rental and maintenance, facilities — other, insurance, in-kind, lodging, meals, major repairs, office expense — other, other, rent, sales commission, supplies, travel, utilities. Communications: dues and subscriptions, postage, shipping, printing, production, exhibition costs, internet, website, telephone.
- 2 Average Per Person Expenditure is \$29.92. By category the averages are: Refreshments/Snacks During Event: \$3.07; Meals Before/After Event: \$13.65; Souvenirs and Gifts: \$2.66; Clothing and Accessories: \$0.93; Ground Transportation: \$3.77; Event-Related Child Care: \$0.23; Overnight Lodging (one night only): \$4.84; Other: \$0.77. These figures are not reflective of average cost per purchase, but of the overall spending across all 2,039 patrons surveyed. See pp. 8-9 and note 3 for examples calculating specific purchases.
- 3 Calculations and breakdown of Visitors spending into subtotals for Day-Trippers and Overnight Visitors are by the Greater Philadelphia Cultural Alliance. 38% of Visitors are Overnight Visitors who spend an average of \$73.24 per person. 62% of Visitors are Day-Trippers; they spend \$27.39 per person. Note

that not all Overnight Visitors stay in hotels; the example on the page, with \$99.72 per person spent on hotel rooms, is for those who do. Similarly, Souvenir Cost is the average for those Day-Trippers purchasing Souvenirs (\$16.62 per person), and Meal costs for those residents purchasing meals (\$25.20 per person).

- 4 FTE Jobs at Arts and Culture Organizations figure calculated by the Greater Philadelphia Cultural Alliance from Pennsylvania Cultural Data Project FY2010 Profiles used for this report.
- 5 The 18 categories on this page are amalgamated from 38 industry classifications that are an output from the economic model built for this report. These 38 categories are themselves amalgamated from the original 533 industry categories described in Methodology.
- 6 These industrial sectors differ from the figures that show how funds are spent on pp. 6-7. For example, p. 7 notes that \$237.8M is spent on Meals. The Business Impact analysis shows where these funds "wind up." For example, of the money spent by audience members on Meals, much would remain in Accommodation and Food Services, but those sectors would also re-spend money on Food & Food Products; Finance, Insurance & Real Estate; Utilities & Construction, etc.
- 7 Manufactured Products is an amalgamation of the following industry classifications: Tobacco, Textiles, Apparel and leather products, Lumber and wood products, Paper and paper products, Printing and related support activities, Petroleum and coal products manufacturing, Chemicals and allied products, Rubber and plastic products, Nonmetallic mineral products, Primary metals, Fabricated metals, Machinery, Instruments and electronic products, Electrical machinery, Transportation equipment, Furniture and fixtures, Miscellaneous manufacturing.
- 8 Distribution of Household Income by geographic area is calculated by the Greater Philadelphia Cultural Alliance. The figures are estimates based on the location of employees' residence, generated using data from the U.S. Census's Longitudinal Employer-Household Dynamics program. Data used to generate estimates by geographic area are Census Data from 2010 (the most recent available year) and the Pennsylvania Cultural Data Project FY2010 Profiles used for this report.
- 9 The sections of Philadelphia used here are based on the Planning Analysis Sections devised by the Philadelphia City Planning Commission, with some modifications. We have used Center City boundaries approximating those used by the Center City District. Household income figures are estimates that have been calculated to zip code areas, amalgamated into the sections used here.
- 10 Commodities and expenditure figures are derived using average annual household expenditure data for the Philadelphia Metropolitan Statistical Area from the Bureau of Labor Statistics, Consumer Expenditure Survey, 2009-2010.
- 11 Discipline calculations by the Greater Philadelphia Cultural Alliance.
- 12 Other Performing Arts is comprised primarily of organizations operating Performing Arts venues which present a variety of programming and organizations that perform more than one type of performing art as their primary purpose.
- 13, 14 Per capita and per resident calculations made by the Greater Philadelphia Cultural Alliance. Population data for calculations from *Arts and Economic Prosperity IV*, Detailed Data Tables, Table 1.
- 15 Major cities included are all cities with population over 500,000 that participated in the study, and all single counties with a city with population over 250,000 in a county with population over 500,000 when the city and county participated in the study as a unit. For example, Allegheny County, PA participated in the study as a unit and is included in the chart. Pittsburgh has a population of 306,000 and is located in Allegheny County, population 1,223,000. This unit is labeled "Pittsburgh, PA" in the chart, with a footnote indicating that the data includes the whole county.
- 16, 17 See notes 13, 14.
- 18 These are questions from the national *Arts and Economic Prosperity IV* study and were asked in all 182 participating communities.
- 19 The questions about voting and whether attending events is important are additional questions added by the Greater Philadelphia Cultural Alliance. They were asked only in Southeastern Pennsylvania.

PARTICIPATING ORGANIZATIONS

This report would not have been possible without the 345 organizations that provided their detailed financial and attendance information through the Pennsylvania Cultural Data Project. Our sincere thanks to them. Special thanks to those organizations at whose events the 2,039 audience surveys were conducted.

COMMUNITY ARTS & CULTURE

Abington Art Center, African Cultural Alliance of North America, Al-Bustan Seeds of Culture, Allens Lane Art Center, Art Partners Studio, Art Sanctuary, Asian Americans United, Asian Arts Initiative, Bainbridge House, Inc., Center in the Park, Centro Cultural Latinos Unidos, Inc., Centro Nueva Creacion, Cheltenham Center for the Arts, Chester County Art Association, Coalition Ingenu, **CommunityArts Center, Darlington Fine Arts Center**, First Night Newtown, Foundation at the Manor, The Gershman Y, Greater Philadelphia Overseas Chinese Association, Islamic Cultural Preservation & Information Council, Japan America Society of Greater Philadelphia, **Main Line Art Center**, Manayunk Roxborough Art Center, NEXUS/foundation for today's art, Philadelphia Art Alliance, Philadelphia Community Arts Network, Philadelphia Folklore Project, Samuel S. Fleisher Art Memorial, Taller Puertorriqueño, Inc., Trinity Center for Urban Life, The Village of Arts and Humanities, Wayne Art Center, West Park Cultural Center

EDUCATION & INSTRUCTION

Academy of Vocal Arts, Art-Reach, The Arts & Spirituality Center, The Arts and Quality of Life Research Center, Arts in Schools Collaborative, Bucks County Community College Office of Cultural and Community Programming, Boyer College of Music and Dance, BuildaBridge, The Center for Art in Wood, Community Conservatory of Music, Community Music School of Collegeville, The Curtis Institute of Music, The Gallery School of Pottstown, Georgia E. Gregory Interdenominational School of Music, Girls Rock Philly, International House Philadelphia, Kardon Institute for Arts Therapy, Main Line School Night, Montgomery County Community College, Moonstone Inc., Moore College of Art and Design, **Pennsylvania Academy of the Fine Arts**, Philadelphia Arts in Education Partnership, Philadelphia Young Playwrights, Settlement Music School, Studio Incamminati, Temple University Music Preparatory Division, Tyler School of Art, Department of Exhibitions & Public Programs, The University of the Arts, Violette de Mazia Foundation, Young Audiences of Eastern Pennsylvania, Inc.

HISTORY

American Philosophical Society, **American Swedish Historical Museum**, American Women's Heritage Society, Inc., Athenaeum of Philadelphia, Beth Shalom Synagogue Preservation Foundation, Bucks County Historical Society, Christ Church Preservation Trust, Cliveden of the National Trust, The Committee of 1926 and Historic Strawberry Mansion, Concord School House and Upper Burying Ground of Germantown, **Eastern State Penitentiary Historic Site, Inc.**, Ebenezer Maxwell Mansion, **Elfreth's Alley Association** +, Fair Hill Burial Ground, Fairmount Park Historic Preservation Trust, Inc., Feinstein Center for American Jewish History, Founder's Hall at Girard College, Friends of Greenwood Cemetery, Friends of Laurel Hill Cemetery, Friends of the Swarthmore Public Library, The German Society of Pennsylvania, Glen Foerd Conservation Corporation, Haverford Township Free Library, Historic Germantown, Historic Philadelphia, Inc., **Historic Yellow Springs, Inc.**, Historical Society of Pennsylvania, **Independence Visitor Center Corporation**, Legacy Center, Library Company Arts Programs, Library Company of Philadelphia, The Mill at Anselma Preservation and Educational Trust, Inc., Montgomery County-Norristown Public Library, **National Constitution Center**, Pearl S. Buck House, Philadelphia Society for the Preservation of Landmarks, Philadelphia Sports Hall of Fame Foundation, Philadelphia Flag Day Association, Preservation Alliance for Greater Philadelphia, **Rosenbach Museum & Library**, Schwenkfelder Library & Heritage Center, Swarthmore Public Library, **Village Library of Wrightstown**, Washington Memorial Heritage, Woodlands Trust for Historic Preservation, Wyck Association

MEDIA ARTS

Ambler Theater, Inc., The American Poetry Review, **Association for the Colonial Theatre**, **Bryn Mawr Film Institute**, **County Theater, Inc.**, The East Coast Black Age of Comics Convention, Inc., First Person Arts, G-Town Radio, Israeli Film Festival Philadelphia, Megawords Magazine, Philadelphia Center for the Book, Philadelphia Community Access Media, Philadelphia Independent Film & Video Association, The Philadelphia Photo Review, Poets and Prophets, Inc., Project Twenty1, shirley road productions, WHY Inc., wxpn, WYBE Public Television

MUSEUMS, GALLERIES & VISUAL ARTS

African American Museum in Philadelphia, Arthur Ross Gallery, Association for Public Art, Atwater Kent Museum of Philadelphia, The Barnes Foundation, **Brandywine River Museum**, Breadboard, The Center For Emerging Visual Artists, The Clay Studio, Conservation Center for Art and Historic Artifacts, COSACOSA art at large, Inc., Da Vinci Art Alliance, The Fabric Workshop and Museum, Galleries at Moore College of Art and Design, Independence Seaport Museum, Institute of Contemporary Art, **James A. Michener Art Museum**, La Salle University Art Museum, **Mercer Fonthill Trust**, National Museum of American Jewish History, Philadelphia Guild of Hand Weavers, **Philadelphia Museum of Art**, Philadelphia Sketch Club, Philadelphia's Magic Gardens, Philagrafika, Philip and Muriel Berman Museum of Art at Ursinus College, **Please Touch Museum**, The Print Center, Slought Foundation, University of Pennsylvania Museum of Archaeology and Anthropology, Visual Arts Alliance, **Vox Populi**, Wharton Esherick Museum, Woodmere Art Museum

SCIENCE + NATURE

The Academy of Natural Sciences, Chemical Heritage Foundation, **The College of Physicians of Philadelphia** +, **The Franklin Institute**, John Bartram Association, John J. Tyler Arboretum, **Longwood Gardens, Inc.**, **Morris Arboretum of the University of Pennsylvania**, The Pennsylvania Horticultural Society, **The Philadelphia Zoo**, Wagner Free Institute of Science

DANCE

Alchemy Dance Company, American Ballet Competition/Dance Affiliates, Anne-Marie Mulgrew and Dancers Co., anonymous bodies, **BALLETX**, **Brandywine Ballet** +, Carbon Dance Theatre, Chinese American Women's Sisterhood Society of Philadelphia, ContempraDance Theatre, Dance Del Bello, Dancefusion, Danse4Nia Repertory Ensemble, Inc., Eleone Dance Theatre, FiddleKicks, Flamenco Ole, Group Motion Multi Media Dance Theater, Headlong Dance Theater, idiosynCrazy productions, International Ballet Classique, International Ballet Exchange, Jeanne Ruddy Dance, Koresch Dance Company, Kulu Mele African American Dance Ensemble, Kun-Yang Lin/Dancers, Leah Stein Dance Company, Mascher Dance, Melanie Stewart Dance Theatre, Miro Dance Theatre, Mutya Philippine Dance Company, Nichole Canuso Dance Company, Pasion y Arte, Penn Chinese Dance Club, **Pennsylvania Ballet Association**, **Philadanco**, Philadelphia Dance Projects, Pink Hair Affair, Project Capoeira, Inc., Schuylkill Valley Regional Dance Company, Scrap Performance Group, SHARP Dance Company, Smoke, Lilies and Jade Arts Initiative, Subcircle, Susan Hess Modern Dance, Three Aksha, Usiloquy Dance Designs, Voloshky Ukrainian Dance Ensemble

THEATER

1812 Productions, **Act II Playhouse, Ltd.**, **Arden Theatre Company**, Azuka Theatre Collective, B. Sameday Productions, Brat Productions, **Bristol Riverside Theatre**, Bushfire Theatre of Performing Arts, Celebration Theater, Coatesville Cultural Society, Inc., **Curio Theatre Company**, EgoPo Productions, Enchantment Theatre Company, **Gas & Electric Arts**, **Hedgerow Theatre**, The Idiopathic Ridiculopathy Consortium, Images of the Motherland-Interactive Theatre, Inis Nua Theatre Company, InterAct Theatre Company, **Lantern Theatre Company** +, **Media Theatre**, **Montgomery Theater, Inc.**, New City Stage Company, New Freedom Theatre, Inc., New Paradise Laboratories, **The People's Light & Theatre Company**, The Philadelphia Shakespeare Theatre, **Philadelphia Theatre Company**, Pig Iron Theatre Company, PlayPenn, Plays and Players, Shakespeare in Clark Park, Spiral Q Puppet Theater, Inc., Stagecrafters, Stages of Imagination, Storybook Musical Theatre, Swim Pony Performing Arts, Theatre Exile, **Village Productions** +, VSA Pennsylvania/Amaryllis Theatre Company, **Walnut Street Theatre**, **The Wilma Theater**, Wolf Performing Arts Center

MUSIC

1807 & Friends, American Composers Forum, Philadelphia Chapter, Anna Crusis Womens Choir, Ars Nova Workshop, The Bach Festival of Philadelphia, Bel Canto Children's Chorus, Black Pearl Chamber Orchestra, Bucks County Symphony Society, **The Chamber Orchestra of Philadelphia**, **Chester Children's Chorus**, The Choristers, Choral Arts Society of Philadelphia, Commonwealth Youthchoirs, The Crossing, Crossroads Music, Delaware County Community College, Delaware County Symphony, Delaware Valley Philharmonic Orchestra, Inc., Delius Society-Philadelphia Branch, Inc., Dolce Suono Chamber Music Concert Series, Inc., Encore Series, Inc., Kennett Symphony of Chester County, Latin Fiesta Inc, **Lenape Chamber Ensemble**, Lyric Fest, Mendelssohn Club of Philadelphia, Music at Abington, Musicopia, Nashirah, Network for New Music, Inc., New Sounds Music, Incorporated, **Opera Company of Philadelphia**, Opera North, Inc., Orchestra 2001, The Philadelphia Boys Choir and Chorale, The Philadelphia Chamber Ensemble, Philadelphia Chamber Music Society, Philadelphia Chinese Opera Society, Philadelphia Classical Guitar Society, Philadelphia Classical Symphony, Philadelphia Clef Club of Jazz & Performing Arts, Inc., Philadelphia Gay Men's Chorus, **Philadelphia Orchestra Association**, Philadelphia Sinfonia Association, The Philadelphia Singers, Philadelphia Trio/Painted Bride, Philadelphia Virtuosi Chamber Orchestra, Philadelphia Youth Orchestra, Piffaro, The Renaissance Band, The Quakertown Band, Relache, Inc., Side One Jazz, Singing City, Sounds of Liberty, Tempesta di Mare, Inc., Tri-County Concerts Association Inc., Warriors of the Wonderful Sound, Inc, West Whiteland Township Friends of the Park

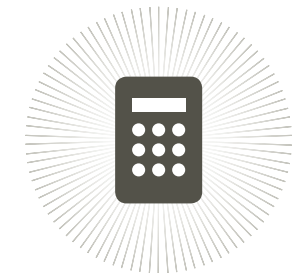
OTHER PERFORMING ARTS

Annenberg Center for the Performing Arts, Artistas y Musicos Latino Americanos, Astral Artists, Bowerbird, Bryn Mawr College, Office for the Arts, fidget, Intercultural Journeys, **Kimmel Center, Inc.**, Mann Center for the Performing Arts, **The Painted Bride Art Center**, Philadelphia Live Arts Festival and Philly Fringe, Raices Culturales Latinoamericanas, Sruti, The India Music and Dance Society, Temple Performing Arts Center

COUNCILS, SERVICES + SUPPORT

Arts & Business Council of Greater Philadelphia, CultureWorks, Dance/USA Philadelphia, Greater Philadelphia Cultural Alliance, InLiquid.com, International Performing Arts for Youth, Jazz Bridge Project, Media Arts Council, Philadelphia Mural Arts Advocates, Philadelphia Sculptors, Theatre Alliance of Greater Philadelphia

Calculate your cultural organization's economic impact at philaculture.org/impact



bold Audience surveys collected at these organizations

+ Organizational data not included (audience surveys only)

PARTNER ORGANIZATIONS

AMERICANS FOR THE ARTS

Founded in 1960, Americans for the Arts is the nation's leading nonprofit organization for advancing the arts and arts education. From offices in Washington, DC and New York City, Americans for the Arts provides a rich array of programs that meets the needs of over 150,000 members and stakeholders. The organization is dedicated to representing and serving local communities and to creating opportunities for every American to participate in and appreciate all forms of the arts.

Americans for the Arts' mission is to serve, advance and lead the network of organizations and individuals who cultivate, promote, sustain and support the arts in America.

Americans for the Arts is the author of the national study *Arts and Economic Prosperity IV*. Americans for the Arts coordinated all aspects of the national study, including recruiting the participating communities, commissioning economists to develop the economic models used for data analysis, coordinating data entry, and producing data analysis in *Arts and Economic Prosperity IV*.

For more information on Americans for the Arts, visit www.artsusa.org.

THE CULTURAL DATA PROJECT

Information on all 345 organizations included in this report is taken from the Pennsylvania Cultural Data Project (Pennsylvania CDP). The Pennsylvania CDP is a collaborative, statewide project of the Greater Philadelphia Cultural Alliance, Greater Pittsburgh Arts Council, The Heinz Endowments, Pennsylvania Council on the Arts, The Pew Charitable Trusts and the William Penn Foundation. The project's mission is to strengthen the nonprofit arts and cultural sector by collecting and disseminating comprehensive, high-quality longitudinal data that supports fact-based decision-making.

The CDP was first launched in Pennsylvania in September 2004, after three years of development and testing. Following its success in Pennsylvania, the CDP has expanded to additional states and is now becoming the national standard for data collection on the arts and cultural sector, with over 14,000 arts and cultural organizations in 12 states and the District of Columbia participating. In the first quarter of 2013, the Cultural Data Project will become an independent 501(c)(3) organization based in Philadelphia with a national board and governance structure.

The CDP's unique system enables arts and cultural organizations to enter financial, programmatic and operational data into a standardized online form once each fiscal year. Now in its seventh year of operations, the Pennsylvania CDP collects information from more than 1,700 organizations located throughout the state. All data submitted by individual organizations is checked for errors in a rigorous process.

For more information on the Cultural Data Project, visit www.culturaldata.org.

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ABOUT THE ALLIANCE

Established in 1972, the Greater Philadelphia Cultural Alliance is the region's premier leadership, research and advocacy organization for arts and culture. Our mission is to, "lead, strengthen and give voice to a diverse cultural sector that is making Philadelphia a world-class region to live, work and play."

The Alliance played a key advocacy role in establishing the Philadelphia Cultural Fund; helped preserve Philadelphia's Percent for Art programs; was a catalyst in re-establishing Philadelphia's Office of Arts, Culture, and the Creative Economy; and led the successful statewide battle in 2009 to defeat the proposed "arts tax," as well as a proposed 70% cut to the Pennsylvania Council on the Arts in 2011.

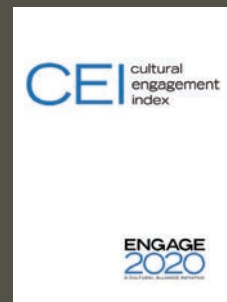
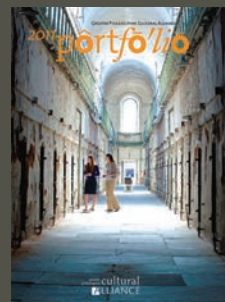
Today, 411 member organizations — which range from museums and dance companies to community art centers, historic sites, music ensembles, and zoos — and the region's cultural community as a whole — count on the Alliance for research; marketing and audience development; policy and community engagement; and membership services.

For more information on the Cultural Alliance please visit www.philaculture.org

CULTURAL ALLIANCE RESEARCH

The Cultural Alliance is committed to strengthening the region's cultural sector through high-quality research. That research has identified major trends affecting the field and demonstrated the impact of the arts on the economy and on cultural participants. Reports like *Portfolio*, *Research Into Action: Pathways to New Opportunities* and *Arts, Culture & Economic Prosperity* have established the Cultural Alliance as the region's leading source for conducting, interpreting and disseminating meaningful data about arts and culture and its impact on our region's growth and vibrancy.

Arts, Culture & Economic Prosperity in Greater Philadelphia is the first product from Creating Change, the Cultural Alliance's new 10-year research initiative. Creating Change is currently funded by the William Penn Foundation and will strengthen Philadelphia's competitive position by providing cultural organizations with the leading-edge research and tools they need to stay relevant, seize emerging opportunities and adapt to an ever-changing environment. The initiative will also demonstrate the important contributions that arts and cultural organizations make to communities and residents in the region.



RECENT PUBLICATIONS:

2011 Portfolio First published in 2006, the *2011 Portfolio*, the third edition, documents the breadth, diversity and well-being of Southeastern Pennsylvania's nonprofit cultural resources. The *2011 Portfolio* included an in-depth analysis on the effects of the Great Recession on arts and cultural organizations

Research Into Action: Pathways to New Opportunities (2009)

Research Into Action offers 10 specific insights into how the Philadelphia region's diverse population engages with the arts. Based on five key research studies conducted by the Alliance, the report also provides strategies for cultural organizations looking to build stronger audience connections.

Cultural Engagement Index (CEI)

Published in 2008 and 2010, the ongoing CEI is an innovative way of measuring the importance and frequency of cultural participation of all residents of the region. By surveying the general population, CEI has uncovered emerging trends in cultural activity that have important implications for both civic leaders and cultural organizations.

Research Briefs

The Alliance publishes short research pieces on current issues on arts and culture for the region, including "Regional Employment in the Cultural Economy" (2010), "Arts Funding by Philadelphia and Peer Cities" (2009), and "Philadelphia-Pittsburgh Arts Voters" (2011).

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Bank of America is proud to invest in Arts & Culture in Greater Philadelphia.

Like individuals, businesses are members of the community too. The most extraordinary enterprises take this connection to heart, doing what they can to help their neighborhoods grow.

Bank of America is pleased to recognize the Greater Philadelphia Cultural Alliance and its members for their active community involvement and appreciation for their important role in advancing the public good.

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