



# Arts, Culture & Economic Prosperity: Greater Philadelphia

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*Arts, Culture & Economic Prosperity: Greater Philadelphia* is an economic and social impact study of the Greater Philadelphia region's nonprofit arts and culture industry. More than 500 arts and culture organizations participated in the research and over 1,000 individuals completed **the Americans for the Arts and Economic Prosperity (AEP) survey** while attending a performance, event, exhibit or while visiting a cultural event or facility in the Greater Philadelphia Region during the period from May 2022 through June 2023. Greater Philadelphia data represents the five-county region (Bucks, Chester, Delaware, Montgomery, and Philadelphia).

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Photo credit: Mike Oswald for VISIT PHILADELPHIA

greater  
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ALLIANCE

# Introduction

## ABOUT ARTS, CULTURE & ECONOMIC PROSPERITY: GREATER PHILADELPHIA

*Arts, Culture & Economic Prosperity: Greater Philadelphia* is an economic and social impact study of the Greater Philadelphia region’s nonprofit arts and culture industry. More than 500 arts and culture organizations participated in the research and over 1,000 individuals completed the *Americans for the Arts and Economic Prosperity (AEP)* survey while attending a performance, event, exhibit or while visiting a cultural event or facility in the Greater Philadelphia Region during the period from May 2022 through June 2023. Greater Philadelphia data represents the five-county region (Bucks, Chester, Delaware, Montgomery, and Philadelphia).

Americans for the Arts conducts its Arts and Economic Prosperity study every five years. This year’s *Arts & Economic Prosperity 6: The Economic and Social Impact Study of Nonprofit Arts and Culture Organizations and Their Audiences in the Greater Philadelphia Region (AEP6)* marks the fifth time the Greater Philadelphia Cultural Alliance has participated in this research.

Initial data for AEP was modeled by Americans for the Arts using IMPLAN, an economic modeling and impact analysis tool used by more than 1,000 U.S. companies and government agencies. This has caused a variation in some of the impact findings compared to previous editions of AEP due to a change from a proprietary model to IMPLAN. AEP data is based on the most recently available commerce and industrial data.

The Greater Philadelphia Cultural Alliance conducted additional analyses for this report in partnership with PA Humanities. See "Methodology" and the notes throughout the report for details.

## ABOUT THE GREATER PHILADELPHIA CULTURAL ALLIANCE

Established in 1972, the Greater Philadelphia Cultural Alliance is the region’s leading arts and culture advocacy, research, and marketing organization. Our mission is to “lead, strengthen and amplify the voices of a cultural community that ignites creativity, inspires people and is essential for a healthy region.” Our membership includes more than 400 organizations ranging from museums and dance companies to community art centers, historic sites, music ensembles and zoos. For more information on the Cultural Alliance, please visit [philaculture.org](http://philaculture.org).

## ABOUT THE GREATER PHILADELPHIA CULTURAL ALLIANCE’S RESEARCH

The Cultural Alliance is dedicated to continuing to release research and reports that serve not only our 400+ members throughout the region but also civic and elected officials, funders, and beyond. Nationally respected signature reports include *Portfolio; Arts, Culture & Economic Prosperity*; and *PA CultureCheck*. Our research continues to be one of the main services offered to our members, the sector, and the region. The Cultural Alliance also partners with the nonprofit organization PA Humanities to produce regular reports on the sector, including its health and impact on our communities.

**540** participating organizations

**1,072** participating individuals

within our **5** county region

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# Study Participants

Arts, Culture, and Economic Prosperity: Greater Philadelphia involves two surveys: one to eligible arts and culture organizations, and one of audience members attending a cultural event.

## Organization Participants

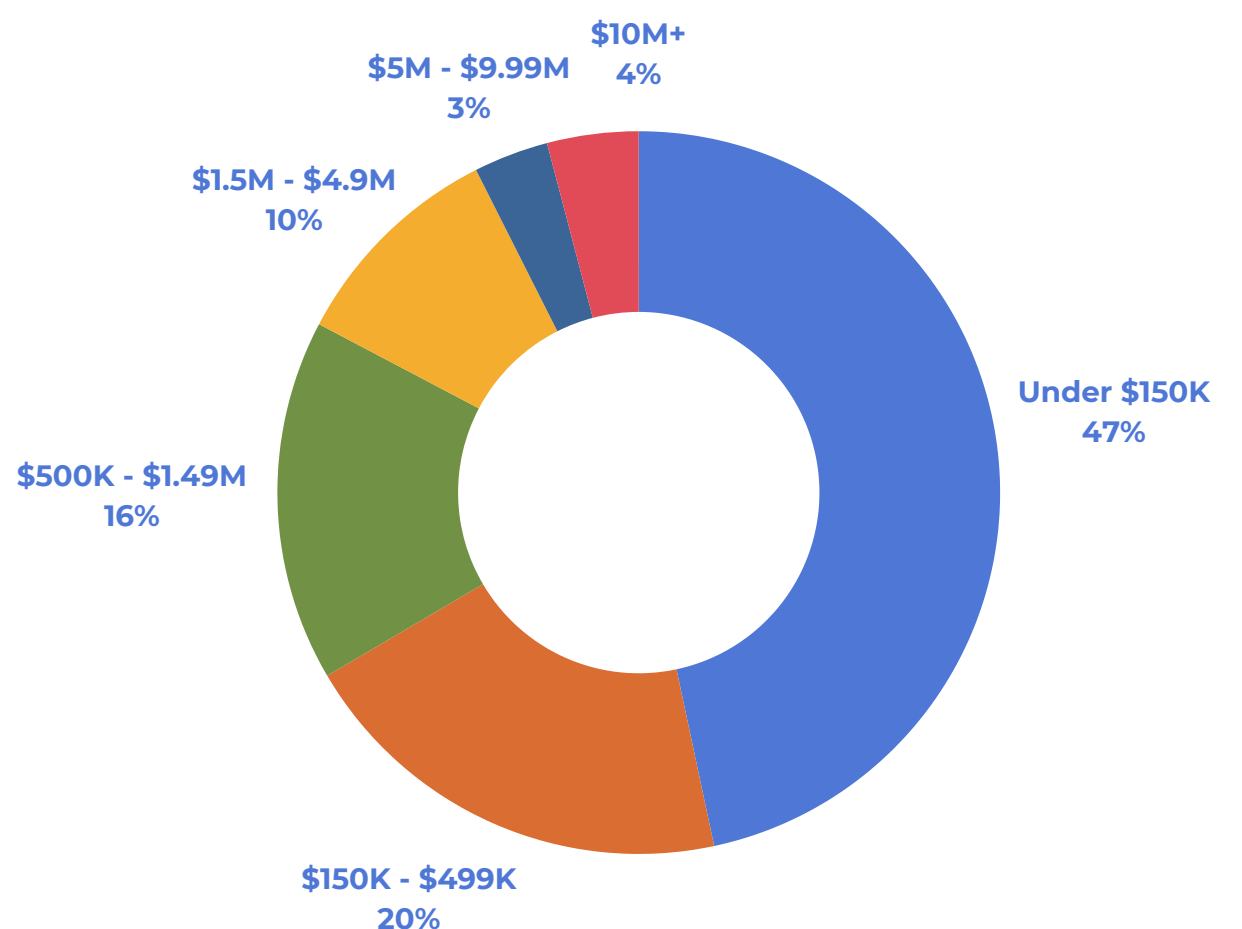
540 arts and culture organizations participated in the research, either by responding to the Americans for the Arts AEP organization survey, or in the case of non-respondents, from data collected by the Greater Philadelphia Cultural Alliance reflecting their FY2022 budgets and attendance numbers (if available).

Study participants represented a wide range of budget sizes, disciplines, and locations, with most organizations having budgets under \$150k. In addition, 53% of all organizations were performing arts organizations, and 73% were from Philadelphia County.<sup>1</sup>

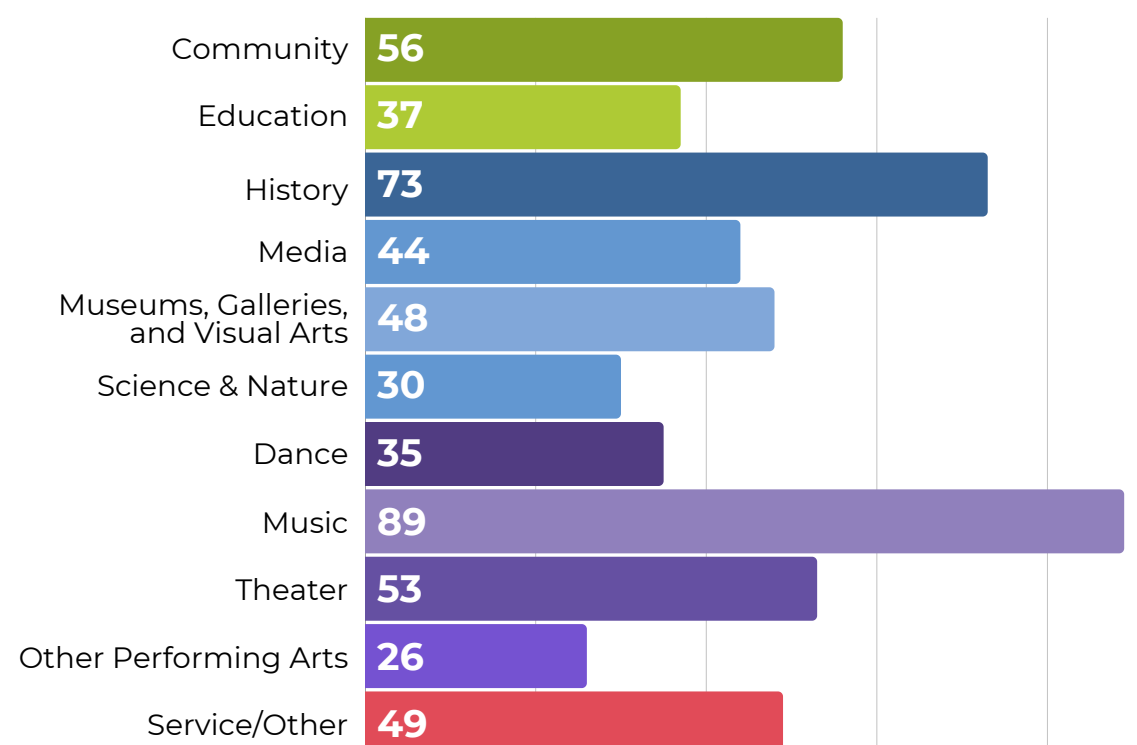


See the appendix on **page 18** for a full list of participating organizations.

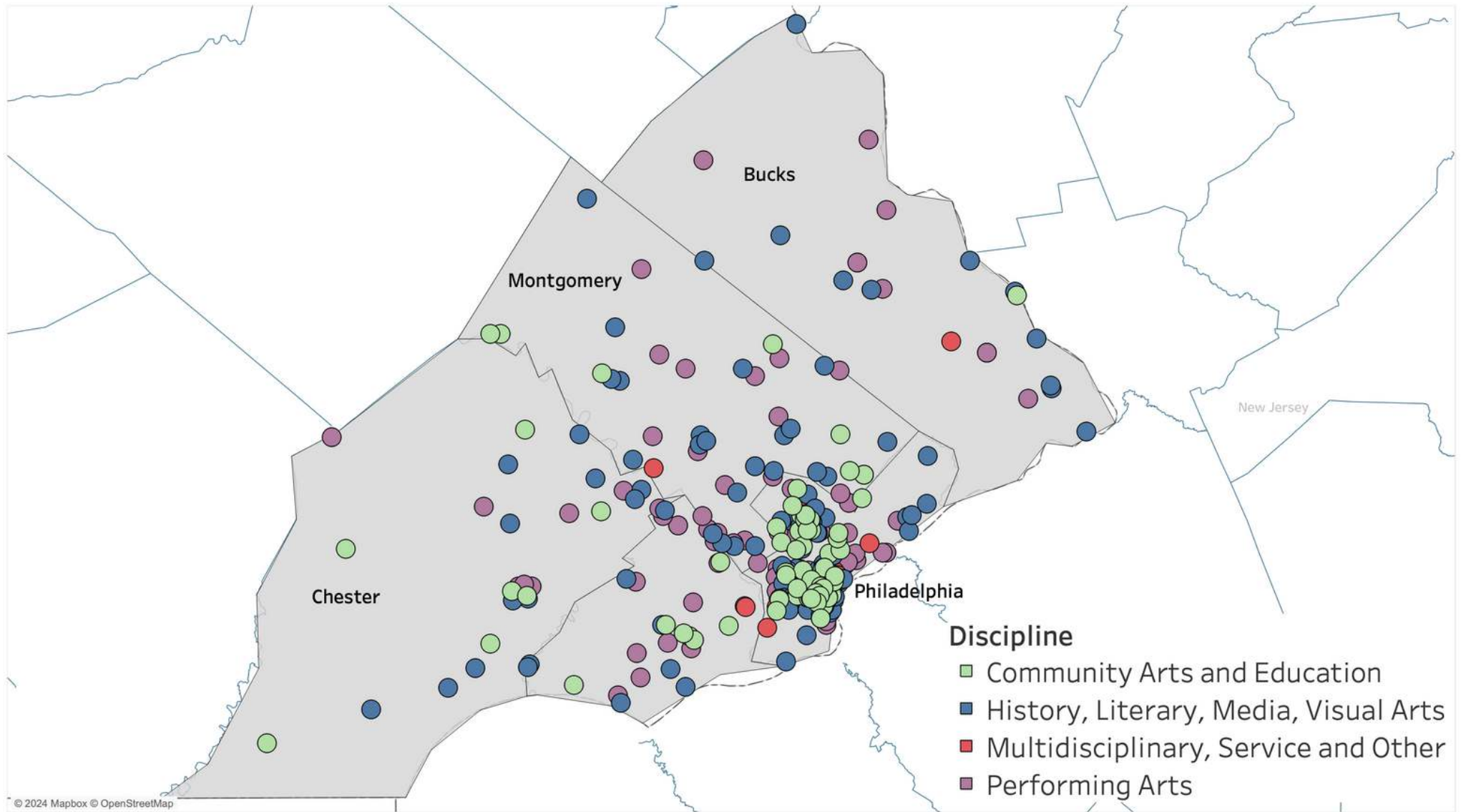
## ORGANIZATION PARTICIPANTS BY BUDGET SIZE



## ORGANIZATION PARTICIPANTS BY DISCIPLINE



## ORGANIZATION PARTICIPANT LOCATIONS<sup>2</sup>

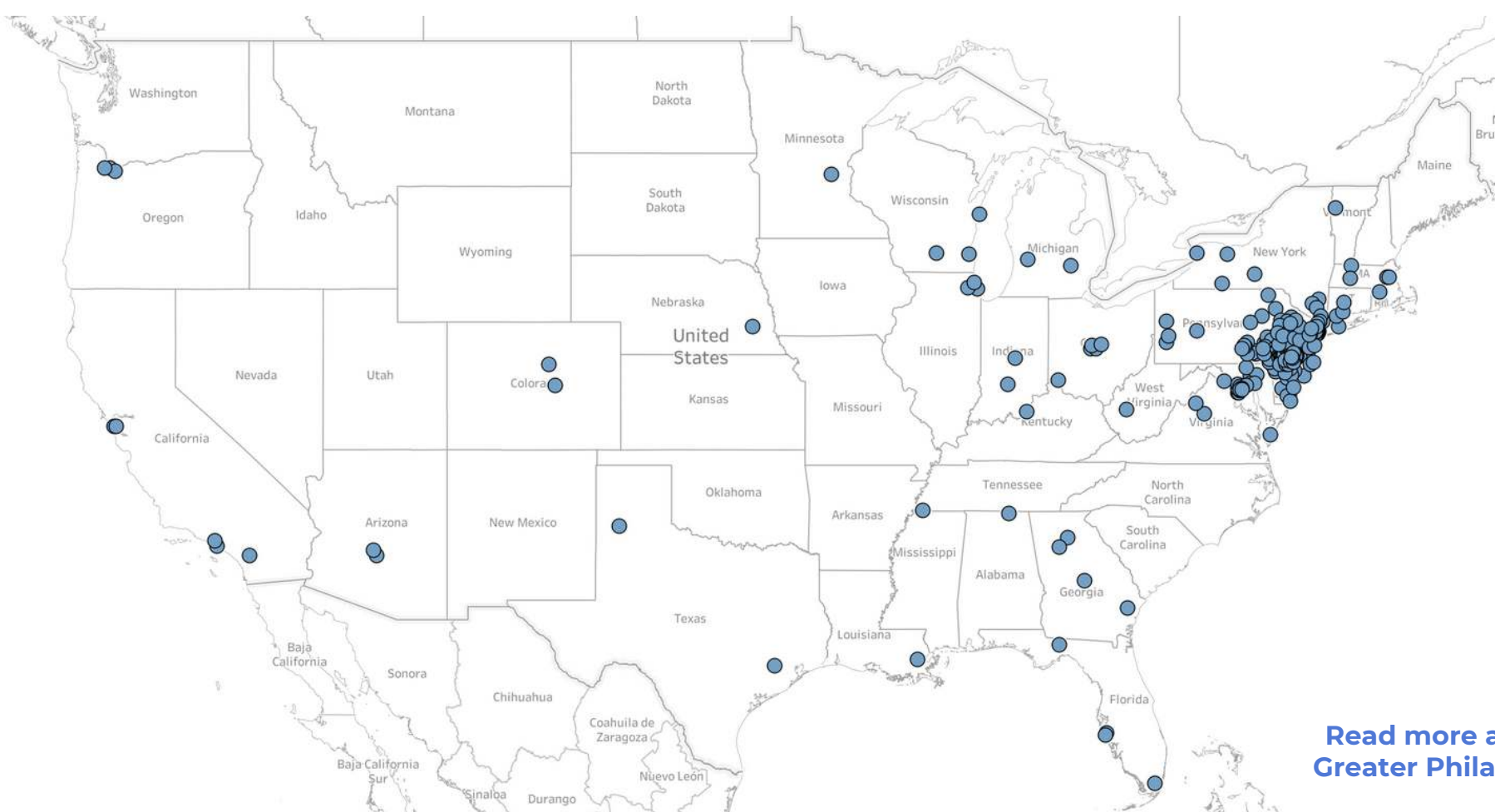


## AUDIENCE SURVEY PARTICIPANTS

1,072<sup>3</sup> individuals completed the AEP survey while attending a performance, event, exhibit, or visiting a cultural event or facility in the Greater Philadelphia region from May 2022 through June 2023.

Researchers used an audience-intercept methodology, a standard technique in which attendees to in-person performances, events, and activities are asked to complete a short survey about their spending related to that event, opinions about the social impact of the arts, ZIP code of their primary address, and basic socio-economic information. Surveys took place only while attendees were attending the event.

## RESIDENCE LOCATIONS OF AUDIENCE SURVEY PARTICIPANTS<sup>4</sup>



Read more about audiences in Greater Philadelphia on page 5.

# Total Economic Impact

Greater Philadelphia's nonprofit arts and culture sector is slowly recovering after being greatly affected by the COVID-19 pandemic and ongoing inflation. The total economic impact of the region's nonprofit arts and culture industry is \$3.3 billion.



**THE TOTAL ECONOMIC IMPACT  
OF THE REGION'S NONPROFIT ARTS  
AND CULTURE INDUSTRY IS**

**\$3.3  
BILLION**

## DIRECT EXPENDITURES

**\$1.9 BILLION**

<b>ORGANIZATIONS:</b>	\$1.22B
<b>AUDIENCES:</b>	\$676M

For organizations, this reflects two data points: total operating expenditures and total capital expenditures reported by the responding eligible arts and culture organizations in each participating community during their fiscal year 2022.

For audiences, this amount reflects total estimated dollars spent by arts and culture attendees in each participating community as a direct result of attending an activity that was presented, produced, or hosted by an eligible arts and culture organization. This spending includes purchases from local establishments on goods and services such as food and drink, retail shopping, local transportation, groceries and supplies, clothing, and childcare.

## INDIRECT AND INDUCED ECONOMIC IMPACT

**\$1.4 BILLION**

<b>ORGANIZATIONS:</b>	\$1.03B
<b>AUDIENCES:</b>	\$403M

Prosperity measures the economic impact of the arts using a methodology that enables economists to track how many times a dollar is respent within the local economy and thus, measuring the economic impact generated by each round of spending. For example, when a theater company purchases paint from the local hardware store, there is a measurable economic effect of that initial expenditure within a community. However, the economic benefits typically do not end there because the hardware store uses some of its income to pay the clerk that sold the paint (induced impact), as well as to pay other businesses such as the electric bill (indirect impact), and so on through additional rounds of spending.

# Arts and Culture Audiences

## ATTENDANCE

Attendance continued to be below pre-pandemic rates—in the most recent *PA CultureCheck* survey conducted by the Cultural Alliance and PA Humanities in 2023, only 32 percent of the region’s arts organizations reported having attendance levels at or above 2019 levels.

<b>ATTENDANCE TO ARTS AND CULTURE EVENTS</b>	<b>LOCAL ATTENDEES<sup>5</sup></b>	<b>NONLOCAL ATTENDEES<sup>6</sup></b>	<b>ALL ATTENDEES</b>
Greater Philadelphia Total Attendance <sup>7</sup> to In-Person Events	9.5M	4.0M	13.5M
Philadelphia Attendance to In-person Events	4.5M	4.9M	9.4M
Greater Philadelphia Virtual Attendees <sup>8</sup>			1.5M

## WHERE ARE AUDIENCES FROM?<sup>9</sup>

Audiences came to the Greater Philadelphia region from a range of locations -- 70.2% were residents of Southeastern Pennsylvania.

For audiences at events in Philadelphia, 47.8% are residents of Philadelphia and 20.9% are suburban residents.

For non-local attendees in Greater Philadelphia, more than half (59%) traveled to the region specifically to attend an arts and culture activity. In addition, 52.7% of nonlocal attendees say they would have traveled to another community to attend a similar activity if the one they were attending wasn't available.

## Breakdown of Direct Audience Expenditures

BREAKDOWN OF DIRECT AUDIENCE EXPENDITURES	LOCAL ATTENDEES	NONLOCAL ATTENDEES	ALL ATTENDEES
Food and Drink	\$124.3M	\$146.0M	\$270.3M
Retail Shopping	\$31.0M	\$41.7M	\$72.7M
Supplies and Grocery	\$19.5M	\$15.2M	\$34.6M
Local Transportation	\$37.3M	\$64.1M	\$101.4M
Clothing and Accessories	\$14.6M	\$9.6M	\$24.2M
Childcare	\$3.1M	\$3.4M	\$6.5M
Overnight Lodging	\$7.3M	\$133.4M	\$140.7M
Other/Miscellaneous	\$14.0M	\$11.9M	\$25.9M
<b>TOTAL</b>	<b>\$251.0M</b>	<b>\$425.2M</b>	<b>\$676.3M</b>

### WHAT DO ATTENDEES SPEND ON?<sup>10</sup>

What might an average spend look like for different attendees? Take a look at the average spends for day-trippers, overnight visitors, and resident attendees.

#### Overnight Visitors

15% of visitors to Greater Philadelphia stay overnight during their visit, with 7% having a paid lodging expense during their stay. Parties that pay for lodging have a **\$119.56 per person per day** average spending on lodging. Those who stay overnight stay on average two nights.

Not surprisingly, these attendees with lodging expenses spent considerably more money during their visit—an average of **\$235.53 per person** in total expenses excluding ticket prices (as compared to \$83.79 per person for the average nonlocal attendee in Greater Philadelphia).

#### “Dinner and a Show” Visitors

54% of attendees to arts and culture venues in Greater Philadelphia purchase a meal. Parties that eat out spend **\$36.96 per person on average on meals**. Those who stayed overnight had even higher spending levels on meals, spending an average of \$60.97 per person.

## AUDIENCE PERSPECTIVES ON ARTS AND CULTURE INSTITUTIONS

Arts and culture organizations contribute to community pride in the Greater Philadelphia Region:

- 89.8% of arts and culture attendees agree that the activity or venue where they were surveyed “is inspiring a sense of pride in this neighborhood or community.”
- 88.6% agree that “I would feel a great sense of loss if this activity or venue were no longer available.”
- 80.7% agree that the venue or facility where they were surveyed is “an important pillar for me within my community.”

Finally, the audience-intercept survey asked **local** attendees if they would have traveled somewhere else (i.e., if they would have left the Greater Philadelphia Region) if the event where they were surveyed had not been available: **47.2% of local attendees responded: “I would have traveled to a different community to attend a similar arts or cultural activity.”**

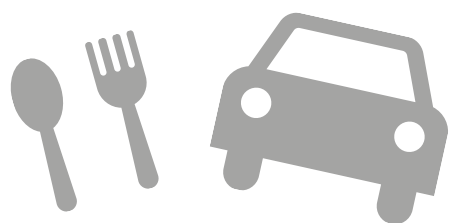
Additionally, 36.3% of the local attendees in the Greater Philadelphia Region indicated that it was the first time they had ever attended a specific activity or visited a specific venue where they were surveyed.

## AUDIENCE PERSPECTIVES ON ARTS AND CULTURE INSTITUTIONS

*Arts & Economic Prosperity* is the only national study that incorporates event-related spending by arts and culture audiences. The typical event attendee in Greater Philadelphia spends \$49.19 per person per event, not including the cost of admission — even adjusting for inflation, that’s more than

**\$5  
more**

than the average spend reported in *Agenda: Prosperity* (2017) (\$35.31 adjusted for inflation = \$43.55).<sup>11</sup>



(Category “Other” includes items like childcare, retail shopping, lodging, etc.)

### ALL ATTENDEES IN GREATER PHILADELPHIA:



### VISITORS TO GREATER PHILADELPHIA:

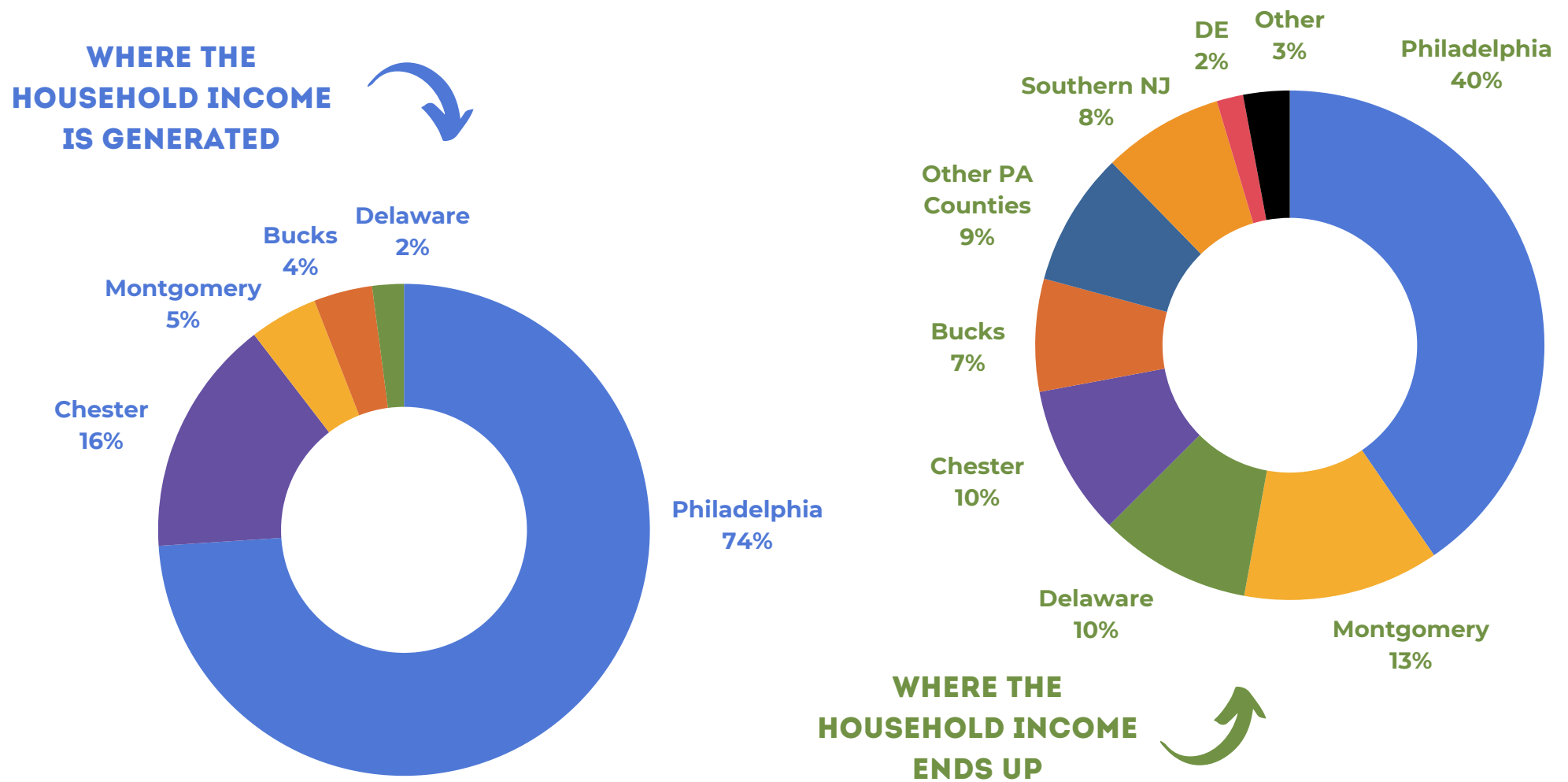


The audience members that stream in and out of theaters, historic sites, performance venues and museums fill our restaurants, cafes, bars and stores. They generate an intricate web of ancillary spending that transforms neighborhoods.



# Household Income Generated By Arts & Culture



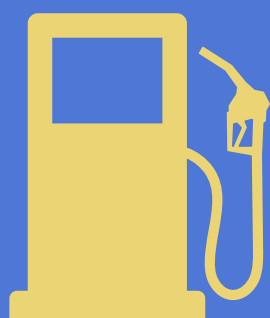
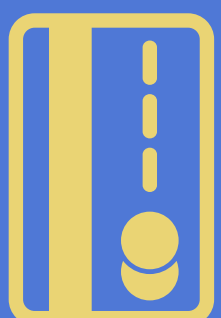
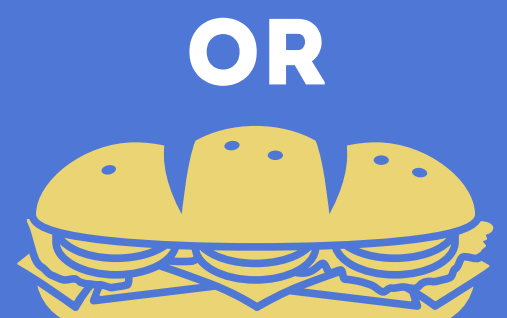
The jobs created by the arts and culture industry return \$1.4 billion to our communities as household income. While a good amount of this income is generated where arts and culture institutions are located and where their audiences spend money, this income ends up in the bank accounts of residents across the region:<sup>12</sup>



People who work in the arts and culture sector and related industries often live outside of Philadelphia and bring their spending power to neighboring areas.

## WHAT CAN \$1.4 BILLION BUY IN THE REGION?<sup>13</sup>

This is money in the pockets and bank accounts of our region's residents and is used to buy groceries, pay rent and utilities, start new businesses, and much more.

	OR		OR		OR		OR	
house payments for		groceries for		gas for		SEPTA passes for		
<b>129,139</b>		<b>236,102</b>		<b>610,794</b>		<b>1,255,521</b>		<b>137,356,185</b>
families		families		families		people		hoagies

# Total Tax Revenue Generated

# \$429.3M

<b>LOCAL TAX REVENUE (CITY AND COUNTY)</b>	\$82.2M
<b>STATE TAX REVENUE</b>	\$89.8M
<b>FEDERAL TAX REVENUE</b>	\$257.4M

Arts and culture are a great return on investment. Beyond creating jobs, drawing tourism, and generating income for local businesses and communities, they also generate \$429 million in local, state, and federal taxes.

While nonprofit organizations are exempt from many federal and state taxes, they still generate tax revenue in many ways. Like all employers, they pay payroll taxes (e.g., Social Security, Medicare) and their

employees pay income taxes on their earnings. In addition, other local businesses are likely to pay taxes on goods they sell and services they provide to nonprofits.

## Organizations Addressing Community Needs

Arts and culture organizations are engaged with their communities — they support job training, youth education, and health and wellness.

Arts and culture organizations stepped up to address urgent community needs during the height of the COVID-19 pandemic. **39.6% of organizations responded “yes,” they helped address urgent community needs during the pandemic** — by collecting and donating food, masks, and cleaning supplies to community members; donating facility space as a testing and/or vaccination site; and helping organizations and individuals apply for pandemic relief funds and unemployment benefits.

Organizations also serve as important pillars in our communities. 24.7% of organizations are located in or do a majority of their work in a designated cultural district, and **16.6% are located in or do a majority of their work in an Empowerment Zone or Renewal Community (or other designated revitalization zone as determined by the local municipality)**. Empowerment Zones (EZs) and Renewal Communities (RCs) are economically distressed communities where qualifying businesses are eligible to receive tax incentives and grants.

Finally, organizations are working to address their pay equity. **76.6% of responding organizations said they were addressing pay equity** through deliberate changes to their policies or practices that were made for the benefit of paid staff, artists, and/or contractors.

# Regional and City Comparisons

Southeastern Pennsylvania's arts and culture sector ranks among the top regions in the United States when comparing per capita (per person) direct expenditures (both organizations and audiences). Note: While Prosperity is the largest edition of the study so far, not all cities and regions in the US participated.

## PROSPERITY PARTICIPATING REGIONS WITH POPULATIONS OVER 2 MILLION<sup>14</sup>

## PER CAPITA TOTAL DIRECT EXPENDITURES

Greater Philadelphia Region (PA)	\$459
Durham/Raleigh/Chapel Hill (NC)	\$343
Greater Nashville (TN)	\$334
Greater Tampa/St. Petersburg Area (FL)	\$279
Charlotte Region (NC)	\$198
Dallas-Fort Worth-Arlington MSA (TX)	\$197
Greater Houston Region (TX)	\$193
Long Island (NY)	\$116
Central Florida Region (FL)	\$112
San Bernardino Region (CA)	\$51

## PROSPERITY PARTICIPATING CITIES WITH POPULATIONS OVER 1 MILLION<sup>15</sup>

## PER CAPITA TOTAL DIRECT EXPENDITURES

Allegheny County (PA)	\$1,004
City and County of Philadelphia (PA)	\$883
City of San Diego (CA)	\$832
Miami-Dade County (FL)	\$758
City of Dallas (TX)	\$654
City of Houston (TX)	\$574
Salt Lake County (UT)	\$511
Wake County -- Raleigh (NC)	\$481
Cuyahoga County -- Cleveland (OH)	\$432
San Diego County (CA)	\$410

# Discipline Breakdown

Organizations in Southeastern Pennsylvania offer a vast range of arts and cultural offerings. We group organizations into 12 Disciplines and 4 broader Organization Types.

History, Literary, Media, Visual Arts

	Direct Expenses	Household Income	Total Taxes	Total Economic Impact
SCIENCE & NATURE	\$599.6M	\$451.3M	\$134.0M	\$1.0B
MUSEUMS, GALLERIES, AND VISUAL ARTS	\$333.2M	\$250.6M	\$74.4M	\$581.1M
HISTORY	\$190.0M	\$135.2M	\$40.2M	\$321.3M
MEDIA	\$90.9M	\$71.2M	\$21.1M	\$162.2M
<b>SUBTOTAL</b>	<b>\$1.2B</b>	<b>\$908.3M</b>	<b>\$269.8M</b>	<b>\$2.1B</b>

Performing Arts

	Direct Expenses	Household Income	Total Taxes	Total Economic Impact
THEATER	\$68.3M	\$50.9M	\$15.1M	\$118.6M
MUSIC	\$62.3M	\$49.2M	\$14.6M	\$111.8M
DANCE	\$34.8M	\$27.6M	\$8.2M	\$62.6M
OTHER PERFORMING ARTS	\$162.4M	\$126.6M	\$37.5M	\$289.0M
<b>SUBTOTAL</b>	<b>\$327.8M</b>	<b>\$254.4M</b>	<b>\$75.5M</b>	<b>\$581.9M</b>

**Community and Education**

	<b>Direct Expenses</b>	<b>Household Income</b>	<b>Total Taxes</b>	<b>Total Economic Impact</b>
<b>EDUCATION</b>	<b>\$185.6M</b>	<b>\$152.0M</b>	<b>\$45.0M</b>	<b>\$339.7M</b>
<b>COMMUNITY</b>	<b>\$64.4M</b>	<b>\$46.2M</b>	<b>\$13.7M</b>	<b>\$109.4M</b>
<b>SUBTOTAL</b>	<b>\$250.0M</b>	<b>\$198.1M</b>	<b>\$58.7M</b>	<b>\$449.1M</b>

	<b>Direct Expenses</b>	<b>Household Income</b>	<b>Total Taxes</b>	<b>Total Economic Impact</b>
<b>SERVICE</b>	<b>\$105.1M</b>	<b>\$85.4M</b>	<b>\$25.3M</b>	<b>\$191.5M</b>

	<b>Direct Expenses</b>	<b>Household Income</b>	<b>Total Taxes</b>	<b>Total Economic Impact</b>
<b>OTHER</b>	<b>\$78.1K</b>	<b>\$55.2K</b>	<b>\$16.4K</b>	<b>\$131.6K</b>

**ARTS, CULTURE & ECONOMIC PROSPERITY:**

**THE ECONOMIC IMPACT OF  
Greater Philadelphia Cultural Alliance**

Custom economic impact report prepared for Greater Philadelphia Cultural Alliance as part of the Greater Philadelphia Cultural Alliance's Arts, Culture & Economic Prosperity research study. Report prepared in April 2024 based on Fiscal Year 2022 data.

Economic Impact			
	Direct Expenditures	Indirect and Induced	Total
<b>Organizational Spending</b>	\$2,326,671	\$1,971,365	\$4,298,036
<b>Audience Spending</b>	\$8,956	\$5,332	\$14,288
<b>Total</b>	<b>\$2,335,627</b>	<b>\$1,976,697</b>	<b>\$4,312,324</b>

Government Revenue			
	Local	State	Federal
<b>Generated By Organizational Expenditures</b>	\$108,865	\$118,265	\$345,418
<b>Generated By Audience Expenditures</b>	\$333	\$367	\$1,009
<b>Total</b>	<b>\$109,198</b>	<b>\$118,632</b>	<b>\$346,427</b>

Household Income	
<b>Generated By Organizational Expenditures</b>	\$1,934,999
<b>Generated By Audience Expenditures</b>	\$5,713
<b>Total</b>	<b>\$1,940,712</b>

Arts, Culture & Economic Prosperity: Greater Philadelphia brought to you by

## About Customized Economic Impact Reports

The findings of the *Arts, Culture & Economic Prosperity* study are a free resource that utilizes region-wide and city-level data to quantify the economic impact of the creative sector but you can further leverage the data by ordering a customized report for your organization. These individualized reports provide key economic indicators such as total economic impact, direct and indirect spending, resident household income, and tax revenue for each organization.

### A CUSTOMIZED REPORT IS A POWERFUL TOOL TO SHARE WITH YOUR ORGANIZATION'S KEY STAKEHOLDERS –

- ✓ **Board of Directors**
- ✓ **Audiences and attendees**
- ✓ **Donors and members**
- ✓ **Elected officials and civic leaders**

Organizations must be in Bucks, Chester, Delaware, Montgomery, or Philadelphia counties to receive a report. Visit [philaculture.org/prosperity](http://philaculture.org/prosperity) for more information and pricing.

# Conclusion

## Key Findings

**Arts and culture are vital to the health and vibrancy of the Greater Philadelphia region.**

### **Audiences are Recovering**

Attendance continues to be below pre-pandemic rates, but as more audiences return to arts and culture in Greater Philadelphia, they are spending more than ever. Both residents (\$34.53 average spend per person) and tourists (\$83.79 average spend per person) are key to boosting the vibrancy and economic growth of the region. Arts and culture organizations working to attract and retain audiences is key to the vitality of our region, and funders, government, and beyond should support efforts to continue to grow our sector. Audiences are spending more per person than they were the last time AEP was conducted, and we expect the economic impact to continue to grow.

### **Arts and Culture Keeps Spending Local**

Cultural organizations buy and hire locally, and audiences spend their money at local businesses close to those venues, events, and attractions. While the economy has shifted (as more and more individuals and businesses purchase online, leading to a shift in the amount of indirect and induced impact created by the sector) the core of dollars spent in the arts and culture sector ripple through our local economy, benefiting a range of industries throughout the entire region. This spending benefits all sorts of related sectors including retail, hospitality, restaurants, finance, real estate, and more.

### **Arts and Culture Puts Valuable Dollars in the Pockets of Residents**

Spending by organizations and audiences travels far from the original point of purchase. Household income and jobs are created across many industries in our region, with \$1.4 billion in household income generated for our region's residents. This money buys groceries, pays rent and utilities, pays school tuition, starts new businesses, and much more. This affects workers all across every part of Philadelphia and the surrounding counties as well.

***When communities invest in arts and culture, they invest in an industry that stimulates the economy, supports local jobs, and contributes to building healthy, vibrant, and more livable communities.***

# Glossary

## Direct Economic Impact

A measure of the economic effect of the initial expenditure within a community. For example, when a symphony pays its players, each musician's salary and the associated payroll taxes paid by the nonprofit represent direct economic impact.

## Direct Expenditures

The first round of expenditures in the economic cycle (the money buyers pay to sellers in exchange for goods or services). A ballet company's purchase of dance shoes is an example of direct expenditures.

## Household Income (or Personal Income)

The salaries, wages, and entrepreneurial income residents earn and use to pay for food, mortgages, and other living expenses. It is important to note that resident household income is not just salary. When a business receives money, for example, the owner usually receives a percentage of the profit, resulting in income for the owner. Household income also includes benefits and employer-paid payroll taxes (Social Security, unemployment, etc.).

## IMPLAN

The *Prosperity* study uses IMPLAN for its economic analysis. IMPLAN is short for "IMpact analysis for PLANning." It is a widely used economic modeling and impact analysis tool. Using the IMPLAN economic modeling platform, input-output analysis models were customized for all 373 study regions. These quantitative models measure the economic relationships between hundreds of different industries in each geographic area. IMPLAN is a well-regarded system that is used by more than 1,000 U.S. companies and governments.

## Indirect and Induced Impact

*Prosperity* measures the economic impact of the arts using a methodology that enables economists to track how many times a dollar is respent within the local economy and thus, to measure the economic impact generated by each round of spending. For example, when a theater company purchases paint from the local hardware store, there is a measurable economic effect of that initial expenditure within a community. However, the economic benefits typically do not end there because the hardware store uses some of its income to pay the clerk who sold the paint (induced impact) and other businesses such as the electric bill (indirect impact). The indirect and induced economic impacts are the effects of the subsequent rounds of spending by businesses and individuals, respectively.

## Input-Output Analysis

A system of mathematical equations that combines statistical methods and economic theory in an area of economic study called econometrics. Economists use this model (occasionally called an inter-industry model) to measure how many times a dollar is respent in, or ripples through, a community before it leaks out (see Leakage). The model is based on a matrix that tracks the dollar flow between hundreds of finely detailed industries in each community. It allows researchers to determine the economic impact of local spending by nonprofit arts and culture organizations on jobs, household income, and government revenue.

## Leakage

Leakage refers to the money that is spent outside of a community. This is measured because nonlocal spending has no economic impact within the community, whereas dollars spent within the community continue to have an economic local impact. A ballet company purchasing shoes from a nonlocal manufacturer is an example of leakage. If the shoe company were local, the expenditure would remain within the community and create another round of spending (and local economic impact) by the shoe company.

## Tax Revenue to Local, State, and Federal Governments

The IMPLAN economic modeling platform used in *Prosperity* provides a measure of government tax income based on the transactions of the tracked economic activities. It includes taxes paid by both businesses and individuals such as sales tax, income tax, corporate tax, and property tax.



# Partner Organizations



Americans  
for the Arts



Americans for the Arts is a national arts service organization based in Washington, D.C., with an office in New York City. Founded in 1960, it serves, advances, and provides leadership to the network of organizations and individuals who cultivate, promote, sustain, and support the arts and arts education in America.



PA Humanities is an independent nonprofit partner of the National Endowment for the Humanities (NEH) and part of a network of 56 state humanities councils across the country. Its mission is to champion the humanities to build community, educate, inspire, and make long-lasting change. More information at [PAHumanities.org](http://PAHumanities.org).

## Methodology

This is the fourth edition of *Arts, Culture & Economic Prosperity* in Greater Philadelphia; the first was published in 2007. Because of a change of model for this year's report, we discourage concluding direct comparisons between the data in this report and prior editions. The Greater Philadelphia Cultural Alliance commissioned analysis for both the five counties of Greater Philadelphia and the City and County of Philadelphia alone. In general, we report on Greater Philadelphia, except for city comparisons and individual economic impact reports for participating organizations

### 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.

#### Arts and Culture Organizations

Detailed information was collected from eligible organizations about their fiscal year 2022 expenditures (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition), as well as their event attendance, in-kind contributions, and volunteerism. Surveys were collected from February through July 2023. Some organizations only provided total expenditures and attendance (they are included in the study).

In the Greater Philadelphia Region, 540 of the 1,191 total eligible nonprofit arts and culture organizations (as defined by AEP study guidelines) identified by the Greater Philadelphia Cultural Alliance provided the financial and attendance information required for the study analysis—an overall participation rate of 45.3%.

It is important to note that each study region's results are based solely on the survey data collected. No estimates have been made to account for non-respondents. Therefore, the less-than-100 percent response rates suggest understating the economic impact findings in most of the individual study regions.

#### Audience Surveys

Audience-intercept surveying, a common and accepted research method, was conducted in all 373 of the study regions to measure event-related spending by nonprofit arts and culture audiences. Attendees and participants were asked to complete a short survey while attending an event. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging, as well as socioeconomic information, ZIP code of primary residence, and four social impact questions. Data was collected from May 2022 through June 2023 at a broad range of both paid and free events. The survey respondents provided information about the entire party with whom they were attending the event. In the Greater Philadelphia Region, a total of 1,072 valid audience-intercept surveys were collected from attendees to nonprofit arts and culture performances, events, exhibits, and special events during the period from May 2022 through June 2023.

Surveying in May 2022 through June 2023 posed many challenges, as the region was just beginning to recover from the effects of the pandemic -- many organizations were operating at below capacity and could not take on having surveyors at their sites. In addition, attendance in FY23 was found to be at 78% of the total capacity for the median organization, leading to a smaller survey base.

Given the above factors, we believe that the Audience Expenditures in general and Hotel Expenditures in particular are lower than would be the case as our sector continues to recover from the pandemic and reflect FY22 data. As such, if anything, the economic impact findings are conservative.

# Methodology cont.

## Economic Impact Modeling

The nation's economy and local economies are shaped by complex interactions among businesses, workers, and communities. 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 multiple 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 Philadelphia Metropolitan area is one of the 10 largest in the US by Gross Domestic Product (GDP) at \$518.48 billion in 2022.<sup>16</sup>

Americans for the Arts uses the IMPLAN platform to create customized models for each of the 373 study regions. Input-output models calculate the interdependencies between various sectors or industries within a region. The model quantifies how changes in one sector's output and demand for inputs affect other sectors of the economy. IMPLAN's models are based on detailed tables that represent the flow of goods and services between different industries.

IMPLAN relies on region-specific and industry-specific data to customize input-output models for different areas and sectors, allowing for more accurate analysis.

In short, this analysis traces how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This economic analysis is well suited for *Prosperity* studies because it can be customized specifically to each participating community, region, or state.

To complete this analysis for the Greater Philadelphia Region, the researchers used the IMPLAN platform to build a customized input-output model based on the unique economic and industrial characteristics of the five-county Greater Philadelphia Region.

A comprehensive description of the methodology used to complete this national study is available at [www.AEP6.AmericansForTheArts.org](http://www.AEP6.AmericansForTheArts.org).

## Additional Analysis

In this report, parts of the sections calculating total economic impact, where audiences are from and how they spend, mapping and illustrating Household Income, Custom Reports, and the Disciplines section are additional analyses performed by the Greater Philadelphia Cultural Alliance, based on the analyses received from Americans for the Arts and described previously.

## Endnotes

1. A number of different audience participation data types were collected from organizations, including virtual participation, hybrid event participation, etc. For the audience expenditure figures, however, the analysis examines spending of in-person participants who have physically been in attendance.
2. The map represents roughly 98% of all participants -- organization locations were determined Google's location API, a CharityNavigator search, or the Greater Philadelphia Cultural Alliance's database; correct addresses were not readily available for participants.
3. Represents a slight undersampling of audiences due to challenges related to the pandemic (the goal was 1200 surveys) with audiences at organizations in suburban counties more likely to be undersampled. At the outset of surveying, procedures were established for surveying audience members in line with past versions of this study, such as randomizing participating organizations by size, discipline, and location. However, the COVID-19 pandemic continued to exert significant effects on in-person events in the Philadelphia area. These procedures could not be fully implemented. However, Cultural Alliance staff and surveyors worked to follow them to the degree that it was possible.
4. US Locations only shown.
5. For Greater Philadelphia, local attendees are those who live within the five counties -- Bucks, Chester, Delaware, Montgomery, or Philadelphia. For Philadelphia, it is those who live within Philadelphia County.
6. For Greater Philadelphia, nonlocal attendees represent regional tourists from the rest of Pennsylvania and other states as well as international tourists. For Philadelphia, nonlocal attendees include suburban visitors, regional tourists from the rest of Pennsylvania and other states as well as international tourists.
7. The aggregate in-person attendance reported by all participating arts and culture organizations in each community. This number does not represent unique visitors; one person who attended three performances was recorded as three attendees for the purpose of this analysis.
8. The aggregate virtual attendance reported by all participating arts and culture organizations in each community. This number does not represent unique visitors; one person who streamed three live performances was recorded as three attendees for the purpose of this analysis.
9. Based on GPCA analysis of zip codes and reason for attending from 1072 audience surveys.
10. Based on GPCA analysis of audience survey data.
11. \*\$35.31 in July 2016 has the same buying power as \$43.55 in December 2022 and represents roughly the mid-point of surveying in each edition. Source: [https://www.bls.gov/data/inflation\\_calculator.htm](https://www.bls.gov/data/inflation_calculator.htm)
12. The distribution of Household Income by geographic area is calculated by the Greater Philadelphia Cultural Alliance and PA Humanities. 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 2021 (the most recent available year).
13. Commodities and expenditure figures are derived using average annual household expenditure data for the Philadelphia Metropolitan Statistical Area from the Consumer Expenditure Surveys, U.S. Bureau of Labor Statistics, September 2023. SEPTA Fares collected from <https://www.septa.org/fares/> in March 2024. Number of hoagies was calculated using an average price for a "twelve-inch" or "regular" Italian hoagie. Average calculated from prices collected from five hoagie shops in Greater Philadelphia in March 2024, including both local chains and single location specialty shops.
14. Compares the 10 study regions with populations over 2 million.
15. Compares cities/counties with populations over 1 million -- includes 10 ten cities/counties only.
16. Bureau of Economic Analysis, Gross Domestic Product by County and Metropolitan Area, 2022

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## Participating Organizations cont.

Friends of Curtis Arboretum; Friends of Laurel Hill; Friends of the Japanese House And Garden; Friends of the Rail Park; Friends of the William Jeanes Memorial Library; Friends of Washington Crossing Park; Fringearts; Gatsme Model Railroad Clubinc; Genealogical Society of Pennsylvania; Georgia E Gregory Interdenominational School of Music; German Society of Pennsylvania; Germantown Community Broadcasting; Girls Rock Philly; Girls With Grit; Glass Commons; Glorify Performing Arts; Graystone Society; Greater Philadelphia Cultural Alliance; Greater Philadelphia Film Office; Harmony Theater; Haverford Township Education Arts & Music Society; Headlong Dance Theater; Hedgerow Theatre ; Hidden City Philadelphia; Hidden City Philadelphia of CultureTrust; Higher Grounds Music; Historic Fair Hill; Historic Fallsington ; Historic Germantown Preserved; Historic Gloria Dei Preservation; Historic Lansdowne Theater Corporation; Historic Rittenhousetown; Historic St Georges Preservation Society; Historic Trappe; Historic Yellow Springs; Historical Society of Fort Washington Penna; Historical Society of Montgomery County; Historical Society of Pennsylvania; Horsham Preservation and Historical Association; Huntingdon Valley Library; Idiopathic Ridiculopathy Consortium; Imperfect Gallery; Independence Hall Association; Independence Historical Trust; Independence Seaport Museum; Independence Sinfonia; Indian Valley Public Library; Inis Nua Theatre Company; In-Kind Baking Project; Inliquid; Institute for Better Gun Violence Reporting; Institute of Contemporary Art; Interact ; Intercultural Journeys; International Ballet Exchange; James A Michener Art Museum; James E Brewton Foundation; Jazz Bridge Project; Jenkins Arboretum; Jewish Chorale of Greater Philadelphia; John Bartram Association; John Graves Productions ; Johnson House Historic Site ; Junk; Just Media Project; Kaleid Theatre; Keep Music Alive; Kelly Music for Life; Kennett Heritage Center; Kimberton Arts Alliance ; Kimmel Center Cultural Campus; Koresh Dance Company; Kulu Mele African American Dance Ensemble; Kyl Dancers; Kyodaiko Taiko Drummers (Formerly Shofuso Taiko); La Fiocco; La Salle University Art Museum; Ladies Who Rock 4 A Cause; Lansdowne Economic Development Corporation; Lantern Theater Company; Lawn Chair Philosophy Foundation; Lawrence Theatre Company; Leah Stein Dance Company; Lenape Chamber Ensemble; Lifeline Music Coalition; Lightning Rod Special; Liveconnections Org; Living Arts Dance Foundation; Longwood Gardens; Louise Nevelson Foundation; Lower Merion Library Foundation; Lupine Performance Cooperative; Lyra Society; Lyric Fest; Macguffin Theatre & Film Company; Main Line Singers; Mamadele Foundation; Mann Center for the Performing Arts; Mario Lanza Institute; Marlboro School of Music ; Mascher Dance; Mauckingbird Theatre Company; Media Arts Council; Media Chamber Chorale; Mendelssohn Chorus of Philadelphia; Methacton Community Theater (ACT); Metropolitan Ballet Company; Mighty Writers; Montgomery County Chorale and Orchestra; Montgomery County Library and Information Network Consortium; Monument Lab of CultureTrust Greater Philadelphia; Morris Arboretum of the University of Pennsylvania; Mt Airy Art Garage; Multicultural Arts Exchange; Museum of the American Revolution; Music Theatre Philly; Musicopia; Narberth Community Theatre; National Constitution Center; National Liberty Museum; Née Danse/Theatre; Network for New Music; Nextmove Dance; Nichole Canuso Dance Company; Ninth Planet; Norman Holland-Hull Instrument Library; Norris Square Neighborhood Project; Norristown Zoological Society; North Light Community Center; North Wales Area Library; Northern Liberties Business Improvement District; Office of Arts, Culture and the Creative Economy (Philadelphia); Ollin Yoliztli Calmecac; Olney Culture Lab of CultureTrust Greater Philadelphia; Opera Philadelphia; Orchestra 2001; Organ Historical Society; Original American Foundation; Owlsong Productions; Oxford Arts Alliance; Painted Bride Art Center; Palisades Community Chorus; Paoli Blues Fest; Parkway Council Foundation; Partners for Sacred Places; Past Present Project; Pearl S. 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