

IMPACT: ARTS & CULTURE

ENRICHING COMMUNITIES,
FUELING ECONOMIES

AN ECONOMIC IMPACT STUDY OF
ARTS, CULTURAL, AND SCIENTIFIC
ORGANIZATIONS IN THE CENTRAL
PUGET SOUND REGION: 2014

TURNING DATA INTO ACTION CONVENING 4.11.16

INSPIRE



EDUCATE



STRENGTHEN



CONNECT



FUNDING SUPPORT BY:



King County



NESHOLM FAMILY
FOUNDATION



OFFICE OF ARTS & CULTURE
SEATTLE

This study was carried out in partnership with Dr. William Beyers (University of Washington) and GMA Research

The ArtsFund Economic Impact Study is an analysis of the aggregate expenditures of cultural organizations and their patrons in the local and state economies



An Economic Impact Study of Arts,
Cultural, and Scientific Organizations
in the Central Puget Sound Region

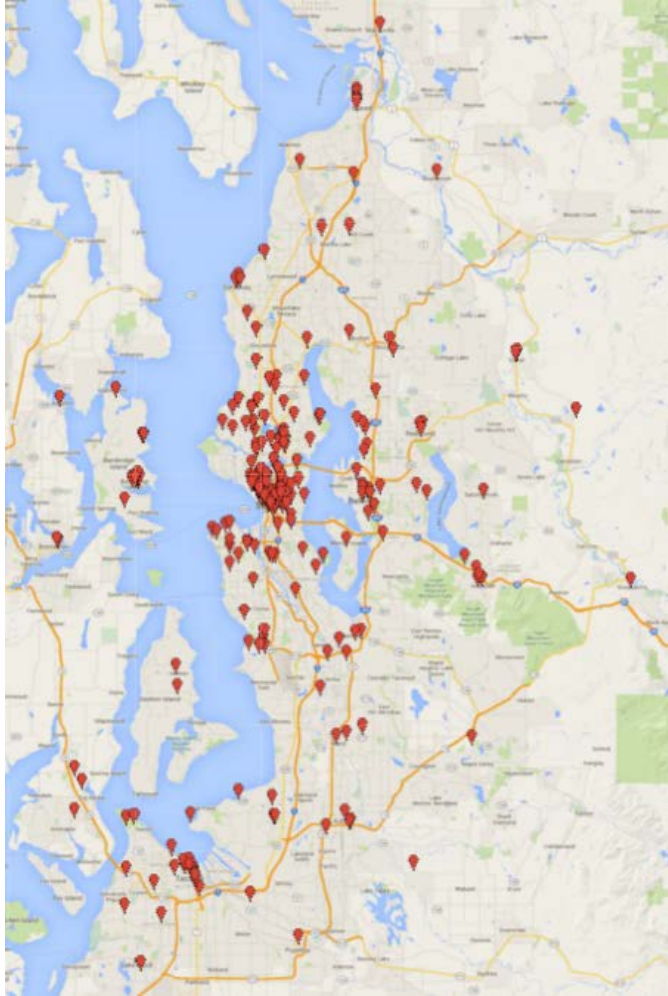
2014

This is ArtsFund's fifth
Economic Impact Study
since 1992

Detailed findings and full
reports are available online
at artsfund.org/EIS

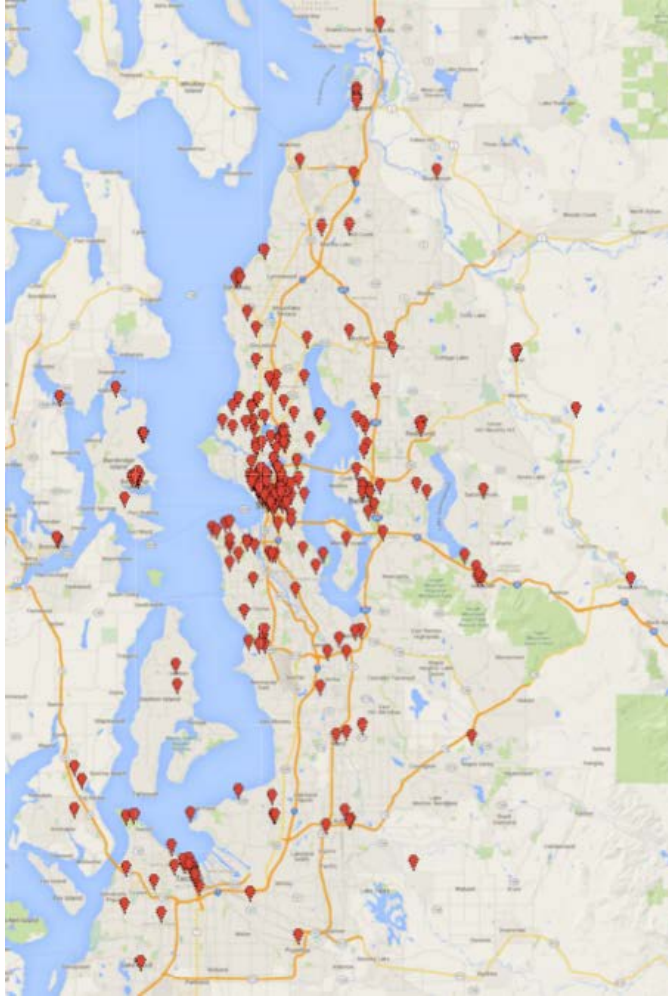


Scope of the Study



- 313 Organizations included from King, Kitsap, Pierce, and Snohomish Counties
- Over 3,500 patrons surveyed between January 2015 to July 2015
- Regional, King County, and Eastside King County reports generated

Scope of the Study



- Disciplines included: Arts Service Organizations, Dance, Festival & Interdisciplinary, Heritage, Music, Science, Theatre, and Visual Arts
- Not included:
 - Endowments
 - For-profit creative industries
 - Capital campaigns
 - Educational institutions
 - Organizations with budgets under \$35,000

IMPACT: ARTS & CULTURE

- Fueling the local and state economies
- Attracting outside investment and driving tourism
- Fostering civic engagement
- Building skills and enhancing educational opportunities for youth
- Elevating the quality of life and defining civic identity



Fueling the economy

\$2.4B aggregate sales impacts

\$105M taxes generated

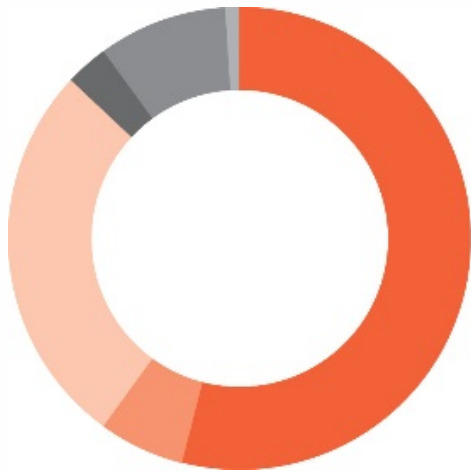
\$996M labor income

35,376 jobs supported



Act 1 final scene of Seattle Opera's production of *Semele*.
© Avi Loud photo

Aggregate Expenditures: \$496M



Employee Expenses.....	54.4%
Contract, Firms & Individuals.....	5.6%
Services.....	27.3%
Utilities & Postage	3.3%
Other Goods & Services ..	8.9%
Taxes	0.4%

Key Findings

- 61% on employee expenses and contract, firms & individuals
- 93% spent locally

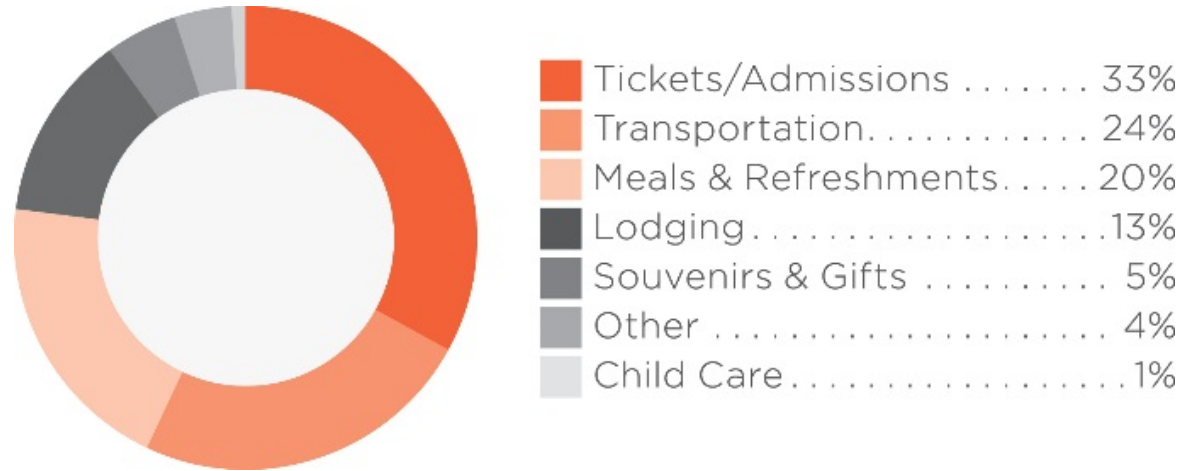


Michael Brockman conducts Seattle Repertory Jazz Orchestra, June 2015; photo by Jim Levitt

Patron Expenditures: \$694M

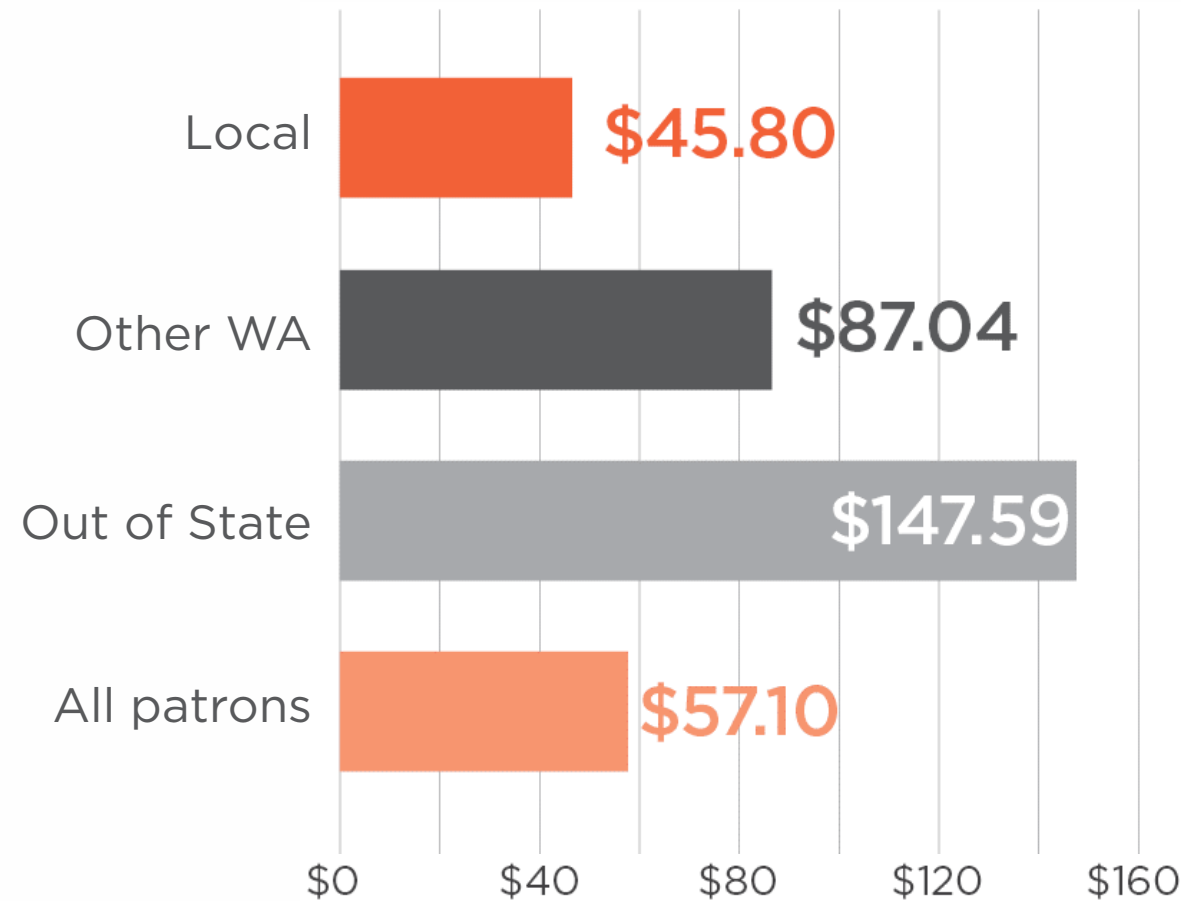
Key Findings

- Tickets/Admissions: \$231M
- 2/3 of patron spending made on non-ticket expenditures
- Nearly 75% reported their primary trip reason was to attend the event at which they were surveyed



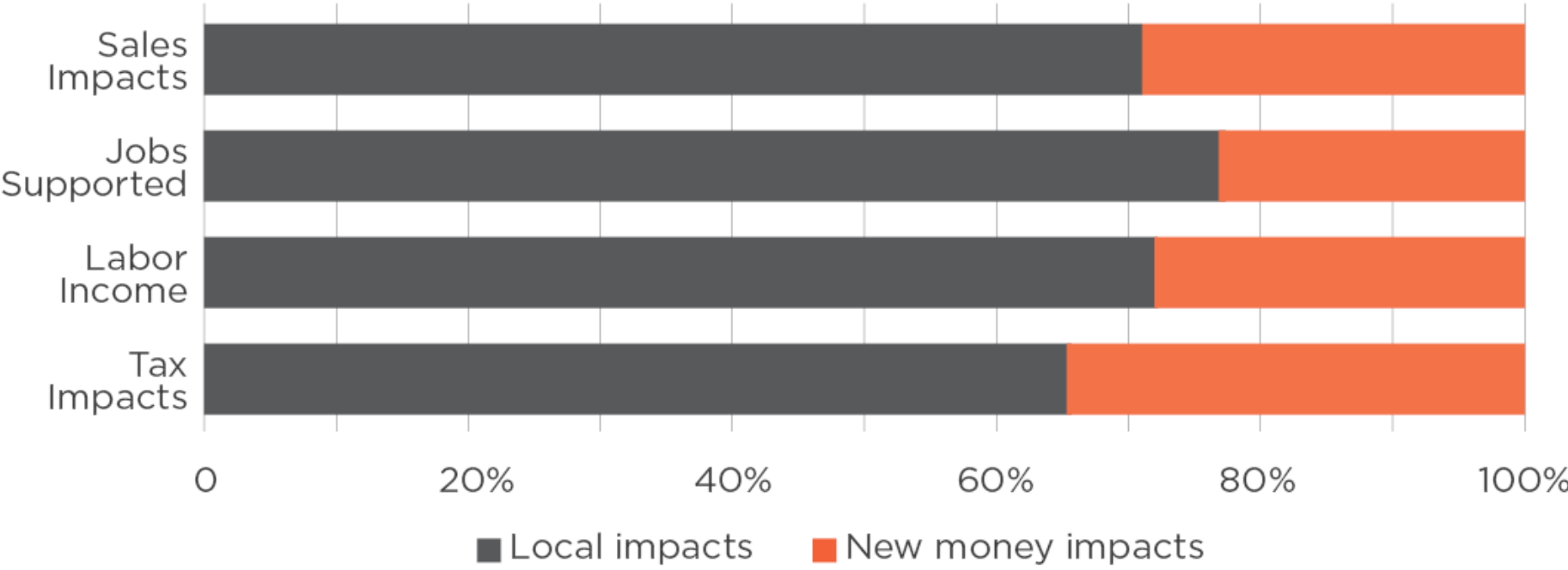
Seattle Arts & Lectures, 14/15 Literary Arts Series: Cheryl Strayed. Courtesy of Libby Lewis Photography

Average patron spending by origin



EMP Museum, **Influencers Concert Series****** featuring De La Soul and Brothers from Another. Photos by Brady Harvey. Photos by Brady Harvey.

Attracting outside investment and driving tourism



Fostering civic engagement

- “Americans who read books, visit museums, attend theatre and engage in other art are more active in community life than those who are not.”
— Dana Gioia (NEA)



Seattle Chamber Music Society, *Chamber Music in the Park*. Photo by Seneca Garber



Nordic Heritage Museum, *Viking Days*. Photo by Jason Brooks



Artist Trust networking event April 2015; Photo courtesy of Artist Trust

Broad participation and public benefit

- Annual admissions totaled 13.4 million visits in 2014—nearly 3.5 times the population of the four counties



Nordic Heritage Museum, Viking Days. Photo by Jason Brooks



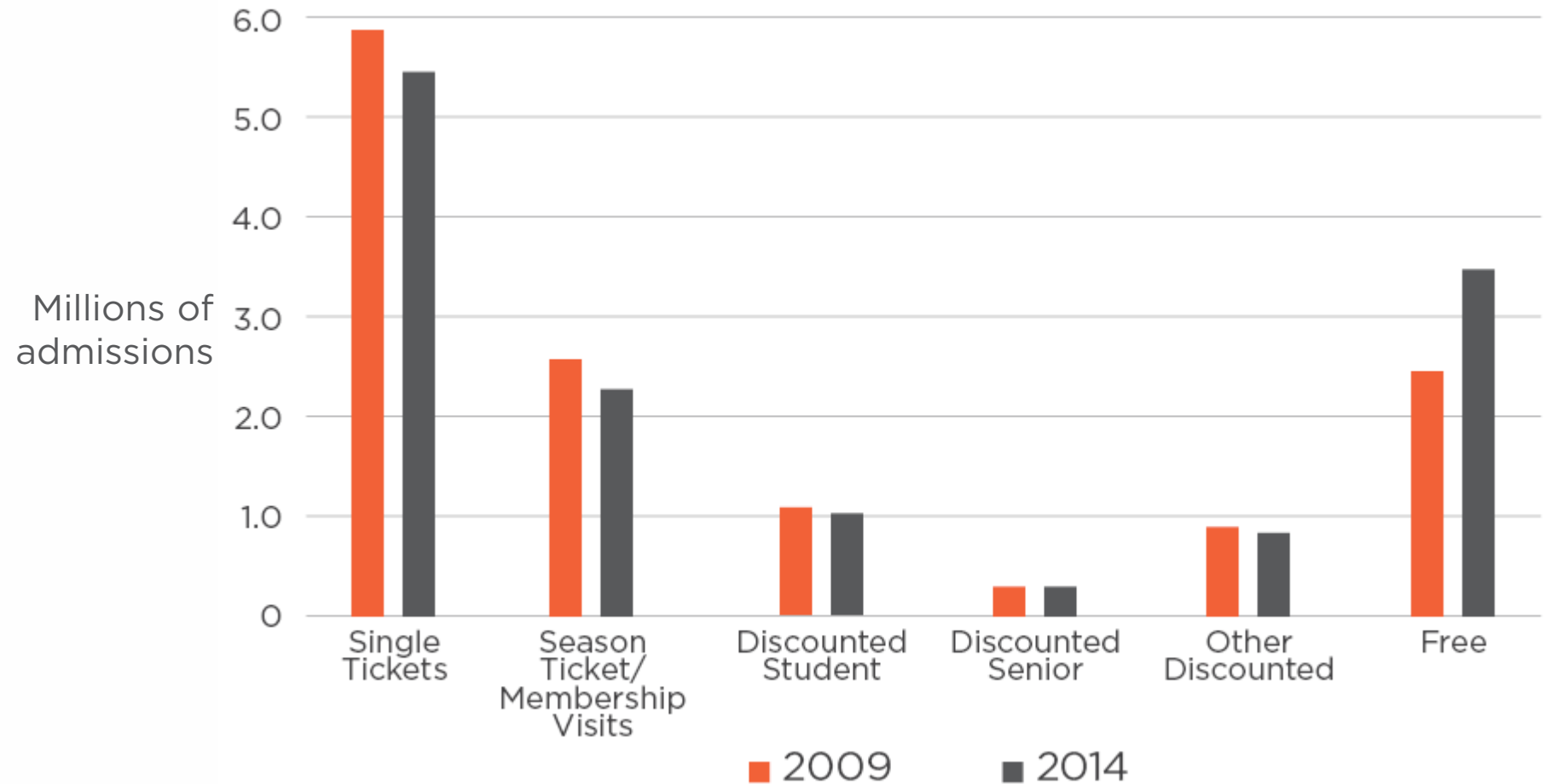
Artist Trust networking event April 2015; Photo courtesy of Artist Trust



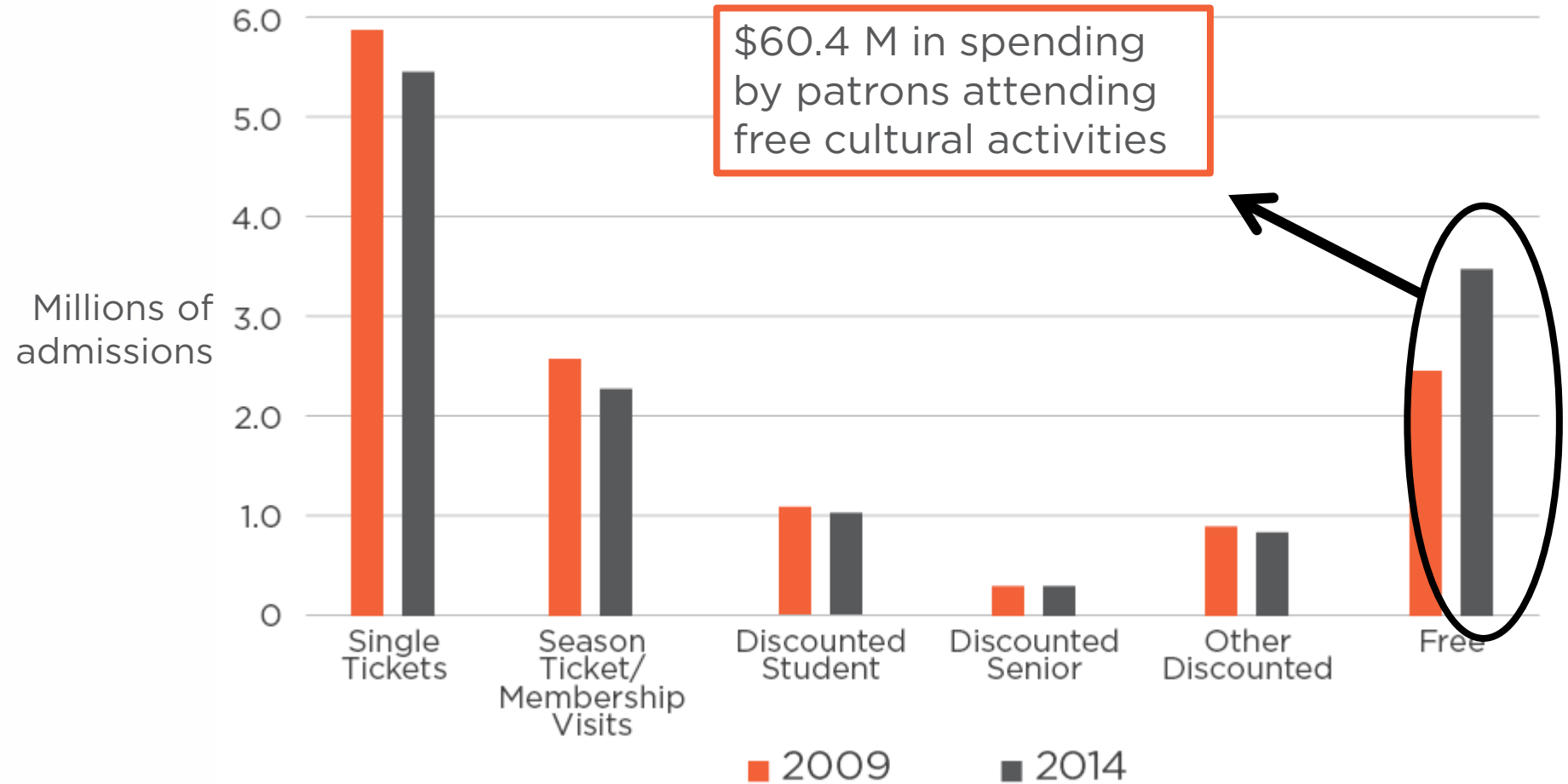
“Arts and cultural activities allow me to learn, explore, think, dream and understand. These activities increase my quality of life, reduce stress and encourage me to engage and participate in the community.”
—Patron survey

Village Theatre KIDSTAGE, *Peter Pan*. Photo by Jean Johnson. Property of Village Theatre.

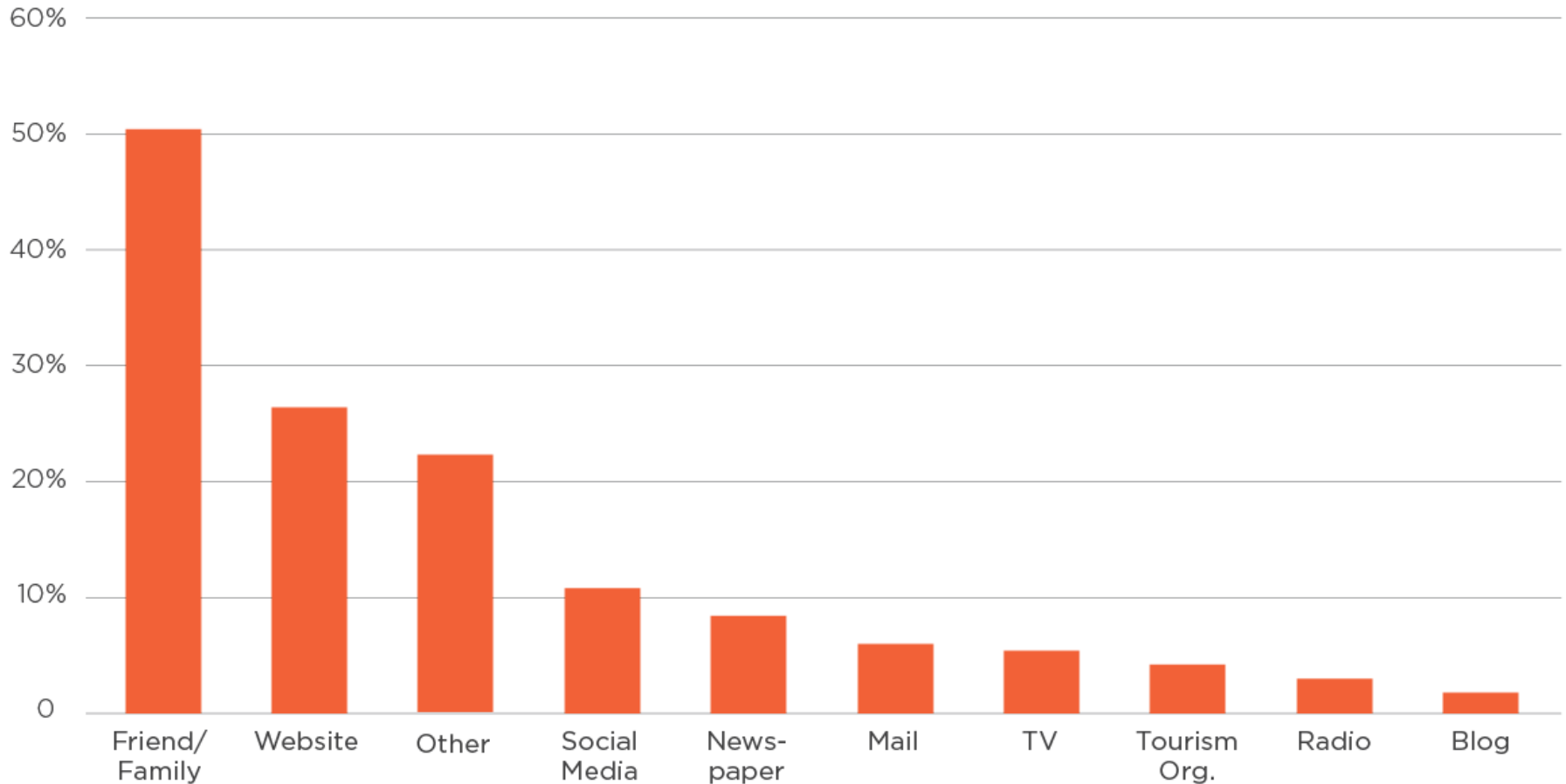
Patron ticketing trends



Patron ticketing trends

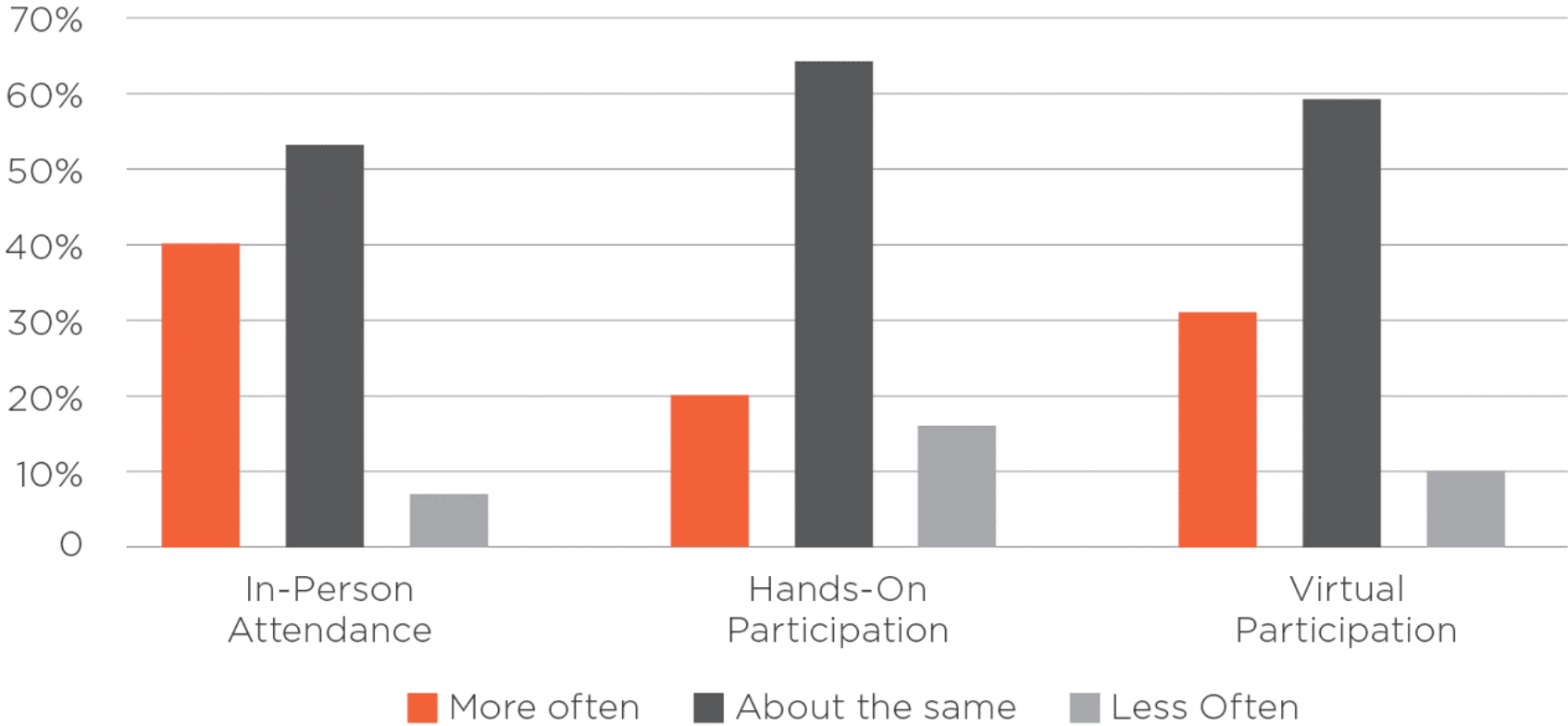


Patron information sources



How patrons heard about the event at which they were surveyed

Changes in patron modes of engagement over the last 3 years





Bellevue Arts Museum, Imagination Station. Photo by Emilie Smith



Seattle Children's Theatre, *The Garden of Rikki Tikki Tavi*. Photo by Chris Bennion



Students enjoy Water Puppet Theatre. Photo courtesy Town Hall



Elementary students at LinkUp, Seattle Symphony. Photo courtesy Ben Van Houten

Building skills and enhancing opportunities for youth

- 1.2 million visits by K-12 students through free and discounted admissions in 2014
 - Double the student population



Students enjoy Water Puppet Theatre. Photo courtesy Town Hall



Elementary students at LinkUp, Seattle Symphony. Photo courtesy Ben Van Houten

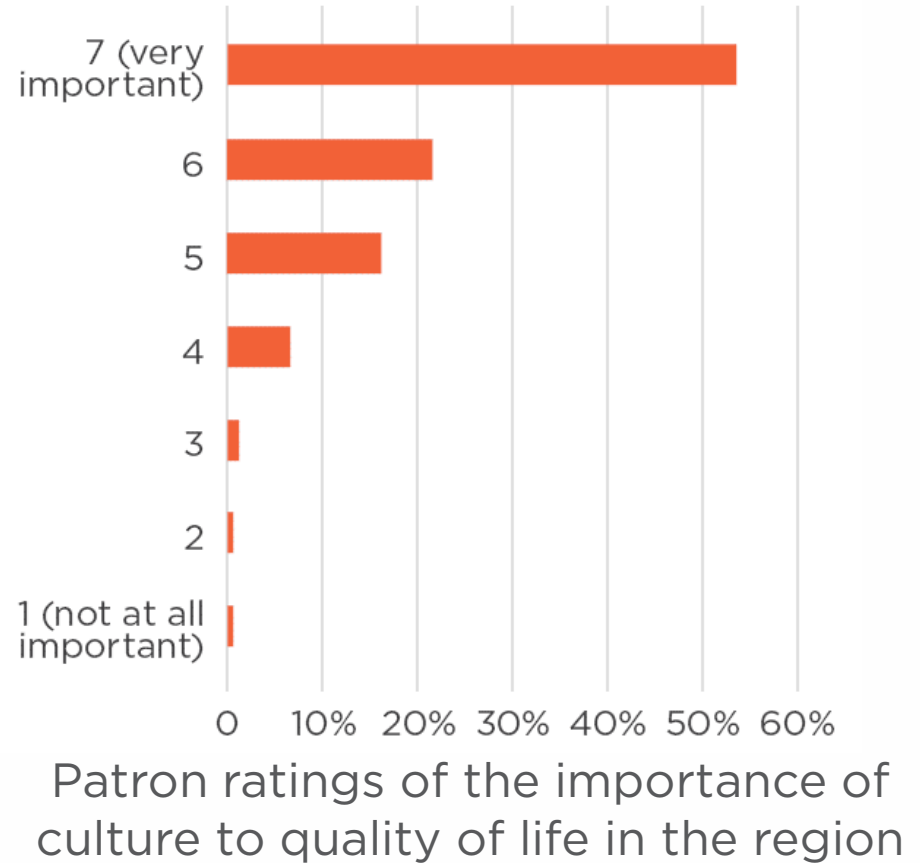
Elevating quality of life, connecting communities



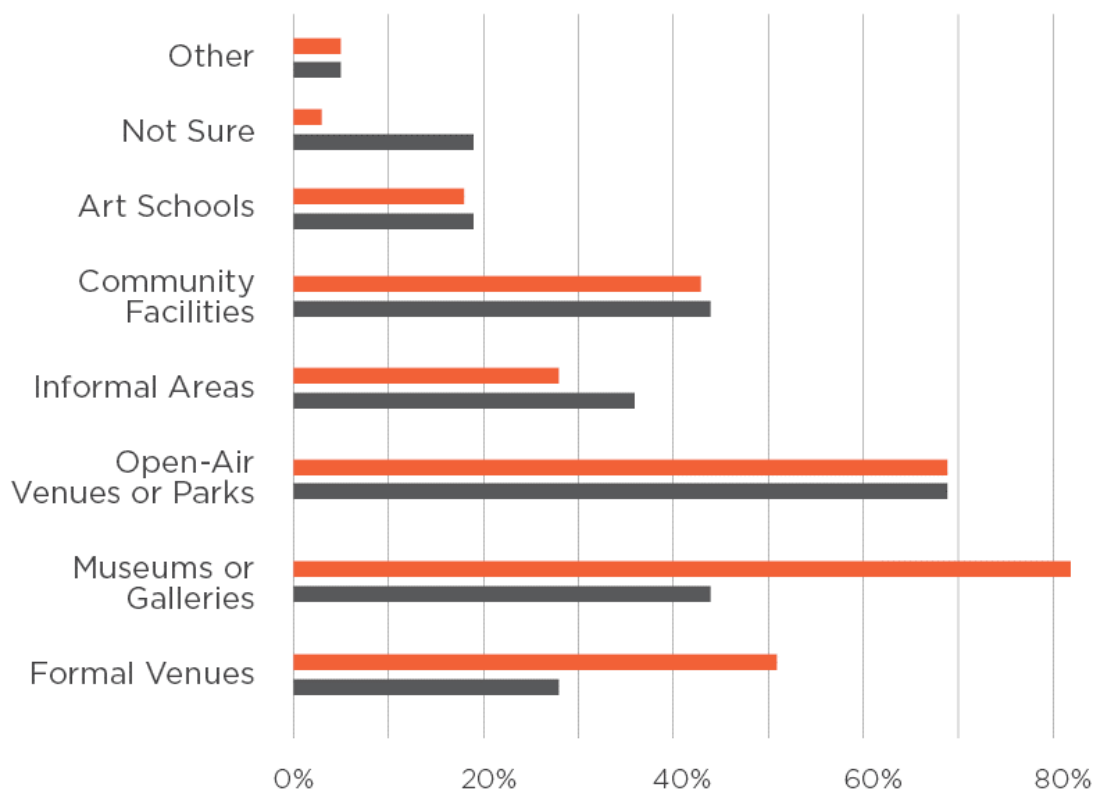
Seattle Art Museum, Olympic Sculpture Park, Photo by Robert Wade



Dr. Charles Johnson signing book, Central District Forum. Photo by Alen Blake



Comparison of current and desired locations for participation in cultural activities



■ Where patrons are currently most likely to go to cultural activities
■ Where patrons would like to see more cultural activities



Seattle Chamber Music Society, *Chamber Music in the Park*. Photo by Seneca Garber

Income and expenses—a delicate balance



Note: figures for King County organizations only

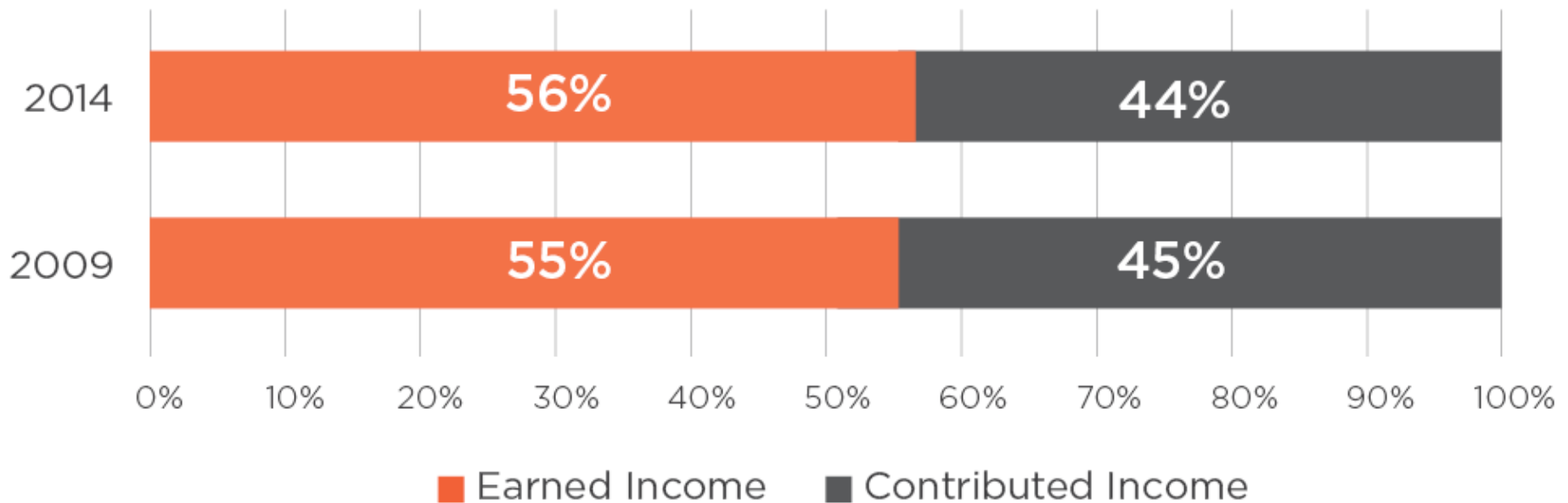


Pacific Northwest Ballet in Crystal Pite's *Emergence*. Photo © Angela Sterling.

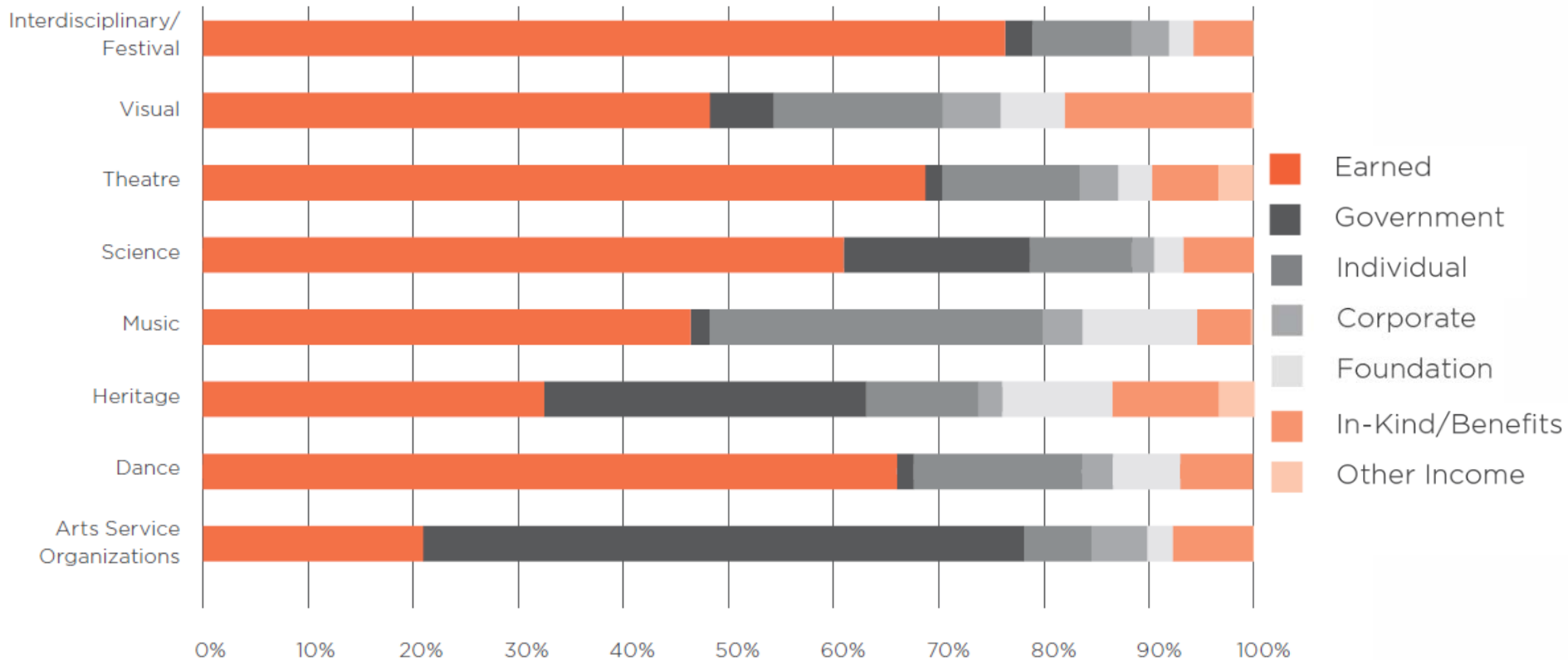


Wing Luke Museum. A tour of the new gallery space and Bruce Lee Exhibition. Photo courtesy Wing Luke Museum

Earned vs. Contributed income over time



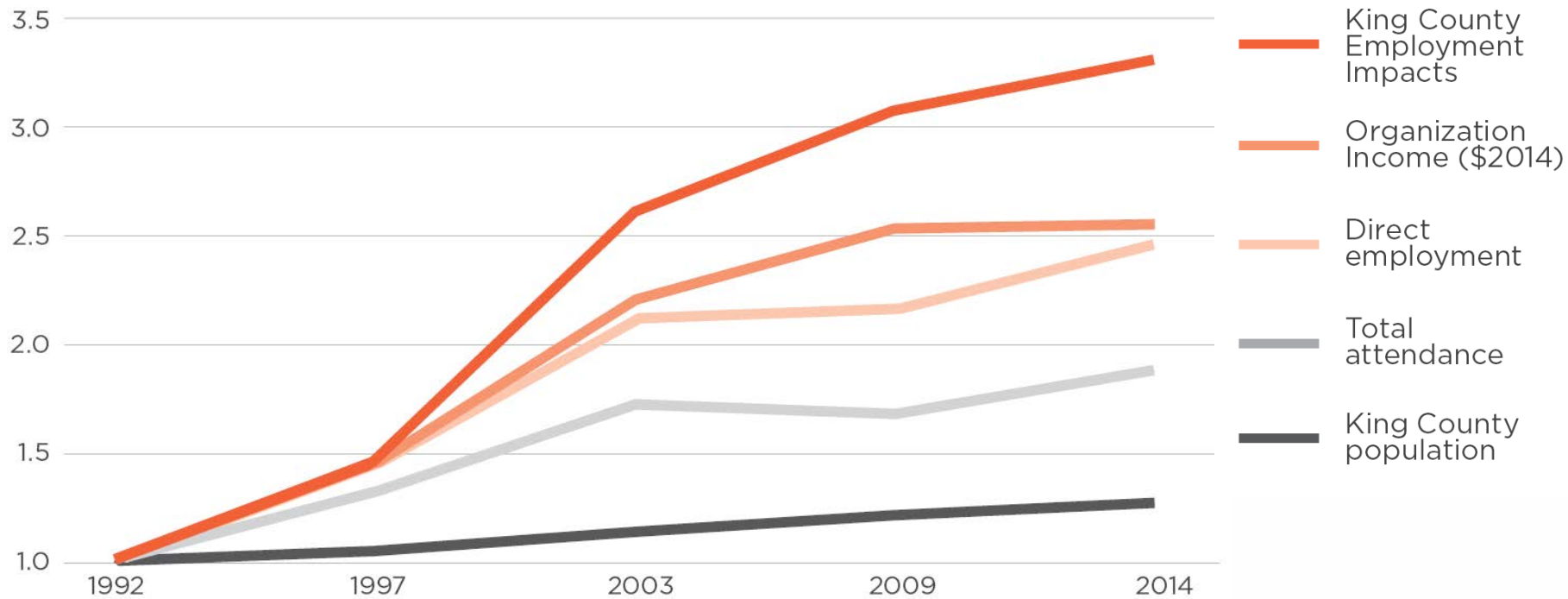
Percentage of Total Income by Discipline and Source



How do we compare nationally?

- Fiscal health
- Patron spending
- Volunteerism
- Engagement

Trends over time



Note: figures for King County organizations only, excluding science for apples-to-apples comparison

Conclusions

- Fueling the local and state economies
- Attracting outside investment and driving tourism
- Fostering civic engagement
- Building skills and enhancing educational opportunities for youth
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To view the reports, visit artsfund.org/EIS



Taproot Theatre Company, *Godspell*. Photo By Eric Stuhau



Spectrum Dance Theater, The School of Spectrum Dance Theater's 2015 All School Demonstration. Photo by Jennifer Richards



Northwest African American Museum, *Debora Moore: Glass Orchidarium*. Photo by [Robert Wade](#)