

2016

GREATER

PITTSBURGH

CULTURE COUNTS



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

created by the Greater Pittsburgh Arts Council with assistance from DataArts and the Greater Philadelphia Cultural Alliance

LETTER FROM THE DIRECTORS

The Greater Pittsburgh Arts Council (GPAC) conducts research to advance widespread understanding of our area's arts and culture sector and to bolster the actions of decision-makers and advocates.

The 2016 Culture Counts report is a measure of the health of our sector over time and in relation to other sectors and comparable cities. We encourage you to read the report. There is positive news to celebrate as well as findings that should raise concerns. GPAC plans to periodically assess changes in our sector's health over time, and to devise programs that address emerging opportunities and challenges. We look forward to partnering with you in this important work.



Joseph B. Smith
Chair, Board of Directors
Greater Pittsburgh Arts Council
Sr. Vice President of Marketing
Dollar Bank



Mitch Swain
CEO
Greater Pittsburgh Arts Council



GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

*cover image: detail of "Sky Beneath Our Feet" by Clayton Merrell
at the Pittsburgh International Airport*

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INTRODUCTION

health of the sector

DATA SOURCES

There are many ways to define the “health” of an arts and culture sector. This report builds on criteria established in a December 2014 report by the National Center for Arts Research, The NCAR Arts Vibrancy Index.* Greater Pittsburgh ranked #14 in “artistic vibrancy” out of 900 cities nationwide, based on three primary criteria:

- **Supply**
of arts & culture organizations and employees
- **Dollars Spent**
by arts & culture organizations, audiences, and contributors
- **Public Support**
from city, regional, state, and federal agencies

**The focus in this report, as well as this 2015 Culture Count report, is arts & culture organizations rather than individual artists, a topic to be explored in future GPAC research.*

The 2015 Culture Count report presents basic data on these measures from multiple sources. First among these is the Cultural Data Project, now called DataArts, a system that enables tabulation and analysis of financial, programmatic, and operational data entered annually by arts and culture organizations.

The Cultural Data Project, established in PA in 2004 and now operating in 12 states, is a unique data resource to help arts and culture organizations and funders to make informed decisions based on identified strengths and challenges. CDP also helps researchers to analyze conditions and trends in arts & culture sectors from multiple geographic areas. The geographic focus of this report is Allegheny County and nearby SWPA counties--Armstrong, Beaver, Butler, Fayette, Greene, Lawrence, Washington and Westmoreland.

In analyzing CDP data from these counties for this project, GPAC benefitted greatly from the staff of DataArts, in particular, from its Senior Research Associate, Nicholas Crosson.



#14

of 900 cities nationwide

*artistic
vibrancy*

Other sources of primary data for this report are: GPAC’s Salesforce database, the Audience Builder Co-op, the Allegheny Regional Asset District, the Pittsburgh Foundation (Arts Day of Giving), the “Unsung Majority” report, the Pittsburgh Technology Council, the National Assembly of State Arts Agencies, the National Endowment for the Arts, and the National Center for Charitable Statistics.

All of these sources were used when tabulating the total numbers, budget size, disciplines, impacts, audiences, and employment figures of arts & culture organizations in SWPA and each of these counties. For this study, 1,054 arts & culture organizations were counted. Of these, 198 had created CDP profiles, 856 had not. The one area where this affected our analysis was the budget analysis.

There are many incentives for arts & culture organizations in SWPA and elsewhere to create a CDP profile each year. For one thing, many public and private funders require creation of a CDP data profile as a requirement for funding eligibility. Still, clearly, not all arts & culture organizations participate in CDP. In the 2010 Culture Count, 189 had created CDP profiles, 944 had not.

OTHER MEASURES OF THE HEALTH OF THE SECTOR *comparative research*

In addition to presenting basic data, this report utilizes another strategy to explore the health of the arts & culture sector: comparisons. This approach takes three forms:

1. Comparison of results over time - those from the 2015 Culture Count with those from the Culture Count report GPAC conducted in 2010, tracing changes in the size, diversity, and scope of the sector by:

- a) budget size
- b) arts & culture disciplines

2. Comparisons by region, drawing on “2015 Portfolio Culture Across Communities,” a report on how Greater Pittsburgh’s arts & culture sector compares with ten other areas nationwide on measures of financial health, support systems, employment, and audiences

3. Comparisons by sector

- a) how spending and attendance in our area’s arts & culture sector compares with figures in the sports world
- b) how job creation in the arts & culture stacks up with figures from “eds & meds” and the non-profit sector as a whole

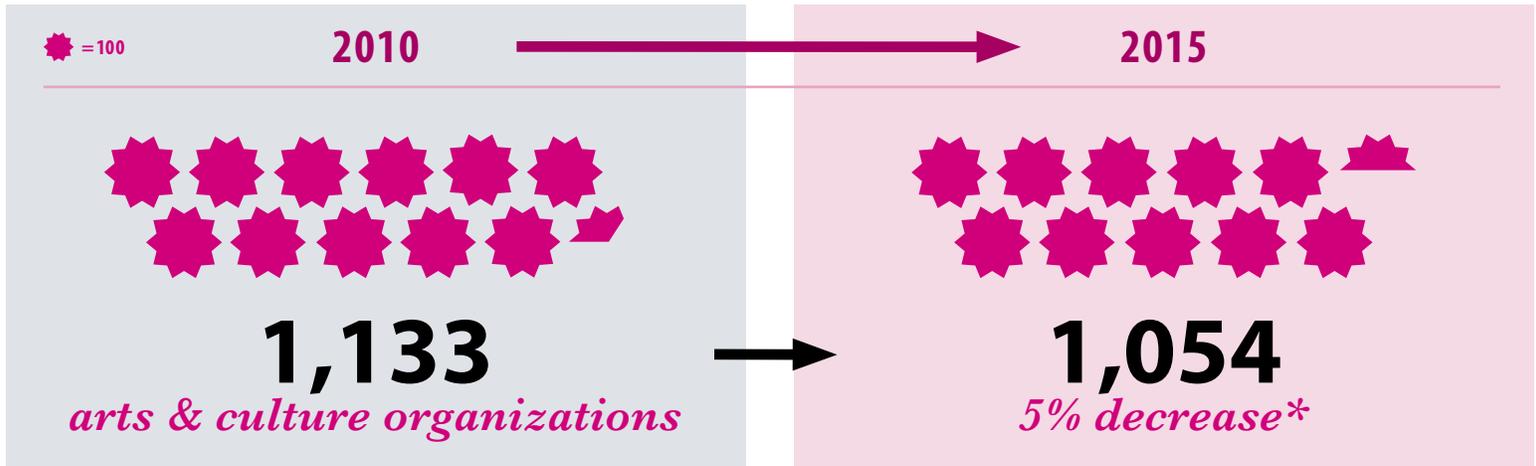
Finally, the report, at its conclusion, explores additional ways the health of the arts & culture sector can be measured over time.

on-stage during the Pittsburgh Cultural Trust’s Pittsburgh JazzLive International Festival



KEY FACTS *about our sector*

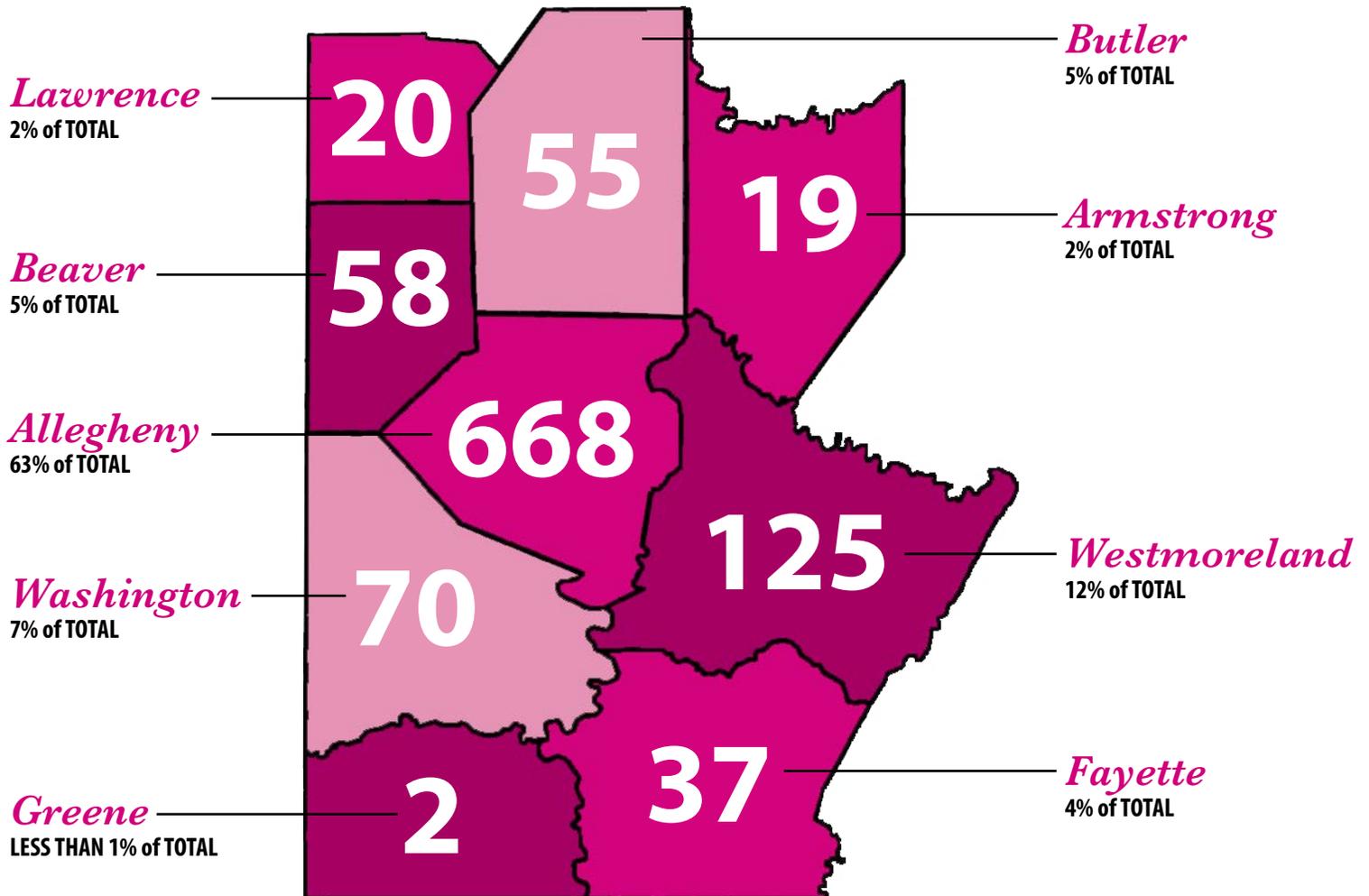
TOTAL COUNT IN ALL SWPA COUNTIES



For information on the Culture Counts sample, see pg. 22.

*Possible reasons for decrease include the Recession and consolidations.

ORGANIZATIONS BY COUNTY



FUNDING & GIVING

Greater Pittsburgh's arts & culture support systems are the envy of many other regions.

#2

*funding from
government &
foundations*

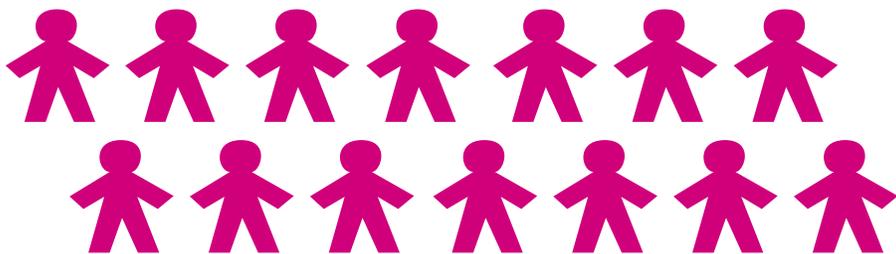
We rank #2 out of 11 metro areas in per capita funding from government sources.

Allegheny Regional Asset District funds account for 71% of all public support for arts & culture in Allegheny County. And, our slice of the pie has increased, from 10.21% of all RAD funds in 2011 to 11.68% in 2014.

We rank #2 in per capita funding from foundations.

Since 2009, we saw the second highest increase in foundation support - 35%. Yet the 2013 "Unsung Majority" report asked whether large/very large arts & culture organizations receive a disproportionate percentage of foundation funding. Further, some local foundations are signaling future declines in giving to arts & culture.

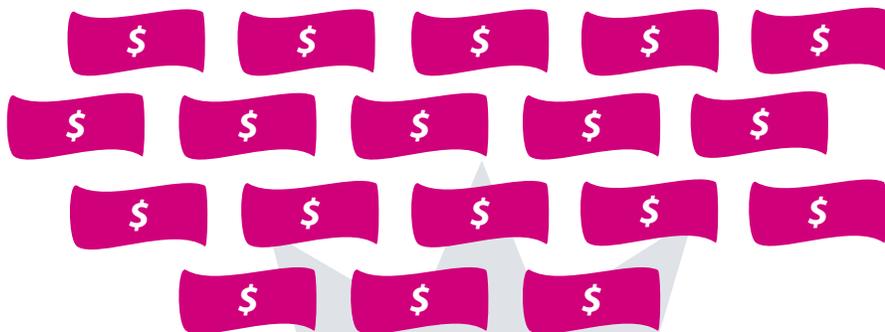
The 2014 Arts Day of Giving proved the community's personal commitment to funding the arts, though individual giving has room to grow.



1,400

new individual donors

= 1,000



\$1.8

MILLION

donations

= 100,000

LOCAL ORGANIZATION SPOTLIGHT

On the following pages, as a complement to this data-intensive report, we feature stories about four local arts and culture organizations that vary by purpose, artistic discipline, and history. We've focused on small/mid-sized nonprofits because they often are counted less frequently in research studies than larger entities. Taken together, these stories highlight notable journeys of development over the past five years.

ORGANIZATIONS SERVING SPECIALIZED AUDIENCES ^{★=4}

25

African-American



17

LGBTQIA

Lesbian, Gay, Bisexual, Trans, Queer, Intersex, Asexual



6.6%

of all SWPA arts & culture organizations

16

Individual artists



4

Asian



4

Hispanic/Latin@



4

Women's issues



BOOM CONCEPTS

Since opening on July 4, 2014, BOOM Concepts has evolved from the dream of its Founders and Directors (D. S. Kinsel, Thomas Agnew, Julie Mallis, and Joi Rogers) to a dynamic, creative hub and destination.

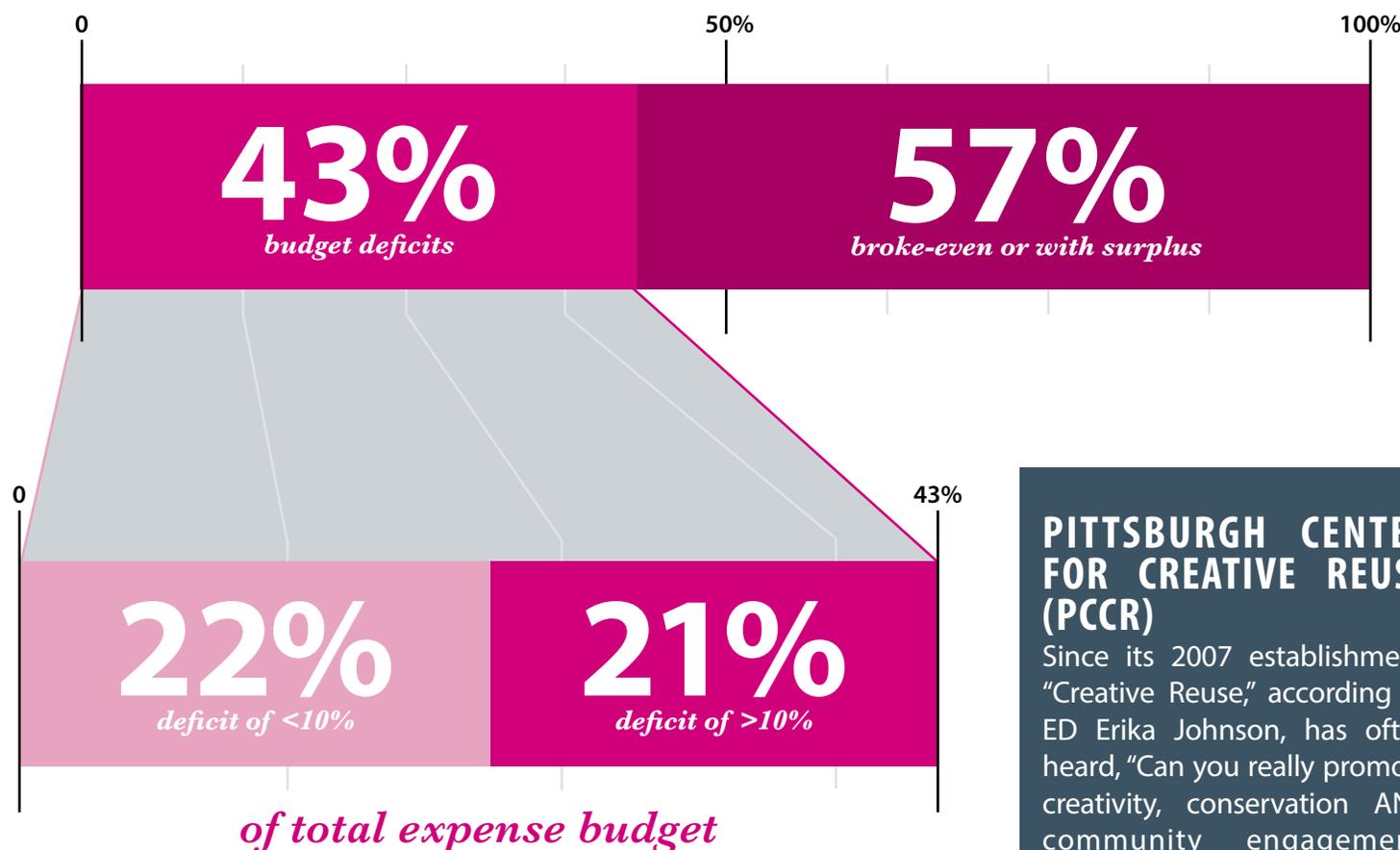
BOOM transformed its Garfield space at 5739 Penn Ave. into a studio and gallery that incubates and showcases the work of artists, musicians, and entrepreneurs.

BOOM offers support systems to its many partners and is a "safe space" for marginalized voices including people of color, LGBTQIA and Women.

BOOM has also formed "symbiotic" relationships with Carnegie Museum of Art, The Andy Warhol Museum, and the the Penn Ave Arts Initiative.



BUDGET STATUS OF SECTOR INSTITUTIONS



The good news is that 57% of our area's arts & cultural organizations broke even or had a surplus in 2012. On the other hand, 43% ran deficits, of varying amounts. Questions going forward are who is running deficits and whether the deficits are structural or not.

PITTSBURGH CENTER FOR CREATIVE REUSE (PCCR)

Since its 2007 establishment, "Creative Reuse," according to ED Erika Johnson, has often heard, "Can you really promote creativity, conservation AND community engagement, equity and inclusion? Shouldn't you focus on one?"

Now, PCCR is seen as an innovator in a climate where non-profits increasingly work at the interactions of multiple issues.

Via its shop and hands-on workshops, Creative Reuse helps artists, teachers, students and families get materials and skills for creative projects, while cultivating sustainable environmental practices.

In recent years, PCCR has doubled its impact, budget, and participants, in part through help from ReMake Learning, GPAC, and the Bayer Center for Nonprofit Management.

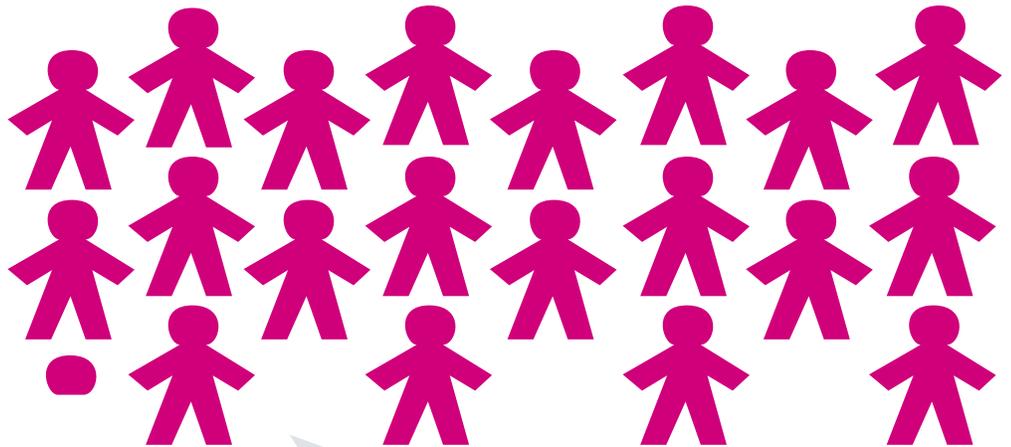
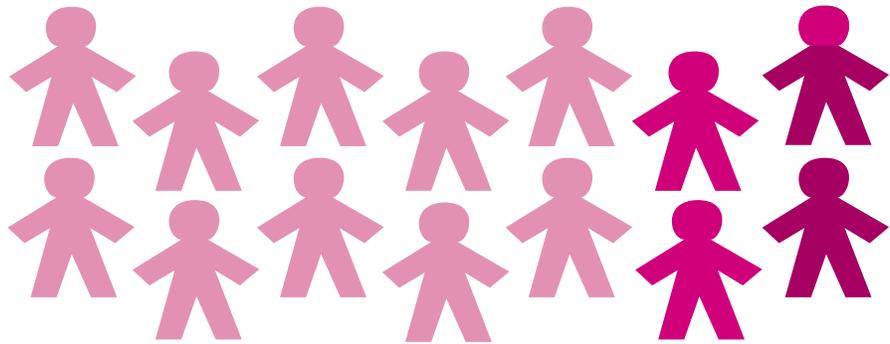


3,477,267

sports

-  **PIRATES**
2,498,597
-  **STEELERS**
512,854
-  **PENGUINS**
463,817

source: www.forbes.com/sports-leisure, 2014



5,025,240

arts & culture

source: DataArts/Cultural Data Project, 2014

CHATHAM BAROQUE

Since 1990, Chatham Baroque, a trio of baroque violin, viola da gamba, and theorbo/baroque guitar, has maintained a full calendar of concerts, tours, musical collaborations, and CD releases.

The ensemble has benefited from growing demand for the traditional performance practices that Chatham Baroque avows. To meet this demand, Chatham Baroque has added professional staff, with the added benefit of freeing up the musicians to perform music vs. administrative tasks.

Also, on the artistic growth front, Chatham Baroque is now producing its own CDs and has established collaborations with Renaissance & Baroque, Pittsburgh Opera, Attack Theatre, and Quantum Theater.



IMPLICATIONS

To maintain and grow its many assets and its standing in the region and nationally, those in the region's arts & culture ecosystem and its support systems will want to:

- **Identify** means to both encourage and support new organizations as well as the continued existence of imperiled organizations
- **Monitor** the sector's reliance on part-time workers at the expense of full-time employees
- **Maximize** audience growth, increase paid attendance, and deepen engagement of current audiences
- **Foster** area-wide capacity for individual giving to arts & culture
- **Ensure** that public and private funding systems are seen as effective and fair in their support of small, mid-size, and larger arts & culture organizations
- **Conduct** regular research on the health of the area's arts & culture sector, in part by broadening the indicators of success studied

HILL DANCE ACADEMY THEATRE (HDAT)

Founded in 2005 by Ayisha A. Morgan-Lee, HDAT's mission is to develop artists to sustain Black dance traditions in the Black community.

In the early years, HDAT teachers held classes in hallways and basements. Upon its move in recent years to St. Benedict Center in the Hill District, HDAT has grown dramatically—more classes, instruction in different genres, expanded performing companies, and space for administration.

HDAT has also recruited and been recruited by national choreographers to work with HDAT dancers which has shifted perceptions of HDAT as a community organization to a rigorous, pre-professional program.



TRENDS & COMPARISONS

This section explores the health of our arts & culture sector through three sets of comparisons:

COMPARISONS OVER TIME

tracing changes from the 2010 Culture report conducted by GPAC with the 2016 Culture Counts report establishing a baseline so that fluctuations can be examined in future reports

COMPARISONS BY REGION

drawing on "2015 Portfolio: Culture Across Communities" An 11-City Snapshot," a national report prepared by the Greater Philadelphia Culture Count (with support from the Doris Duke Charitable Foundation), that compares these cities on measures of financial health, support systems, employment, and audiences

COMPARISONS BY SECTOR

- a) how spending and attendance in our area's arts & culture sector compares with figures in the professional sports world
- b) how job creation in the arts & culture compares with figures from "eds and meds" and the non-profit sector as a whole

Westmoreland Museum of Art, Center for Creative Connections



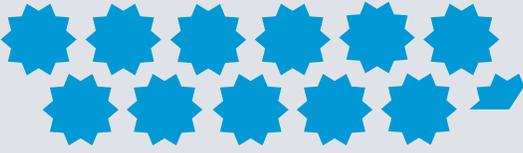
I. COMPARISONS OVER TIME

2010



2015

TOTAL COUNT = 100



1,133

arts & culture organizations

For information on the Culture Counts sample, see pg. 22.

BY BUDGET SIZE = 10

budget figures not available for some organizations



387

small organizations

budgets <\$250,000



105

medium organizations

budgets \$250,000 - 999,999



54

large organizations

budgets \$1,000,000 - 9,999,999



12

very large organizations

budgets >\$10,000,000



1,054

5% decrease



373

4% decrease



116

10% increase



52

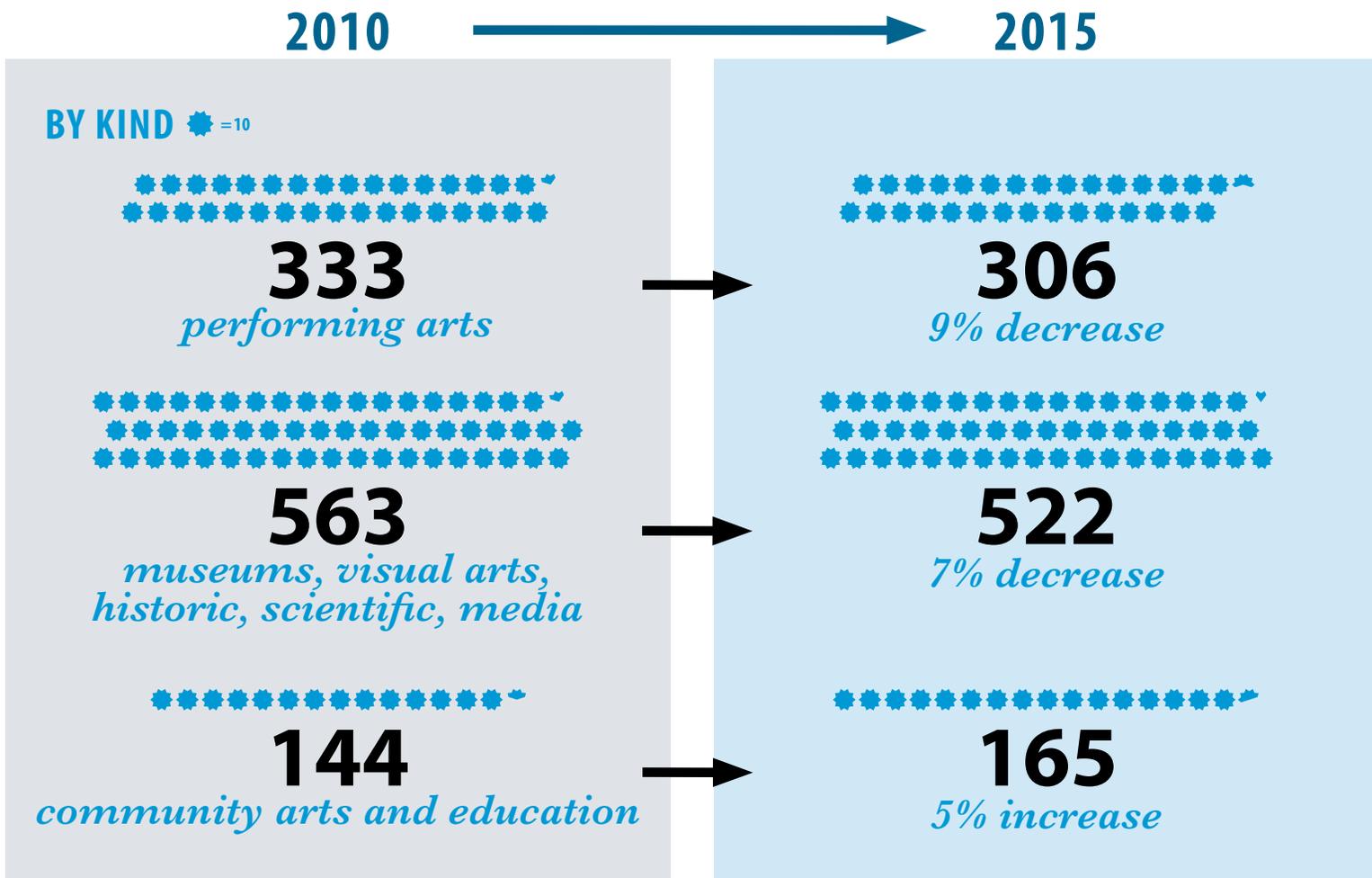
4% decrease



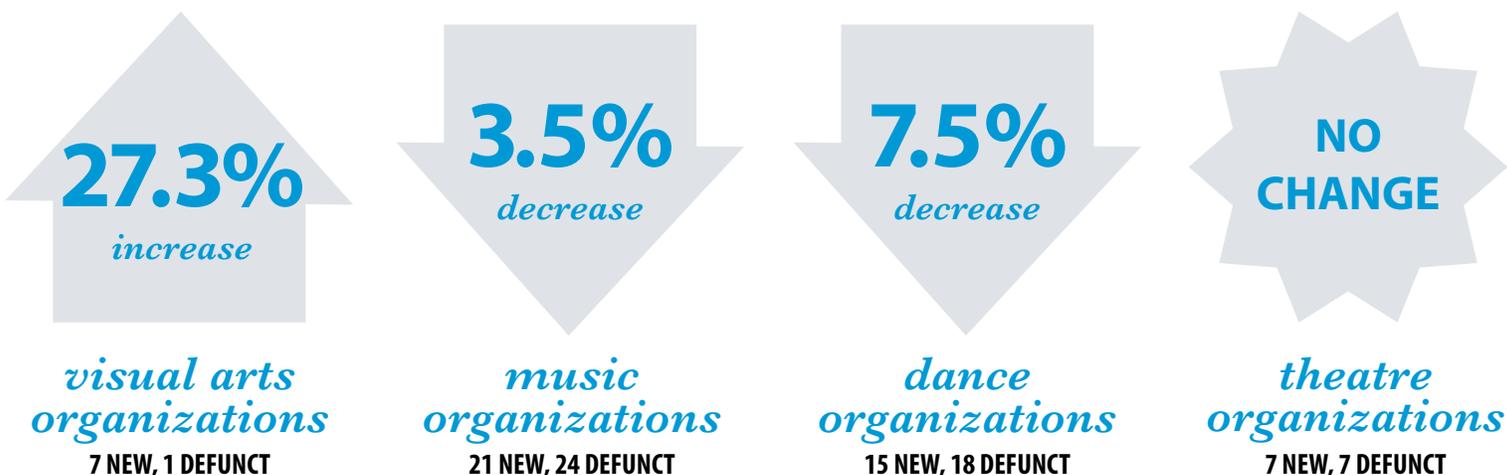
13

8% increase

The arts and culture sector in SWPA is diverse by discipline



BY DISCIPLINE



II. COMPARISONS BY REGION

This section summarizes how Greater Pittsburgh stacks up with the other 10 areas featured in the “Culture Across Communities” report: Bay Area, Boston, Chicago, Cleveland, Los Angeles, New York, Philadelphia, Phoenix, Twin Cities, and Washington, DC.

Greater Pittsburgh arts & culture organizations compare well with the other 10 areas on several measures.



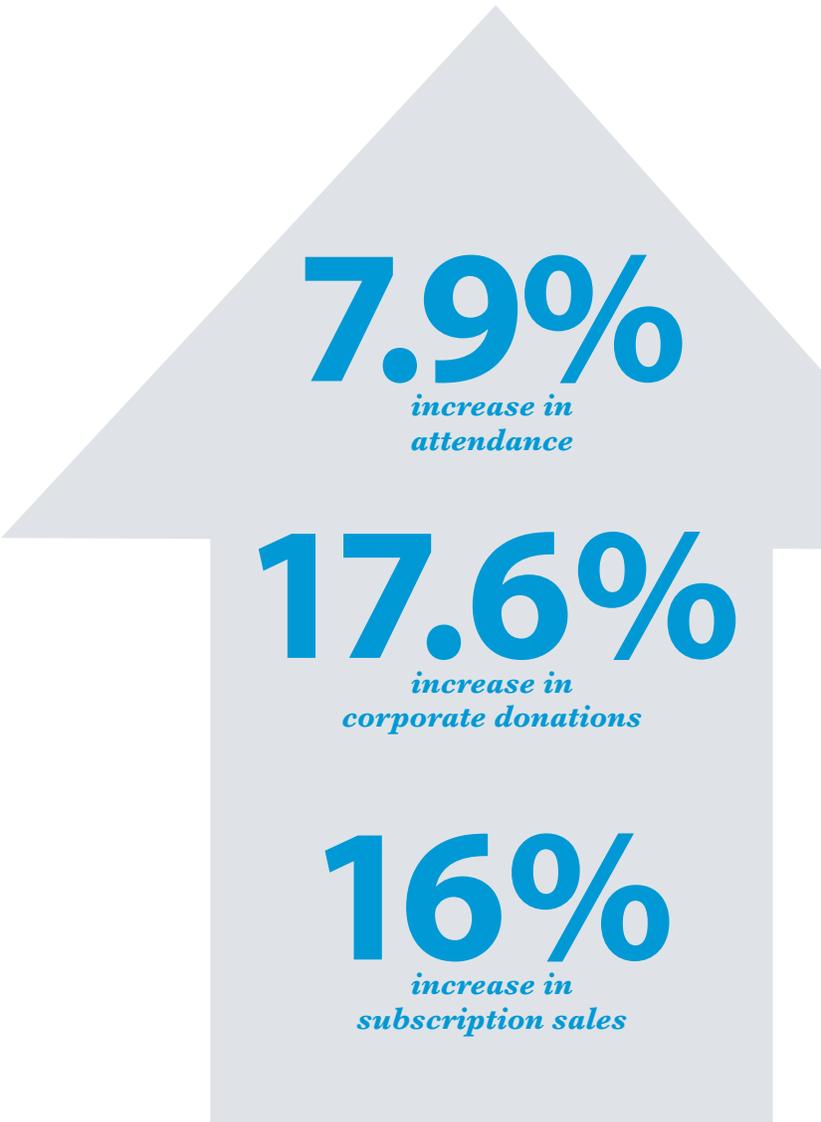
#2

*funding from
government & foundations*

We rank #2 out of 11 metro areas in per capita funding from government sources.

We rank #2 in per capita funding from foundations.

In the past four years, attendance has increased 7.9%. Greater Pittsburgh ranks #4 among metro areas on this measure.



7.9%
*increase in
attendance*

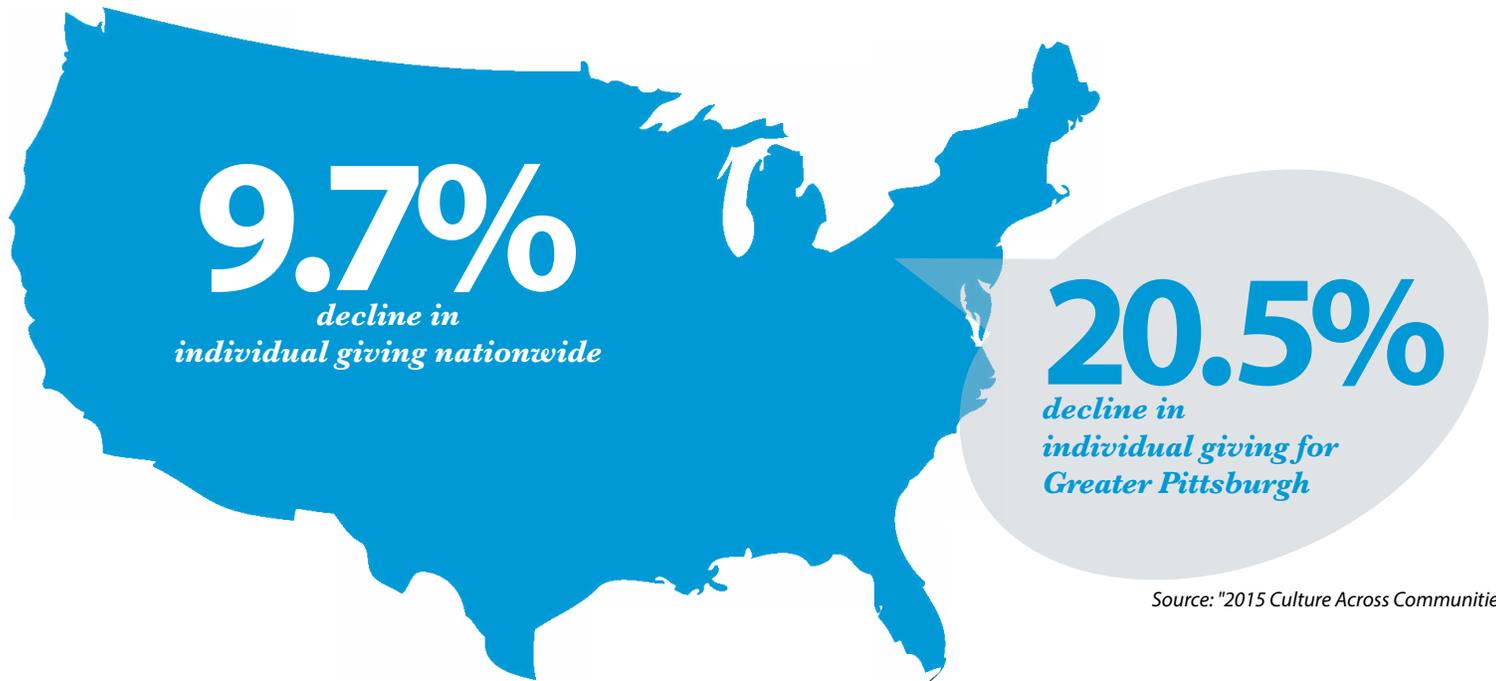
Greater Pittsburgh was one of only two metro regions that saw corporate donations go up since 2009, increasing 17.6%.

17.6%
*increase in
corporate donations*

There was an increase in subscription sales of 16% over the past five years, unlike most other metro regions.

16%
*increase in
subscription sales*

Greater Pittsburgh lags behind other metro regions on these measures:



1.4%
*annual increase in
earned income*

Pittsburgh's earned income increase was modest compared with other regions.

2.7%
*increase in
arts & culture employment*

Pittsburgh's increase in arts & culture employment was average among metro regions; however, employment growth was almost exclusively in part-time positions.
(See page 20 for more details.)

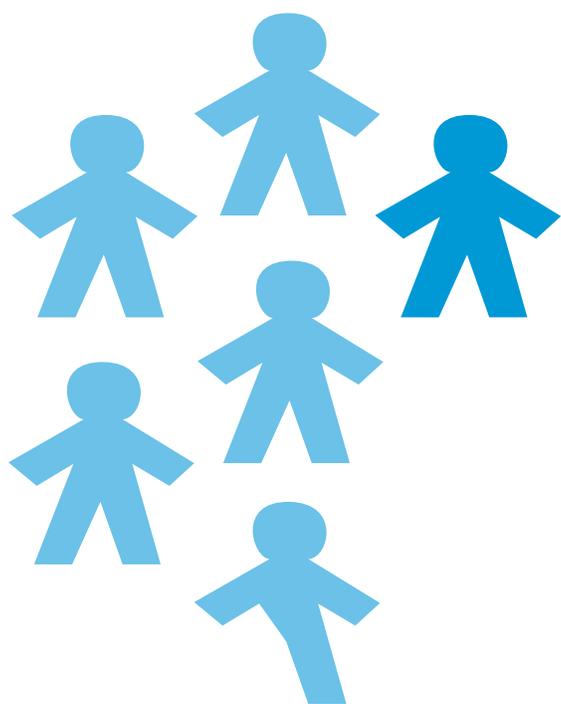
III. COMPARISONS BY SECTOR

The arts and culture sector remains a very strong economic force for the SWPA region.

The size of the sector has been relatively stable over the past five years, with the percentages of small, medium, large, and very large organizations remaining stable as well.

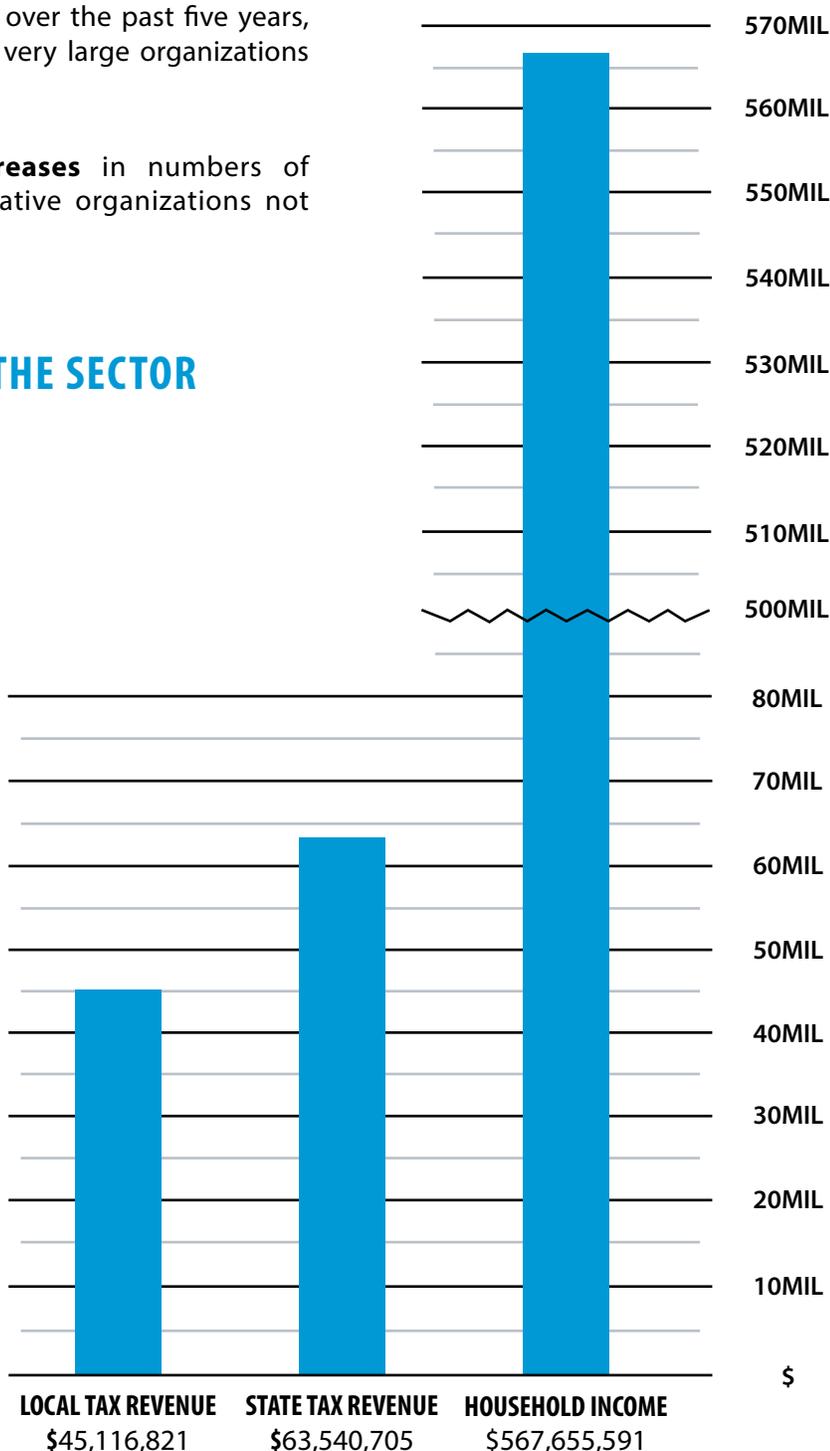
Some disciplines have seen slight net decreases in numbers of organizations during that time, with new, innovative organizations not fully replacing institutions that closed.

ECONOMIC IMPACT OF SPENDING BY THE SECTOR



29,347
full-time equivalent
jobs generated by
arts & culture

OUTSIDE OF THE SECTOR
 = 5,000



Sources: "Arts, Culture, and Economic Prosperity in Allegheny County, GPAC, 2013; The Economic Impact of Nonprofit Arts and Culture Organizations and Their Organizations in Southwestern Pennsylvania, GPAC, 2013

ATTENDANCE



25 MILLION
annual attendees

in all nine counties

FREE ATTENDANCE

= 5,000,000



Of the sector's nearly 25 million annual attendees, 75% attend for free, evidence of our sector's commitments to public value and participation.

For information on the Culture Counts sample, see pg. 22.

Those who do pay tend to have high levels of education, income, and home ownership.

Spending and attendance in our area's arts & culture sector compares well with those figures in Pittsburgh's popular professional sports.

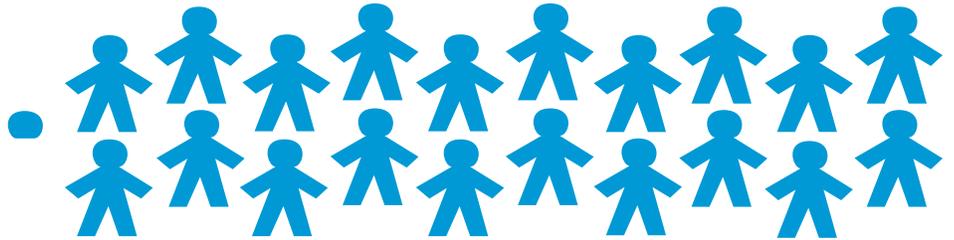
EVENT ATTENDANCE

= 250,000

at Allegheny County institutions

5,025,240
arts & culture

source: DataArts/Cultural Data Project, 2014

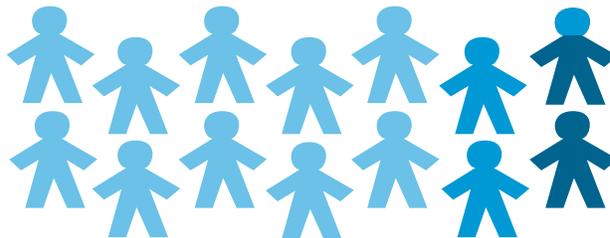


3,477,267
sports

PIRATES
2,498,597

STEELERS **PENGUINS**
512,854 463,817

source: www.forbes.com/sports-leisure, 2014



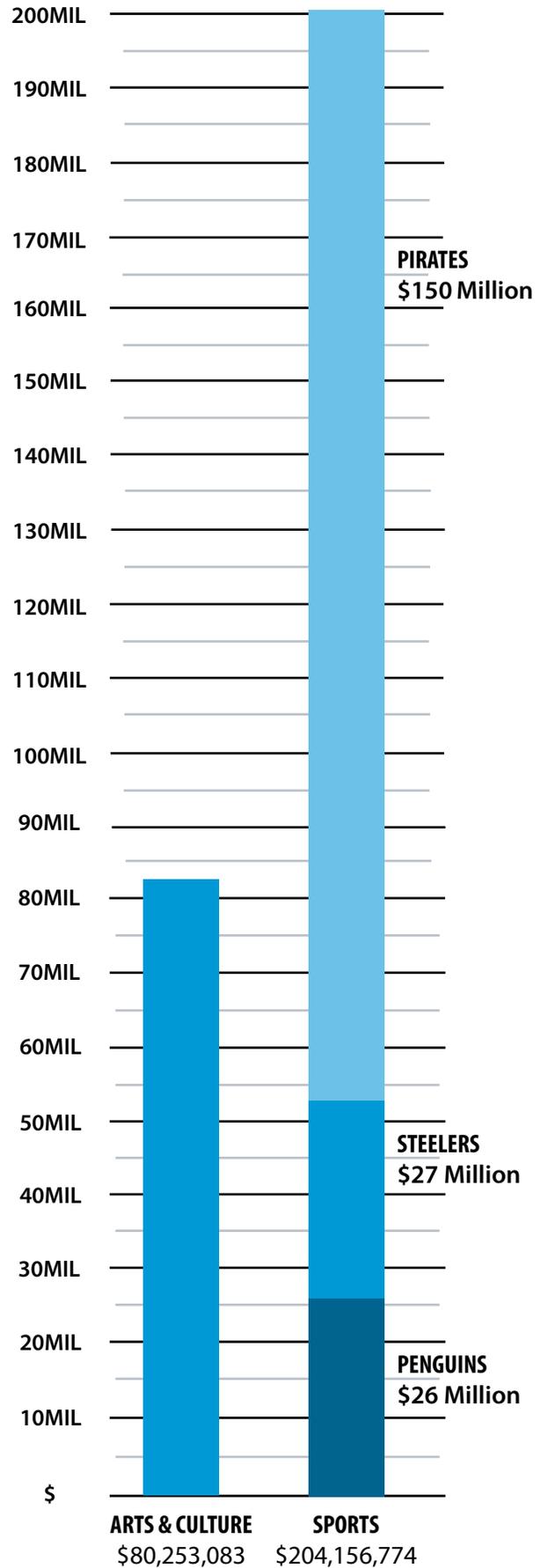
AVERAGE ATTENDANCE FEE



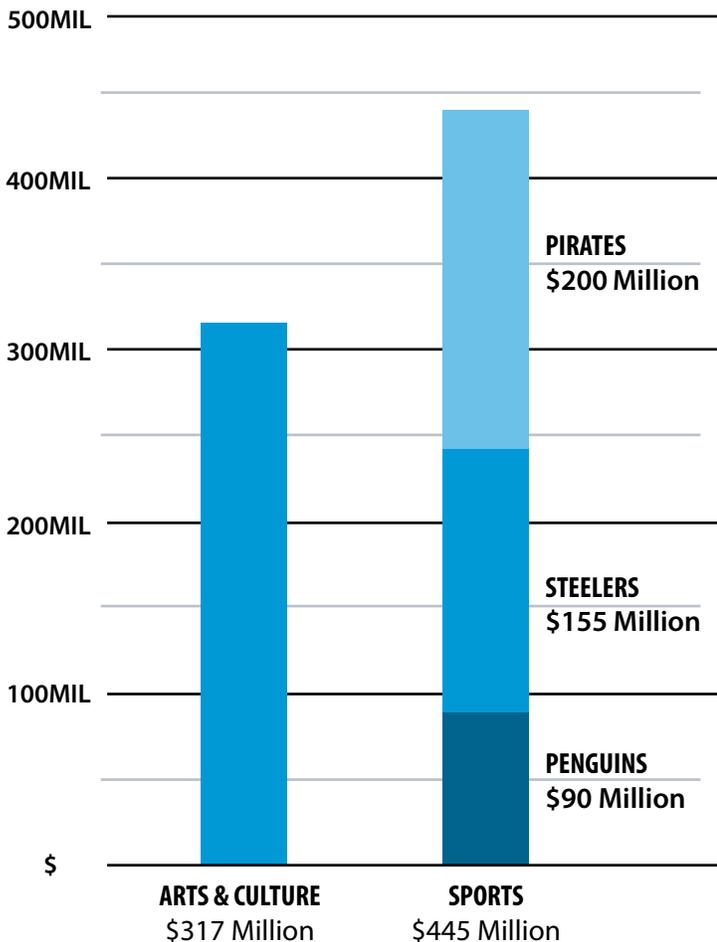
Attending the arts is a relative bargain compared to sports admissions.



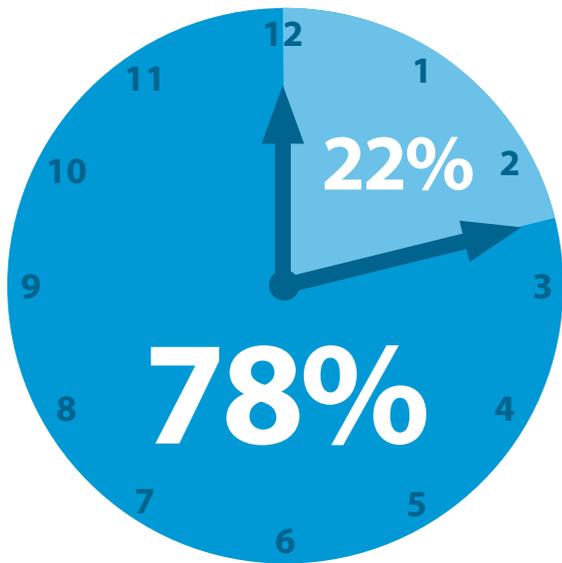
TOTAL ADMISSION REVENUES



DOLLARS SPENT ANNUALLY



JOB CREATION



arts & culture employees

● FULL-TIME EQUIVALENT

● PART-TIME OR CONTRACTOR



39,393

volunteers

The arts & culture sector is a magnet for volunteer participation.

BREAKDOWN

Total: 12,794

Full Time: 2,806 (22%)

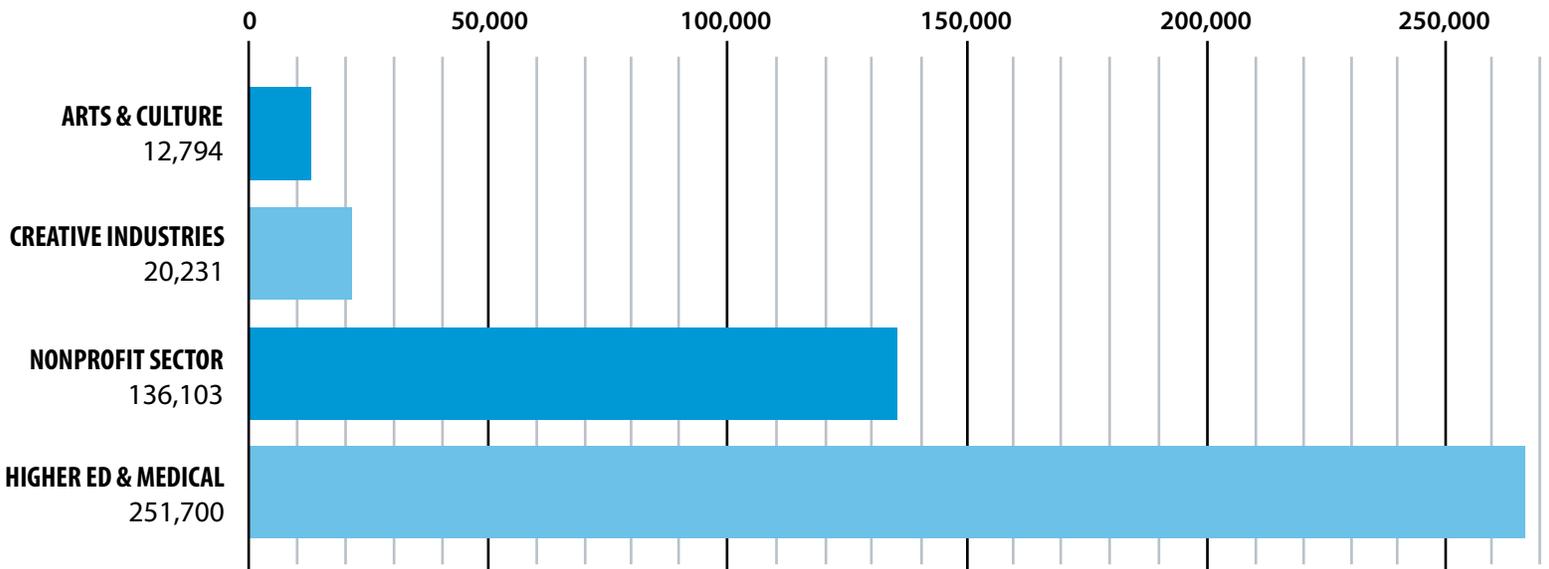
Part Time: 5,116 (40%)

Contractors: 4,872 (38%)

How does job creation in the arts & culture stack up with figures from the “eds & meds” sectors and the non-profit sector as a whole?

EMPLOYMENT BY SECTOR

source: DataArts/Cultural Data Project, 2014



APPENDIX

GPAC RESEARCH PLANS

Future “Health of the Sector” research, conducted periodically, will use a broad range of community-defined arts & culture indicators of success and rubrics, ranging from existing measures such as scope and size of the sector, financial health, audience size, and employment, plus a range of additional measures: live/work conditions for artists; the arts as a tourism draw and for entrepreneurs and employers; impacts on community life; rates and forms of arts participation among others. Another measure could be how a healthy arts & culture sector can help create communities where all can thrive.

“Health of the Sector” research will be accompanied by forecasting reports examining how broad societal trends will impact the conditions and prospects of the arts & culture sector.

“Arts, Culture & Economic Prosperity 5” (Allegheny County) will determine the current economic potency of Allegheny County’s cultural sector by showing how expenditures by institutions and their visitors lead to new job creation, household income, and tax revenues, and how arts participation yields intrinsic, social, and cultural benefits.

Research on Individual Artists will continue to identify live/work challenges and opportunities for individual artists in Greater Pittsburgh.

Arts-Funding Research Project: To determine the extent to which and in what ways the area’s public and private funding systems are effective and equitable, with special emphasis on small and mid-sized arts and culture institutions, organizations of color, and individual artists.

RESEARCH RESOURCES

- National Endowment for the Arts
- Americans for the Arts
- DataArts (Cultural Data Project)
- CreatEquity
- Bureau of Labor Statistics
- TRG Arts, Inc.
- Arts Education Partnership
- National Assembly of State Arts Agencies
- Greater Philadelphia Cultural Alliance
- Greater Pittsburgh Arts Council
- Greater Pittsburgh Nonprofit Partnership

Carnegie Museum of Art, Silent Disco



STATISTICAL SUMMARY

2015 TOTAL COUNT

1,054 Arts & Culture organizations (all SWPA counties)

Types of Organizations:

Performing Arts
Museums, Visual Arts, Historic, Scientific (including parks and libraries)
Education
Community Arts
Media Arts
Support & Advocacy Organizations

Note: parks and libraries in Allegheny County have very large free attendance figures, which are reflected in this report's overall totals. All attendance figures in this report are from DataArts (formerly Cultural Data Project) profiles, and parks and libraries in Allegheny County create DataArts profiles in part because it is an Allegheny Regional Asset District requirement.

by county

Allegheny: 668 (63% of total)
Westmoreland: 125 (12% of total)
Washington: 70 (7% of total)
Armstrong: 19 (2% of total)
Beaver: 58 (5% of total)
Butler: 55 (5% of total)
Fayette: 37 (4% of total)
Greene: 2 (less than 1% of total)
Lawrence: 20 (2% of total)

by discipline (all SWPA counties)

Performing Arts: 306 (29% of total)
Museums, Visual arts, Historic, and Scientific:
465 (44% of total)
Education: 32 (3% of total)
Community Arts: 133 (13% of total)
Media Arts: 57 (5% of total)
Support & Advocacy Organizations: 61 (6% of total)

by budget size (all SWPA counties)

Small organizations, with budgets less than \$250,000:
373 (36% of total)
Medium organizations, with budgets from \$250,000 to \$999,999:
116 (11% of total)
Large organizations, with budgets from \$1,000,000 to \$999,999,999:
52 (5% of total)
Very large organizations, with budgets over \$10,000,000:
13 (1% of total)
Budget size unknown: 500 (47% of total)
not all arts & culture organizations in this study are reflected in the DataArts Database.

NUMBER OF SWPA ARTS & CULTURE ORGANIZATIONS SERVING SPECIFIC AUDIENCE SEGMENTS

African-American: 25
LGBTQIA: 17
Individual Artists: 16
Hispanic/Latin@: 4
Asian: 4
Women's issues: 4

AUDIENCES (all SWPA counties)

Total: 24,765,516
Paid: 6,259,172: (25.3%)
Free: 18,515,344: (74.7%)

LARGEST SEGMENTS OF SWPA ARTS & CULTURE AUDIENCES BY CATEGORY

**Data based on organizations currently participating in Audience Builder Co-op (ABC)*

Age 55-64: 21.8%
0-1 Children at Home: 81.6%
4-year College degree or higher: 58.6%
Own a Home: 63.8%

FINANCIAL HEALTH

- 43% of arts & culture organizations ran deficits in 2012.
- 22% ran deficits of < 10% of their total expense budgets.
- 21% ran deficits of more than 10%.

EMPLOYMENT (all SWPA counties)

Total: 12,794
Full Time: 2,806 (22%)
Part Time: 5,116 (40%)
Contractors: 4,872 (38%)
Volunteers: 39,393

ACKNOWLEDGEMENTS

This version of Culture Counts represents the most recent data following the initial 2/26/16 release.

PARTNERS

The Heinz Endowments
DataArts (Nicholas Crosson, Senior Research Associate)
Pittsburgh Arts Research Committee
Greater Philadelphia Cultural Alliance (John McInerney, VP of Marketing and Communications)

AUTHORS

David Pankratz, Research & Policy Director, GPAC
Daniel Fonner, Research Associate, GPAC

DESIGN

Jen Saffron, Director of Communications, GPAC, Production Director
Maggie Negrete, Administrative Assistant, GPAC, Designer

ABOUT THE GREATER PITTSBURGH ARTS COUNCIL

The Greater Pittsburgh Arts Council (GPAC) is the leading voice for arts and culture across the Greater Pittsburgh region, driving the political, financial, and professional support for the sector. As the primary arts advocacy and service organization, GPAC offers expert programs, resources and research that strengthen and ensure a thriving regional creative community. GPAC is a membership organization comprised of over 300 diverse non-profits and artist members across several counties. GPAC supports its members and the creative community at large through grant funding, workshops, professional development, tools and technical assistance, pro bono legal/professional consulting, research, and a range of advocacy initiatives. Partnering with state and federal organizations, GPAC also positions the arts as an important part of community revitalization, education, tourism, business and economic development. We strive to define and serve the greater good as a guiding principle.

Pittsburgh Opera production of NABUCCO





GREATER PITTSBURGH ARTS COUNCIL
Arts loud and clear

cover image: detail of "Sky Beneath Our Feet" by Clayton Merrell at the Pittsburgh International Airport