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

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

• 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

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2014 ECONOMIC IMPACT STUDY OF ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATIONS IN THE CENTRAL PUGET SOUND REGION
Fueling the economy

$2.4B aggregate sales impacts

$105M taxes generated

$996M labor income

35,376 jobs supported
Aggregate Expenditures: $496M

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

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

- **Local**: $45.80
- **Other WA**: $87.04
- **Out of State**: $147.59
- **All patrons**: $57.10

 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 vs. New money impacts

2014 Economic Impact Study of Arts, Cultural, and Scientific Organizations in the Central Puget Sound Region
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 13.4 million visits in 2014—nearly 3.5 times the population of the four counties
“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

Millions of admissions

- Single Tickets
- Season Ticket/Membership Visits
- Discounted Student
- Discounted Senior
- Other Discounted
- Free

2009 vs 2014

2014 ECONOMIC IMPACT STUDY
OF ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATIONS IN THE CENTRAL PUGET SOUND REGION
Patron ticketing trends

$60.4 M in spending by patrons attending free cultural activities

2014 ECONOMIC IMPACT STUDY
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Patron information sources

How patrons heard about the event at which they were surveyed

2014 Economic Impact Study
Of Arts, Cultural, and Scientific Organizations in the Central Puget Sound Region
Changes in patron modes of engagement over the last 3 years

- In-Person Attendance
- Hands-On Participation
- Virtual Participation

More often  | About the same  | Less Often
---|---|---

Bellevue Arts Museum, Imagination Station. Photo by Emilie Smith

Students enjoy Water Puppet Theatre. Photo courtesy Town Hall

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

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

2014 ECONOMIC IMPACT STUDY
OF ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATIONS IN THE CENTRAL PUGET SOUND REGION
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
Elevating quality of life, connecting communities

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

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

2014 ECONOMIC IMPACT STUDY
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Comparison of current and desired locations for participation in cultural activities

- Other
- Not Sure
- Art Schools
- Community Facilities
- Informal Areas
- Open-Air Venues or Parks
- Museums or Galleries
- Formal Venues

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.

Earned vs. Contributed income over time

2014
- Earned Income: 56%
- 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 Scientific Organizations in the Central Puget Sound Region
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