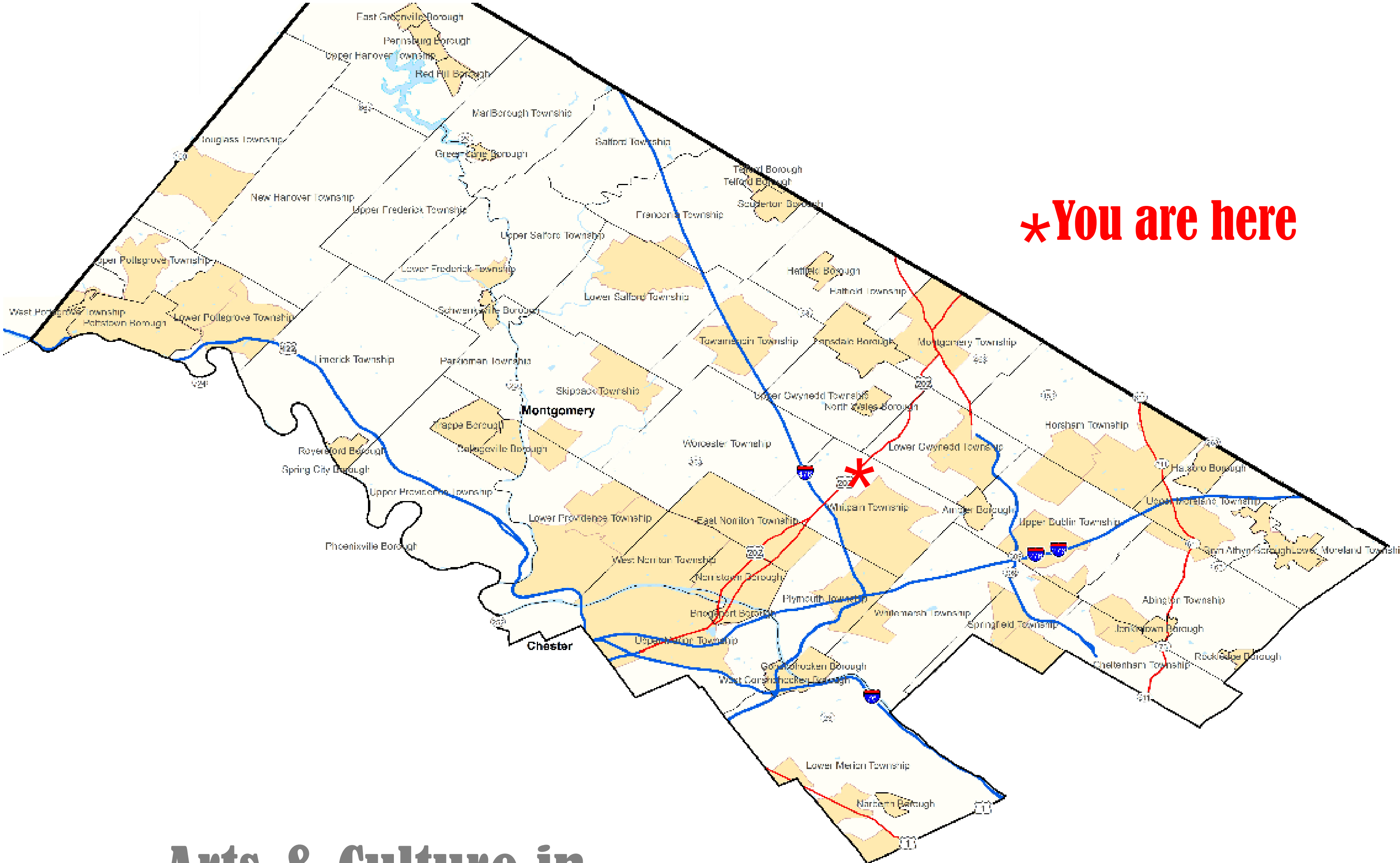
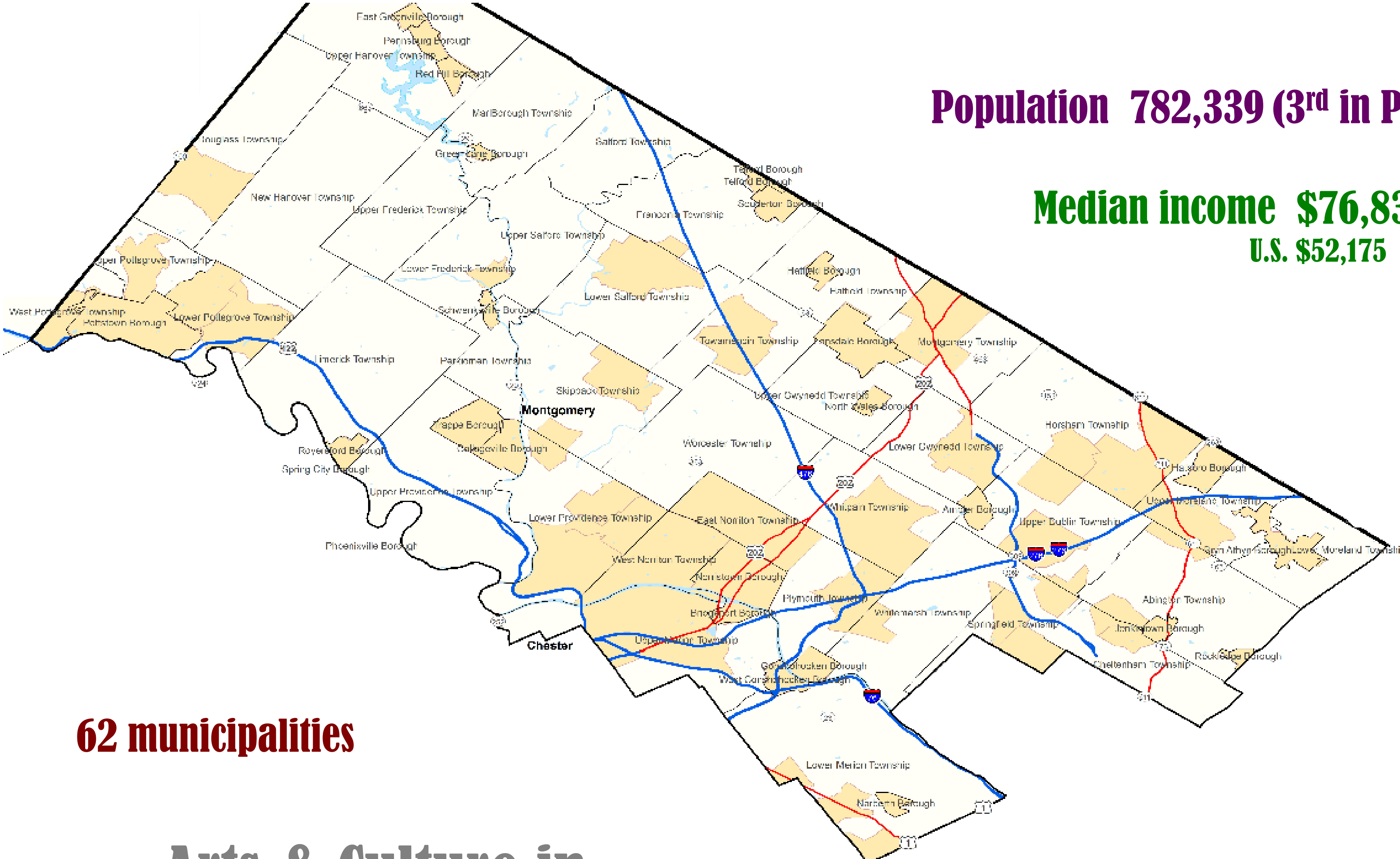
Montgomery County

Arts & Culture Summit



Arts & Culture in

Montgomery County



Population 782,339 (3rd in PA)

Median income $76,834

U.S. $52,175

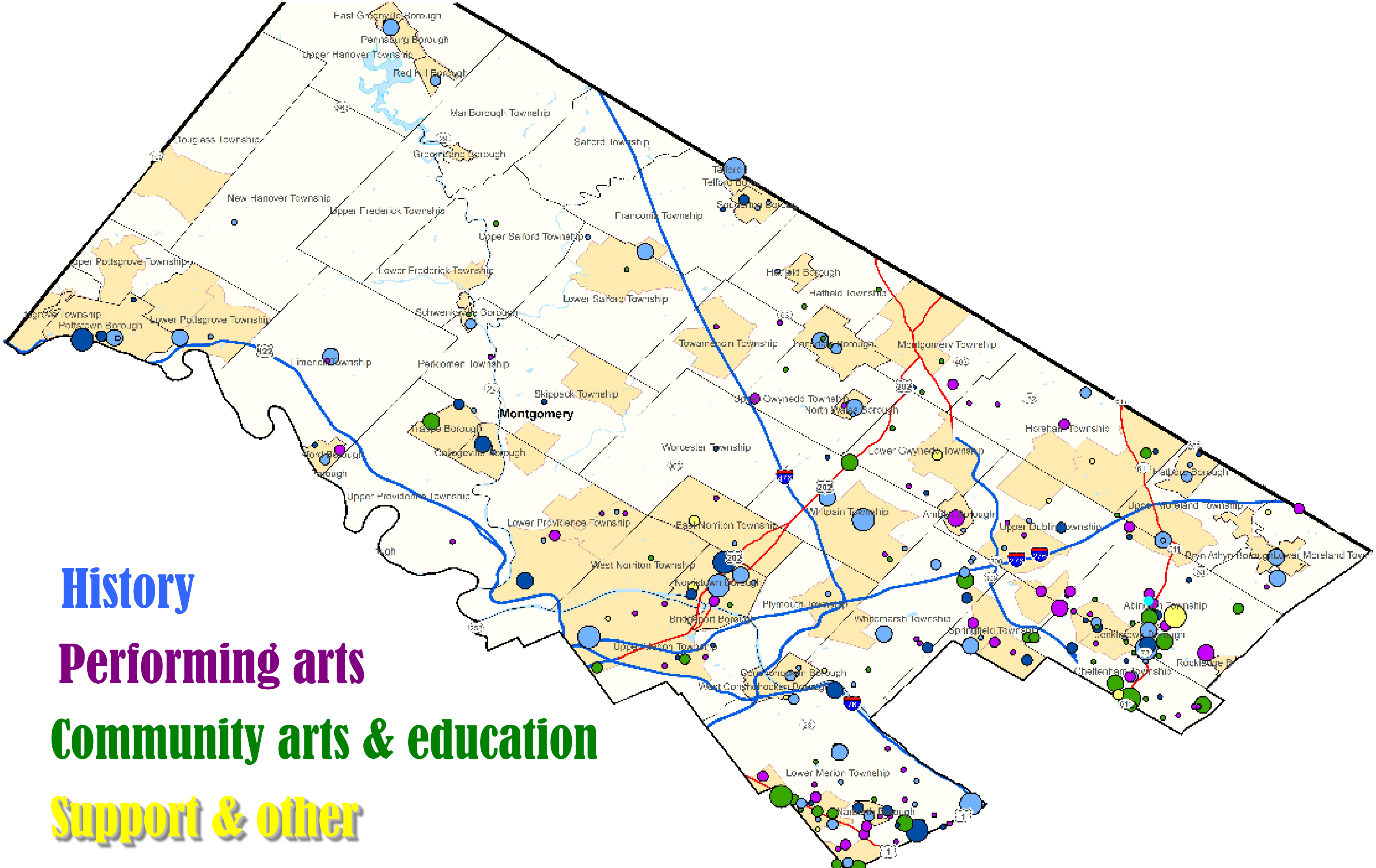
62 municipalities

Arts & Culture in Montgomery County

Education – BA or higher 43%

U.S. 27%

U.S. Census 2006-08 est.



History

Performing arts

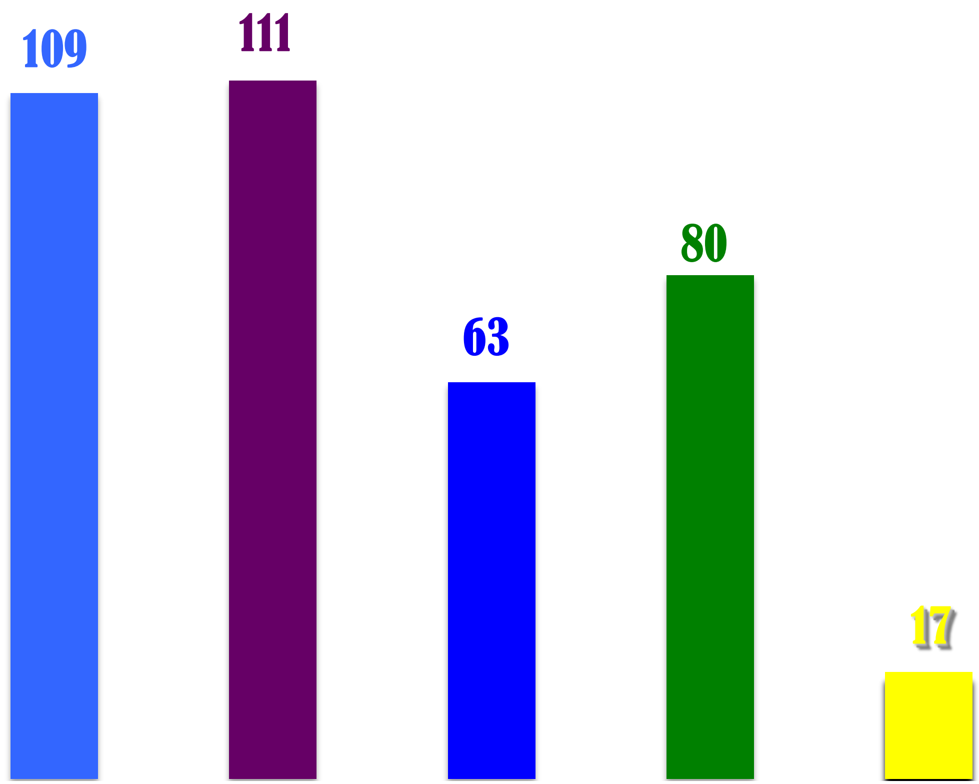
Community arts & education

Support & other

Museums, visual arts & science

Montgomery County

Map: Greater Philadelphia Cultural Alliance



History

Performing arts

Community arts & education

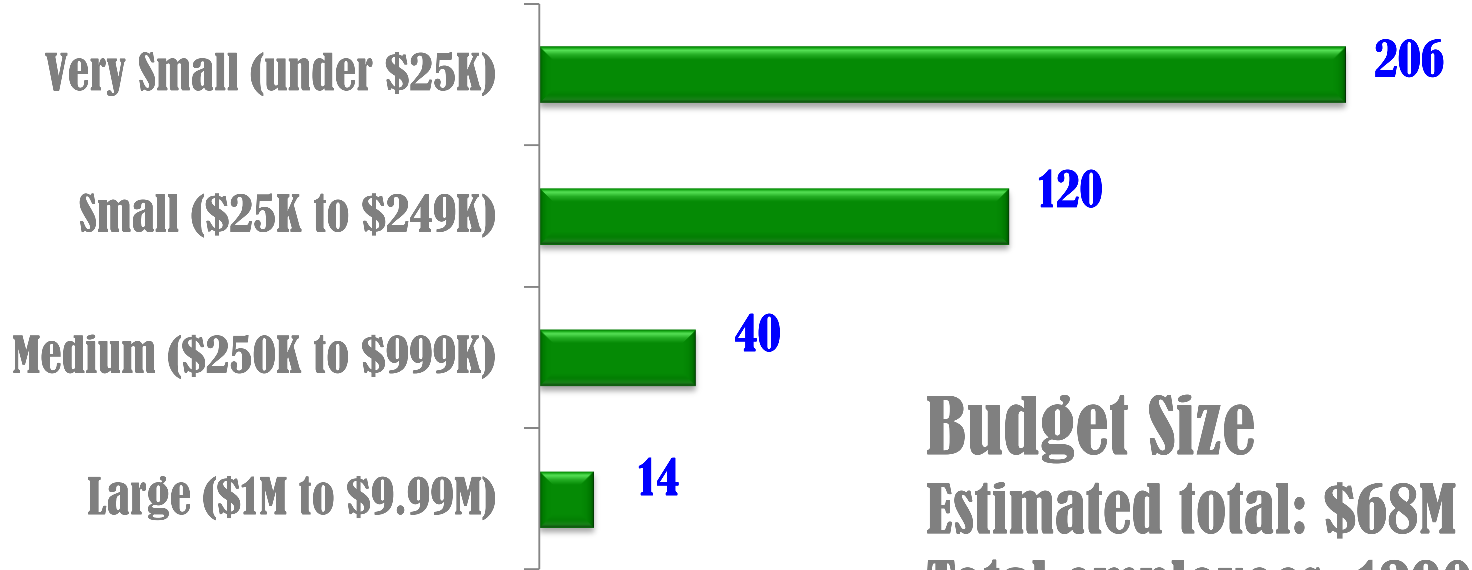
Support & other

Museums, visual arts & science

Total 380 organizations

Montgomery County

Data: Greater Philadelphia Cultural Alliance



Budget Size

Estimated total: $68M

Total employees: 1290

History

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Museums, visual arts & science

Total 380 organizations

Montgomery County

Map: Greater Philadelphia Cultural Alliance; PACDP

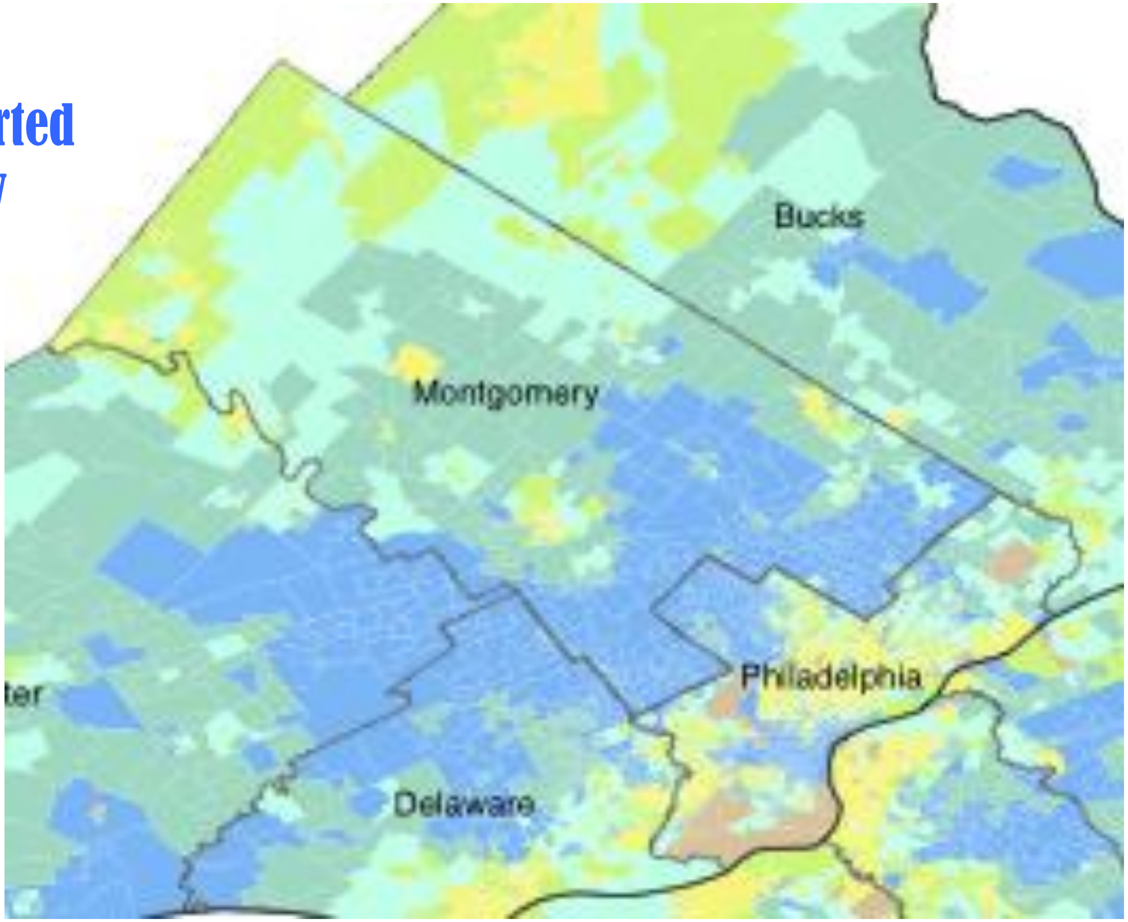
Total attendance reported by Montgomery County organizations:

1,118,025*

50% were free

County pop: 782,339

*53 organizations
who report to PACDP



Regional participation map Social Impact of the Arts, UPenn

Arts & Culture in Montgomery County

Data: PACDP

Families with children are highest participants

Women are the decision makers

People prefer to participate over attend

Product matters

People desire a complete experience – the whole package

Social interaction is an important motivator

Audiences are growing more diverse

Many don't know what is available despite media sources

Outings are planned on short notice

Audience

Montgomery County

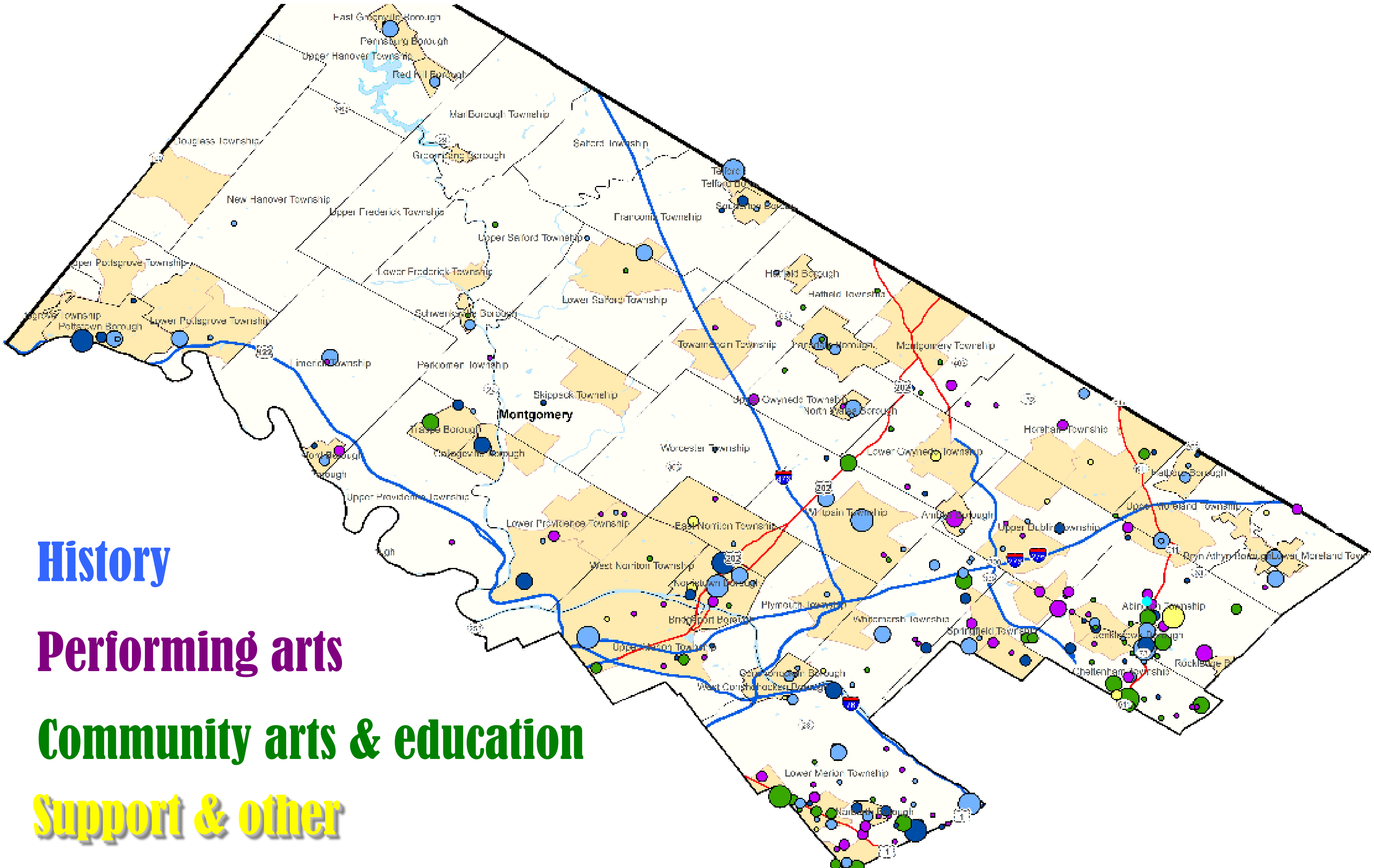
Advertising
Architecture
Art and antique market
Crafts
Design
Fashion
Film & video
Music
Performing arts
Publishing
Software
Television & radio
Video & computer games

"those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property"

No of Establishments - 1,857
Revenues - $4.8 B (6%)
Employees - 24,716
Payroll - $1.6B (11%)

Creative Economy
Montgomery County

UN Creative Economy Report, 2008
U.K. DCMS 2001
2007 U.S. Economic Census



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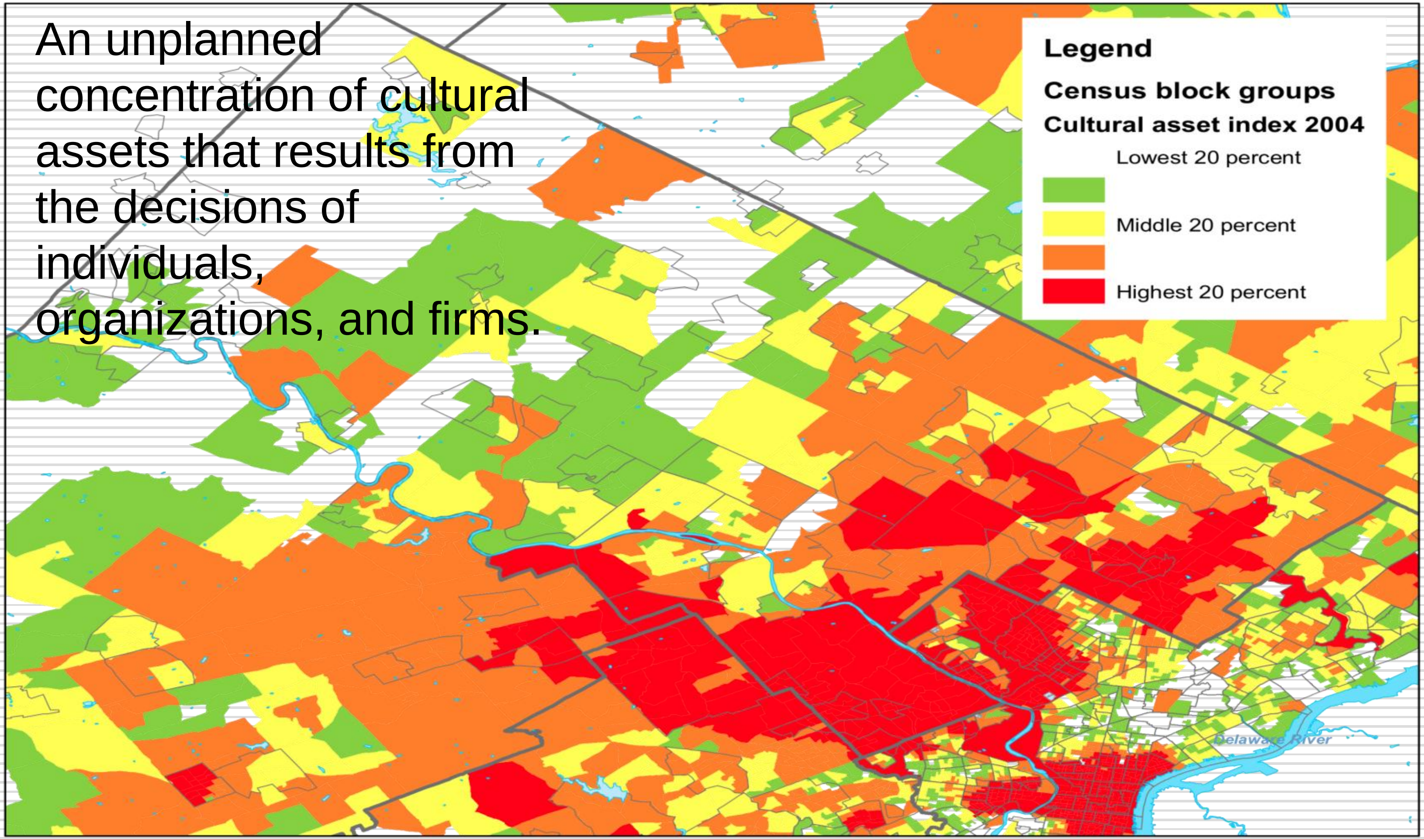
Map: Greater Philadelphia Cultural Alliance

“Natural” cultural district

An unplanned concentration of cultural assets that results from the decisions of individuals, organizations, and firms.



Natural cultural districts are:

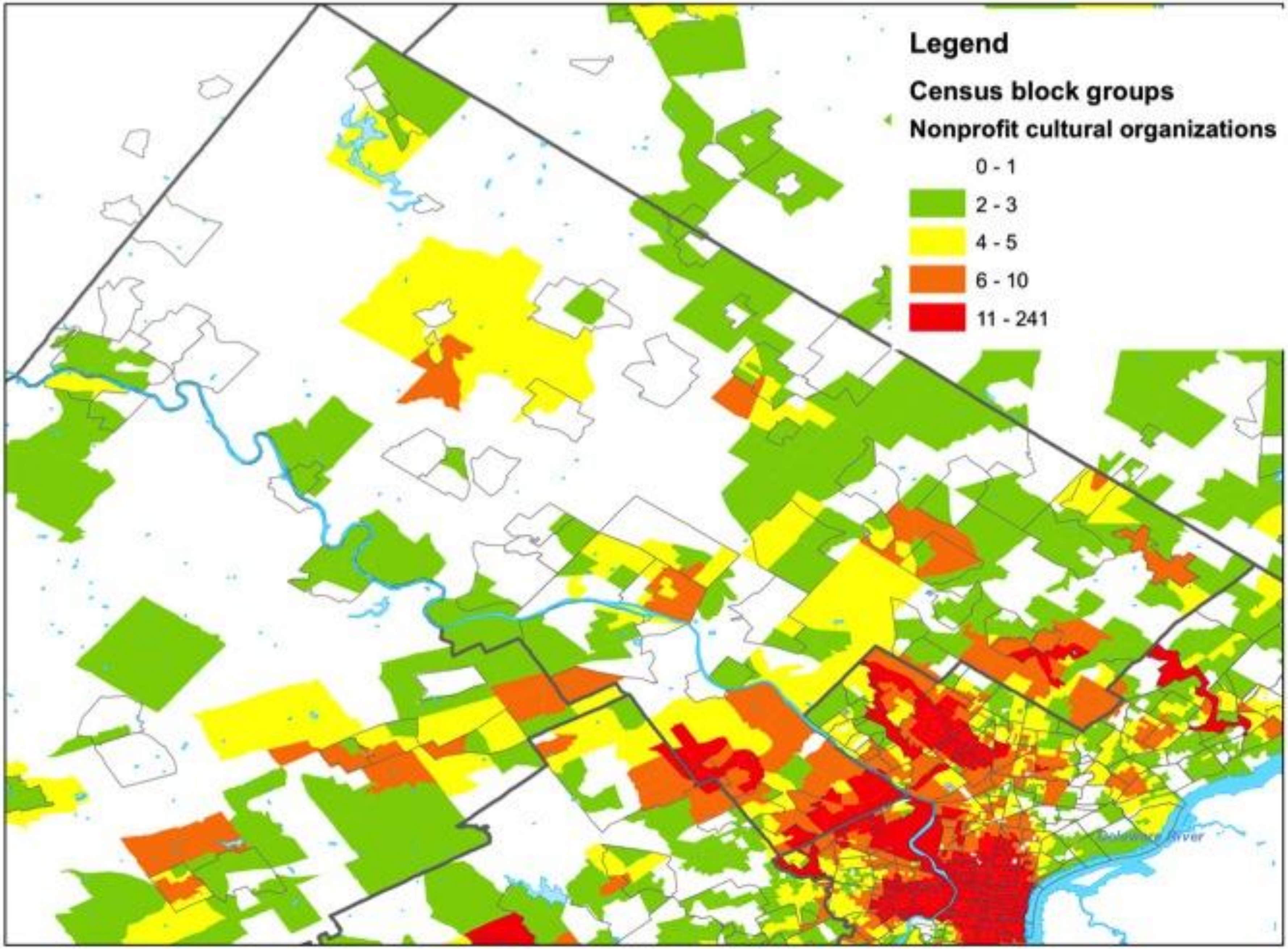
- Self-organized: they emerge from the actions of individuals and groups
- Discovered: they require funders and policy-makers to scan their environment for existing opportunities rather than initiate their own vision
- Cultivated: they require policies that are responsive to conditions on the ground and flexible enough to accommodate the unique qualities of particular types of districts.

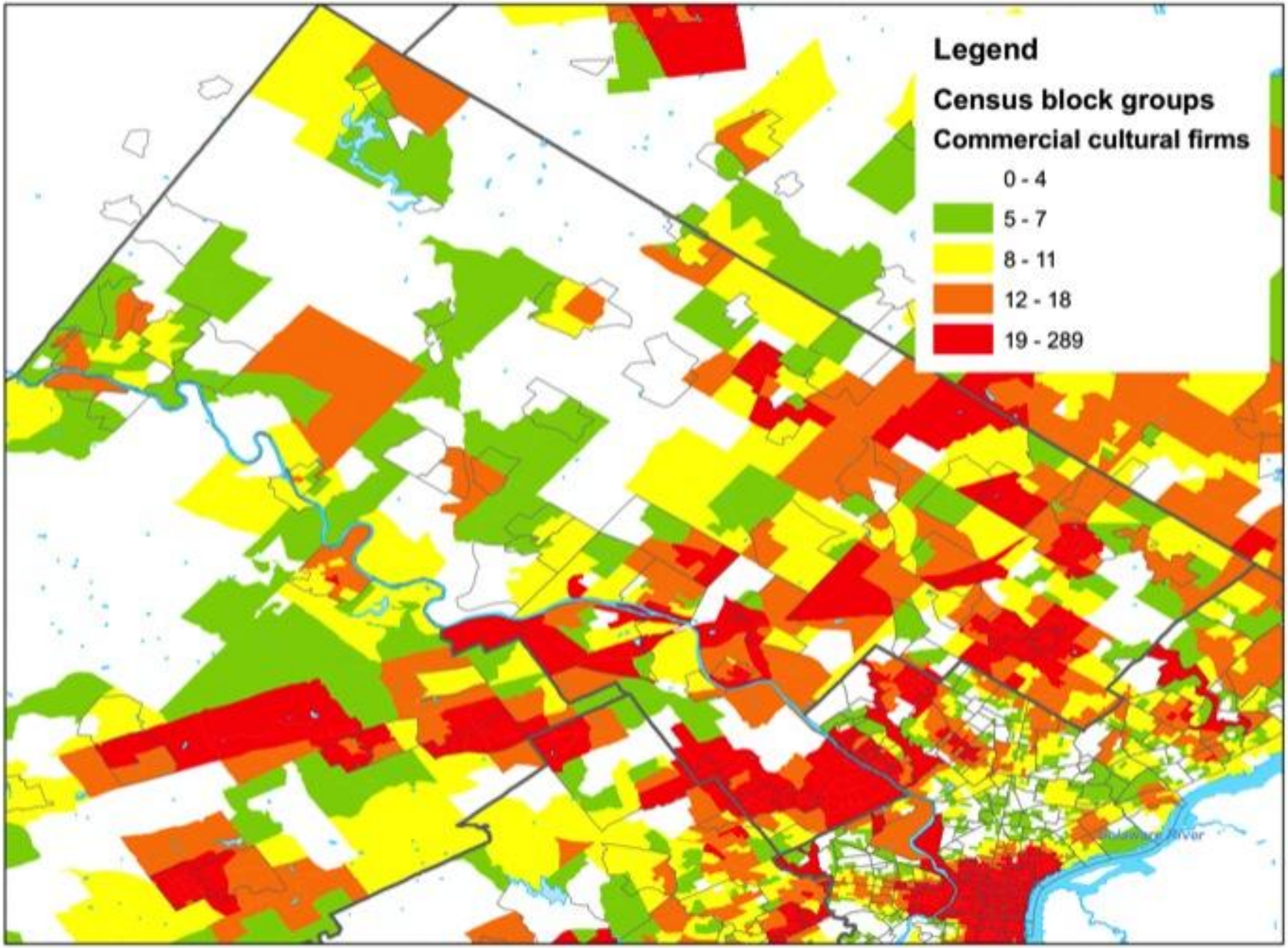
Self-organized

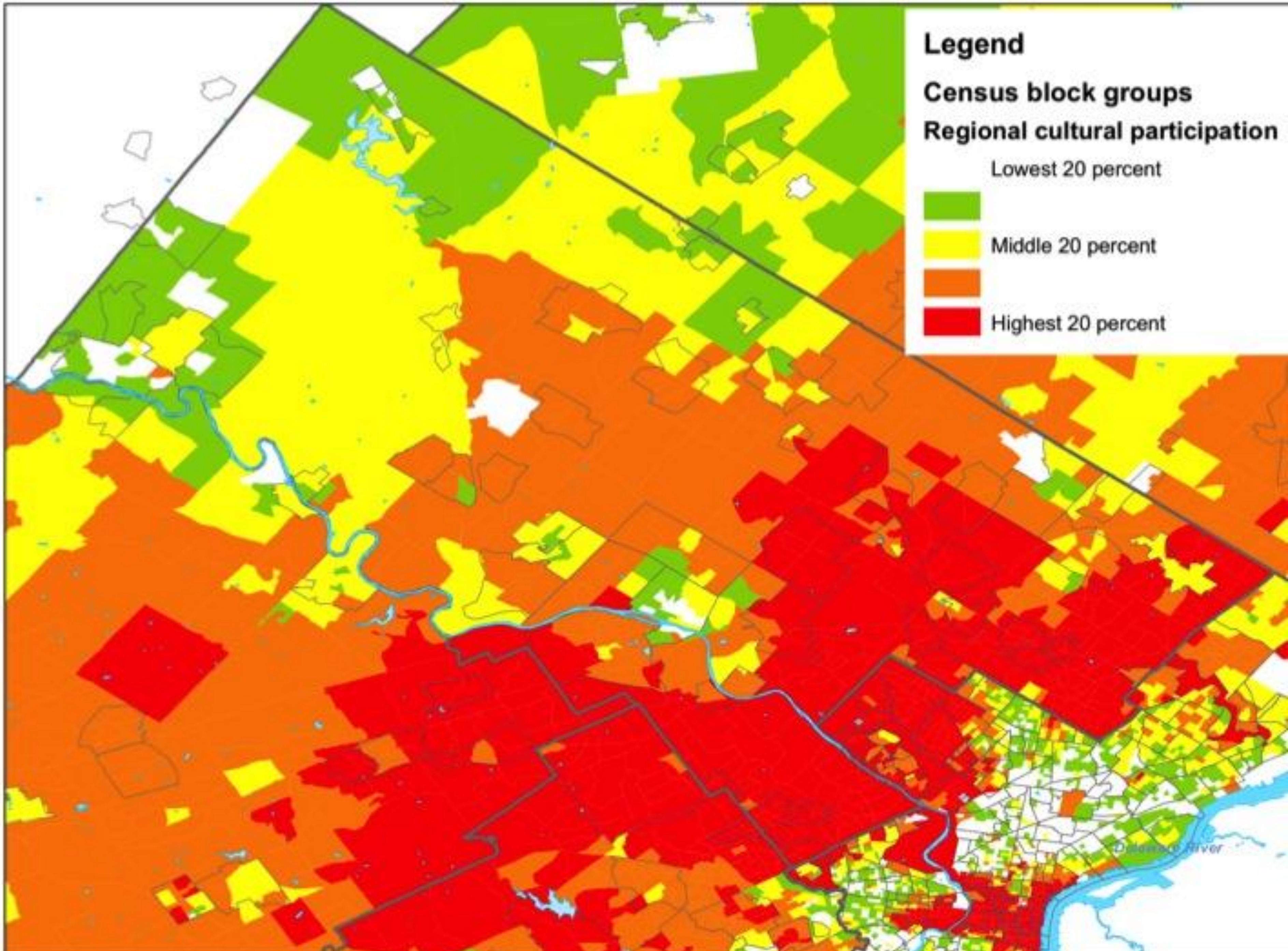
- Concentration of cultural resources—nonprofit orgs, businesses, artists, and participants—in a particular neighborhood
- Unlike planned cultural districts, ”natural” cultural districts emerge as a result of grassroots efforts of creative producers and consumers.
- Cultural cluster is special type of social network in which geography is a critical feature.

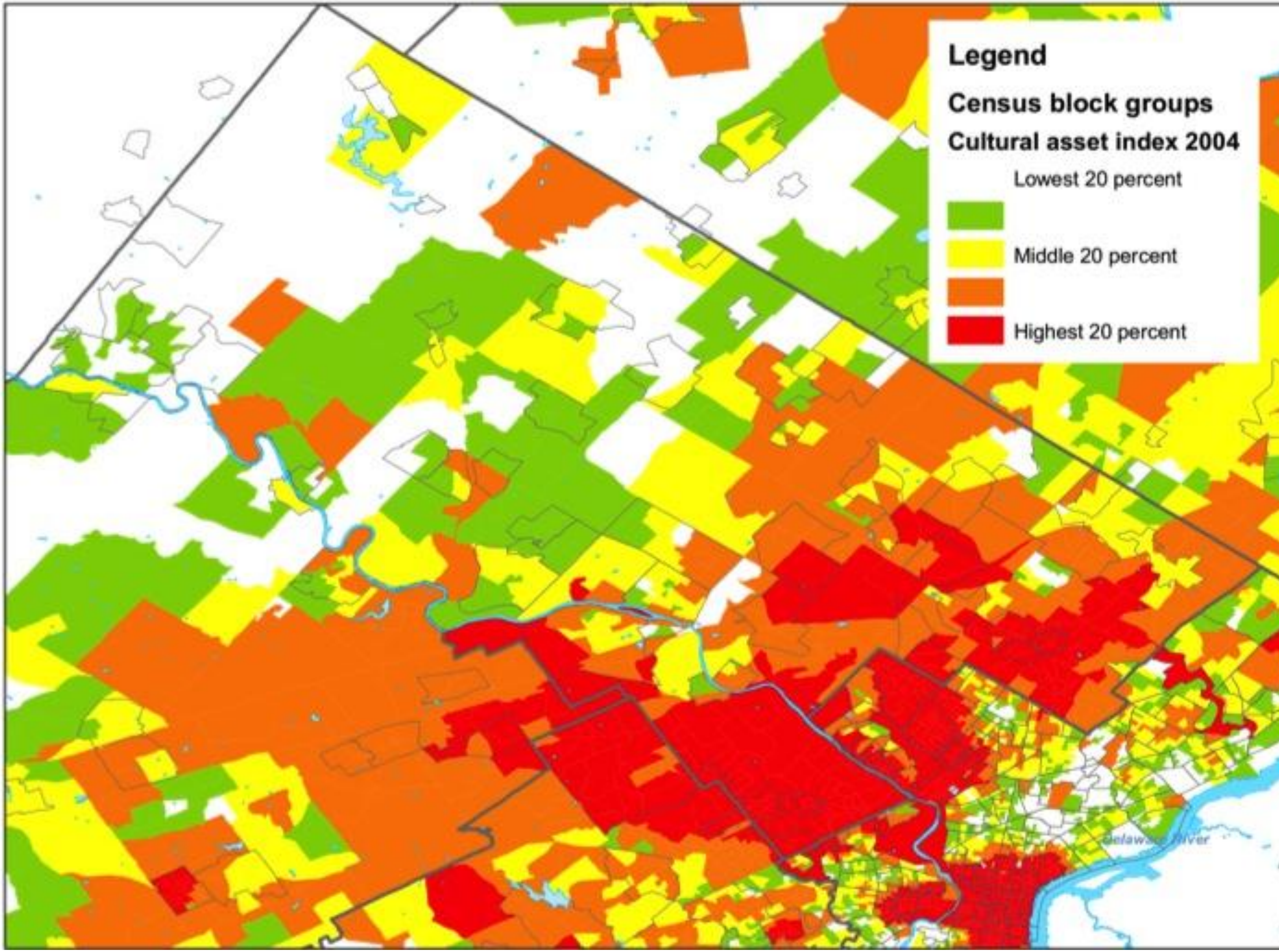
Discovered

- Build on strength by identifying *all* assets:
  - Nonprofit cultural organizations (including smaller groups that may not yet have IRS status)
  - Commercial cultural firms
  - Cultural participants
  - Resident artists


Legend
Census block groups
Nonprofit cultural organizations
0 - 1
2 - 3
4 - 5
6 - 10
11 - 241

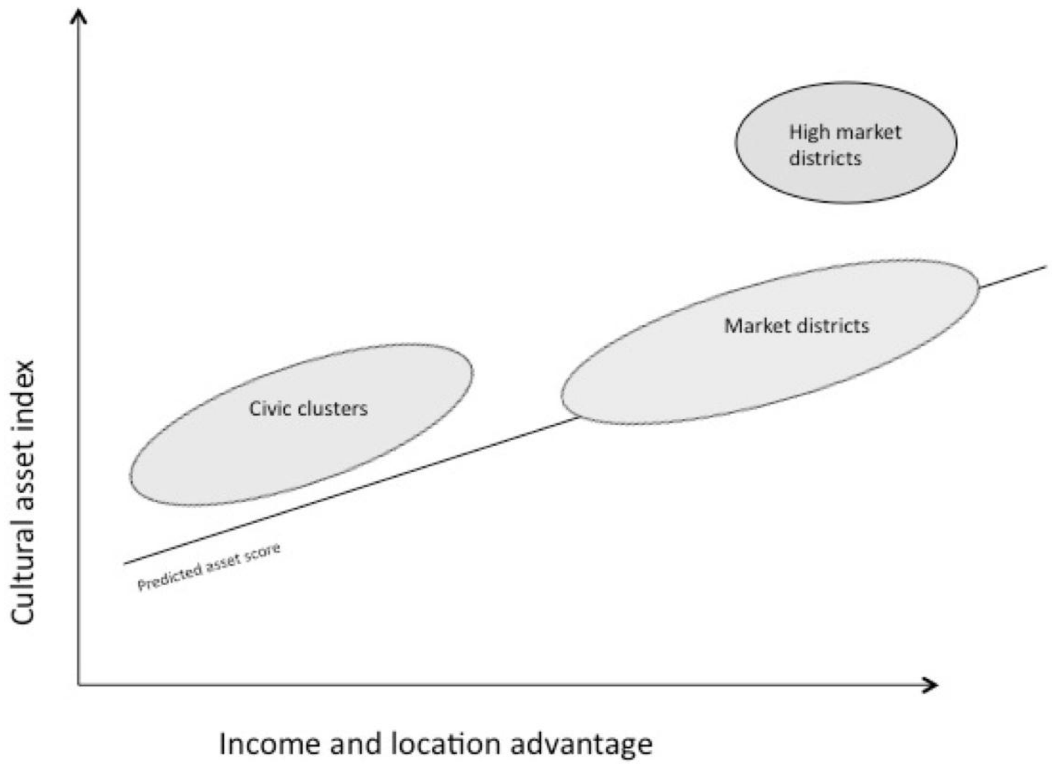

Legend
Census block groups
Commercial cultural firms
0 - 4
5 - 7
8 - 11
12 - 18
19 - 289


Legend
Census block groups
Regional cultural participation
Lowest 20 percent
Middle 20 percent
Highest 20 percent
Delaware River


Legend
Census block groups
Cultural asset index 2004
Lowest 20 percent
Middle 20 percent
Highest 20 percent
Delaware River

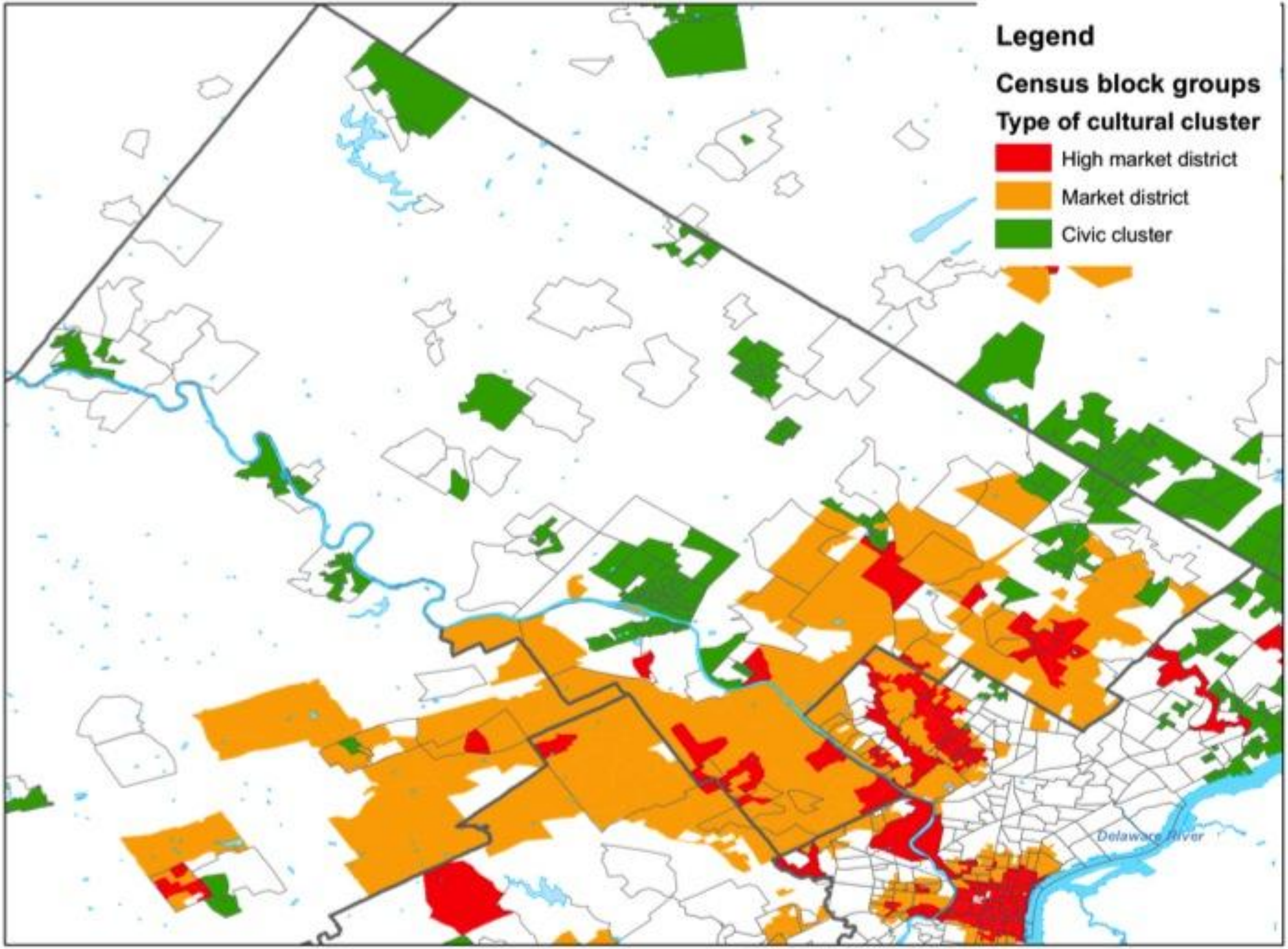
Types of cultural district

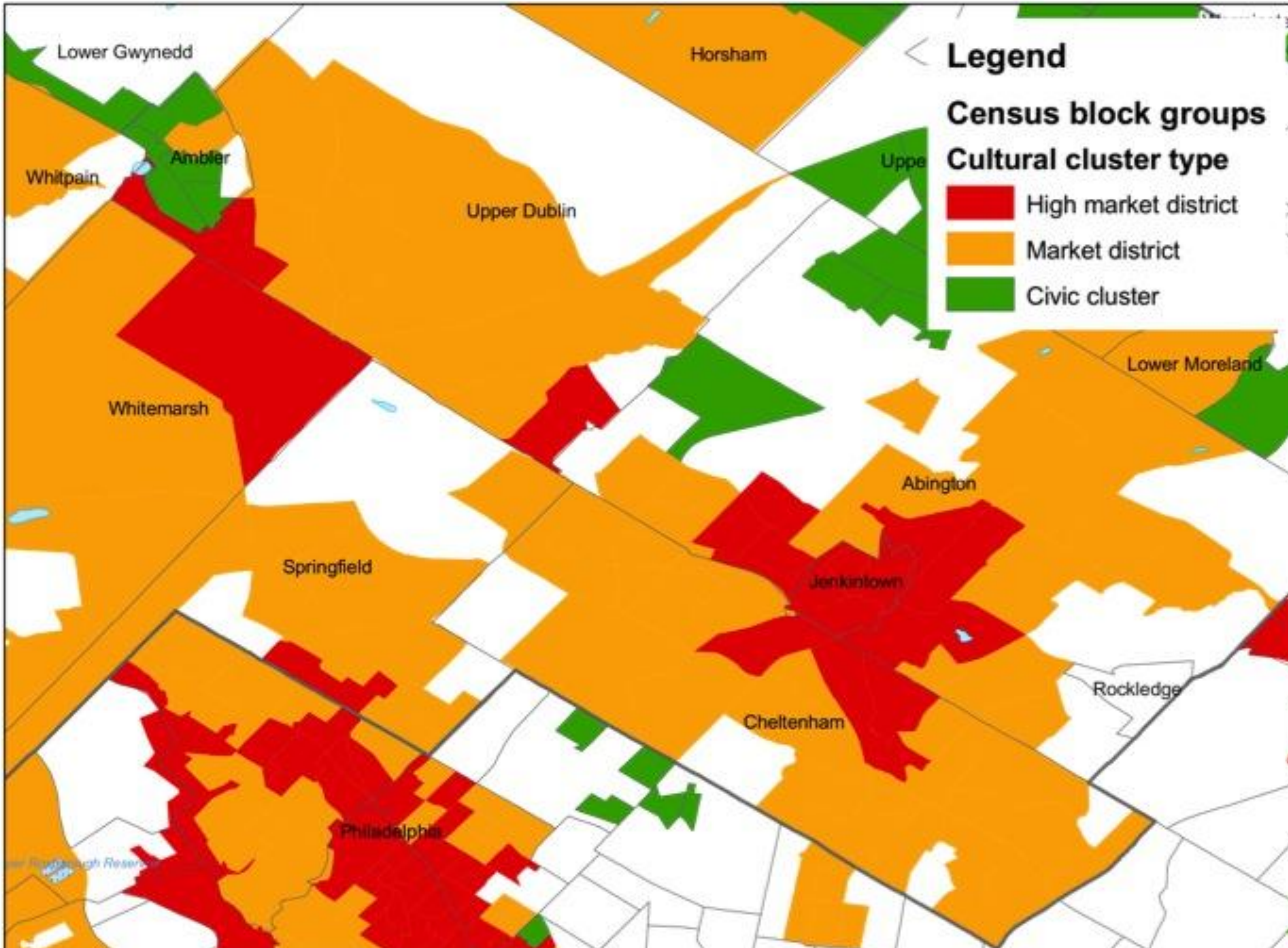
- Correlation with socio-economic and locational factors
- Statistically correct for these factors to identify neighborhoods that "exceed expectations"

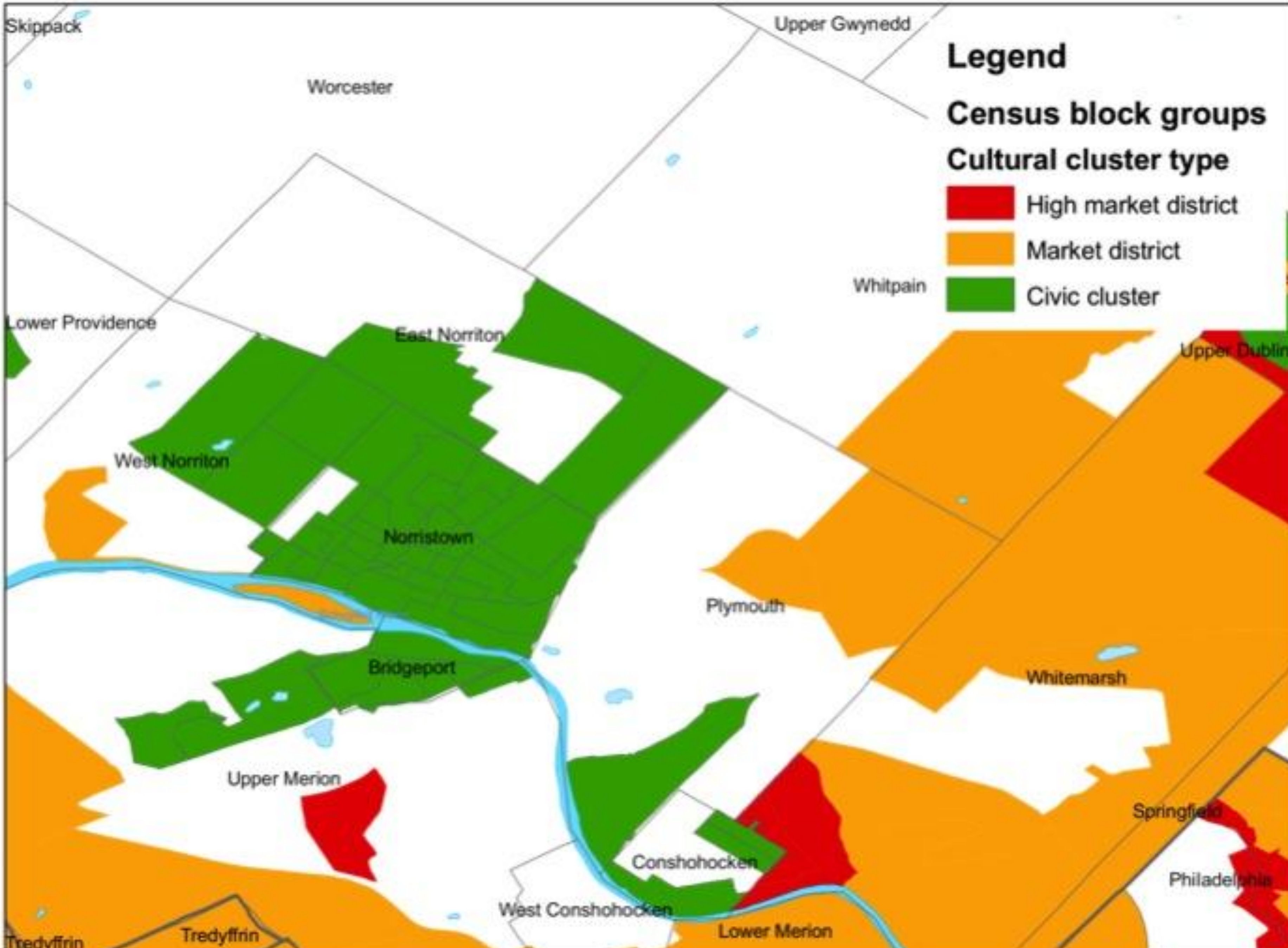


Three types of cultural clusters:

- High market districts combine heavy concentrations of cultural assets with very advantageous economic and location advantages.
- Market districts tend to locate in the "next hot" neighborhood but often face significant challenges.
- Civic clusters emerge from the collective efforts of residents in neighborhoods who seek to use cultural engagement to overcome significant economic and location disadvantages.

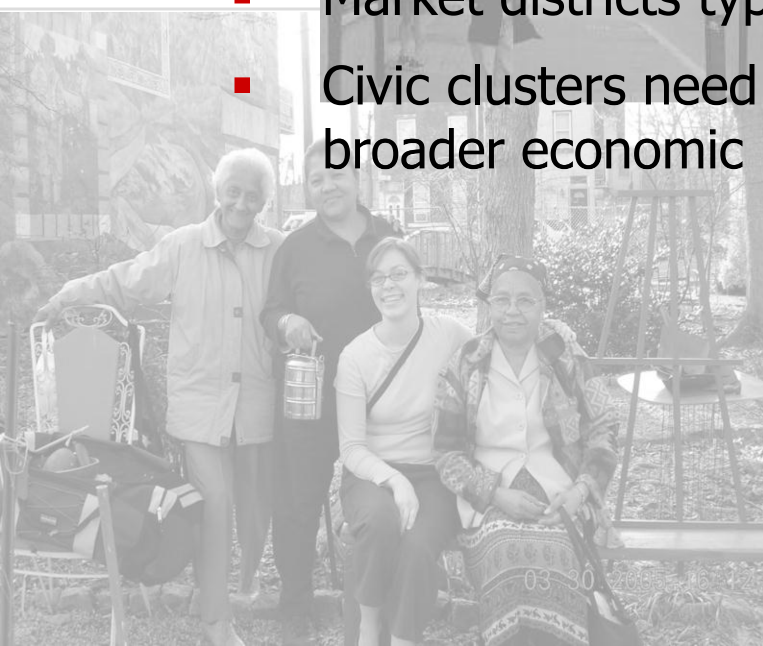

Legend
Census block groups
Type of cultural cluster
High market district
Market district
Civic cluster
Delaware River


Lower Gwynedd
Horsham
Legend
Census block groups
Cultural cluster type
High market district
Market district
Civic cluster
Ambler
Whitpain
Upper Dublin
Whitemarsh
Lower Moreland
Abington
Springfield
Jenkintown
Rockledge
Cheltenham
Philadelphia


Legend
Census block groups
Cultural cluster type
High market district
Market district
Civic cluster
Skippack
Upper Gwynedd
Worcester
Whitpain
Lower Providence
East Norriton
Upper Dublin
West Norriton
Norristown
Plymouth
Bridgeport
Whitemarsh
Upper Merion
Springfield
Conshohocken
Philadelphia
West Conshohocken
Lower Merion
Tredyffrin
Tredyffrin

Cultivated

- Build on existing resources
- Assess role of equity in policy and planning goals
- Different policies for different types of districts:
  - High market districts can look after themselves
  - Market districts typically need reliable services and credit
  - Civic clusters need more substantial assistance to have broader economic impacts.

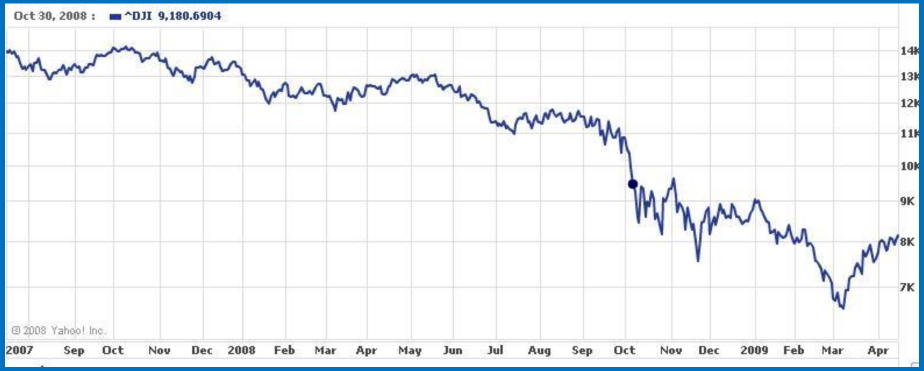


Montgomery County

Arts & Culture – Moving Forward

Challenge #1:

It’s the economy, ...



TempCheck Findings

Finances Remain Fragile

- Nearly half reported shrinking government support
- One-third reported declines in Corporate support
- Almost one third said foundation support declined; 19% reported growth
- Almost two-thirds have reserves of 3 months or less

TempCheck Findings

Individual patrons continue to lead the way

- Single ticket sales are growing for 37% of groups (up from 27% in October)
- More than 75% report stable or increased Individual giving

TempCheck Findings

Confidence is Improving

- 32% of cultural leaders say things will get better (up from 21% in October)
- Only 11% say things will get worse (down from 29% in October)
- Only 8% expect further staffing reductions in the next six months

TempCheck Findings

Meeting the Challenge – Creating More With Less

- Two-thirds of groups have produced programs with lower budgets
- 43% have actually increased or expect to increase programming
- 45% of cultural organizations have collaborated or expect to collaborate in the next six months (up from 36% in October)

Challenge #2 -

Expanding cultural participation …reaching the new consumer

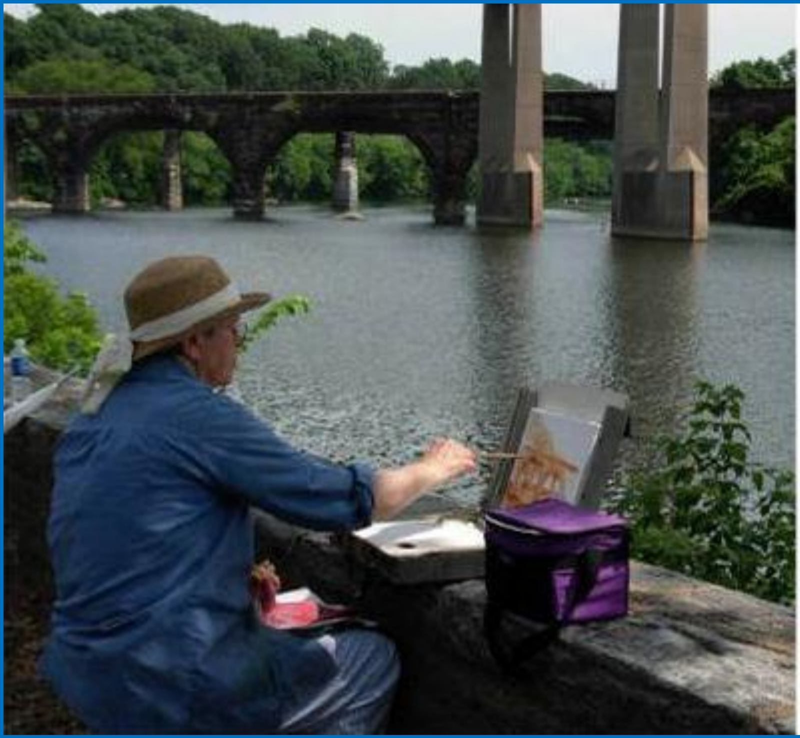
Research Into Action: Implications

- Reach out to families
- Embrace the new appetite for personal creative practice
- Facilitate social connection
- Cultivate diversity

Research Into Action: Implications

- Build high quality, relevant product
- Reduce barriers
- Be prepared to invest more time and money in marketing

Moving Forward Together



Arts & Culture
It’s how we grow.

It’s an engine for economic growth.

It has the power to elevate lives.

It has the power to educate.

We own it because it comes from us.

It helps individuals come together
and grow as a community.