

ARTS & ECONOMIC PROSPERITY 6 ALLEGHENY COUNTY FINDINGS



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

ABOUT THIS STUDY

Arts and Economic Prosperity 6 is the largest and most inclusive study of its kind. It documents the economic and social contributions of arts and culture in 373 diverse communities and regions representing all 50 states and Puerto Rico. The study areas range in population from 4,000 to 4 million and represent rural, suburban, and urban communities (130 cities and 126 counties, 78 multi-city or multi-county regions, 18 individual arts districts, and 21 entire states/territories).

Using the IMPLAN economic modeling platform, input-output analysis models were customized for each study region to provide specific and reliable economic impact data for each. IMPLAN relies on region-specific and industry-specific data to customize input-output models for different areas and sectors, allowing for more accurate analysis. 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.



FULL ALLEGHENY COUNTY REPORT

These findings have been prepared for Allegheny County by Americans for the Arts, in collaboration with the Allegheny County community research partner, the Greater Pittsburgh Arts Council. This report has been led by Director of Research and Cultural Policy, Morgan Kasprovicz, with support from Research Intern, Ana-Alicia Feng.

Read more about these findings, the methodology behind them, and who responded in Allegheny County in the full report.



Through AEP6, we reconfirm what our region has known for decades: **The arts significantly contribute both directly and indirectly to Allegheny County's economy, quality of life, and a sense of pride in our local community.**

This study also allows us to benchmark ourselves against other communities in the nation, and the data tells a clear story that the sum of our sector achieves a multiplier effect that we cannot afford to ignore. When you combine Allegheny County's arts and culture organizations and events with our sports and recreation offerings, you can see that the region provides a democracy of choice for both our residents and visitors."

— Patrick Fisher, CEO
Greater Pittsburgh Arts Council

WHO RESPONDED

169

NONPROFIT ARTS AND CULTURE ORGANIZATIONS

768

AUDIENCE MEMBERS
(815 SUBMITTED; OUTLIERS REMOVED)

28%

SURVEYS COLLECTED FROM AUDIENCES OF BIPOC/ALAANA ORGANIZATIONS
(SEE FULL REPORT FOR AFTA DEFINITION)

ALLEGHENY COUNTY OVERALL FINDINGS

During fiscal year 2022, spending by both Allegheny County's nonprofit arts and culture organizations and their audiences

TOTALED \$1.3 BILLION

**\$544.4
MILLION**

IN SPENDING BY
ARTS AND CULTURE
ORGANIZATIONS

**\$711.3
MILLION**

IN EVENT-RELATED
AUDIENCE
EXPENDITURES

29%

PROPORTION
OF AUDIENCE
FROM OUTSIDE
ALLEGHENY COUNTY

\$267 MILLION IN LOCAL, STATE, AND
FEDERAL ANNUAL TAX INCOME

**\$167
MILLION**

IN FEDERAL
TAX INCOME

**\$58
MILLION**

IN STATE
TAX INCOME

**\$42
MILLION**

IN LOCAL
TAX INCOME

\$953 MILLION IN PERSONAL INCOME

**\$39
PER PERSON**

AVERAGE SPENDING
PER EVENT:
LOCAL AUDIENCES

**\$91
PER PERSON**

AVERAGE SPENDING
PER EVENT:
NON-LOCAL AUDIENCES

**\$54
PER PERSON**

AVERAGE SPENDING
PER EVENT:
ALL AUDIENCES

An increase of \$6.36 from AEP5 if adjusted for inflation

An increase of \$15.93 from AEP5 if adjusted for inflation

See full report for how these items were defined and calculated.

ALLEGHENY COUNTY ARTS & CULTURE IS PUNCHING ABOVE ITS WEIGHT



Americans for the Arts organized the 373 study regions into cohorts based on region type and stratified by estimated 2022 population. Allegheny County was compared to other city or county regions with estimated populations greater than one million.

As shown here, **Allegheny County arts and culture continues to drive greater economic activity** than the median of all regions in its cohort.

Total Economic Impacts of Spending by Allegheny County Nonprofit Arts and Culture Organizations During Fiscal Year 2022

	ALLEGHENY COUNTY	Median of Population Cohort (1,000,000 or More)
Direct Expenses	\$544,351,618	\$183,207,530
Household Income Paid	\$525,766,766	\$157,476,429
Local Government Revenue	\$20,291,055	\$4,531,638
State Government Revenue	\$27,900,556	\$5,978,552
Federal Tax Revenue	\$94,652,470	\$32,806,972

Total Economic Impacts of Spending by Allegheny County Nonprofit Arts and Culture Audiences During Fiscal Year 2022

	ALLEGHENY COUNTY	Median of Population Cohort (1,000,000 or More)
Direct Expenses	\$711,333,528	\$235,934,800
Household Income Paid	\$427,700,806	\$117,119,459
Local Government Revenue	\$21,772,369	\$6,771,884
State Government Revenue	\$29,801,977	\$7,266,914
Federal Tax Revenue	\$73,017,668	\$21,582,049

OUR BENCHMARKS

Allegheny County continues to punch above its weight when compared to peers in the same population cohort.

	Estimated 2022 Population	Economic Activity	Audience Spend	Annual In-person Attendance	Tax Revenue Generated
ALLEGHENY COUNTY	1,250,578	\$1,255,685,146	\$711,333,528	13,127,151	\$267,436,095
CUYAHOGA COUNTY, OH	1,235,072	\$533,156,171	\$143,316,139	3,839,957	\$104,232,078
FAIRFAX COUNTY, VA	1,147,532	\$260,256,948	\$80,059,065	3,611,351	\$43,656,277
MONTGOMERY COUNTY, MD	1,050,688	\$183,815,220	\$59,348,157	2,574,105	\$143,316,139
CITY AND COUNTY OF PHILADELPHIA	1,584,064	\$1,322,324,114	\$472,647,034	9,368,114	\$265,204,284
CITY OF SAN DIEGO, CA	1,425,976	\$1,185,912,007	\$528,236,404	16,317,687	\$275,740,071



As a supporter of the arts and an even bigger supporter of artists who do the work as creatives that allow for the vibrancy of the arts in our local economy, I want to say thank you and challenge us to do more by supporting and advocating for art in the city and county that transcends differences and unites people and communities through a genuine and authentic sense of belonging, inclusion, and equity. Accepting this challenge will grow the arts economy and *champion* a more vibrant and inclusive arts scene.



— DR. VERONICA MORGAN-LEE
*Board Chair, Greater Pittsburgh Arts Council
 Director of Fund Development, Hill Dance Academy Theatre*

ALLEGHENY COUNTY ARTS & CULTURE ORGANIZATIONS ARE DOING MORE WITH LESS

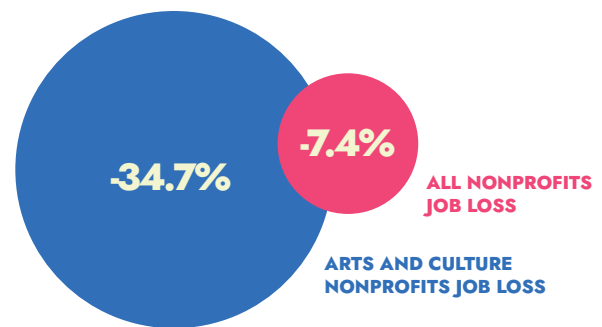


AEP6 was conducted in 2022-23 as the nation continued its emergence from the COVID-19 pandemic. **By every measure, the arts and culture industry was among the most devastated economic sectors.**

"In year one of the COVID-19 pandemic, few areas of the U.S. economy were harder hit than the performing arts: Performing arts presenters and companies joined oil drilling/exploration and air transportation as the steepest-declining areas of the U.S. economy in 2020. After adjusting for inflation, the value added by performing arts presenters (including festivals) fell by nearly 73% between 2019 and 2020."

- U.S. Bureau of Economic Analysis on the pandemic's impact on the arts in 2022

John Hopkins University reported in 2021 that the percentage of COVID-19 job losses at nonprofit arts and culture organizations was nearly **5 times** worse than the average of all nonprofits



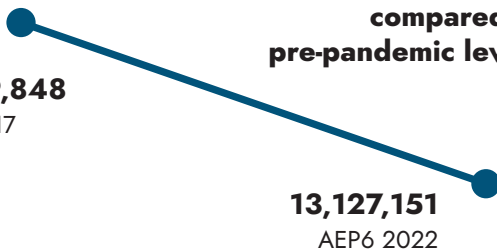
99%

OF PRODUCING AND PRESENTING ORGANIZATIONS CANCELED EVENTS DURING THE PANDEMIC WITH MANY SHUTTERING FOR ENTIRE SEASONS—A LOSS OF AN ESTIMATED **557 MILLION TICKETED ADMISSIONS** (*Americans for the Arts, 2022*)

Allegheny County arts and culture attendance remains approximately

21% down
compared to pre-pandemic levels

16,629,848
AEP5 2017



13,127,151
AEP6 2022

Nationally, in 2020:

63% of artists experienced unemployment

95% of artists lost creative income

37% of artists were unable to access or afford food at some point during the pandemic

58% of artists did not visit a medical professional due to an inability to pay

*Comparison between AEP6 and AEP5 is not perfect because the group of participating organizations is slightly different; however, this approximately 20% drop is mirrored in other local sources of data, including PA Humanities and Philadelphia Cultural Alliance's 2023 CultureCheck survey.

(*Americans for the Arts, 2022*)

And yet arts and culture in Allegheny County have continued to bring more to our region and its communities:

**AEP5
NONLOCAL ATTENDANCE**



**AEP6
NONLOCAL ATTENDANCE**



Allegheny nonlocal attendance up; national average down

Allegheny County drew a higher proportion of its audiences from places outside of Allegheny County in AEP6 compared to AEP5 (2016-2017). This is opposite the national trend, which saw non-local audiences dropping.

**AEP5
PER PERSON, PER EVENT SPEND**



**AEP6
PER PERSON, PER EVENT SPEND**



Allegheny average audience spend grew 77% and surpassed national average



A Note on Inequity in Pandemic Impact and Recovery

The pandemic's impact was not felt equally.

Organizations serving and representing BIPOC communities were more likely to report that they lacked the financial resources needed to return to in-person programming than non-BIPOC organizations:

**55%
vs. 38%**

BIPOC artists had higher rates of unemployment than white artists in 2020:

**69%
vs. 60%**

and lost a larger percentage of their creative income:

**61%
vs 56%**

(Americans for the Arts, 2022)



70.7%
**OF PARTICIPATING
ALLEGHENY COUNTY
ORGANIZATIONS**

Addressed pay equity, since the beginning of the COVID-19 pandemic, through deliberate changes to policies or practices that were made for the benefit of paid staff, artists, and/or contractors

42%
**OF PARTICIPATING
ALLEGHENY COUNTY
ORGANIZATIONS**

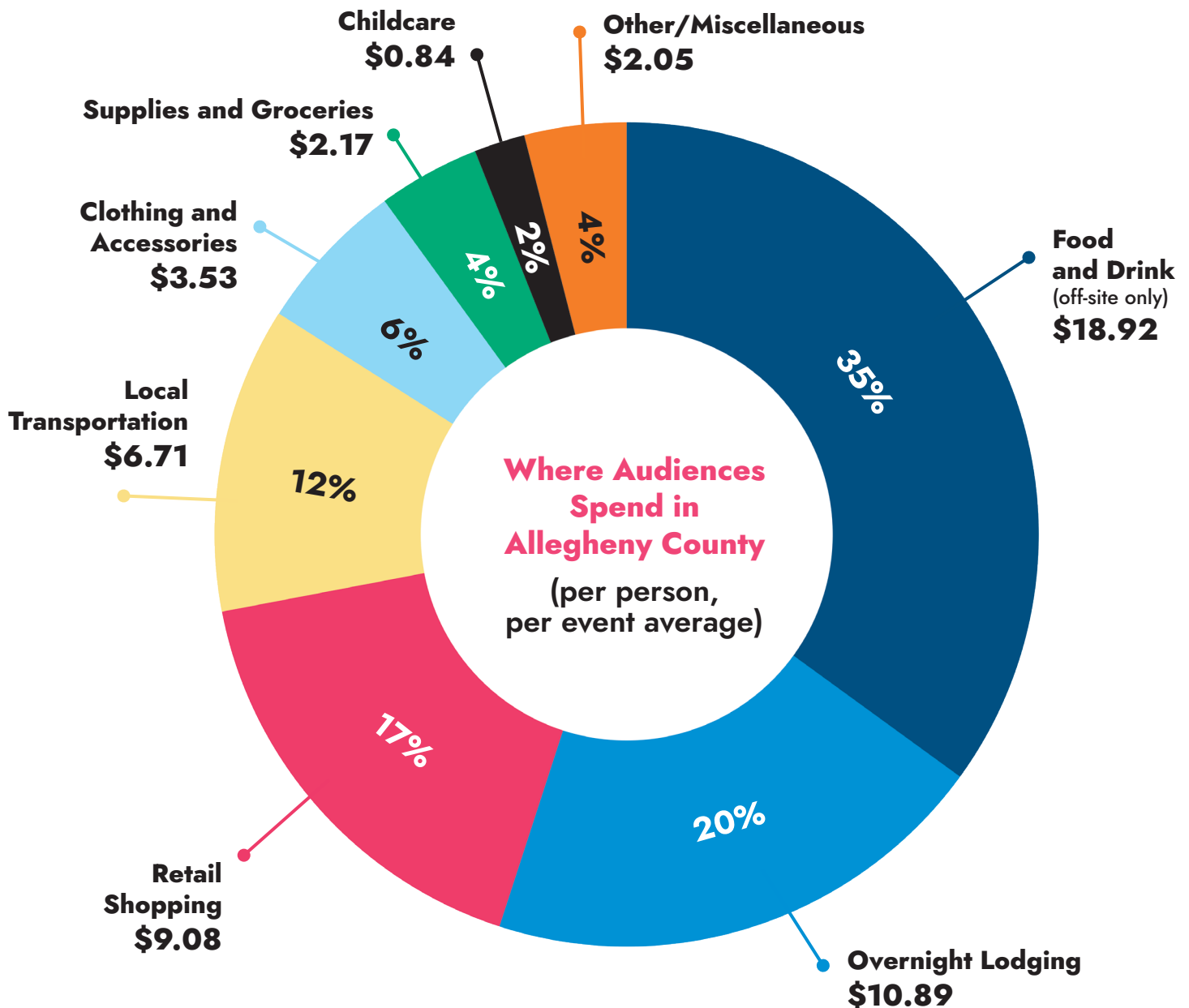
Expanded their services beyond arts and culture to address urgent community needs during the height of the COVID-19 pandemic

Examples could include collecting and donating food, masks, and cleaning materials 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.

THE ARTS IMPACT ADJACENT SECTORS

Arts and culture drives commerce to local businesses.

In Allegheny County, attendees spend \$54.19 per person per event, beyond the cost of admission. These dollars represent vital income for local merchants and a value-add with which few industries can compete.



Based on the average audience spend levels in each category, arts and culture audiences are purchasing the equivalents of each of the following every year in Allegheny County:



3.3 MILLION

\$75 RESTAURANT DINNERS FOR TWO



1 MILLION

\$140 HOTEL ROOM STAYS PER YEAR



43.3 MILLION

\$2.75 PITTSBURGH RAPID TRANSIT SINGLE BUS PASSES

Based on annual in person attendance of 13,127,151

Cultural tourism strengthens the visitor economy.

56.2%

OF NONLOCAL ATTENDEES

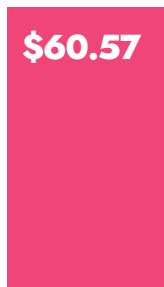
Reported that the primary purpose of their visit was specifically to attend the performance, event, exhibit, venue, or facility where they were surveyed.

60.7%

OF NONLOCAL ATTENDEES

Indicated that it was the first time they had ever attended the specific activity or visited the specific venue where they were surveyed.

Allegheny County non-local arts and culture attendees outspend the national average



National average per-person, per event spend



Allegheny nonlocal attendee per-person, per event spend

“

On the first Friday of every month, we see two to three times the revenue that we would on a normal Friday. We see our usual neighbors, but also many new faces from other neighborhoods, pulled to this short strip of Penn Avenue because of Unblurred, the monthly arts crawl through Bloomfield, Garfield, and Friendship. The neighborhood arts scene is a big part of why we're here. We're not just a brewery — we want to participate in the experience created by the studios around us. We hang and rotate local art on our walls from local artists. We want to actively be a part of the neighborhood culture.

”

— MIKE ONOFRAY
Owner, Two Frays Brewery

IMPACT BEYOND DOLLARS: IMAGINE A WORLD WITHOUT ART



**A vibrant arts and culture community keeps local residents—
and their discretionary dollars—in the community.**

50% + **48.9%**
**OF LOCAL ATTENDEES TO BIPOC
AND ALAANA ORGANIZATIONS** **OF ALL LOCAL ATTENDEES**

Said they would have “traveled to a different community to attend a similar arts or cultural activity” if the event they attended hadn’t been available locally.

“

Arts and culture can support quality of life. At RealTime Arts, our show Khūrākī (meaning “eat” or “meal” in the Afghan language Dari) was built around the desire of a group of female Afghan refugees to create Pittsburgh’s first Afghan food business. Through funding for each phase of our project from Shiftworks and others, we created a culinary-theatrical experience that challenged Americans’ assumptions about Afghanistan by introducing audiences to Afghan culture, music, flavors, and people. And with support from local immigrant-run restaurants, business training programs, and other partners, Khūrākī enabled the women to launch their own cooperatively-owned LLC, Zafaron, that continues to sustain their families today.

”

— MOLLY RICE AND RUSTY THELIN
Co-Artistic Directors, RealTime Arts



Arts and culture drive pride in Allegheny County communities, makes them more livable, and improves the well-being of our residents.

Percentage of nonprofit arts and culture attendees who agree with statements about the social impact of arts and culture in Allegheny County

■ **ALL NONPROFIT ARTS AND CULTURE ATTENDEES**

(N=768)

■ **ATTENDEES TO BIPOC AND ALAANA ORGANIZATIONS**

(N=216)

“This venue or facility is an **important pillar** for me within my community.”

86.5% **80.7%**

“This activity or venue is inspiring a **sense of pride** in this neighborhood or community.”

92.3% **89.2%**

“I would feel a **great sense of loss** if this activity or venue were no longer available.”

89.9% **86.9%**

“My attendance is my way of ensuring that this activity or venue is **preserved** for future generations.”

89.8% **87.3%**

Feelings of social impact were even slightly greater for attendees of events and venues that primarily serve BIPOC/ALAANA communities.



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

The Greater Pittsburgh Arts Council builds a more resourced and connected arts and culture sector, empowering artists and arts organizations throughout Southwestern PA. By sharing resources, fostering significant relationships, advocating for arts-centric policies, and increasing public awareness of arts and culture, the Arts Council cultivates a thriving, vibrant arts community for the Greater Pittsburgh region.

Learn more at pittsburghartscouncil.org

The Greater Pittsburgh Arts Council is supported in part thanks to funding from the following organizations

