

# IMPACT: ARTS & CULTURE

ENRICHING COMMUNITIES,  
FUELING ECONOMIES

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

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

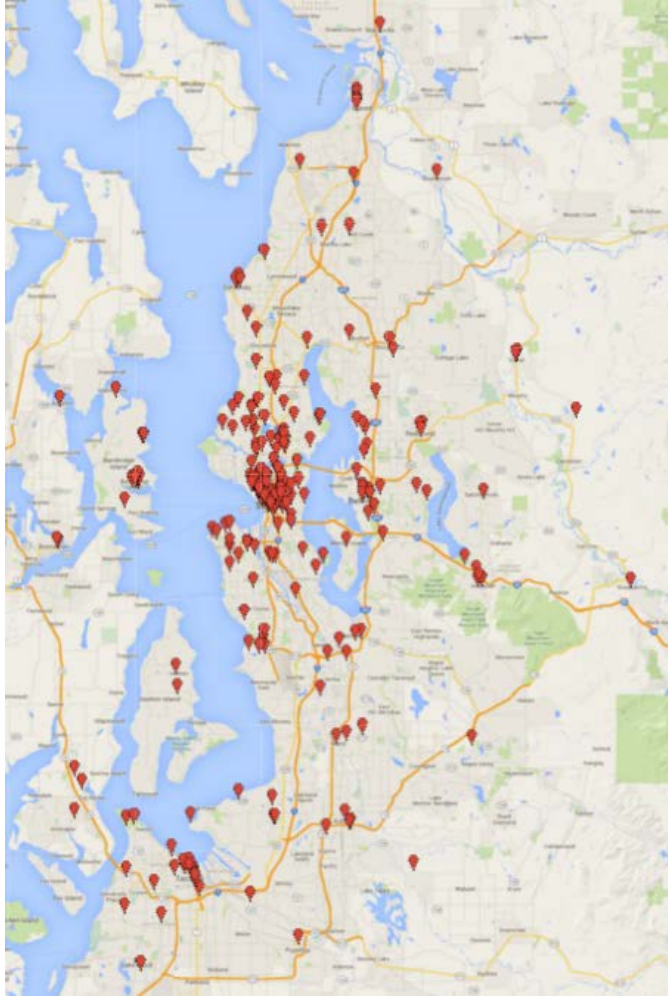
2014

This is ArtsFund's fifth  
Economic Impact Study  
since 1992

Detailed findings and full  
reports are available online  
at [artsfund.org/EIS](http://artsfund.org/EIS)

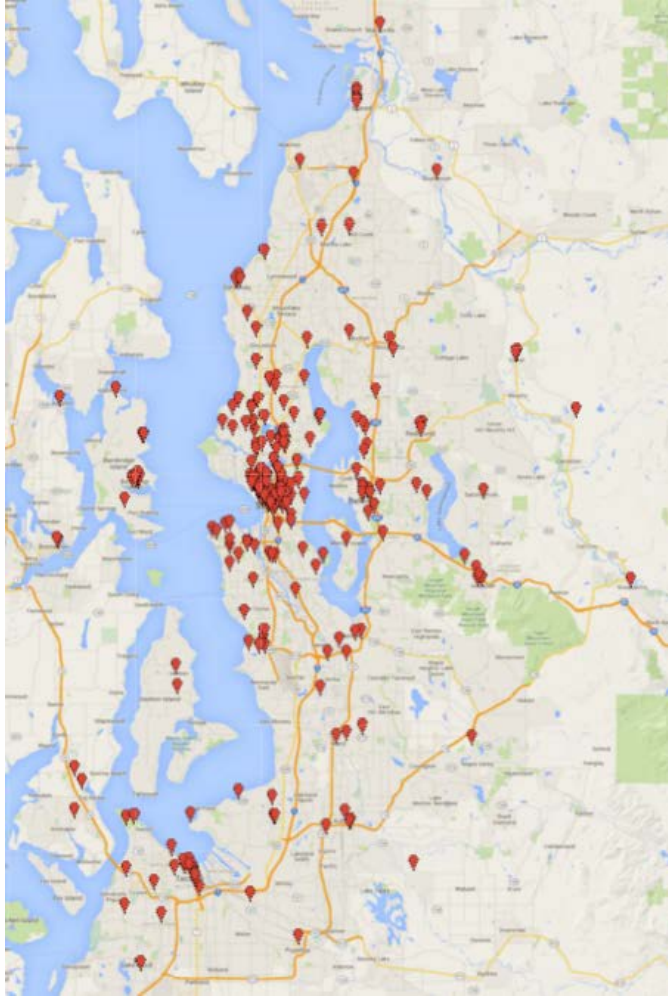


# Scope of the Study



- 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

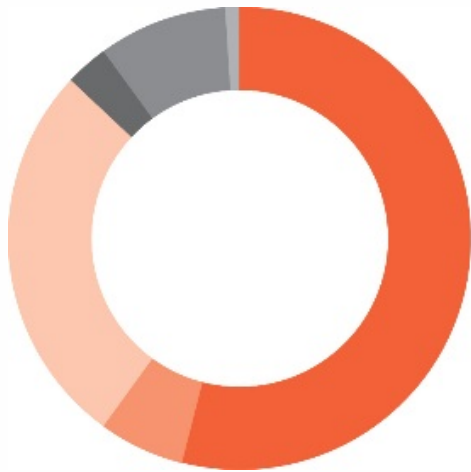
**35,376** jobs supported



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

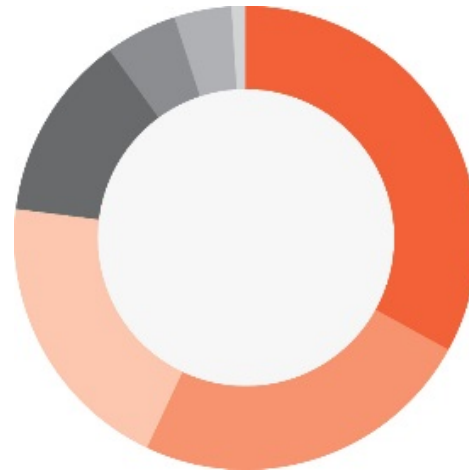


Michael Brockman conducts Seattle Repertory Jazz Orchestra, June 2015; photo by Jim Levitt

# 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

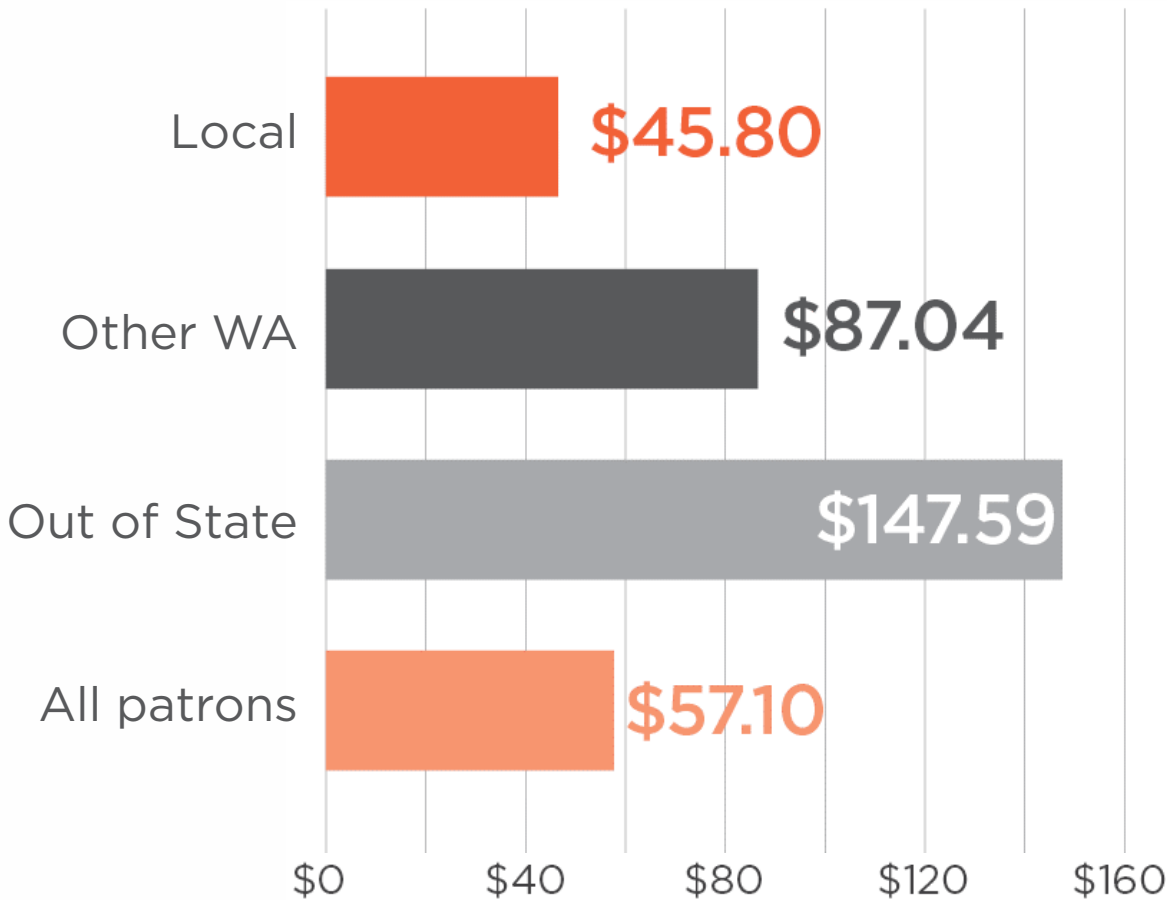


Tickets/Admissions . . . . .	33%
Transportation . . . . .	24%
Meals & Refreshments . . . . .	20%
Lodging . . . . .	13%
Souvenirs & Gifts . . . . .	5%
Other . . . . .	4%
Child Care . . . . .	1%



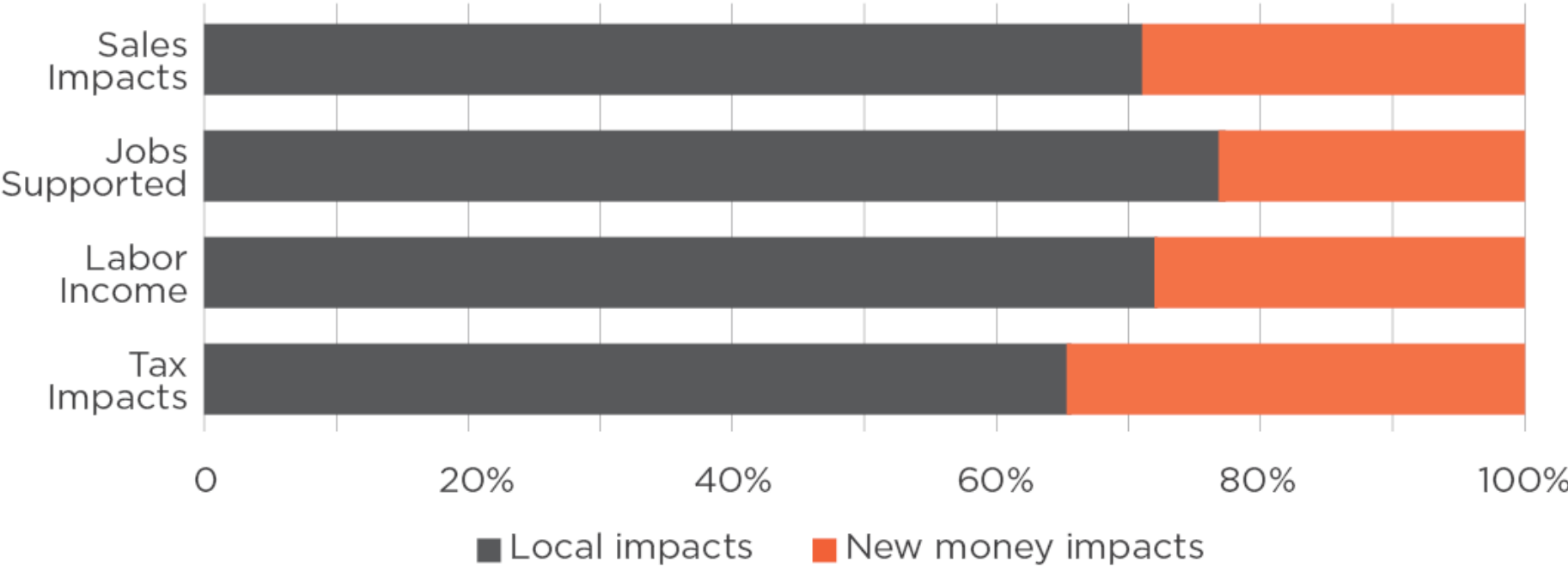
Seattle Arts & Lectures, 14/15 Literary Arts Series: Cheryl Strayed. Courtesy of Libby Lewis Photography

# Average patron spending by origin



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

# 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



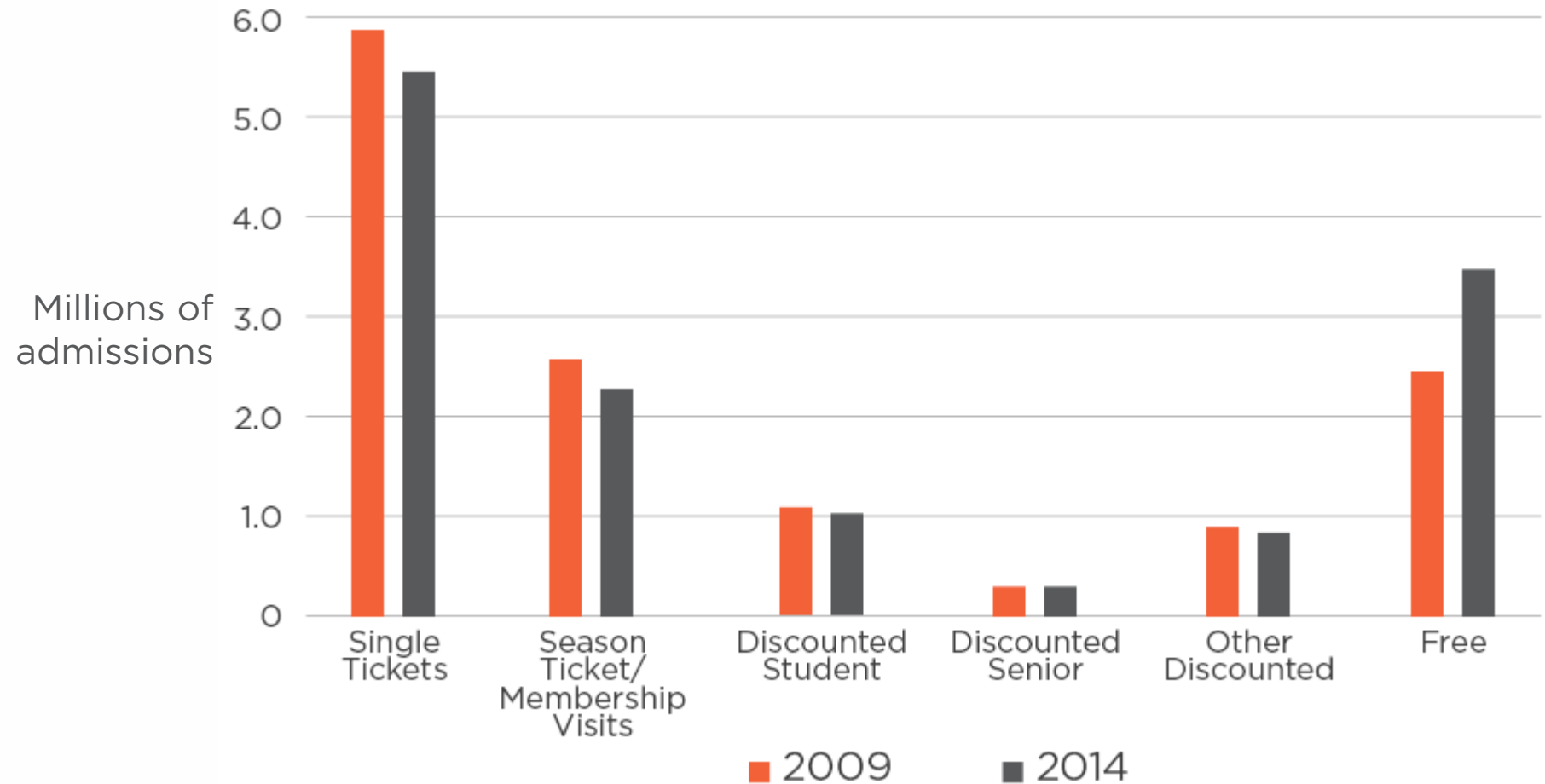
Artist Trust networking event April 2015; Photo courtesy of Artist Trust



“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

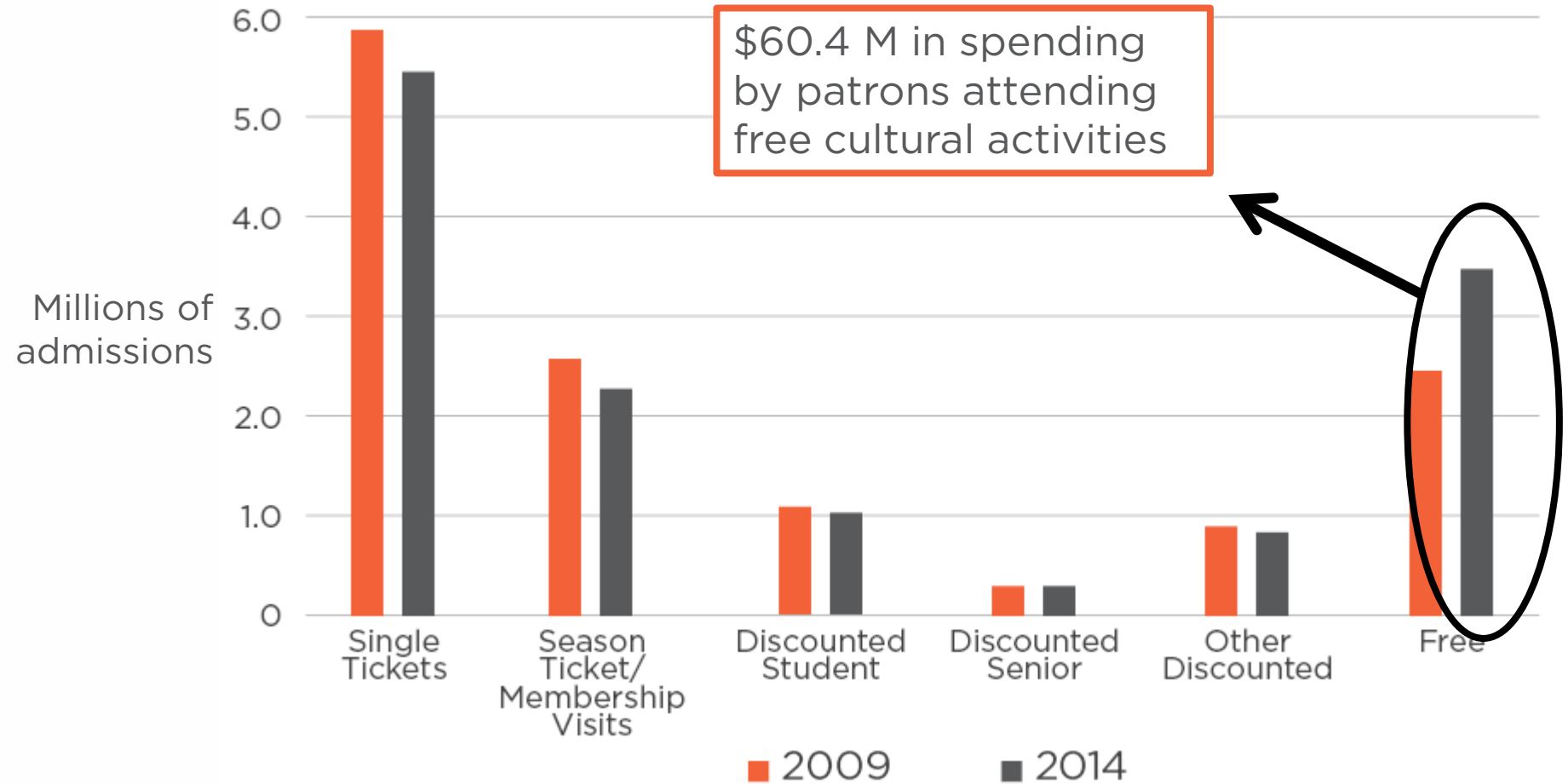
Village Theatre KIDSTAGE, *Peter Pan*. Photo by Jean Johnson. Property of Village Theatre.

# Patron ticketing trends

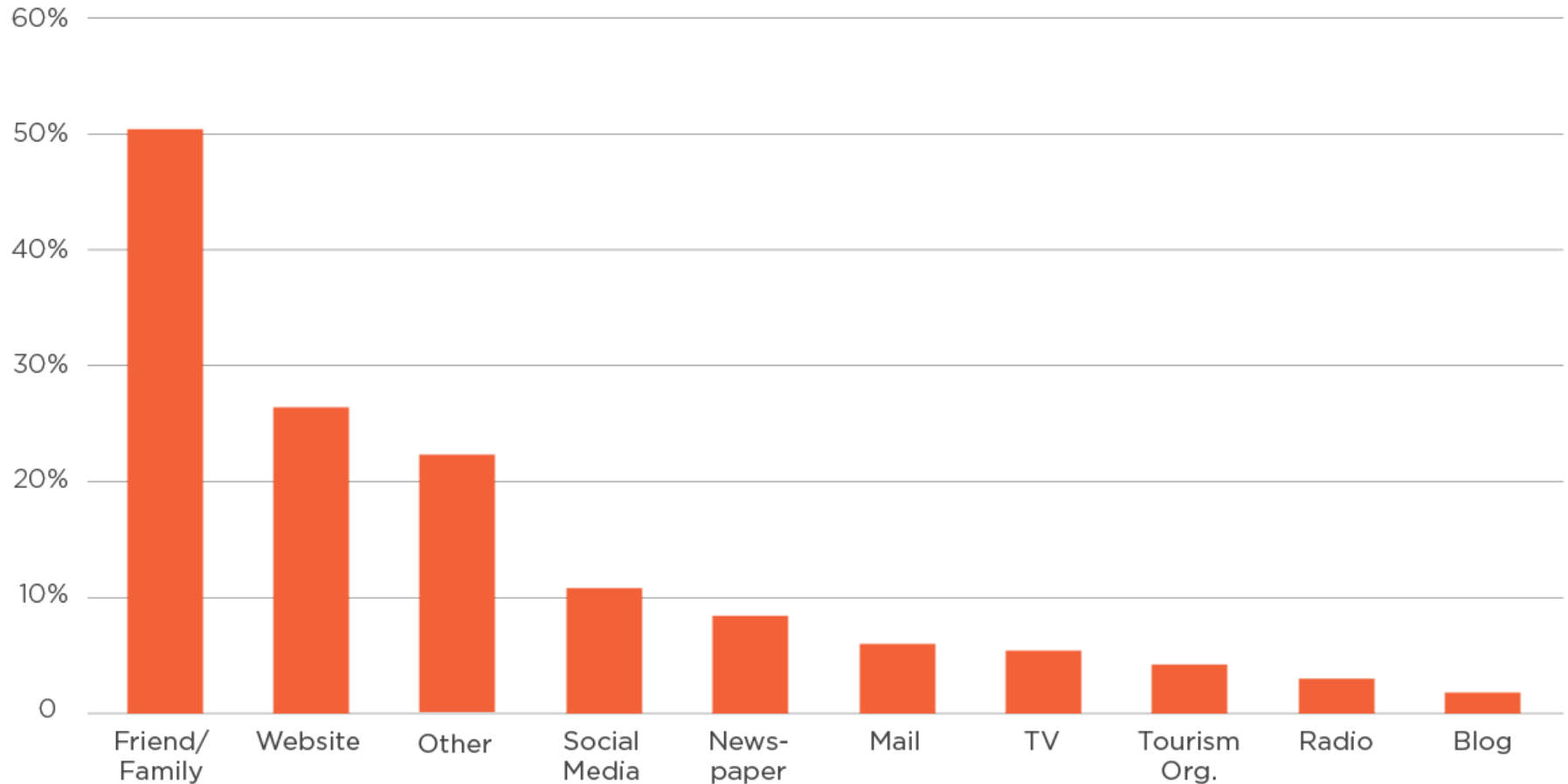




# Patron ticketing trends

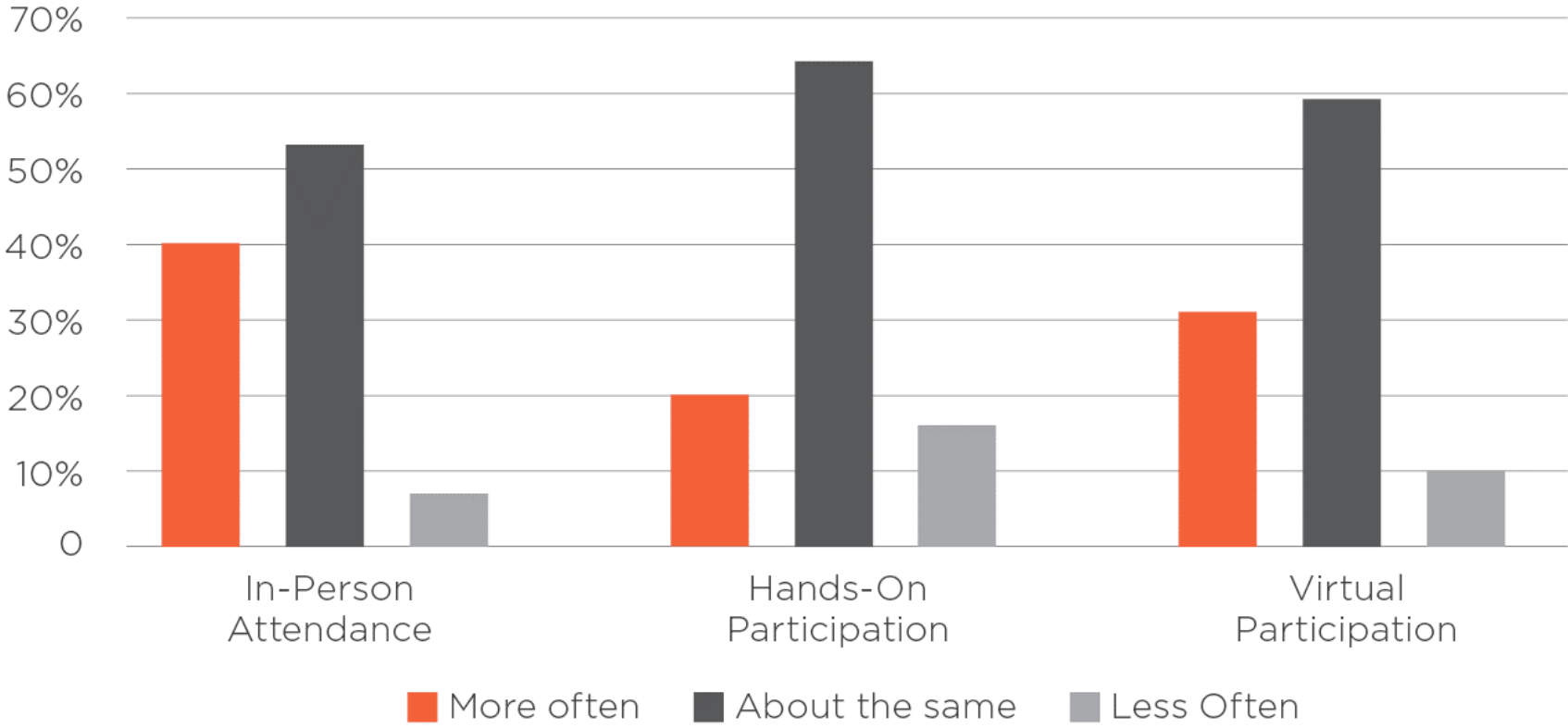


# Patron information sources



*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

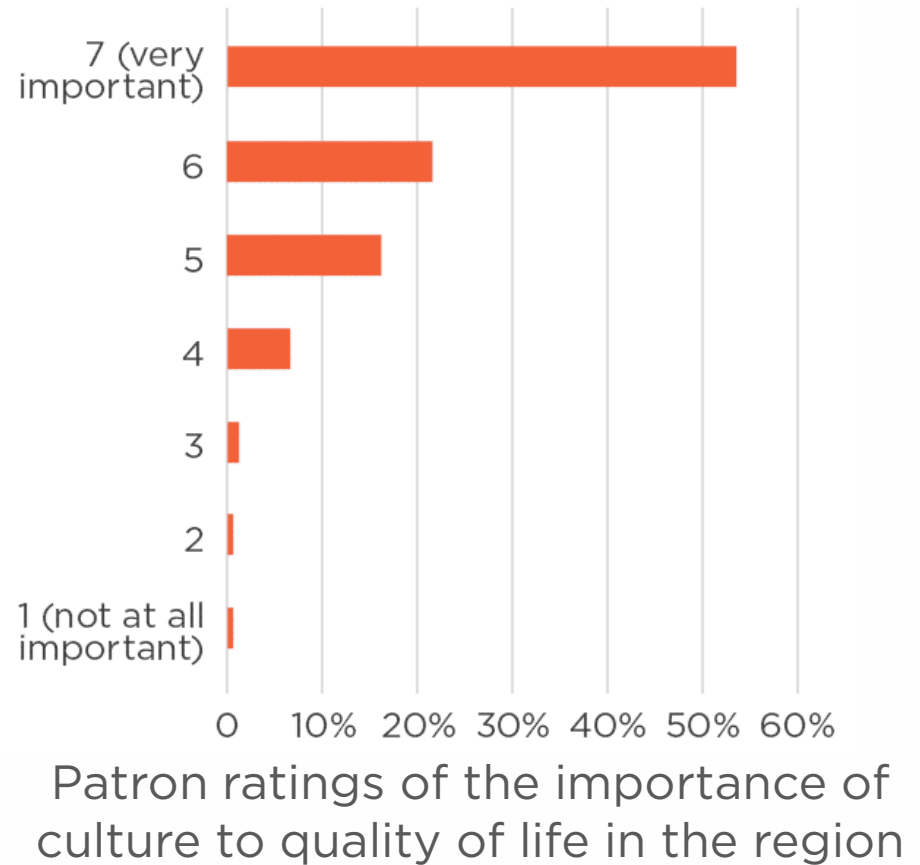
# Elevating quality of life, connecting communities



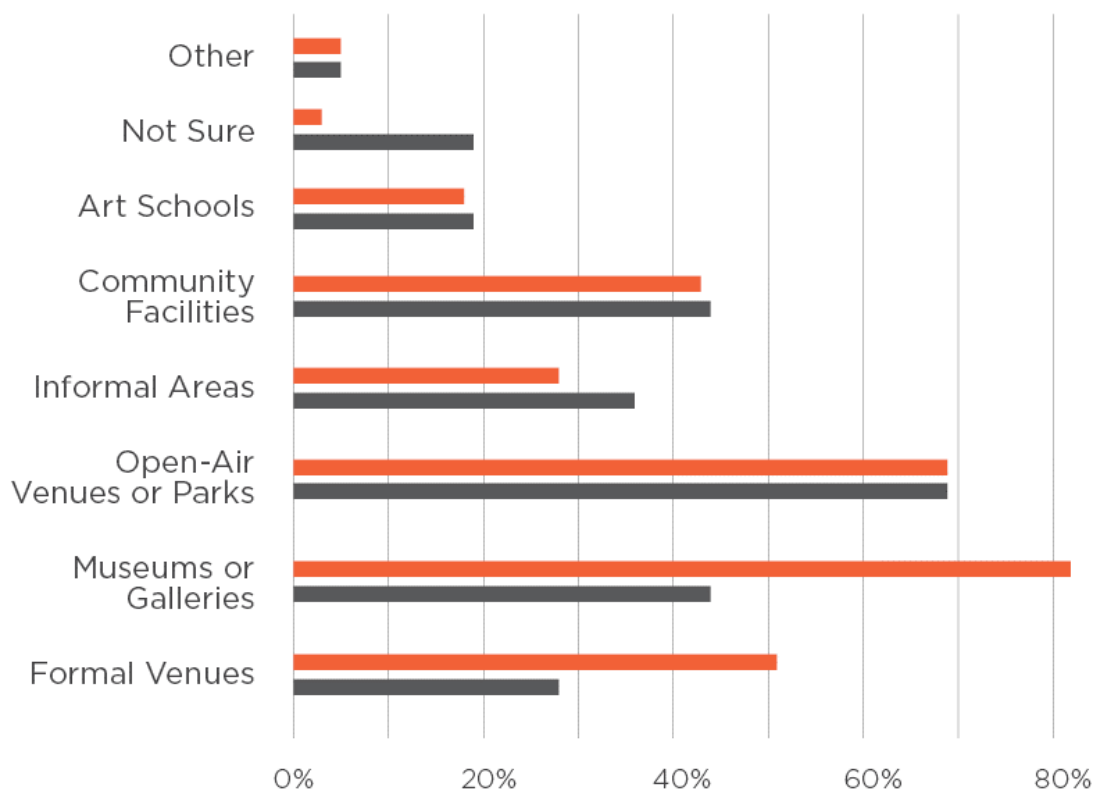
Seattle Art Museum, Olympic Sculpture Park, Photo by Robert Wade



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*



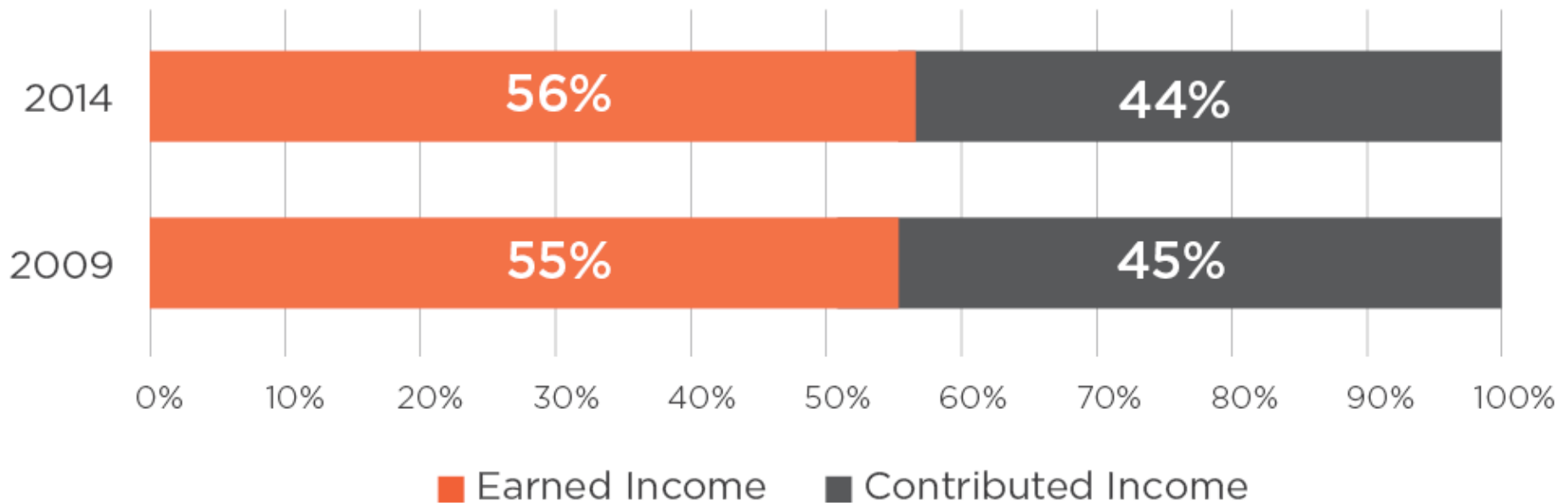


Pacific Northwest Ballet in Crystal Pite's *Emergence*. Photo © Angela Sterling.

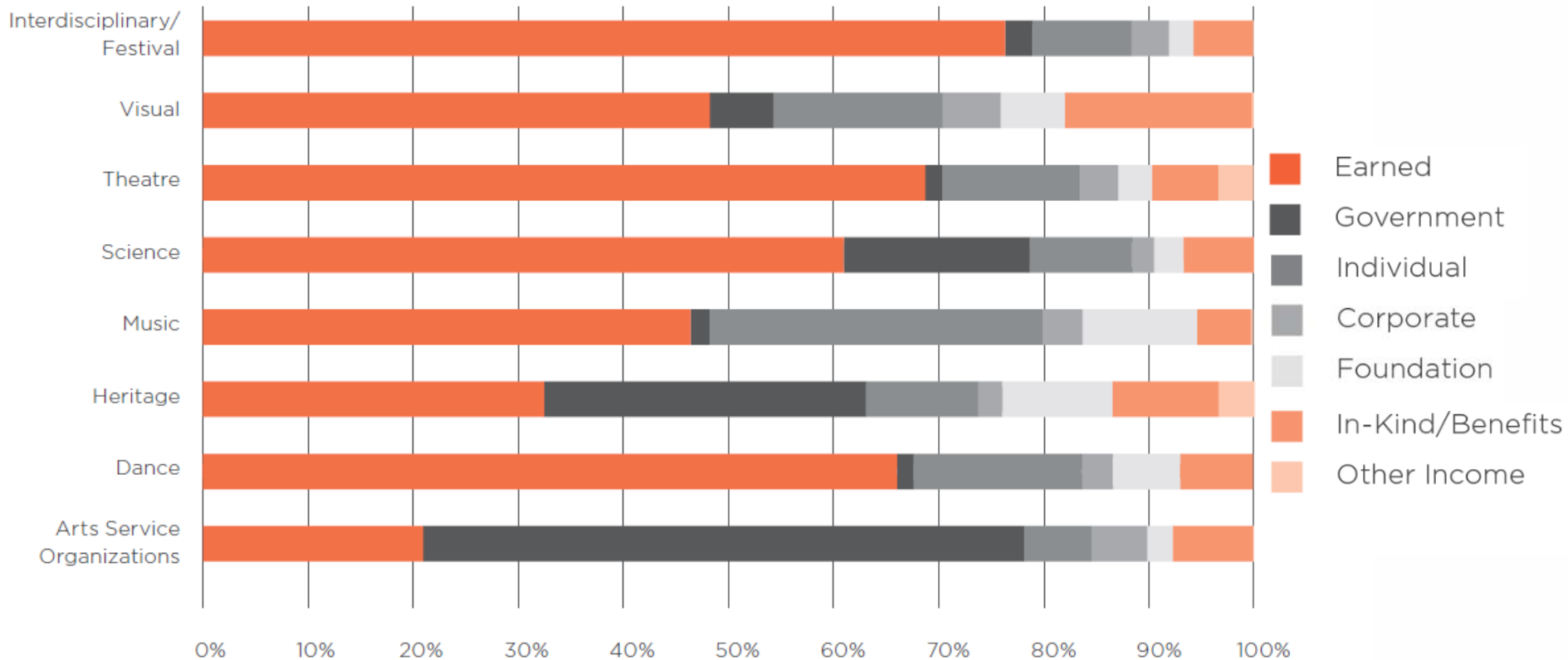


Wing Luke Museum. A tour of the new gallery space and Bruce Lee Exhibition. Photo courtesy Wing Luke Museum

# Earned vs. Contributed income over time



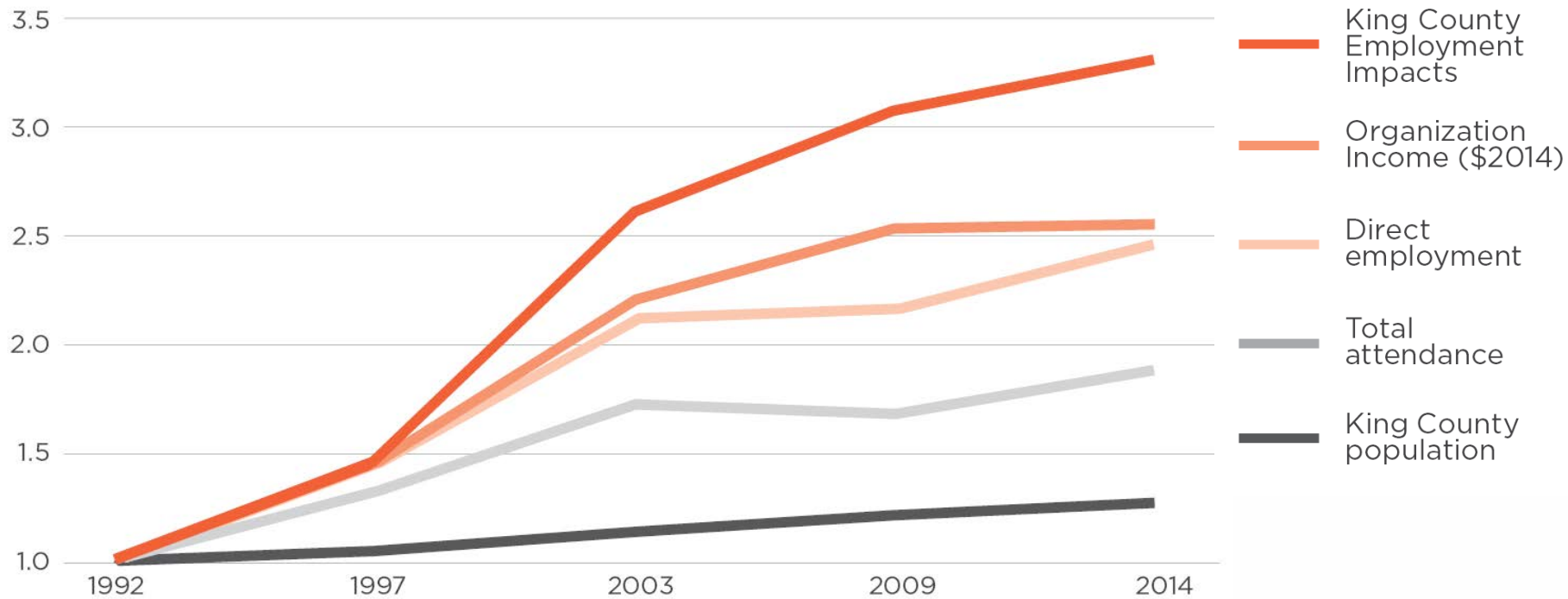
# Percentage of Total Income by Discipline and Source



# 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
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To view the reports, visit [artsfund.org/EIS](https://artsfund.org/EIS)



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



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



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