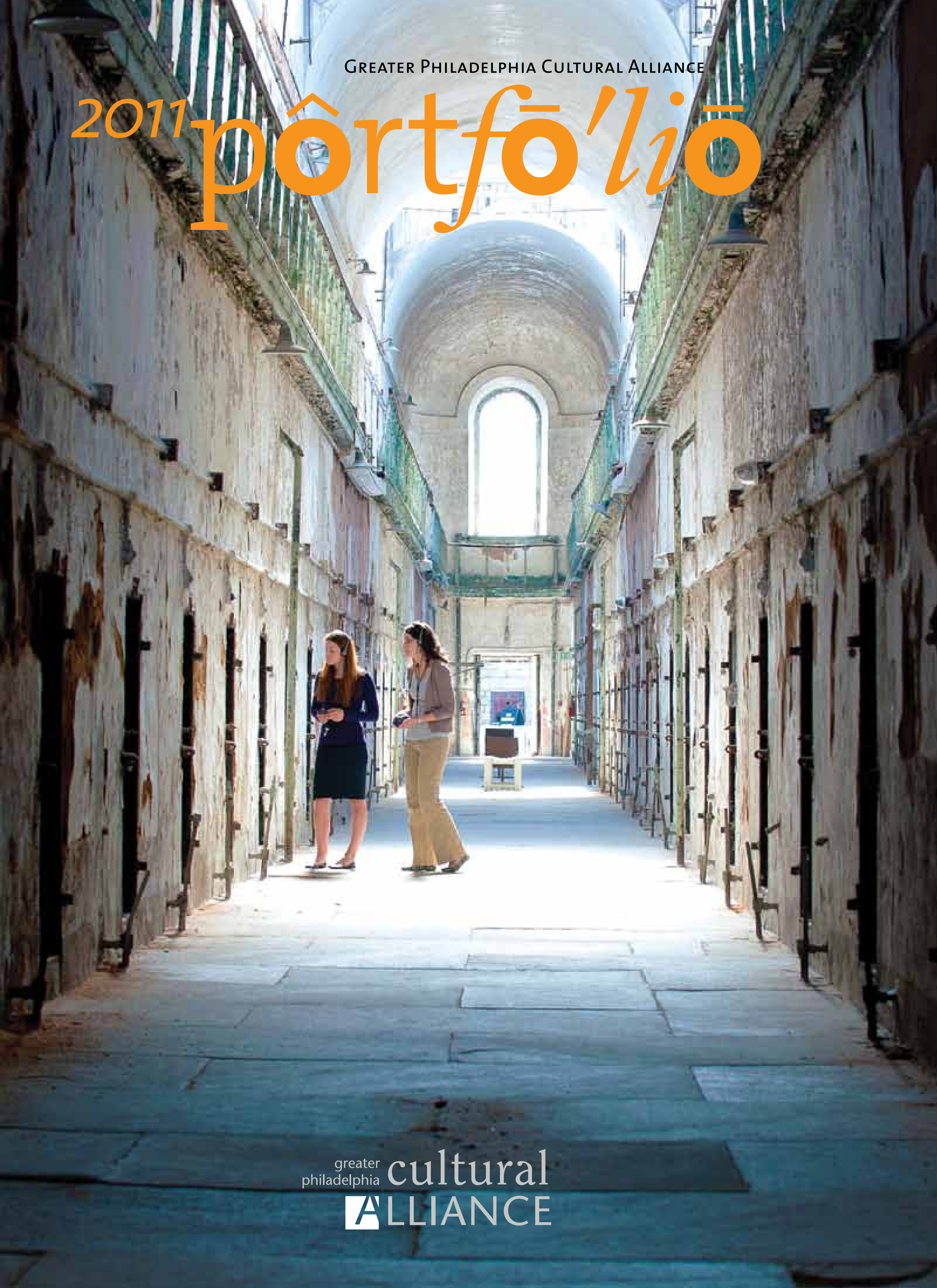
Greater Philadelphia Cultural Alliance

2011 pôrtfō'liō



greater philadelphia cultural ALLIANCE

The Greater Philadelphia Cultural Alliance is proud to present, with the support of 405 participating organizations, the ***2011 Portfolio***.

2011 pôrtfō'liō

Arts and culture is one of our region's strongest assets for growth. The ***2011 Portfolio*** provides information on the health, breadth, and diversity of the region's cultural sector, including the first comprehensive look at the effects of the recession on Southeastern Pennsylvania's nonprofit arts and cultural organizations.

As in our two previous ***Portfolio*** reports (2006 and 2008), the ***2011 Portfolio*** provides a single-year snapshot of the current financial and programmatic health of the region's nonprofit cultural organizations. The report comes at a critical time for our region, as the recent economic downturn has significantly altered the landscape in which cultural groups operate. This report also examines recession-period trend data for 276 organizations, enabling us to better understand the recession's impact at its height.

By examining the height of the recession and its impact to date on the region's nonprofit cultural organizations, the ***2011 Portfolio*** captures the sector at a moment in which we all have a stake and a powerful individual influence on the outcome. We hope that the findings of this report inform the region's thinking about how best to advance economic, educational, community, and personal growth through the cultural and civic vibrancy of Southeastern Pennsylvania.

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Letter from Cultural Alliance President

This is the Cultural Alliance's third installment of ***Portfolio*** and perhaps its most important to date. Since our last edition, the United States has been hit by one of the most prolonged recessions in its history. The data provided within ***2011 Portfolio*** gives area civic, business and cultural leaders a clearer understanding of the impact that these lean economic times have had on nonprofit cultural organizations, and on the regional priorities they support.

Arts and culture helps drive our economy, unite our communities and educate our children, and it is highly valued by the residents of Greater Philadelphia. ***Portfolio 2011*** tells the story of adversity, but it also tells the story of adaptation in the face of adversity.

The Cultural Alliance thanks The Pew Charitable Trusts, PNC, and the William Penn Foundation for their generous support of this publication. We thank our partners at the Pennsylvania Cultural Data Project for developing and maintaining the longitudinal dataset that makes this report possible. We're grateful to our Cultural Data Project partners from across the Commonwealth and around the country for their shared counsel and investment in this data tool. We also owe a debt of gratitude to the Economy League of Greater Philadelphia for their analysis of this year's data and their thoughtful collaboration on previous editions of ***Portfolio***.

We especially thank the 405 cultural organizations that submitted information. With 129 new participants this year, the ***2011 Portfolio*** is richer and more complete than ever before.

Finally, we'd like to thank you, the reader. Southeastern Pennsylvania's nonprofit cultural organizations are an investment held by the entire community, and it is your interest, support, and participation that makes our region a leader in cultural innovation and creativity.

Tom Kaiden
President
Greater Philadelphia Cultural Alliance

Letter from PNC Regional President

PNC is pleased to support the ***2011 Portfolio***, the third edition of this landmark study of the arts and cultural sector in Southeastern Pennsylvania. We have a long-standing commitment to investing in the arts because we have a fundamental belief in the power of this sector to:

- help drive our regional economy;
- support education for all of our citizens, including our children; and
- add to the quality of life for all of us.

In 2009, PNC doubled its commitment to the arts with the launch of PNC Arts Alive, a five-year, $5-million initiative of the PNC Foundation. Through PNC Arts Alive, regional arts groups have received support for targeted programming designed for those who don't routinely engage in the arts. Thousands of our neighbors have gained greater access to arts and culture through subsidized tickets, and have experienced free performances in unexpected places. Over the past three years, 76 regional arts groups, with innovative ideas for increasing access to the arts, have received support from PNC Arts Alive.

We are honored to continue to support this important publication and the work of the Greater Philadelphia Cultural Alliance. We pride ourselves on creating partnerships with community-based nonprofit organizations to help strengthen the economic vitality of the region and to help nonprofit organizations grow and prosper. We will continue to strive for PNC to be a corporate citizen that makes a difference in our community.

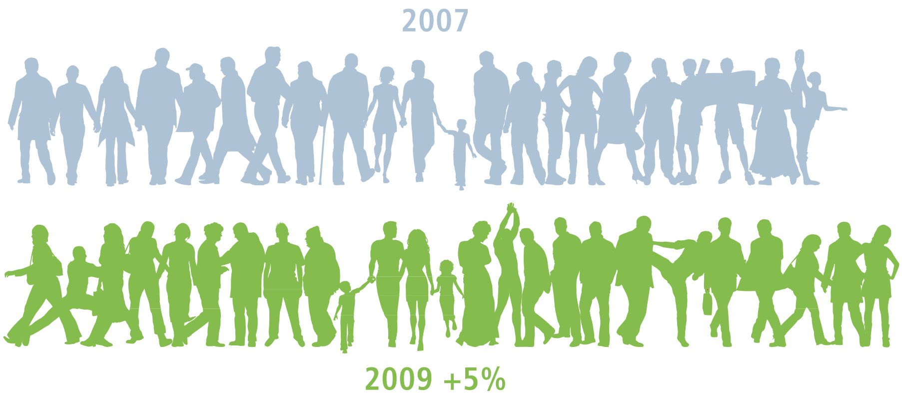
J. William Mills, III
Regional President for Philadelphia & Southern New Jersey
PNC

Key Findings

The show must go on...

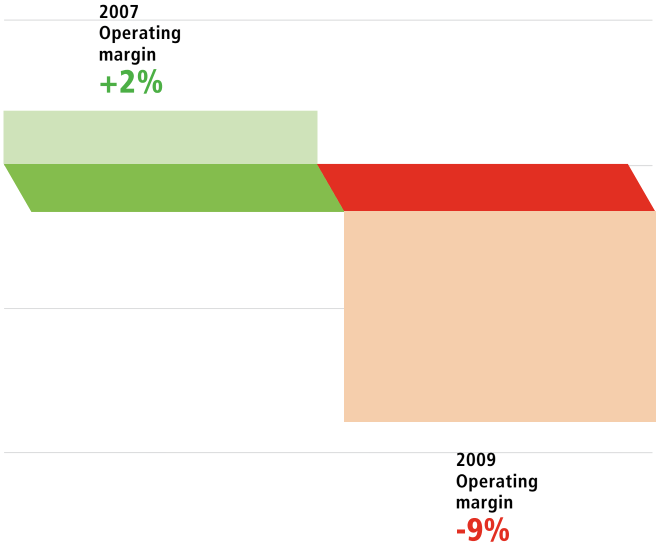
The arts remained affordable in the recession.
Pricing was stable at a median admissions price of $15.

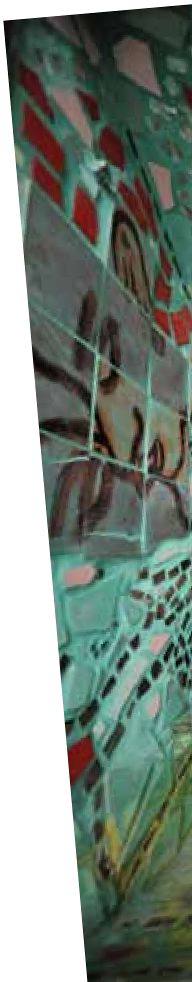
Activity was up. During the recession, attendance increased 5% while the number of events remained stable.



Expenses remained essentially flat, but revenues dropped.
Revenues fell 12% (excluding investments). Including investments, revenues fell 43%.

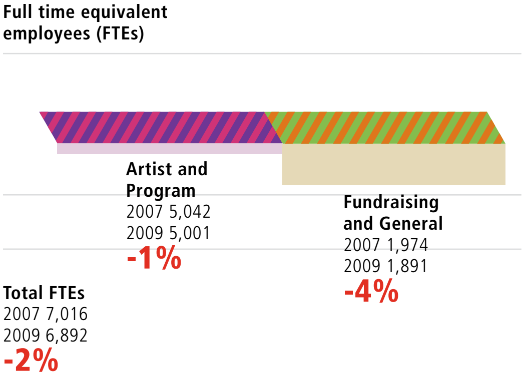
Almost half of *Portfolio* organizations are in the red. Operating margins (excluding investments), which had been thin in FY2007 (+2%), became negative in FY2009 (-9%).





In making hard workforce decisions, **organizations made deeper cuts to administrators than to artistic and programmatic staff.**

Employment changes left cultural workers and organizations vulnerable. There was a 16% growth in the number of independent contractor positions and a 2% drop in full-time equivalents (FTEs). Currently, only 4 in 10 (39%) positions represent full-time employment.



Organizations deferred maintenance to keep the doors open. Expenditures on facilities-related categories, including major repairs, declined by 44%.

Organizations have less margin for error. Working capital fell 24% and liquid assets declined 12%.

…because people value arts and culture

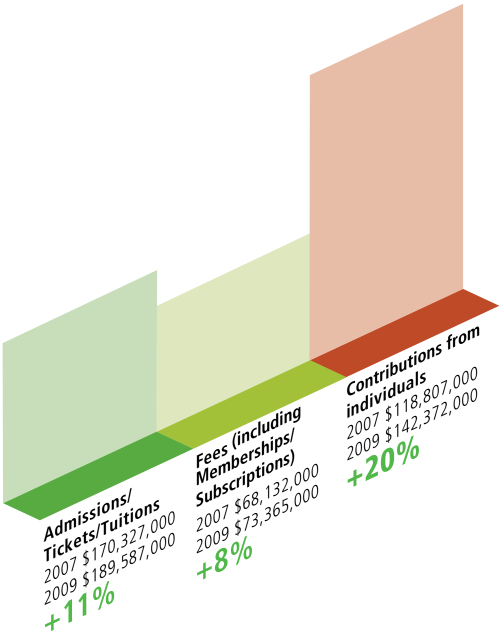
The arts are more accessible than ever. Admission prices to cultural organizations are significantly less than the actual cost to organizations of producing events and performances. For organizations that charge admission, the median cost of production ($48) is three times higher than the median ticket price ($15).

Median admission price **$15** **Median cost of production** **$48**

There are almost 17 million visits to cultural organizations each year. This is equivalent to more than four visits for every resident of Southeastern Pennsylvania. **More than half of all visits (52%) are free.**

Culture extends the classroom. There were 34,000 visits by school groups to cultural organizations.

Individuals saved the day. Individuals proved to be the greatest source of support for cultural organizations during the recession. Admissions, tickets, and tuition revenue rose 11%, and memberships/subscription fees grew 8%. Individual donations rose 20% while all other sources of contributed income declined.



Volunteers are the unsung heroes of the industry. The total number of volunteer and board positions (38,000) outnumbers total employment positions (24,000), with volunteers accounting for 29% of the total work hours for the field.

Veronica Castillo Perez, Executive Director, Raices Culturales Latinoamericanas. Through her work at Raices (Spanish for "Roots"), Veronica uses art to celebrate the diverse and vibrant cultures in her neighborhood and in the region. Like other executive directors, she has been leading her organization through a challenging funding environment. From FY2007 to FY2009, while funding from institutional sources like foundations and corporations declined, income that came from individuals, such as ticket sales and individual contributions, increased markedly.

From the Economy League

The Economy League of Greater Philadelphia is pleased to serve as a research partner for the ***2011 Portfolio*** report, providing independent analysis of the current state of Southeastern Pennsylvania's arts and culture industry. This marks the third time that the Economy League has collaborated with the Greater Philadelphia Cultural Alliance to assess the treasure trove of information on area arts and cultural organizations provided by the Pennsylvania Cultural Data Project. This time around, our energies focused on the impact of the Great Recession.

It would be natural to assume that arts and cultural organizations would be at a particular disadvantage as impacts of the downturn have rippled through the economy. However, while the data in this report point to some revenue and operating margin risks, there are encouraging and, in some cases, impressive signs of strength and adaptation among area arts and cultural organizations. The fact that several key attendance and employment measures grew or held steady even amidst the worst recession in decades is a testament to the vitality and significant role of this sector in our economy.

The analysis and findings in this report prove especially important during the current economic recovery, as they provide a resource for cultural organizations, civic leaders, and arts supporters to better understand the region's nonprofit cultural industry and devise strategies to ensure its ongoing success.

Steven T. Wray
Executive Director
Economy League of Greater Philadelphia

About the Pennsylvania Cultural Data Project

Information on all 405 organizations included in this report is taken from the Pennsylvania Cultural Data Project (Pennsylvania CDP). The Pennsylvania CDP is a collaborative, statewide project of the Greater Philadelphia Cultural Alliance, Greater Pittsburgh Arts Council, The Heinz Endowments, Pennsylvania Council on the Arts, The Pew Charitable Trusts and the William Penn Foundation. The project's mission is to strengthen the nonprofit arts and cultural sector by collecting and disseminating comprehensive, high-quality longitudinal data that supports fact-based decision-making.

The CDP was first launched in Pennsylvania in September 2004, after three years of development and testing. Following its success in Pennsylvania, the CDP has expanded to additional states and is now becoming the national standard for data collection on the arts and cultural sector, with 11 states and more than 11,000 arts and cultural organizations participating around the country.

The CDP's unique system enables arts and cultural organizations to enter financial, programmatic, and operational data into a standardized online form once each fiscal year. Financial data is drawn from each organization's audit or financial statements, insuring accurate and reliable information. Organizations can then use the CDP to produce a variety of reports designed to help increase management capacity, identify strengths and challenges, and inform decision-making. They can also generate reports to be included as part of the application processes to participating grantmakers.

In addition to creating a streamlined data-collection process for hundreds of arts and cultural organizations throughout Pennsylvania, the CDP provides a source of consistent and reliable information on the state's cultural sector. Now in its seventh year of operations, the Pennsylvania CDP collects information from more than 1,600 organizations located throughout the state.

To ensure the collection of high-quality data and help organizations take advantage of the CDP's management features, the project operates a highly trained help desk and provides a team of on-call financial consultants to assist organizations as they complete their CDP profiles. All data submitted by individual organizations is checked for errors in a rigorous process conducted by CDP staff. In the event that anomalies are found, organizations are notified by the CDP. Organizations then have the ability to change or correct their submissions as appropriate.

For more information on the Cultural Data Project, visit www.culturaldata.org.

Implications

Because culture cuts across so many civic priorities, there are findings in the *2011 Portfolio* that will be important to many stakeholders including policymakers, civic leaders, artists, arts managers and cultural organization staff, donors, and audiences. This report comes at a critical moment, telling us the story of the recession's impact on the cultural sector we care so much about. The *2011 Portfolio* reminds us again that culture is vital and valuable, but also vulnerable.

Ultimately, as stewards of Philadelphia's cultural vitality, our collective responsibility is not just to tell the story, but also to interpret it. So what do we take away? What have we learned from *2011 Portfolio's* data, and where might we go from here?

We offer these final thoughts on the *2011 Portfolio* for its partner stakeholders:

From Institution to Individual

The locus of influence is shifting from the institution to the individual. This trend touches all aspects of the creative sector from finance to philanthropy, from management to marketing.

As the economy entered recession, many traditional sources of revenue eroded. Contributed income from corporations fell 36%, foundation giving shrank 30%, and government giving dropped 11%. Yet, there was a silver lining—individual giving grew 20%. On the earned income side, investments plummeted 128%. Event income, concessions, and rentals fell too. But again, individual patrons stepped up. Despite shrinking disposable income, Admissions rose 11% and Memberships & Subscriptions increased 8%. Trustees and Board members, the volunteer stewards of these organizations, also kept up their support despite the challenging economy, increasing the number of gifts with only a slight decline in their average value. Clearly people care about their arts and culture and are willing to invest in it, even when times get tough.

The question organizations need to ask themselves now is: Are we investing in building relationships?

Is our contact one-sided? Are our relationships with audiences and stakeholders expressed purely in terms of what cultural organizations need from them, and less about what they want from us?

Technology will be key to future adaptation and optimization. The emergence of Customer Relationship Management (CRM) databases is an example of the tools being used across all industries to deepen individual engagement. Arts and culture, with its inherent social bond, is positioned better than most to leverage such databases. Do we have the technology mindset, risk capital, and institutional will to develop this asset?

On the fundraising side, can we broaden our base? Will we continue to focus on a narrow band of major donors, or can we also further democratize our appeal and create mini-causes that connect with individuals through social networking platforms such as Kickstarter?

Are we investing in building relationships?

Are we attracting and retaining the best and the brightest?

Labor of Love

The data from this year's ***Portfolio*** reveal an industry that is squeezing its labor costs tightly. But there are limits, and we may be passing the point of wringing out the excess and now starting to strangle the flow of oxygen.

Labor is the number one cost for cultural organizations, but this is normal for a service-based industry. In fact, the percentage of salary expense (32%) for the cultural sector actually appears low. Comparable numbers from private sector industries, such as architecture (48%), accounting (59%), and law (53%), show that the cultural sector spends less on labor than its peers.

With the continuation of a trend to squeeze labor costs ever tighter, we see that the actual composition of the work force is changing. Where the last ***Portfolio*** documented the displacement of full-time employees by part-time staff (who typically receive no benefits), this report reveals a further migration from part-time to independent contractors (who can be more easily added or removed).

The labor squeeze is also evident in the use of volunteers, who account for a staggering 30% of the work-hours in the field. While we can be encouraged by the devotion of individuals to their favorite cause, we should also ask whether this balance limits accountability and structure.

During the recession, fringe costs rose faster than payroll. It is not clear whether that is simply an arithmetic relationship because salaries are comparatively low, a conscious decision to help offset lower wage rates, a choice not to pass through benefits cost to employees, or an opportunity to aggregate and lower fees.

The data also suggest that the recession focused organizations on their artistic priorities, and we note that they continued to invest in artistic and programmatic staff, reserving the deepest labor cuts for administrative positions.

Ultimately, we're reaching the labor limits, and we have to acknowledge that there still appears to be some tacit acceptance of the notion of the "starving artist." We cannot simultaneously call for the professionalization of the creative sector and then under-compensate its labor force. Are we attracting and retaining the best and brightest? What is the true cost of turnover in hiring, training, and lost institutional knowledge?

Florcy Morisset, Owner, Vivant Art Collection. Since opening her art gallery in 2007, Florcy has worked tirelessly as an arts advocate and a bridge between the business and nonprofit arts and cultural communities. She is the Arts and Culture Chair of the National Coalition of 100 Black Women—Pennsylvania Chapter and volunteers with several arts and cultural organizations, including the African American Museum in Philadelphia. There are more than 32,000 volunteer positions at arts and cultural organizations in the region.

Are we able to recognize when an asset becomes a liability?

Maintain to Sustain

If labor is the number one expense for cultural organizations, then ***2011 Portfolio*** makes clear that building and physical plant is a close second. Over the past decade, Philadelphia has undertaken a series of major capital investments in building new infrastructure—The Barnes Foundation, the Independence Visitor Center, the Kimmel Center for the Performing Arts, the Mercer and Michener Museum expansions, the National Constitution Center, the National Museum of American Jewish History, the Philadelphia Museum of Art, the Please Touch Museum, the Suzanne Roberts Theatre, and the Tri-County Performing Arts Center are noteworthy examples.

With those projects comes a responsibility not only to raise the capital for construction, but also the endowment and expanded operating funds for ongoing debt coverage, operations, and maintenance.

For older buildings (and an historic community like ours has many), while there may be less debt service, the cost of maintenance, utilities and repairs is substantial. ***2011 Portfolio*** reveals that in the course of the recession, many cultural organizations chose to defer repairs and maintenance. While this may have been a prudent short-term strategy, it suggests future liability to catch up on required investment in physical plant needs.

Are we able to recognize when an asset becomes a liability? That is when the fixed costs related to purchasing or operating a facility actually hampers an organization's ability to achieve its mission.

Going forward it will be important that management, boards, policymakers, and donors rigorously assess the long-term market demand for new projects before committing capital dollars. These investments are highly illiquid and bind an institution and the region to a course that cannot be altered if the market does not materialize.

Second, utilities management appears to be a future area of opportunity, both for environmental and financial reasons. While no one can know with certainty the future costs of fuel and electricity, the historic trend suggests that there is more upside than downside. Efficiency investments and aggregated purchasing contracts may yield savings going forward that can be reinvested in the core artistic experience.

Finally, organizations and their boards need to treat depreciation and maintenance as real costs for which they should budget. By managing to cash flow only, organizations understate their true operating costs, increase long-term operating costs, and create crises when deferred maintenance results in disruptions of physical plant or working capital.

Jennifer Hoff, Activist, President, Lansdowne Economic Development Corporation. Jennifer is currently working with other community members, elected officials, and business people in her home town of Lansdowne to restore the vibrancy of the downtown business district. Arts organizations in the community and an annual arts festival have been essential to this revitalization. Arts and cultural organizations in the four suburban counties of the region saw two million paid admissions last year.

Moving to New Models

The dominant finding of this year's ***Portfolio*** report is that operating margins, which had been thin in 2006 and 2008, have moved into negative territory in 2011.

In understanding this trend, we can start by looking at the shift in earned and contributed income. Three years ago, in the last edition of ***Portfolio***, the ratio was 55/45 in favor of earned income. Now it is 48/52. At the core of the shift is the steep decline in investment and interest income, which has traditionally been included in the "earned" category.

Also, in the last edition of ***Portfolio***, we warned that the sector's high reliance on investment income was a potential source of vulnerability. Unfortunately, that concern proved to be warranted, as the subsequent decline of the stock market generated significant realized and unrealized endowment losses, exacerbated by overall weakness in the economy.

Smaller institutions, which typically do not have endowments, have performed better than larger institutions during the recession. However, given their reliance on the endowments of foundations, it is reasonable to assume that this is largely a timing issue, and that the lag will likely catch up to them too, as the multi-year averages upon which foundation giving is based may settle at a new lower level.

The fragility of the cultural sector's business model suggests important considerations for institutions, foundations, and policymakers. For institutions with endowments, it seems prudent to plan for a more conservative long-term investment draw that takes into account market volatility. For organizations without endowments, it will be important to deepen engagement with individuals as institutional and government funding streams are further stretched.

For all organizations, the heart of the matter is capitalization. As framed in the 2009 TDC report *Getting Beyond Breakeven*, "A strong balance sheet evidences an organization's ability to access the cash necessary to cover its short- and long-term obligations, to weather downturns in the external operating environment, and to take advantage of opportunities to innovate."

Moving forward, cultural leaders and funders will need to articulate and adapt to a range of capital needs based on organizations' unique business models. Better understanding and matching of the six forms of capital (operating funds, working capital, operating reserve, capital replacement, endowment, and risk capital) will lead to better capitalization and, with it, stronger financial health and delivery on mission.

One question funders and cultural leaders should consider: Is breakeven budgeting realistic or appropriate? Would it not be healthier to encourage organizations to budget for some annual reserve? Nonprofits in other sectors such as higher education and health care routinely plan for an annual surplus that offers some future risk capital and insulation from business cycles.

Is breakeven budgeting realistic or appropriate?

We might also ask whether there has been an historic overemphasis on project-based support? Would a higher balance of general operating support provide more flexible dollars to support the programming of strong, high-quality organizations rather than encouraging the continued development of new projects? Similarly, would the wider acceptance of fiscal agency allow for the easier entry and exit of shorter-term artistic projects and thus discourage the proliferation of 501(c)(3)s?

At the macroeconomic level, just as in other sectors, some industry consolidation seems inevitable. But consolidation can take many forms, and cultural organization executives and boards should be open to a range of alternative options. These include strategic alliances, shared services and joint programming, and market assessments that examine and focus an organization's resources on its unique place in the cultural ecology.

Finally, from a policy perspective, elected officials and civic and corporate leaders cannot take cultural institutions for granted. There is far too much evidence, both within this report, and from other sources, that the sector is a vital contributor to civic goals that yields a huge return on investment in economic, social, and educational outcomes. Our consistent underinvestment has put the focus at cultural institutions on "survive" rather than "thrive."

What if, instead, we viewed the creative sector not as an amenity, but as a growth engine?

KC Marquart, Photography and Digital Arts Student, Moore College of Art and Design. A photographer since attending a high school for digital communication in Western Maryland, KC loves exploring and photographing Philadelphia's public art and hidden architectural treasures. Now a Senior at Moore, she is interested in photo journalism and would like to hone her skills working for a magazine and photographing live music performances. Education & Instruction organizations, including university-based programs, employ close to 3,800, the most positions by any *Portfolio* discipline.

A Moment of Collective Opportunity

In the spring of 2011, the Cultural Alliance released its most recent Cultural Engagement Index, which measured Greater Philadelphia's cultural participation in the two recessionary years immediately following the stock market collapse of 2008. What did it show? At a time when Americans were reevaluating their priorities and scaling back their spending, Greater Philadelphia experienced an 11% increase in its cultural engagement.

This 2011 edition of ***Portfolio*** also bears out that trend. It shows that in spite of recession, over the past two years individual attendance, subscriptions, memberships, and individual giving all grew. Clearly Philadelphians value their arts and culture.

But the ***2011 Portfolio*** also makes it abundantly clear that individual support is not enough. Because nonprofit cultural organizations rely on contributions for more than half of their operating cost, the decline in institutional, corporate and public support and investment declines overwhelmed individual giving. Our cultural sector is now operating in the red—a trend that is unsustainable.

So we find ourselves at a collective moment of opportunity.

From a policy perspective, we've got a lot at stake, and we're counting on arts and culture to carry a lot of water for us. Philadelphia's cultural sector is key to our highest regional priorities. Educationally, we know that access to the arts dramatically increases outcomes and reaches and teaches children in ways that nothing else can. In a city desperate to increase its graduation rates, culture is an essential ingredient in the educational mix.

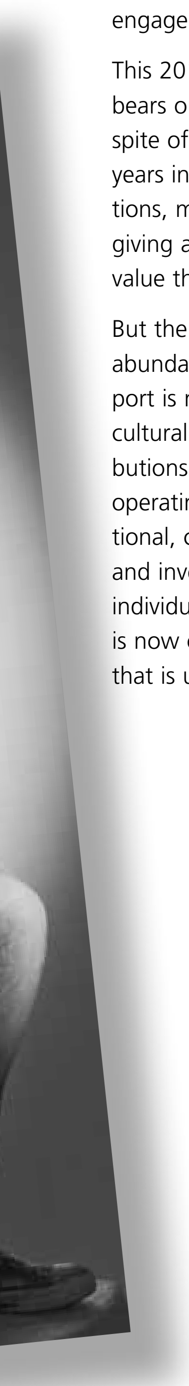
From an economic standpoint, the quality and breadth of Philadelphia's cultural resources clearly drives our attractiveness as a place to locate a business, stay after graduation, bring a convention, or visit on vacation. Arts and culture grows our tax base, the value of real estate, and quality of life. And it stimulates the creativity that is the fuel of growing companies.

At the local level, culture is building communities one by one. It's a rallying point that brings neighbors together. Culture is central to our regional identity and civic pride. And Philadelphians, so rooted in our Quaker heritage, could stand to be a little prouder.

Finally, arts and culture is also vital to us as individuals. It stimulates our perception, compassion, connection, and creativity.

At all levels, arts and culture is how we grow.

So as we approach this moment of collective opportunity, each of us has a stake in and a powerful individual influence on the outcome. We hope that the findings of this ***2011 Portfolio*** can serve not only to inform our thinking, but also as a catalyst to action. Both within and outside cultural organizations let us adapt to advance the civic vibrancy of the region we love.



What if we viewed the creative sector not as an amenity, but as a growth engine?

Endnotes

1 A comprehensive analysis of nonprofit cultural organizations in Southeastern Pennsylvania undertaken by the Greater Philadelphia Cultural Alliance in January 2010 counted more than 2,000 organizations, more than half of which have annual budgets less than $25,000. Data from the National Center for Charitable Statistics, the Pennsylvania CDP, and the Cultural Alliance's databases were used.

2 Realized loss occurs when assets are sold for less than their original value. Unrealized loss occurs when as asset is still held, but has declined from its original value.

3 Though Advertising/Sponsorship rose 82%, the actual dollar value of this gain (+$6.3 million) is much less than that of the Individual-related categories described above (+$48 million).

4 One Very Large organization has been removed from the dataset for the above calculations. Because of a "blockbuster" exhibit, this organization's attendance increased from an average of 907,000 attendees per year prior to FY2007, up to over 1.7 million in FY2009, then returned to the institution's historical norms. Since FY2005, there have been no other blockbuster-driven attendance swings at this scale in Pennsylvania CDP datasets. Because we are trying to draw conclusions about the arts and culture sector as a whole in ***2011 Portfolio***, this organization's attendance figures were removed from both fiscal years used here.

5 "Productions" reflects the number of overall works offered in a given fiscal year, while 'performances' indicates the number of times each production was presented. E.g., the Main Street Theater could put on a production of Phantom of the Opera that ran for ten performances.

6 "Events" refers to both productions and performances.

7 A one-time pension allocation of $17,021,000 by one organization removed from the figures as noted and corresponding totals to ensure dataset is representative of the participating organizations as a set and to prevent conclusions being skewed by statistical outliers.

8 The S&P 500 is a capitalization-weighted index of 500 large, publicly-traded companies, published by Standard & Poor's. It is generally used as a benchmark indicator of general U.S. stock market trends. The Lipper Balanced Fund Index tracks funds that are a mixture of stocks and bonds and intended to preserve the capital of the funds. Published by Lipper, the index is generally used as a benchmark for endowments and similar funds. Use of these benchmarks is for comparison only and not meant as an endorsement of them, nor is it meant to imply connection or affiliation between their publishers and the organizations in ***2011 Portfolio*** or the Greater Philadelphia Cultural Alliance.

9 Because organizations have different fiscal years, their returns must be compared to benchmarks covering the same months and years. For example, all organizations whose fiscal year ends in February must be tracked against the same time period for the market, i.e. February 2007–February 2009.

10 Current non-endowment assets.

11 In most cases, FY2009 or FY2010.

12 Individual support includes Earned revenue categories of Admissions/Tickets/Tuitions, Memberships/Subscriptions, Workshops/Lectures, Sales/Concessions, and Contributed revenue categories of Trustee and/or Board and Individual.

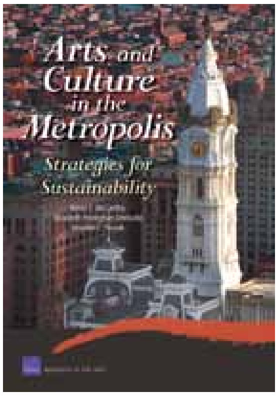
13 For a region-wide analysis of employees residential and commuter patterns, see Greater Philadelphia Cultural Alliance, *Arts, Culture, and Economic Prosperity in Greater Philadelphia* (2007), page 18.

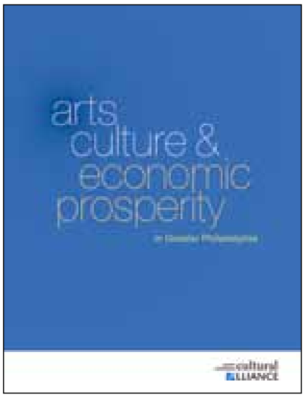
14 In compiling data, great care was taken to correctly represent unique instances of cultural production. In this report, the term "productions" refers to the number of exhibitions and theatrical, dance, or music presentations in a given fiscal year. Multiple showings or presentations of the same program are not included in the total. The term "performances," on the other hand, refers to all showings and presentations of all productions.

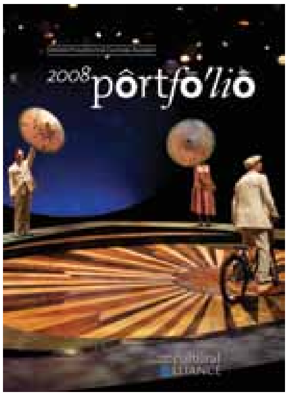
15 There are 3,969,978 residents in the five counties of Southeastern Pennsylvania. Source: *U.S. Census, 2005–2009 American Community Survey 5-Year Estimates.*

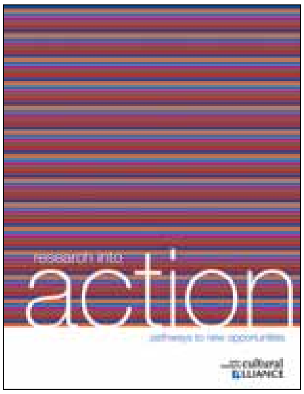
About the Greater Philadelphia Cultural Alliance

With over 400 nonprofit member organizations, the Greater Philadelphia Cultural Alliance is dedicated to advancing the region's cultural sector and broader community. Our mission is to make Greater Philadelphia one of the foremost creative regions in the world.









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PNC arts alive
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