IMPACT: ARTS & CULTURE

ENRICHING COMMUNITIES, FUELING ECONOMIES

AN ECONOMIC IMPACT STUDY OF ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATIONS IN KING COUNTY: 2014
INSPIRE

EDUCATE

STRENGTHEN

CONNECT

2014 ECONOMIC IMPACT STUDY
OF ARTS, CULTURAL, AND SCIENCE ORGANIZATIONS IN KING COUNTY
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.

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

- 236 Organizations included from King County—188 (80%) in Seattle
- Nearly 3,000 patrons between January 2015 to July 2015—991 (33%) reside in Seattle
- 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
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

$2.0B aggregate sales impacts

$87M taxes generated

$859M labor income

30,721 jobs supported

Act 1 final scene of Seattle Opera’s production of Semele. © Avi Loud photo
Organization Expenditures: $438.7M

- 60% on employee expenses and contract firms & individuals
- 93% spent locally

- Employee Expenses: 54%
- Contract Individuals & Firms: 6%
- Services: 28%
- Utilities & Postage: 3%
- Other Goods & Services: 9%
- Taxes: 0.4%

Michael Brockman conducts Seattle Repertory Jazz Orchestra, June 2015; photo by Jim Levitt
Patron Expenditures: $574M

- Tickets/Admissions: $211M
- 63% spent on non-ticket expenditures
- Nearly 75% reported their primary trip reason was to attend the event at which they were surveyed
### Average patron spending by origin

<table>
<thead>
<tr>
<th>Origin</th>
<th>Average Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>King County</td>
<td>$44.92</td>
</tr>
<tr>
<td>Other WA</td>
<td>$74.78</td>
</tr>
<tr>
<td>Out of State</td>
<td>$149.62</td>
</tr>
<tr>
<td>All patrons</td>
<td>$55.79</td>
</tr>
</tbody>
</table>

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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

Sales Impacts
Jobs Supported
Labor Income
Tax Impacts

Local impacts
New money impacts

2014 ECONOMIC IMPACT STUDY OF ARTS, CULTURAL, AND SCIENCE ORGANIZATIONS IN KING COUNTY
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)
Broad participation and public benefit

Annual admissions totaled 11.4 million visits in 2014—more than 5.5 times the population of King County.
“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
Patron ticketing trends

- Single Tickets
  - 2009: 5.0
  - 2014: 3.0
- Season Ticket/Membership Visits
  - 2009: 2.0
  - 2014: 1.0
- Discounted Student
  - 2009: 1.0
  - 2014: 0.5
- Discounted Senior
  - 2009: 0.1
  - 2014: 0.1
- Other Discounted
  - 2009: 0.5
  - 2014: 0.5
- Free
  - 2009: 1.5
  - 2014: 2.5

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Region free admission spending

$60.4 M in spending by patrons attending free cultural activities

2009 vs. 2014

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OF ARTS, CULTURAL, AND SCIENCE ORGANIZATIONS IN KING COUNTY
Patron information sources

How patrons heard about the event at which they were surveyed

- Friend/Family: 40%
- Website: 20%
- Other: 20%
- Social Media: 10%
- Newspaper: 10%
- Mail: 5%
- TV: 5%
- Tourism Org.: 5%
- Radio: 5%
- Blog: 1%

2014 ECONOMIC IMPACT STUDY
OF ARTS, CULTURAL, AND SCIENCE ORGANIZATIONS IN KING COUNTY
Changes in patron modes of engagement over the last 3 years
Building skills and enhancing opportunities for youth

• 1.1 million visits by K-12 students through free and discounted admissions in 2014

➢ 3.5 times the school-aged population
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

Patron ratings of the importance of culture to quality of life in the region

2014 ECONOMIC IMPACT STUDY
OF ARTS, CULTURAL, AND SCIENCE ORGANIZATIONS IN KING COUNTY
Comparison of current and desired locations for participation in cultural activities

<table>
<thead>
<tr>
<th>Location</th>
<th>Current Participation</th>
<th>Desired Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Art Schools</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Community Facilities</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Informal Areas</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Open-Air Venues or Parks</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>Museums or Galleries</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>Formal Venues</td>
<td>30%</td>
<td>25%</td>
</tr>
</tbody>
</table>

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: Science organizations not included in 1992—2003 studies
Earned vs. Contributed income over time

2014:
- Earned Income: 57%
- Contributed Income: 44%

2009:
- Earned Income: 55%
- Contributed Income: 45%
Percentage of Total Income by Discipline and Source

- Interdisciplinary/Festival
- Visual
- Theatre
- Science
- Music
- Heritage
- Dance
- Arts Service Organizations

Legend:
- Earned
- Government
- Individual
- Corporate
- Foundation
- In-Kind/Benefits
- Other Income

2014 Economic Impact Study of Arts, Cultural, and Science Organizations in King County
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
- Elevating the quality of life and defining civic identity
To view the reports, visit artsfund.org/EIS

Northwest African American Museum, Debora Moore: Glass Orchidarium. Photo by Robert Wade

Taproot Theatre Company, Godspell. Photo By Eric Stuhaug

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