ARTS CULTURE + ECONOMIC PROSPERITY IN GREATER PHILADELPHIA
In my inaugural presentation as President of the Alliance, at our Annual Meeting in 2010, I talked about the importance of “Data + Stories = Proof”. With this latest report we present the most compelling data yet - that the cultural sector is a significant economic driver, pumping billions into local economies, neighborhoods and paychecks. Combined with your stories and inspiration, we have compelling proof of the value of arts and culture to our region and to our residents and visitors.

This report would not have been possible without the critical support of the 345 participating organizations, organizational data from the Pennsylvania Cultural Data Project and the 13 surveyors who fanned out across the region over the last nine months to survey audiences. Our special thanks to Americans for the Arts, which calculated many of the findings as part of its national report, Arts and Economic Prosperity IV.

We are also grateful to our supporters and sponsors, including the William Penn Foundation, Bank of America and Pennsylvania Council on the Arts. I also want to express special thanks to our staff who guided the work through its inception and development.

This report reflects the Alliance’s new Creating Change initiative. In the coming years we will provide the hard data and analysis our members and supporters need. We believe that research has a vital role to play in a re-envisioning of Philadelphia’s cultural and civic experience. Working together, we can ensure that arts and culture is viewed as an investment, not an amenity, and that Greater Philadelphia is universally recognized as a world-class region defined by its rich and vibrant cultural life.

Tom Kaiden
President
Greater Philadelphia Cultural Alliance

Bank of America is pleased to sponsor Arts, Culture and Economic Prosperity in Greater Philadelphia. At Bank of America, we understand the importance of cultural and civic investment. Our commitment is based in the belief that a strong and thriving cultural community not only enriches civic life, but also plays an important economic role in helping to spur urban renewal, attract new businesses, draw tourism and spark innovation. The vibrant cultural sector in the Philadelphia region continues to have a significant impact on our community and regional economy, and with this report, that impact is very evident.

Our support for this report is part of Bank of America’s larger investment in arts and culture throughout the United States. Building on a long-standing tradition of investing in the communities it serves, Bank of America is delivering on a 10-year goal to donate $2 billion to nonprofit organizations engaged in improving the health and vitality of their neighborhoods. We continue to demonstrate our support and enthusiasm for arts and culture through our philanthropy, sponsorships and other innovative partnerships. For example, our Museums on Us® program provides Bank of America and Merrill Lynch cardholders with monthly free access to more than 150 of our country’s greatest museums, zoos, science centers and botanical gardens. Additionally, Bank of America continues its Art in our Communities® program where works from our collection are shared with museums across the globe. The program provides museums and nonprofit galleries the opportunity to borrow complete exhibitions at no cost while enabling us to share these works with a much broader public.

In recognizing the important role arts and culture plays on our regional well-being and economic prosperity, Bank of America also takes pride in the strong relationships and partnerships we have with some of the organizations leading the sector. Congratulations to the Greater Philadelphia Cultural Alliance and to the hundreds of cultural organizations who participated and contributed to the findings in this important research report.

We look forward to the coming years and to the competitive advantage afforded our Greater Philadelphia region through its vibrant, rich and diverse culture.

Tom Woodward
Market President, Pennsylvania
Bank of America
Arts, Culture and Economic Prosperity in Greater Philadelphia

“Philadelphia’s vibrant arts culture and thriving restaurant scene are no accident. Ours is a city that takes its role as audience seriously and is both appreciative of innovation and also utterly honest and generous with their feedback. It’s a tremendous place to be if you’re involved in a creative field, and one with a great deal of interaction between dining and the arts.”

Jose Garces, Executive Chef and Owner, Garces Group

The findings in this report are based upon spending information collected from 345 arts and cultural organizations and 2,039 audience surveys in Southeastern Pennsylvania. This effort was part of the Cultural Alliance’s participation, with 181 other communities, in Americans for the Arts’ national Arts and Economic Prosperity IV study. The Cultural Alliance is the local partner for the Southeastern Pennsylvania and City of Philadelphia editions, which provide the basis for this report.

Arts and culture is important to the residents of Southeastern Pennsylvania for many reasons — it enhances education, draws communities together, and makes life more fun. In addition, arts and culture positively impacts the economy of the region in significant ways. This economic impact is explored in detail in this report.

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Arts + Cultural Organizations and Their Audiences

**AN ECONOMIC ENGINE FOR THE PHILADELPHIA REGION**

**TOTAL ECONOMIC IMPACT**

**$3.3 BILLION**

Direct expenditures of $1.4 billion trigger indirect spending of $1.9 billion. This total economic impact of $3.3 billion generates jobs, household income and tax revenue.

**DIRECT EXPENDITURES**

- **$1.4 BILLION**
  - ORGANIZATIONS: $875 million
  - AUDIENCES: $521 million

**INDIRECT EXPENDITURES**

- **$1.9 BILLION**
  - ORGANIZATIONS: $1.208 million
  - AUDIENCES: $655 million

**TOTAL ECONOMIC IMPACT**

$1.4 BILLION + $1.9 BILLION = $3.3 BILLION

**FULL-TIME EQUIVALENT JOBS**

44,000

- ARTS + CULTURE: 7,600
- OTHER INDUSTRIES: 36,100

**RESIDENT HOUSEHOLD INCOME**

$1.04 BILLION

**TAX REVENUE**

$169 MILLION

- STATE: $95 million
- LOCAL: $74 million

**DIRECT EXPENDITURES**

The first round of spending by organizations and audiences.

**EXAMPLE:** An organization creates jobs through its expenditures in the form of paychecks to its own employees.

**INDIRECT EXPENDITURES**

Economic activity generated as cultural dollars make their way through the region’s economy.

**EXAMPLE:** A restaurant owner hires a contractor to make repairs, with money made from cultural attendees.
**ORGANIZATIONAL SPENDING**

Arts and culture has a substantial impact on Philadelphia's regional economy. The 345 nonprofit arts and cultural organizations in this report pay salaries, buy or rent property, purchase office supplies, hire contractors and pay for a myriad of professional services.

For example, cultural organizations spend $34 million to put on productions and exhibits, $23 million for repairs and maintenance and $24 million to market their events and shows. This money is directly injected into the larger economy and is crucial to local workers and businesses.

**$875 MILLION FROM DIRECT EXPENDITURES**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$290.9M</td>
</tr>
<tr>
<td>Professional Services</td>
<td>$89.5M</td>
</tr>
<tr>
<td>Benefits</td>
<td>$68.5M</td>
</tr>
<tr>
<td>Communications</td>
<td>$61.2M</td>
</tr>
<tr>
<td>Artistic/Programmatic Services</td>
<td>$97.5M</td>
</tr>
<tr>
<td>Physical Plant</td>
<td>$266.8M</td>
</tr>
</tbody>
</table>

**$521 MILLION FROM DIRECT EVENT-RELATED EXPENDITURES**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals Before/After Event</td>
<td>$237.8M</td>
</tr>
<tr>
<td>Overnight Lodging</td>
<td>$84.3M</td>
</tr>
<tr>
<td>Ground Transportation</td>
<td>$65.7M</td>
</tr>
<tr>
<td>Refreshments/Snacks During Event</td>
<td>$53.5M</td>
</tr>
<tr>
<td>Souvenirs + Gifts</td>
<td>$46.3M</td>
</tr>
<tr>
<td>Clothing + Accessories</td>
<td>$16.2M</td>
</tr>
<tr>
<td>Other</td>
<td>$13.4M</td>
</tr>
<tr>
<td>Event-Related Childcare</td>
<td>$4.0M</td>
</tr>
</tbody>
</table>

**AUDIENCE SPENDING**

Above and beyond the cost of a ticket, cultural attendees spend an average of $30 per person, per event. A portion of this money is spent on concessions and souvenirs, but most is spent outside cultural venues.

The crowds that stream in and out of theaters, historic sites, performance venues and museums fill our cafes and restaurants. They generate an intricate web of ancillary spending that transforms neighborhoods, revitalizes Main Streets and helps to create entirely new retail corridors.
FOLLOW THE MONEY

as these three typical groups of attendees add their cultural dollars to our region’s economy. You can see how even just a portion of their spending can ripple through the economy, ringing cash registers far from the original point of purchase.

The Feldmans (OVERNIGHT VISITORS)
The Feldmans are in town for a weekend away, which includes dinner at a restaurant, a show at the theater and cocktails at a Center City bar before heading back to the HOTEL for the evening.

The Kims (DAY-TRIPPERS)
The Kims hop on the trolley to take 4-year old Carolina and 10-year old Damon on their annual spring trip to the zoo. To remember the occasion, the Kims buy t-shirts of the children’s favorite animals as SOUVENIRS.

Rachel + Malik (RESIDENTS)
This weekend is First Friday, so Rachel and Malik get a babysitter and plan for a night attending art openings around the Old City followed by dinner and drinks at a new RESTAURANT.

AUDIENCE SPENDING BY ATTENDEE TYPE

OVERNIGHT VISITORS
$143.0M

DAY-TRIPPERS
$85.8M

RESIDENTS
$292.3M

$199.44
AVERAGE COST OF HOTEL FOR OVERNIGHT VISITORS PER COUPLE

$16.26
AVERAGE COST OF SOUVENIRS FOR DAY-TRIPPERS PER PERSON

$50.40
AVERAGE COST OF A MEAL FOR TWO RESIDENTS

$143.0M
DAY-TRIPPERS

$85.8M
RESIDENTS

$292.3M
OVERNIGHT VISITORS

HOTEL

CLOTHES

LINEN SERVICE

DELIVERY PERSON

PRODUCT SUPPLIER

CLEANERS

HOUSE-KEEPER

WAREHOUSE

PRODUCT SUPPLIER

CLERK

GRAPHIC DESIGNER

SALES ASSISTANT

FACTORY WORKER

WAREHOUSE

PRODUCT SUPPLIER

PURCHASING AGENT

SEAFOOD SUPPLIER

FISH MONGER

FITTED FARMER

SEED SUPPLIER

RESTAURANT

WAITER

SEAFOOD SUPPLIER

Purchasing agent

Factory worker

Sales assistant

Warehouse

Product supplier

Graphic designer

Clerk

Delivery person

House-keeper

Linen service

Cleaners

Restaurant

Hotel

Average cost of a meal for two residents

Average cost of souvenirs for day-trippers per person

Average cost of hotel for overnight visitors per couple

Audience spending by attendee type

Overnight visitors

Day-trippers

Residents
EMPLOYMENT IMPACT

Arts and culture benefits workers and businesses in every industry and every community. These are jobs that provide paychecks not just to cultural staffers, but also to independent artists, designers and musicians; marketers, accountants and consultants; construction workers and contractors; and chefs, bartenders and hotel managers.

44,000 FULL-TIME EQUIVALENT JOBS

WHAT IS A FULL-TIME EQUIVALENT JOB?

Jobs in this report are calculated as FTE, or Full-Time Equivalent. One FTE job is generally equal to a 40-hour work week for one employee, or two half-time jobs, or four quarter-time jobs.

In arts and culture as in many industries, not all jobs are full-time. A small museum may employ an accountant part-time, or an actor may work in three shows for three theaters over the course of the year. For details about part-time employment in arts and culture, see the Cultural Alliance’s 2011 Portfolio report.

4 OUT OF 5 jobs generated by arts and culture are in other industries.

JOBS GENERATED

<table>
<thead>
<tr>
<th>ORGANIZATIONS’ SPENDING</th>
<th>DIRECT</th>
<th>INDIRECT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,200</td>
<td>20,100</td>
<td>30,300</td>
<td></td>
</tr>
<tr>
<td>AUDIENCES’ SPENDING</td>
<td>9,100</td>
<td>4,300</td>
<td>13,400</td>
</tr>
<tr>
<td>TOTAL SPENDING</td>
<td>19,300</td>
<td>24,400</td>
<td>43,700</td>
</tr>
</tbody>
</table>

BUSINESS IMPACT

Arts and cultural organizations are important regional or neighborhood anchors that hire locally and support surrounding businesses. The economic model for this report allows us to track the ultimate destination of expenditures made by arts and cultural organizations and audiences. The chart below shows the industries in the region that benefit from direct and indirect expenditures and to what degree.

<table>
<thead>
<tr>
<th>INDUSTRIAL ACTIVITY</th>
<th>IN SOUTHEASTERN PA</th>
<th>from Direct &amp; Indirect Expenditures by Arts + Cultural Organizations and Their Audiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINANCE, INSURANCE + REAL ESTATE</td>
<td>$267.2M</td>
<td></td>
</tr>
<tr>
<td>ACCOMMODATION + FOOD SERVICES</td>
<td>$282.4M</td>
<td></td>
</tr>
<tr>
<td>MANAGEMENT + BUSINESS SUPPORT</td>
<td>$273.6M</td>
<td></td>
</tr>
<tr>
<td>MANUFACTURED PRODUCTS</td>
<td>$269.3M</td>
<td></td>
</tr>
<tr>
<td>ENTERTAINMENT + RECREATION</td>
<td>$137.9M</td>
<td></td>
</tr>
<tr>
<td>EDUCATIONAL + HEALTH SERVICES</td>
<td>$136.9M</td>
<td></td>
</tr>
<tr>
<td>RETAIL TRADE</td>
<td>$102.6M</td>
<td></td>
</tr>
<tr>
<td>PUBLISHING + INFORMATION SERVICES</td>
<td>$69.7M</td>
<td></td>
</tr>
<tr>
<td>WHOLESALE TRADE</td>
<td>$62.5M</td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL, SCIENTIFIC + TECH SERVICES</td>
<td>$59.0M</td>
<td></td>
</tr>
<tr>
<td>OTHER SERVICES (EXCEPT GOVERNMENT)</td>
<td>$57.6M</td>
<td></td>
</tr>
<tr>
<td>TRANSPORTATION + WAREHOUSING</td>
<td>$53.2M</td>
<td></td>
</tr>
<tr>
<td>FOOD + FOOD PRODUCTS</td>
<td>$43.6M</td>
<td></td>
</tr>
<tr>
<td>UTILITIES + CONSTRUCTION</td>
<td>$42.4M</td>
<td></td>
</tr>
<tr>
<td>EQUIPMENT RENTAL + LEASING</td>
<td>$16.7M</td>
<td></td>
</tr>
<tr>
<td>AGRICULTURE</td>
<td>$3.2M</td>
<td></td>
</tr>
<tr>
<td>MINING</td>
<td>$2.8M</td>
<td></td>
</tr>
<tr>
<td>GOVERNMENT</td>
<td>$0.3M</td>
<td></td>
</tr>
</tbody>
</table>
The jobs created by arts and culture return $1.04 billion back to our communities as household income. This is money in the pockets and checkbooks of our region’s residents that is used to buy groceries, pay rent and utilities, and start new businesses.

WHAT IS HOUSEHOLD INCOME?
Most people receive their income as salaries, but Household Income also includes other funds, such as business profits, investment dividends and fees.
WHAT CAN $1.04 BILLION BUY FOR FAMILIES IN THE REGION?

$1.04 billion sounds like a lot of money, and it is! Let’s see what local families that work in industries connected with arts and culture in our region can purchase with this income.¹

1 YEAR’S WORTH OF:

- **GAS FOR 577,000 FAMILIES**
- **CLOTHING FOR 572,000 FAMILIES**
- **GROCERIES FOR 281,000 FAMILIES**
- **HOUSE PAYMENTS FOR 127,000 FAMILIES**

**OR**

129,966,625 CHEESESTEAKS

(Regul ar steak, American, provolone or whiz + onions)²

That’s 32 1/3 cheesesteaks for each resident of Southeastern PA!

¹Based on the average price for regular steak with cheese and onions at four popular cheesesteak venues

²Based on the average price for regular steak with cheese and onions at four popular cheesesteak venues
## DISCIPLINES

Organizations in Southeastern Pennsylvania offer a vast range of arts and cultural offerings. We group organizations into 11 Disciplines and 4 broader Organization Types.

Calculate your cultural organization’s economic impact at philaculture.org/impact

<table>
<thead>
<tr>
<th>DISCIPLINE</th>
<th># of Organizations in Study</th>
<th>Total Direct Expenditures</th>
<th>Full-time Equivalent Jobs Generated</th>
<th>Total Tax Revenue Generated (local + state)</th>
<th>Total Economic Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDIA ARTS</td>
<td>20</td>
<td>$69.2M</td>
<td>2,200</td>
<td>$8.4M</td>
<td>$163.4M</td>
</tr>
<tr>
<td>MUSEUMS, GALLERIES + VISUAL ARTS</td>
<td>34</td>
<td>$255.8M</td>
<td>8,000</td>
<td>$31.0M</td>
<td>$604.1M</td>
</tr>
<tr>
<td>SCIENCE + NATURE</td>
<td>10</td>
<td>$278.4M</td>
<td>8,700</td>
<td>$33.8M</td>
<td>$658.1M</td>
</tr>
<tr>
<td>HISTORY</td>
<td>46</td>
<td>$257.8M</td>
<td>7,300</td>
<td>$32.5M</td>
<td>$616.0M</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td><strong>110</strong></td>
<td><strong>$861.1M</strong></td>
<td><strong>26,200</strong></td>
<td><strong>$105.6M</strong></td>
<td><strong>$2.0B</strong></td>
</tr>
<tr>
<td>DANCE</td>
<td>45</td>
<td>$26.1M</td>
<td>800</td>
<td>$3.1M</td>
<td>$61.5M</td>
</tr>
<tr>
<td>THEATER</td>
<td>41</td>
<td>$75.1M</td>
<td>2,400</td>
<td>$9.1M</td>
<td>$177.4M</td>
</tr>
<tr>
<td>MUSIC</td>
<td>58</td>
<td>$103.0M</td>
<td>3,300</td>
<td>$12.3M</td>
<td>$242.2M</td>
</tr>
<tr>
<td>OTHER PERFORMING ARTS</td>
<td>14</td>
<td>$82.5M</td>
<td>2,700</td>
<td>$9.8M</td>
<td>$194.0M</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td><strong>158</strong></td>
<td><strong>$286.8M</strong></td>
<td><strong>9,200</strong></td>
<td><strong>$34.4M</strong></td>
<td><strong>$675.1M</strong></td>
</tr>
<tr>
<td>COMMUNITY ARTS + CULTURE</td>
<td>35</td>
<td>$33.1M</td>
<td>1,000</td>
<td>$4.1M</td>
<td>$78.3M</td>
</tr>
<tr>
<td>EDUCATION + INSTRUCTION</td>
<td>31</td>
<td>$199.8M</td>
<td>6,800</td>
<td>$23.3M</td>
<td>$466.5M</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td><strong>66</strong></td>
<td><strong>$232.8M</strong></td>
<td><strong>7,800</strong></td>
<td><strong>$27.3M</strong></td>
<td><strong>$544.8M</strong></td>
</tr>
<tr>
<td>COUNCILS, SERVICES + SUPPORT</td>
<td>11</td>
<td>$14.9M</td>
<td>500</td>
<td>$1.8M</td>
<td>$16.7M</td>
</tr>
</tbody>
</table>

**TOTAL ECONOMIC IMPACT**

$61.5M + $177.4M + $242.2M + $194.0M + $78.3M + $466.5M + $544.8M = $2.0B

Additional economic impacts include:

- $604.1M from museums, visual arts, and historic and scientific disciplines
- $658.1M from science and nature disciplines
- $616.0M from history disciplines

**TOTAL DIRECT EXPENDITURES:** $861.1M

**FULL-TIME EQUIVALENT JOBS GENERATED:** 26,200

**TOTAL TAX REVENUE GENERATED (LOCAL + STATE):** $2.0B

**TOTAL ECONOMIC IMPACT:** $2.0B
REGIONAL COMPARISONS

When it comes to job creation and economic vitality, Southeastern Pennsylvania’s cultural sector ranks among the top regions in America.

ECONOMIC IMPACT OF ARTS + CULTURE IN REGIONS

WITh POPULATIONS OVER 1 MILLION, BY PER-CAPITA EXPENDITURES

<table>
<thead>
<tr>
<th>Regions Over 1 Million</th>
<th>Per Capita Direct Expenditures</th>
<th>Jobs Generated Per 1,000 Residents</th>
<th>Total FTE Jobs Generated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Washington, DC Region, DC, MD, VA</td>
<td>$334</td>
<td>7.6</td>
<td>29,000</td>
</tr>
<tr>
<td>Southeastern Pennsylvania</td>
<td>$348</td>
<td>10.9</td>
<td>43,700</td>
</tr>
<tr>
<td>Greater Hartford Area, CT</td>
<td>$224</td>
<td>6.7</td>
<td>6,900</td>
</tr>
<tr>
<td>Greater Houston Area, TX</td>
<td>$174</td>
<td>5.2</td>
<td>20,100</td>
</tr>
<tr>
<td>Metropolitan Kansas City Area, MO, KS</td>
<td>$159</td>
<td>4.8</td>
<td>8,300</td>
</tr>
<tr>
<td>Greater Portland Area, OR</td>
<td>$154</td>
<td>5.2</td>
<td>8,500</td>
</tr>
<tr>
<td>Greater Milwaukee Area, WI</td>
<td>$148</td>
<td>5.4</td>
<td>10,900</td>
</tr>
<tr>
<td>Southeastern Michigan Region (incl. Detroit), MI</td>
<td>$39</td>
<td>3.9</td>
<td>18,700</td>
</tr>
<tr>
<td>North Texas Region (incl. Dallas), TX</td>
<td>$73</td>
<td>2.6</td>
<td>15,200</td>
</tr>
<tr>
<td>Central Florida Region (incl. Orlando), FL</td>
<td>$71</td>
<td>2.4</td>
<td>9,000</td>
</tr>
</tbody>
</table>

When it comes to job creation and economic vitality, Southeastern Pennsylvania’s cultural sector ranks among the top regions in America.

1ST AMONG REGIONS IN JOBS CREATED

<table>
<thead>
<tr>
<th>Region</th>
<th>Jobs Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southeastern PA</td>
<td>43,700</td>
</tr>
<tr>
<td>Greater Houston, TX</td>
<td>29,100</td>
</tr>
<tr>
<td>Greater Washington DC</td>
<td>28,000</td>
</tr>
<tr>
<td>Southeastern MI (+Detroit)</td>
<td>18,700</td>
</tr>
<tr>
<td>North TX (+Dallas)</td>
<td>15,200</td>
</tr>
<tr>
<td>Greater Milwaukee, WI</td>
<td>10,900</td>
</tr>
<tr>
<td>Central FL (+Orlando)</td>
<td>9,000</td>
</tr>
<tr>
<td>Greater Portland, OR</td>
<td>8,500</td>
</tr>
<tr>
<td>Metro Kansas City, MO, KS</td>
<td>8,300</td>
</tr>
<tr>
<td>Greater Hartford, CT</td>
<td>6,900</td>
</tr>
</tbody>
</table>

2ND AMONG REGIONS IN DIRECT EXPENDITURES

<table>
<thead>
<tr>
<th>Region</th>
<th>Direct Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Washington, DC</td>
<td>$1.5B</td>
</tr>
<tr>
<td>Southeastern PA</td>
<td>$1.4B</td>
</tr>
<tr>
<td>Greater Houston, TX</td>
<td>$978M</td>
</tr>
<tr>
<td>Southeastern MI (+Detroit)</td>
<td>$477M</td>
</tr>
<tr>
<td>North TX (+Dallas)</td>
<td>$428M</td>
</tr>
<tr>
<td>Greater Milwaukee, WI</td>
<td>$300M</td>
</tr>
<tr>
<td>Metro Kansas City, MO, KS</td>
<td>$273M</td>
</tr>
<tr>
<td>Central FL (+Orlando)</td>
<td>$266M</td>
</tr>
<tr>
<td>Greater Portland, OR</td>
<td>$254M</td>
</tr>
<tr>
<td>Greater Hartford, CT</td>
<td>$230M</td>
</tr>
</tbody>
</table>
CITY COMPARISONS

We can also see how Philadelphia compares to its peer cities. By almost any measure, Philadelphia ranks highly when it comes to arts and culture’s contribution to the economy.

ECONOMIC IMPACT OF ARTS + CULTURE IN MAJOR CITIES

<table>
<thead>
<tr>
<th>CITIES</th>
<th>PER-CAPITA DIRECT EXPENDITURES</th>
<th>JOBS GENERATED PER 1,000 RESIDENTS</th>
<th>TOTAL FTE JOBS GENERATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>WASHINGTON, DC</td>
<td>$1,806</td>
<td>24.3</td>
<td>14,600</td>
</tr>
<tr>
<td>SAN FRANCISCO, CA</td>
<td>$871</td>
<td>24.2</td>
<td>19,700</td>
</tr>
<tr>
<td>PHILADELPHIA, PA</td>
<td>$805</td>
<td>19.3</td>
<td>29,000</td>
</tr>
<tr>
<td>CHICAGO, IL</td>
<td>$770</td>
<td>21.2</td>
<td>60,500</td>
</tr>
<tr>
<td>SEATTLE, WA</td>
<td>$746</td>
<td>18.1</td>
<td>10,800</td>
</tr>
<tr>
<td>BALTIMORE, MD</td>
<td>$609</td>
<td>14.9</td>
<td>5,400</td>
</tr>
<tr>
<td>PITTSBURGH, PA</td>
<td>$563</td>
<td>16.9</td>
<td>20,500</td>
</tr>
<tr>
<td>ATLANTA, GA</td>
<td>$558</td>
<td>17.5</td>
<td>9,400</td>
</tr>
<tr>
<td>SAN DIEGO, CA</td>
<td>$520</td>
<td>15.9</td>
<td>20,400</td>
</tr>
<tr>
<td>INDIANAPOLIS, IN</td>
<td>$475</td>
<td>16.2</td>
<td>13,100</td>
</tr>
<tr>
<td>ST. LOUIS, MO</td>
<td>$432</td>
<td>14.1</td>
<td>19,000</td>
</tr>
<tr>
<td>MIAMI, FL</td>
<td>$520</td>
<td>11.9</td>
<td>29,000</td>
</tr>
<tr>
<td>LOS ANGELES, CA</td>
<td>$361</td>
<td>9.7</td>
<td>37,400</td>
</tr>
<tr>
<td>AUSTIN, TX</td>
<td>$312</td>
<td>9.7</td>
<td>7,500</td>
</tr>
<tr>
<td>DALLAS, TX</td>
<td>$252</td>
<td>8.8</td>
<td>11,200</td>
</tr>
<tr>
<td>CHARLOTTE, NC</td>
<td>$222</td>
<td>6.8</td>
<td>6,200</td>
</tr>
<tr>
<td>HOUSTON, TX</td>
<td>$213</td>
<td>4.8</td>
<td>19,700</td>
</tr>
<tr>
<td>COLUMBUS, OH</td>
<td>$197</td>
<td>7.4</td>
<td>8,500</td>
</tr>
<tr>
<td>PHOENIX, AZ</td>
<td>$192</td>
<td>6.1</td>
<td>6,600</td>
</tr>
<tr>
<td>RALEIGH, NC</td>
<td>$185</td>
<td>7.4</td>
<td>8,600</td>
</tr>
<tr>
<td>ALBUQUERQUE, NM</td>
<td>$176</td>
<td>7.0</td>
<td>3,700</td>
</tr>
<tr>
<td>MEMPHIS, TN</td>
<td>$136</td>
<td>4.2</td>
<td>3,900</td>
</tr>
<tr>
<td>SAN JOSE, CA</td>
<td>$129</td>
<td>3.0</td>
<td>2,800</td>
</tr>
<tr>
<td>SAN ANTONIO, TX</td>
<td>$100</td>
<td>3.8</td>
<td>5,600</td>
</tr>
<tr>
<td>TUCSON, AZ</td>
<td>$86</td>
<td>2.6</td>
<td>2,600</td>
</tr>
<tr>
<td>SACRAMENTO, CA</td>
<td>$80</td>
<td>3.2</td>
<td>4,400</td>
</tr>
<tr>
<td>FORT WORTH, TX</td>
<td>$47</td>
<td>1.7</td>
<td>3,000</td>
</tr>
<tr>
<td>RIVERSIDE, CA</td>
<td>$41</td>
<td>1.2</td>
<td>2,500</td>
</tr>
<tr>
<td>LAS VEGAS, NV</td>
<td>$30</td>
<td>0.8</td>
<td>1,500</td>
</tr>
</tbody>
</table>

* Includes surrounding county
ABOUT OUR AUDIENCES

Our audience survey asked 2,000+ attendees a number of questions about themselves — where they were from, why they visited the region and whether they vote.

29% of attendees come from outside the region.

Reason for visiting Greater Philadelphia?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To attend this arts/cultural event</td>
<td>44%</td>
</tr>
<tr>
<td>On vacation/holiday</td>
<td>40%</td>
</tr>
<tr>
<td>Visit friends and/or relatives</td>
<td>6%</td>
</tr>
<tr>
<td>Business or combination of business &amp; leisure</td>
<td>4%</td>
</tr>
<tr>
<td>Other/miscellaneous</td>
<td>6%</td>
</tr>
</tbody>
</table>

70% of visitors would have stayed home or gone elsewhere were it not for this event.

Spending by audience members

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average amount spent by residents</td>
<td>$24 per person</td>
</tr>
<tr>
<td>Average amount spent by visitors</td>
<td>$45 per person</td>
</tr>
</tbody>
</table>

Do you vote?

89% of attendees

- Yes, at least once a week: 89%
- Yes, at least once a month: 48%
- Yes, at least once a year: 36%
- Yes, never/almost never: 4%

75% of attendees

- Yes, at least once a week: 12%
- Yes, at least once a month: 48%
- Yes, at least once a year: 36%
- Yes, never/almost never: 4%

Attendees by size of group

- 14% for size of group
- 45% for size of group
- 14% for size of group
- 15% for size of group
- 12% for size of group

On average, how frequently do you attend cultural events?

- At least once a week: 12%
- At least once a month: 48%
- At least once a year: 36%
- Never/almost never: 4%
IN CONCLUSION

1. ARTS + CULTURE MEANS JOBS.

Through both direct and indirect spending, Greater Philadelphia’s arts and cultural organizations and our audiences have a total economic impact of $3.3 billion, providing residents with 44,000 jobs. This economic activity also helps generate more than $169 million in tax revenues for state and local coffers — money that is leveraged to pay for other vital services, including teachers, police, firefighters and transportation.

2. PHILADELPHIA IS OUTPERFORMING THE COUNTRY AS A WHOLE.

Our region’s cultural sector is ranked first for job creation, providing 10.9 jobs per thousand residents — nearly double the national average. Southeastern Pennsylvania ranks second for per-capita cultural spending, and we far exceed the national average for percentage of attendees who are visitors (29% to 21%). Arts and culture is a unique competitive advantage for this region — one that can be leveraged by civic, business and policy leaders to ensure greater prosperity and economic growth for our region’s citizens.

3. GREATER PHILADELPHIA’S BUSINESS COMMUNITY THRIVES WITH A STRONG AND VIBRANT CULTURAL SECTOR.

Cultural organizations buy and hire locally, and audiences spend their money at businesses close to those venues, events and attractions. These cultural dollars then ripple through our economy, benefiting a diversity of industries throughout the entire region. Beyond the $1.4 billion in direct spending by cultural organizations and their audiences, another $1.9 billion of indirect spending is generated. This spending benefits an array of related sectors including Manufacturing, Finance, Insurance, Real Estate, Hospitality and Retail.

4. ARTS + CULTURE REVITALIZES NEIGHBORHOODS AND MAKES OUR COMMUNITIES STRONGER.

Throughout our region — in technology corridors, county seats, inner-ring suburbs and urban neighborhoods — culture provides the civic glue. Art galleries, cultural organizations and community partners are helping to create unique and eclectic retail and food hubs, revitalizing Main Streets and providing healthy outlets for our youth.

5. CULTURAL DOLLARS SUPPORT FAMILIES AND INDIVIDUALS THROUGHOUT THE ENTIRE REGION.

Spending by organizations and audiences travels far from the original point of purchase. Its impact is diverse and its benefits widely distributed. Jobs are created across nearly every industry, with over $1 billion in household income generated for our region’s residents. This money buys groceries, pays rent and utilities, pays school tuition and starts new businesses.

Arts and culture is a vital regional asset that touches every life in Greater Philadelphia. Together we need to ensure its vibrancy, not just as an industry, but as a key to growing our economy, educational outcomes, sense of place and quality of life.
and economic theory in an area of study called econometrics. The analysis traces how many times a dollar is re-spent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for this study because it can be customized specifically to each community, region, or state. A Granger–Causes output model was customized for both Philadelphia and Southeastern Pennsylvania based on the local dollar flow in S33 finely detailed industries within these areas. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, Regional Economic Information System, and Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and culture organizations and their audiences. The basic purchase patterns for S33 local industries were derived from a similar table for the U.S. economy for 2007 (the latest detailed data available from the U.S. Department of Commerce). The table is first reduced to reflect the unique size and industry mix of the local economy, based on data from County Business Patterns and the Regional Economic Information System of the U.S. Department of Commerce. It is then adjusted so that only transactions with local businesses and transactions at the inter-industry part of the table. This technique maximizes supply and demand and estimates the additional imports or exports required to make total supply equal total demand. The resulting table shows the number of direct and indirect purchases required for each industry and organization. The table is next aggregated to reflect the general activities of 38 industries plus local households, creating a total of 39 categories.

ADDITIONAL NOTES

For the first time, surveying was undertaken in full 2011 Greater Philadelphia Cultural Alliance and other organizations known to the Cultural Alliance (including those who did not agree to complete the data through the Pennsylvania Cultural Data Project (PCDP); please see Partner Organizations for details). An extensive process of survey organization recruitment was undertaken in fall 2010. Great data was collected through the Pennsylvania Cultural Data Project (PCDP). All surveys were anonymous. Organizations were placed into six cohorts based on attendance and location. Audience surveys were collected in proportion to each cohort’s share of overall audience figures for the sector. To prevent surveying bias, every three months organizations were anonymized and randomly selected from each cohort for audience surveying. Surveying in 2011 presented a number of challenges worth noting. Overall, surveys for this study more frequently reported audience members declining to take the survey than in the past. This is consistent with reports from other participating communities and, indeed, with survey trends over the last several decades (a 2006 special edition of Public Opinion Quarterly (70-5) addresses the issue of declining survey participation in detail). Overall, this trend is not seen as invalidating survey results. In addition, the weather in summer 2011 presented additional challenges for surveying. July 2011 was the hottest month on record for the region (average daily high: 92 degrees), followed by the wettest month on record in August 2011 (16 rainy days and over 19 inches of rain). For the first time, surveying was canceled due to rain-nosed closures of facilities. (Weather figures: National Weather Service at the Franklin Institute.) It is also believed that tourism and visitation to the region was affected by the Debt Crisis during July and August. During this time, consumer confidence dropped significantly (University of Michigan Consumer Sentiment Index), and the Dow Jones Industrial Average dropped almost 2,000 points (Dow Jones). July and August are normally peak months for tourism for the region. The Greater Philadelphia Tourism Marketing Corporation and other local partners reported that
This report would not have been possible without the 345 organizations that provided their detailed financial and attendance information through the Pennsylvania Cultural Data Project. Our sincere thanks to them. Special thanks to those organizations at whose events the 2,039 audience surveys were conducted.
PARTNER ORGANIZATIONS

AMERICANS FOR THE ARTS
Founded in 1960, Americans for the Arts is the nation’s leading nonprofit organization for advancing the arts and arts education. From offices in Washington, DC and New York City, Americans for the Arts provides a rich array of programs that meet the needs of over 150,000 members and stakeholders. The organization is dedicated to representing and serving local communities and to creating opportunities for every American to participate in and appreciate all forms of the arts.

Americans for the Arts’ mission is to serve, advance and lead the network of organizations and individuals who cultivate, promote, sustain and support the arts in America.

Americans for the Arts is the author of the national study Arts and Economic Prosperity IV. Americans for the Arts coordinated all aspects of the national study, including recruiting the participating communities, commissioning economists to develop the economic models used for data analysis, coordinating data entry, and producing data analysis in Arts and Economic Prosperity IV.

For more information on Americans for the Arts, visit www.artsusa.org.

THE CULTURAL DATA PROJECT
Information on all 345 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 over 14,000 arts and cultural organizations in 12 states and the District of Columbia participating.

In the first quarter of 2015, the Cultural Data Project will become an independent 501(c)(3) organization based in Philadelphia with a national board and governance structure.

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. Now in its seventh year of operations, the Pennsylvania CDP collects information from more than 1,700 organizations located throughout the state. All data submitted by individual organizations is checked for errors in a rigorous process.

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

CULTURAL DATA PROJECT – GOVERNING GROUP
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Theresa Dukhngels
Nancy DeLucia
Tom Kaiden
Michelle Lopez
John McIntney
Michael Norris
Karim Olaechea
Whitney Roxx
Timothy Weeks

AMERICANS FOR THE ARTS
Randy Cohen
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BANK OF AMERICA
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Samuel DiAgostino
Akin Sullivan

DREXEL UNIVERSITY ARTS ADMINISTRATION GRADUATE PROGRAM
Julie Hawkins
Neville Valharia

GHI DESIGN
Cara Cox
Mark Gallini
Andrea Hemmann

GREATER PHILADELPHIA CULTURAL ALLIANCE
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Mark Gallini
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Jenny Henhour
Tom Woodward

HOGAN LOVELLS
American Management Systems

JENNY HENHOUR
Jenny Henhour

KPMG
KPMG

L E J A
L E J A

MOORE COLLEGE OF ART AND DESIGN
Cecilia Fitzgibbon

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PA State Art Council

Pennsylvania Council on the Arts

PENNSTATE UNIVERSITY
PA State Art Council

Philadelphia Cultural Alliance

Greater Pittsburgh Arts Council

The Heinz Endowments

The Pew Charitable Trusts

William Penn Foundation

PROOFREADER
Janine E. Guglielmino

SPECIAL THANKS
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Drexel University Arts Administration Graduate Association
Drexel University Arts Administration Program

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Drexel University Arts Administration Program

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Whitney Roux
Sari Widman
Nicole Wilson

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ABOUT THE ALLIANCE

CULTURAL ALLIANCE RESEARCH

The Cultural Alliance is committed to strengthening the region’s cultural sector through high-quality research. That research has identified major trends affecting the field and demonstrated the impact of the arts on the economy and on cultural participants. Reports like Portfolio, Research Into Action: Pathways to New Opportunities and Arts, Culture & Economic Prosperity have established the Cultural Alliance as the region’s leading source for conducting, interpreting and disseminating meaningful data about arts and culture and its impact on our region’s growth and vibrancy.

Arts, Culture & Economic Prosperity in Greater Philadelphia is the first product from Creating Change, the Cultural Alliance’s new 10-year research initiative. Creating Change is currently funded by the William Penn Foundation and will strengthen Philadelphia’s competitive position by providing cultural organizations with the leading-edge research and tools they need to stay relevant, seize emerging opportunities and adapt to an ever-changing environment. The initiative will also demonstrate the important contributions that arts and cultural organizations make to communities and residents in the region.

RECENT PUBLICATIONS:

Portfolio: 2011 Portfolio First published in 2006, the 2011 Portfolio, the third edition, documents the breadth, diversity and well-being of Southeastern Pennsylvania’s nonprofit cultural resources. The 2011 Portfolio included an in-depth analysis on the effects of the Great Recession on arts and cultural organizations.

Research Into Action: Pathways to New Opportunities (2009)

Research Into Action offers 10 specific insights into how the Philadelphia region’s diverse population engages with the arts. Based on five key research studies conducted by the Alliance, the report also provides strategies for cultural organizations looking to build stronger audience connections.

Cultural Engagement Index (CEI)

Published in 2008 and 2010, the ongoing CEI is an innovative way of measuring the importance and frequency of cultural participation of all residents of the region. By surveying the general population, CEI has uncovered emerging trends in cultural activity that have important implications for both civic leaders and cultural organizations.

Research Briefs

The Alliance publishes short research pieces on current issues on arts and culture for the region, including “Regional Employment in the Cultural Economy” (2010), “Arts Funding by Philadelphia and Peer Cities” (2009), and “Philadelphia-Ellisburgh Arts Voters” (2011).

Design, printing and distribution of Arts, Culture and Economic Prosperity in Greater Philadelphia was generously underwritten by Bank of America. This publication was made possible by the William Penn Foundation and the Dolfinger-McMahon Foundation. It was also supported in part by the Pennsylvania Council on the Arts, a state agency funded by the Commonwealth of Pennsylvania and the National Endowment for the Arts, a federal agency.

Operating support for the Greater Philadelphia Cultural Alliance was provided by the William Penn Foundation; The Pew Charitable Trusts; Pennsylvania Council on the Arts, a state agency funded by the Commonwealth of Pennsylvania and the National Endowment for the Arts, a federal agency; Independence Foundation; Philadelphia Cultural Fund; Barra Foundation; Lincoln Financial Foundation; and the Cultural Alliance’s Board of Directors and individual donors.

For more information on the Cultural Alliance please visit www.philaculture.org
Bank of America is proud to invest in Arts & Culture in Greater Philadelphia.

Like individuals, businesses are members of the community too. The most extraordinary enterprises take this connection to heart, doing what they can to help their neighborhoods grow.

Bank of America is pleased to recognize the Greater Philadelphia Cultural Alliance and its members for their active community involvement and appreciation for their important role in advancing the public good.

Visit us at bankofamerica.com