

Comprehensive Report for Cardinal Stage

O'Neill School of Public and Environmental Affairs Capstone

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ECONOMIC IMPACT REPORT STUDY PREPARED BY:

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Economic Impact

Introduction

Cultural assets, such as the arts, play an essential role in creating and maintaining the global economy. To support the competitiveness in a global knowledge-economy, communities must make available art opportunities to promote creativity and innovation and encourage the formation of paid, skilled jobs, as well as provide new goods and services (Lamore et al., 2013). Art and community creation are likely to have three main economic impacts. A thriving arts industry functions as a direct job creation tool with immediate economic benefits from art organizations and activities, including museums, orchestras, theaters, galleries, and ongoing art education opportunities (Lamore et al., 2013). Art acts as a magnet for other creative businesses. Artistic assets enhance the quality of life that attract and maintain highly-paid, knowledgeable workers, and innovators (Florida, 2002). Finally, an art-rich environment can also stimulate the creative capacities of current and future generations (Pink, 2005). Some research shows the relationship between art and the manual participation of individuals, patents created, and businesses formed (Lamore et al., 2013). In analyzing further, there is a lack of systematic research and clear conclusions regarding the effects of the performing arts sector on local economies. In order to bridge this gap of research in the Bloomington community, we set out to analyze the performing arts sector's economic impact on Monroe County by asking local organizations for their economic data. We also administered surveys in order to analyze performing arts audiences and the additional impact their performing-arts-related spending has on the Monroe County economy.

Background on Cardinal Stage

Cardinal Stage was founded in 2006, filling an essential niche in the Bloomington community and Monroe County. Cardinal Stage began as a small office in the now Social Cantina, located on the downtown Bloomington Square. Randy White, the first theater director, and his wife, Ellen Mackay, took advantage of the opportunity to showcase professional theater productions in the city's theater landscape. Over the past 13 years, Cardinal Stage has proven to be a success and one of Bloomington's premier theater production companies (Brush, 2018).

Cardinal Stage's reputation has gradually increased, affirming both its quantity and quality of performances. Cardinal Stage brings classical and contemporary works to audiences in south-central Indiana, from classics like "A Streetcar Named Desire" and "To Kill a Mockingbird," to new plays like "The Agony and the Ecstasy of Steve Jobs" (Brush, 2018). These performances have the unique flair of Cardinal Stage and have been positively received by the public.

Cardinal Stage also has many activities focusing on community development. The Community Ticket Initiative, established in 2009, is a program that offers free tickets to children and families who cannot afford attending performances. In 2010, the Cardinal for Kids program was launched, a series aimed to engage younger audiences. In 2013, with the cooperation of IU Credit Union, Cardinal Stage organized the IU Credit Union Education Initiative. This program supports Cardinal for Schools, comprised of weekday performances for school groups and master classes for young actors. All these programs have received the attention of donors and individuals in the community, contributing to the development of both the performing arts and the Bloomington community (Brush, 2018).

In 2016, Cardinal Stage shifted its focus after the hiring of a new artistic director, Kate Galvin. In 2017, a new strategic plan was created (Cardinal Stage, 2018). With the principle focus being "World Class Theater, Locally Crafted," Cardinal Stage made a series of goals to enhance its vision for dedication to community development. Eight core values were outlined in the new strategic plan: education, empowerment, engagement, excellence, fun, inclusivity, innovation, and resourcefulness. These values help to define the organization's mission to bring "high-quality professional productions that make the audiences and strengthens the cultural, educational, and economic vibrancy of South Central Indiana" and "as a dynamic professional theater, Cardinal Stage is essential to the region for its creative, inspiring, and affordable programming" (Cardinal Stage, 2018). Six main goals have been proposed to implement this strategy:

- Advance Artistic Excellence
- Inspire Cooperation and Engagement
- Strengthen Staff and Leadership
- Develop Sustainable Resources
- Grow and Engage Audiences
- Enhance Company and Theatrical Facilities (Cardinal Stage, 2018)

To achieve these goals, Cardinal Stage plans to develop its financial strength, artistic capacity, and community support. The organization has outlined steps and timelines for each goal, with close supervision and accountability from the Board of Director's Executive Committee. Studying the economic impact of performing arts on the community is a crucial step in realizing these strategic goals.

National Trends

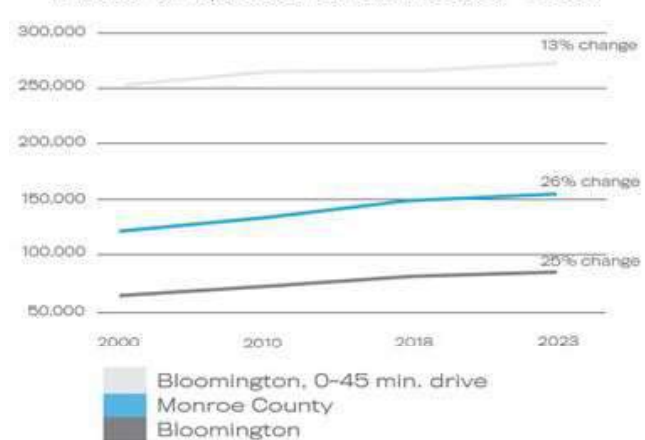
The National Endowment for the Arts (NEA) was created by Congress in 1965 to support the arts and America's rich cultural heritage by promoting equal access to the arts in communities across America. The organization supports and funds the arts through partnerships at the local, state, and federal level. In 2011, the NEA conducted economic impact studies of the arts, analyzing GDP and monetary value. When completing national analysis, the NEA looks at the arts as a group, which combines performing arts, sports, and museum industries. While this data over-represents the focus of this paper, it is important to realize international trends to understand the value of culture in the US economy. As a group, the arts contributed \$70.9 billion

in 2009, with 57 percent being attributed to job creation and 34 percent attributed to capital (Arts and GDP, 2011). Trends in labor share show an increase, likely due to fewer self-employed artists and more organizations supporting them; however, this data could also be skewed by the increase in compensation to professional athletes being considered in the analysis.

Looking just at performing arts industries, the US economy supports “nearly 8,840 organizations with a total of 127,648 paid workers...[generating] nearly \$13.6 billion in annual revenue” (Time and Money, 2011, p.2). The NEA estimates the nonprofit sector to contribute 45 percent of organizations and 58 percent of workers with theatre and opera contributing over half the total revenue and expenses for all nonprofits and over half of all paid employees. This analysis shows 41 percent of revenues coming from individual donations and 35 percent from admission fees, concluding that Americans spend \$14.5 billion on performing arts admissions, which is higher than movie-box tickets, but still lower than sports admissions (Time and Money, 2011). These trends might be useful when looking at Bloomington data and analysis of arts organizations when comparing spending patterns - whether or not Cardinal Stage and other organizations are receiving similar donations and admission fees to support their operations. Further, the NEA found that Indiana was among one of the top five states with greatest “job creation resulting from additional production by the performing arts industry” (Arts and GDP, 2011).

A 2010 national economic impact analysis conducted by Americans for the arts highlighted the significant economic contributions that the arts community has on household income, full-time equivalent jobs as well as local and state revenue and federal income tax revenue (Arts and GDP, 2011). The study comprised of 182 study regions, in all 50 states, found \$132.2 billion of economic activity, \$61 billion by arts and culture organizations and \$74 billion event-related expenditures. The arts community created 4.1 million jobs nationwide while contributing \$22.3 billion in local, state, and federal taxes. The average per audience expenditures was \$24.60 per event, not including the cost of admission, with 53 percent of the expense being meals, snacks, and refreshments.

Exhibit 1. Population Growth, 2000 - 2023



Demographic Profile of Monroe County

To better understand the economic impact and opportunities for the performing arts industry in Monroe County, it is critical to understand the current and projected growth of the area. Using available data, this section highlights key information on population growth, population by age, median household income, average disposable income by age, and entertainment/recreation expenditures. Data on the City of Bloomington, 45-minute drive time from Bloomington, and

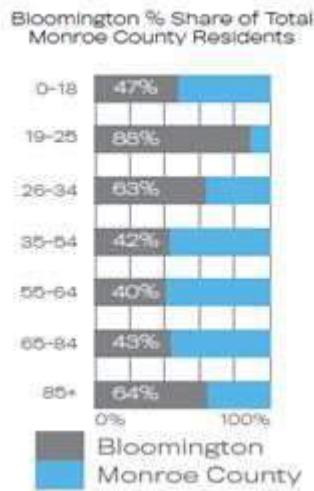
Monroe County is compared to better understand the differences and opportunities (Data source: Esri Business Analyst and Census)

Table A.1 shows the population growth and annualized growth rate per year. Comparing the data, Monroe County and Bloomington have been growing at a similar pace; however, the growth rate is expected to increase in the next five years.

Table A.1: Population Annual Growth Rate between 2000 - 2023

	2000-2010	2010-2018	2018-2023
Bloomington, Indiana (0 - 45 minutes)	0.7%	0.4%	0.6%
Monroe County, IN	1.4%	0.7%	0.8%
Bloomington City, IN	1.4%	0.7%	0.8%

Exhibit 2. Population by Age, 2018



In exhibit A.2, the population breakdown by age groups reveals over half of Bloomington’s population under 25 years old. Monroe County has a more even breakdown with a higher share of population above 35 years old. As Cardinal Stage seeks to attract new patrons, it is helpful to understand these demographics in order to obtain future members.

To understand the best ticket pricing strategies, it is critical to understand the local area incomes (see Exhibit A.3). Monroe County has a \$43,108 median household income which is much higher than Bloomington (\$31,255), but slightly lower than Marion County (\$44,869). Over the next five years, both the city and county household incomes are expected to grow by 3.7%.

Exhibit 3. Median Household Income



However, when comparing the share of households by income bracket (Exhibit A.4), a larger share of households in Bloomington make under \$35,000, which is most likely due to the large student population. In Monroe County and 45-minute drive time, there’s a larger share of households that make over \$35,000.

Exhibit 4. Household Income % Breakdown, 2018

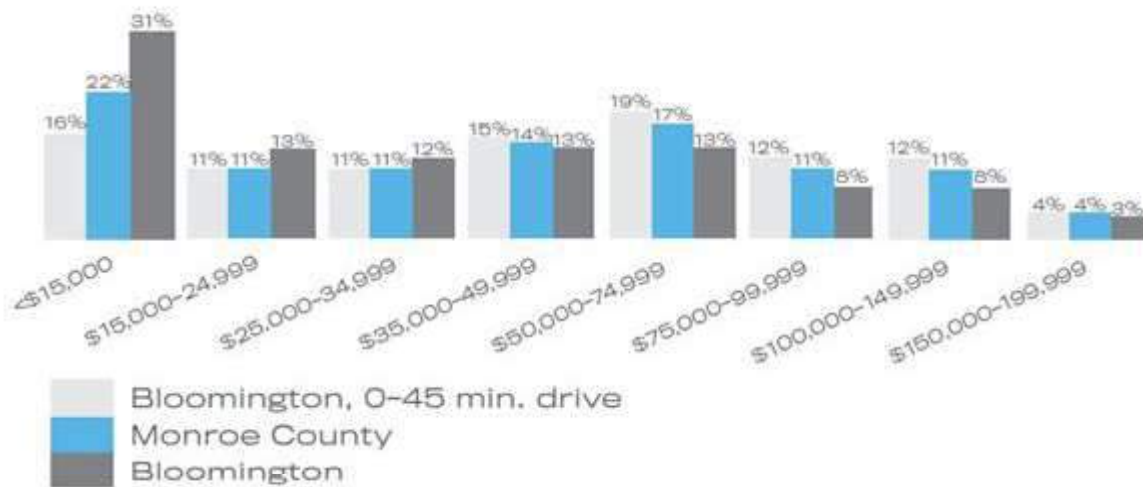
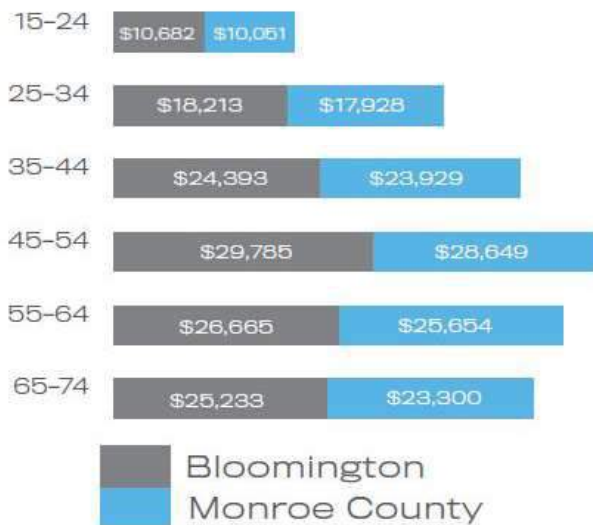


Exhibit 5. Average Disposable Income, 2018



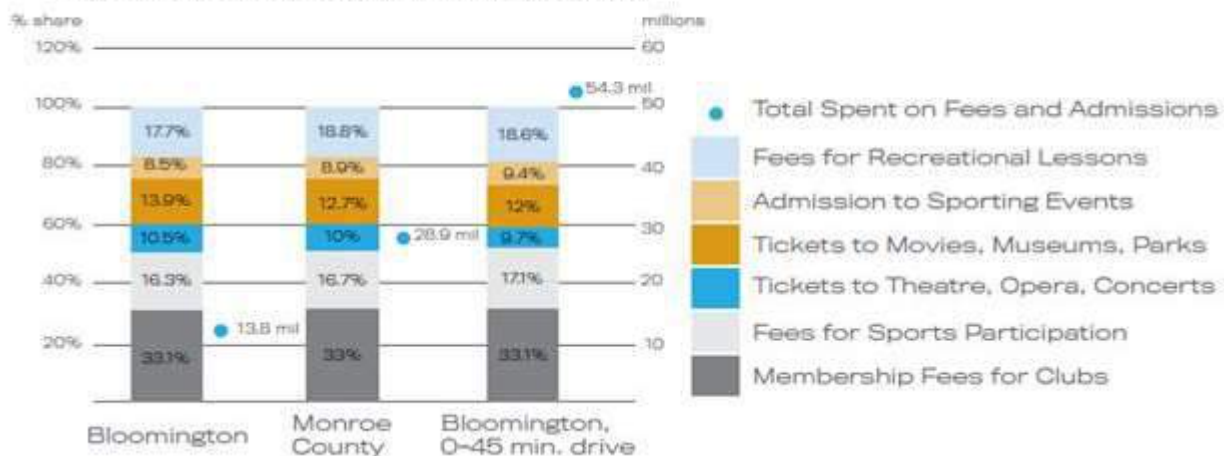
The average disposable income per household is calculated by taking taxes, housing, and transportation costs out of the average household income [1]. This number is the “disposable” or “discretionary” funds that households may use for food, shopping, recreation, etc. In Exhibit A.4., the age group with the highest amount of disposable income in both Bloomington and Monroe County are those ages 55-64 followed by those between ages 35-44 and 55+. The average disposable income provides context on the available amount of money that people in different life stages can use for entertainment. Cardinal Stage can utilize this information to inform price setting for events, membership rates, ticket prices, and discounts.

Table A.2: Entertainment Expenditures for Monroe County, Indiana

	Avg. Amt Spent	Total Spent	% Total
Entertainment & Recreation	\$2,449.69	\$142,721,645	100%
Fees and Admissions	\$496.76	\$28,941,893	20%
Membership Fees for Clubs (2)	\$163.88	\$9,547,643	7%
Fees for Participant Sports, excl. Trips	\$82.69	\$4,817,635	3%
Tickets to Theatre/Operas/Concerts	\$49.71	\$2,896,098	2%
Tickets to Movies/Museums/Parks	\$63.12	\$3,677,151	3%
Admission to Sporting Events, excl. Trips	\$44.37	\$2,584,951	2%
Fees for Recreational Lessons	\$92.28	\$5,376,551	4%
Dating Services	\$0.72	\$41,863	0%

Analyzing expenditures in 2018, Monroe County households spent \$2,896,098 on tickets to a performing arts theatre, opera, or concert. With approximately 58,261 households, this is an average of \$50 per household. Comparing expenses on fees and admissions, households spend more to participate in sports, attend movies/museums/parks, and club memberships.

Exhibit 6. Entertainment & Recreation Spending on Fees & Admissions, 2018



When comparing the percentage breakdown of expenditures in fees and admissions (Exhibit A.6), the Bloomington community spends a larger share on tickets to theatres, operas, concerts, movies, museums, and parks than Monroe County and the surrounding region. However, Monroe County and 45-minute drive time from Bloomington each have a larger spending budget for entertainment fees and admissions. As Cardinal Stage expands its reach to areas outside Bloomington, the data indicates there are many households (within a 45-minute drive) that are looking for entertainment options.

Economic Impact Overview

Methodology Summary

To understand the demographic profile of Monroe County, data was collected from the following sources: Census, Bureau of Labor Statistics, Esri Business Analyst, and Center of Neighborhood Technology.

Population and income data were acquired for Monroe County, Bloomington and 45-minute drive time (from Bloomington) using the American Community Survey (Census) and Esri Business Analyst. Esri Business Analyst has a specific methodology for estimating 2018 and 2023 projections, based on a combination of data sources, trends, and models. The current year data and five-year projections create the demographic baseline and future projections of Cardinal Stage's patrons.

The Center for Neighborhood Technology created the Housing and Transportation Affordability Index to determine the affordability of a place and the cost burden of housing and transportation expenses (H+T). The H+T Index for Monroe County showed that households spend 58% of income on housing and transportation costs, while households in Bloomington only spend 53% of income on housing and transportation. These costs and income tax estimates (Census) were subtracted from the average household income (Census) for each geography to determine the average disposable income per household. The household average disposable income is the funds can be used to spend on goods, services, and entertainment.

To assess the current consumer spending, Esri Business Analyst uses the Bureau of Labor Statistics Consumer Expenditure Survey (CEX) 2015/2016. Esri Business Analyst updates the CEX model with 2018 demographic data to estimate consumer spending in 2018. Consumer spending data for Monroe reflect Esri's estimates of average household consumer spending on entertainment fees and admissions in 2018. This information can inform Cardinal Stage of the amount spent on performances and the share of local entertainment spending that could be encapsulated.

A survey was distributed via organization email lists to their audience members. The survey questions can be found in Appendix A. It was open from February 7th to March 21st of 2019 and assessed demographic information and self-reported spending by audience members before and after performances. We contacted organizations in Monroe County to encourage them to send out the survey to their mailing lists. The participants were Cardinal Stage, Buskirk-Chumley

Theater, Ivy Tech John Waldron Arts Center, Bloomington Playwrights Project, and IU auditorium.¹

The performing arts organizations were also asked to provide economic information to assess their economic impact on Monroe County. Four organizations supplied us with economic information - Cardinal Stage, IU auditorium, Ivy Tech John Waldron Arts Center, and Buskirk-Chumley Theater. The categories in their budgets were marked according to the North American Industry Classification System (NAICS). We then used economic impact spending multipliers specific to Monroe County to assess the total economic impact on the region using an IMPLAN-based input-output model.²

How to Interpret Economic Impact Analysis Results

The economic impact analysis in this paper uses an input-output model to assess the economic impact. An input-output model functions as it sounds – data is input into the model, the model analyzes the data using multipliers, and then it outputs an estimate of the impact in the region. In this case, the input data is spending data obtained from organization budgets and annual financial reports.

Spending is not isolated. The spending flows throughout the economy of Monroe County, changing hands multiple times before it leaves the economy. These monetary flows contribute to the region's economy as a whole, creating a greater economic impact on the economy than the value of the initial direct spending. Every input-output model is different because the flow of money within every region has different flows in and out of the economy. For example, the money spent by a tech startup in Silicon Valley will remain within Silicon Valley longer due to the associated tech industries in that area than if a tech startup began in Mississippi. The money spent by the Mississippi tech startup would leave that economy much faster because the materials that company needs are obtained from other places outside of Mississippi. These differences in flows between an economy are captured by using economic multipliers specific to the region being studied. This makes every input-output model unique. The input-output model utilized in this study's analysis, and its multipliers for Monroe County, were obtained from IMPLAN and are used to estimate the indirect and induced impact caused by an organization's direct spending.

The direct economic impact is caused by an organization's direct spending into the economy. The indirect economic impact is the amount of money from the initial expenditure that gets re-spent within the economy by other businesses. The indirect economic impact will be lower than the direct economic impact due to these businesses requiring products and services that must be

¹ Organizations that were contacted but did not participate or respond were the Arts Alliance of Greater Bloomington, Stages Bloomington, Jewish Theatre of Bloomington, Herald Times, Bloom Mag, IDS, Visit Bloomington, Bloomington EDC, Community Foundation, and Monroe County Library. These organizations were contacted at least twice by email, and one attempt by phone if a phone number could be obtained. A message was left if no one picked up the phone, but none of the organizations called us back.

² Special thanks to Matt Kinghorn of the Indiana Business Research Center of Indiana University for his help using IMPLAN and giving us access to the spending multipliers. These multipliers can be found in the Appendix.

supplied from a different economic region. When money leaves the economy like this, it is known as leakage. The induced economic impact is the amount of money from the initial expenditure that gets re-spent within the economy by the employees of an organization. The total economic impact is the direct economic impact plus the indirect and induced impacts.

These same ideas of direct and indirect effects can be applied to employment and the value added to the region. The direct spending by an organization supports other businesses in the area and thereby also supports a certain number of jobs. The jobs supported in this way are measured as indirect employment ripple effects. The model used for this analysis considers employees, not full-time equivalents, so a full-time employee is not distinguished from a part-time employee. Value-added (aka GDP) is treated in much the same way. A multiplier is used to calculate the direct value added to the economy by an organization and further multipliers are used to calculate the ripples of indirect value added by the organization.

As a word of caution, the results of the analysis should not be misconstrued. The total economic impact should not be thought of as economic productivity that would be lost in the community if the organization did not exist. If the organization didn't exist, some of this money would end up being repurposed by the people in the community to be used by and for other businesses and residents. What *would* be different is how the money that gets spent ripples its way through the economy. These ripple effects are going to depend on the type of organization spending the money and the other industries within the community, causing higher or lower indirect economic impacts based on the differences in the sectors of the economy that are involved.

Cardinal Stage

Results and Impacts

Cardinal Stage is a valued partner and member of the business community. They employ people locally, purchase goods and services from the community, engage community members and contribute to the quality of life in Monroe County. In 2018, Cardinal Stage contributed over \$1.7 million into the regional economy, supporting 36 jobs, engaging 13,332 ticket holders, and partnering with 51 community businesses and organizations.



The initial spending of Cardinal Stage creates both a direct effect and an indirect effect of additional activity in the local economy. Local businesses benefited from the \$1.7 million (direct and indirect effects) investment and economic output in the community. The direct and indirect effects generated the induced effects of an estimated \$152,896 through increased household-to-income business activity caused by direct and indirect effects. The total GDP effects are estimated at \$718,194 generating a 1.805 multiplier effect in the economy.



In addition to Cardinal’s economic impact, its performing arts show generated an estimated \$429,096.63 of spending in Bloomington and an additional \$28,071.74 governmental revenue.

Although volunteer contributions are not included in this economic impact study, volunteers add value to their communities by supporting their local performing arts organizations. Volunteers at Cardinal Stage donated approximately 512 volunteer hours which is valued at \$12,641.28.

The study demonstrates that investing in Cardinal Stage supports jobs, stimulates local spending, generates governmental revenue, contributes to local tourism, and enhances the quality of life of Monroe residents and the surrounding region.

Methodology

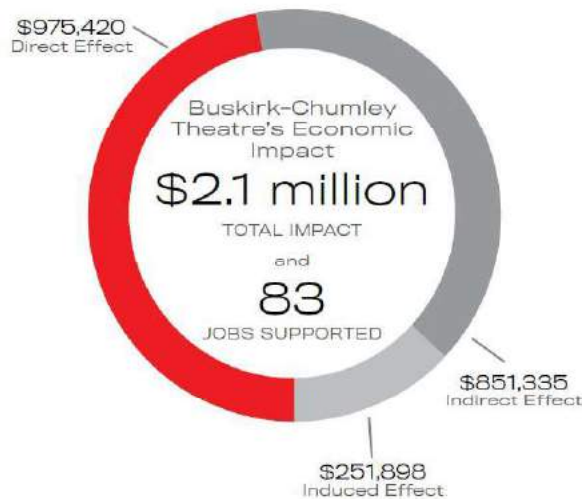
Cardinal Stage provided an itemized list of its budget for the fiscal year 2019, including all of the organization’s estimated expenses. The items were placed into the categories of the North American Industry Classification System (NAICS) using our best judgment. They were then converted into the categories used for IMPLAN input-output models. The results of the model are listed below. Cardinal Stage has four full-time employees, six part-time employees, and 8-15 hourly employees. We used a larger number of 15 hourly employees for the analysis. Cardinal Stage also hires actors for its shows, but since these actors seemed to fit better under the independent artists and performers category of the NAICS, they were not included as employees in this analysis.

To estimate the overall value of volunteer hours contributed to Cardinal Stage, the total hours were multiplied by \$24.69 which is the Independent Sector value of the average 2018 volunteer hour.

Buskirk Chumley Theater

Results and Impact

Buskirk-Chumley Theatre is a valued partner and asset to the community. It employs people locally, purchases goods and services from the community, engages community members and contributes to the quality of life in Monroe County. In 2018, the Buskirk-Chumley Theatre contributed over \$2.1 million into the regional economy, supporting 83 jobs, and engaging 59,120 ticket holders.



The initial spending of Buskirk-Chumley creates both a direct effect and an indirect effect of additional activity in the local economy. Local businesses benefited from the \$2.1 million investment and economic output in the community. The direct and indirect effects generated the induced effects of an estimated \$251,898 through increased household-to-income business activity caused by direct and indirect effects. The total GDP effects are estimated at \$869,476 generating a 2.078 multiplier effect in the economy.

In addition to its economic impact, its performing arts show generated an estimated \$1,902,804.73 of spending in Bloomington.

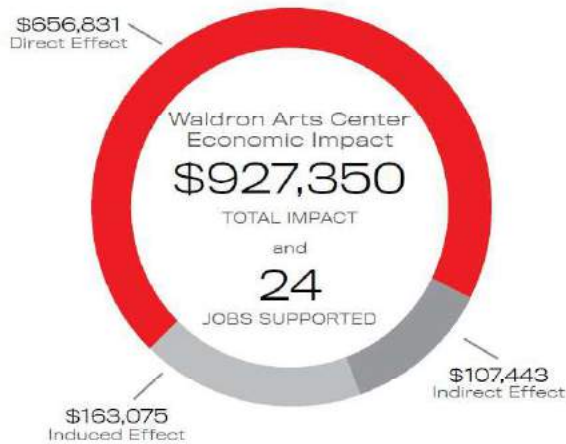
Methodology

Buskirk Chumley provided us with its annual report for 2017, but the expenses were not itemized enough to enable us to assign NAICS categories in a meaningful way to the line items. Instead, we used the IMPLAN production function for the performing arts to assign NAICS spending category amounts. Buskirk Chumley has 4 full-time workers, 13 part-time workers, and has 40-50 seasonal workers (50 was used for this analysis). A part-time worker was considered anyone working less than 35 hours per week and was not a seasonal worker. To estimate the overall value of volunteer hours contributed to Buskirk-Chumley Theater, the total hours were multiplied by \$24.69 which is the Independent Sector value of the average 2018 volunteer hour.

Ivy Tech John Waldron Arts Center (WAC)

Results and Impact

Similar to the Buskirk Chumley Theater, the Ivy Tech John Waldron Arts Center is also a valued partner and community asset. In 2018, the John Waldron Arts Center contributed over \$927,350 into the regional economy, supporting 24 jobs, and engaging 1,117 attendees.



The initial spending of the John Waldron Arts Center creates both a direct effect and an indirect effect of additional activity in the local economy. Local businesses benefited from the \$7.9 million investment and economic output in the community. The direct and indirect effects generated the induced effects of an estimated \$163,075 through increased household-to-income business activity caused by direct and indirect effects. The total GDP effects are estimated at \$332,684 generating a 1.181 multiplier effect in the economy.

In addition to its economic impact, its performing arts' shows generated an estimated \$35,951.17 of spending in Bloomington.

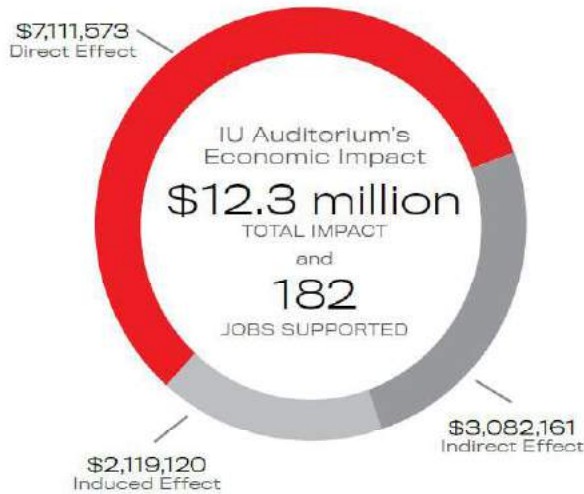
Methodology

The WAC did its best in separating out its spending for the Center of Lifelong Learning from the WAC for performing arts spending in an attempt to better evaluate only its performing arts impact. WAC provided an itemized list of its budget for the fiscal year 2018, including all of its expenses. The items were placed into the categories of the North American Industry Classification System (NAICS) using our best judgment. They were then converted into the categories used for IMPLAN input-output models. The results of the model are listed below. WAC has 3 full-time employees, 6 part-time employees, and uses 12 contractors.

IU Auditorium

Results and Impact

IU Auditorium is a part of Indiana University and is another valued partner in the community and Monroe County. In 2018, IU Auditorium contributed over \$12.3 million into the regional economy, supporting 164 jobs and attracting 65,616 attendees.



The initial spending of IU Auditorium creates both a direct effect and an indirect effect of additional activity in the local economy. Local businesses benefited from the \$12.3 million investment and economic output in the community. The direct and indirect effects generated the induced effects of an estimated \$2,119,120 through increased household-to-income business activity caused by direct and indirect effects. The total GDP effects are estimated at \$4,683,736 generating a 1.535 multiplier effect in the economy.

In addition to the auditorium economic impact, its performing arts' shows generated an estimated \$2,111,881 of spending in Bloomington.

Methodology

IU Auditorium provided its 2018 annual report, but the expenses were not itemized enough to enable us to assign NAICS categories in a meaningful way to their line items. Instead, we used the IMPLAN production function for the performing arts to assign NAICS spending category amounts. IU Auditorium has 23 employees listed on its staff listing website and according to its annual report had 48 student managers, 31 student box office clerks, and 13 interns. To estimate the overall value of volunteer hours contributed to Cardinal Stage, the total hours were multiplied by \$24.69 which is the Independent Sector value of the average 2018 volunteer hour.

Audience Economic Impact

On average, each individual surveyed spends \$32 in addition to the fare for each visit to a show, of which more than half of the money (\$20) is paid on food and drink, and the



remaining amount equally divided into items such as travel costs, souvenirs, and other expenses. In terms of gender, men tend to spend more money than women, but if considering residential, those who do not live in Monroe County pay more than those who live locally.

Methodology

Audiences were asked in the survey we sent them about the estimated average amounts of money that they and the people that traveled with them spent on food, transportation, childcare, hotels, souvenirs, and clothing before and after a single performance. They were also asked to provide the number of people they travel with to a show on average. Each respondent's answers were divided by the total number of people they traveled with plus one (to account for the respondent him/herself) to obtain the amount of money spent per show per person among that group of people. This was done for every respondent. All of these numbers were then added together and divided by the number of respondents to obtain the average amount of money spent per show per person in each category. This figure was then multiplied by the number of tickets sold during the year (under the assumption that every ticket represented one person at one show) for each organization to arrive at an estimate of the total yearly spending generated by these organizations in Monroe County spent by audiences before or after a performance.

*For comparison, the Arts for Economic Prosperity Report IV for Bloomington, conducted in 2012, found this number to be about \$20.82 on average for the entire culture and arts center.

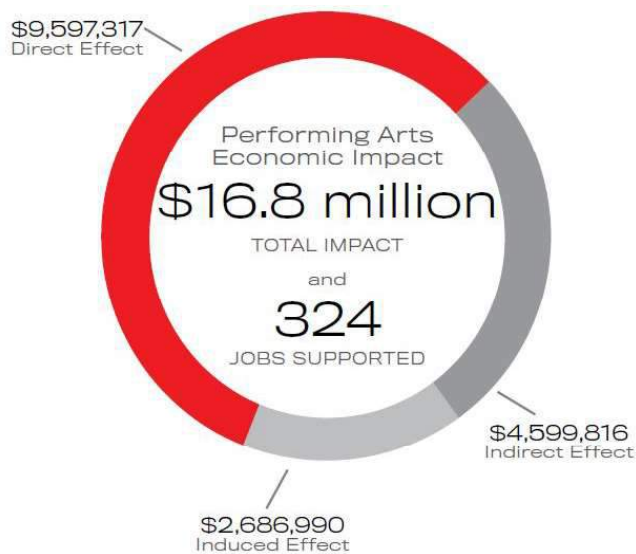
	Cardinal Stage	IU Auditorium	Buskirk Chumley	Ivy Tech	Total
Food	\$261,279.72	\$ 1,285,938.36	\$ 1,158,630.15	\$21,890.90	\$ 2,727,739.13
Transportation	\$ 43,655.69	\$ 214,859.89	\$ 193,588.71	\$ 3,657.62	\$ 455,761.92
Childcare	\$ 21,712.47	\$ 106,862.08	\$ 96,282.71	\$ 1,819.14	\$ 226,676.40
Overnight	\$ 38,736.87	\$ 190,650.93	\$ 171,776.44	\$ 3,245.51	\$ 404,409.75
Souvenirs	\$ 26,409.35	\$ 129,978.70	\$ 117,110.78	\$ 2,212.66	\$ 275,711.49
Clothing	\$ 34,275.24	\$ 168,692.17	\$ 151,991.61	\$ 2,871.70	\$ 357,830.71
Other	\$ 3,027.29	\$ 14,899.38	\$ 13,424.34	\$ 253.64	\$ 31,604.65
Total	\$429,096.63	\$ 2,111,881.52	\$ 1,902,804.73	\$35,951.17	\$ 4,479,734.04

*The numbers for the John Waldron Center are reflective of their performing arts functions only and do not reflect other types of events. This distinction was not made by IU Auditorium or Buskirk-Chumley and therefore makes their impact look much smaller by comparison than it really is.

Total Performing Arts Economic Impact

Results

Performing arts organizations contribute to the economy in many different ways. They employ people locally, purchase goods and services from the community, engage community members, improve the quality of life and increase tourism. Performing arts organizations bring together audiences that will spend additional revenue before or after the event at restaurants and shops, hotels, transportation and parking, and other places in the local community.



To better understand the economic impact of performing arts in Monroe County, the economic impact study evaluates four performing arts contributions to the economy in 2018: Cardinal Stage, Buskirk-Chumley Theatre, IU Auditorium, and Ivy Tech Waldron Center for Arts.

In 2018, these four performing arts organizations contributed direct effects of \$9,597,317.40, indirect effects of \$4,599,816.28, and induced effects of \$2,686,990.92 into the regional economy for a total of \$16,884,124.60, supporting 324 jobs, and impacting 139,185 ticket holders.

The initial spending of these organizations created both a direct effect and an indirect effect of additional activity in the local economy. Local businesses benefited from the \$17 million investment and economic output in the community. The direct and indirect effects generated the induced effects of an estimated \$2,686,990 through increased household-to-income business activity caused by direct and indirect effects. The total GDP effects are estimated at \$6,572,254.80 generating a 1.596 multiplier effect in the economy.

In addition to their economic impact, their performing arts' shows generated an estimated \$4,479,734.04 (\$4.4 million) of spending in Bloomington and \$293,066.71 in government revenue.

The study demonstrates that investing in the performing arts sector supports job growth, stimulates local spending, generates governmental revenue, contributes to local tourism, and improves the quality of life of Monroe residents and the surrounding region. Supporting performing arts in Monroe County supports local economic development in many different ways.

Independent Performing Arts Impact

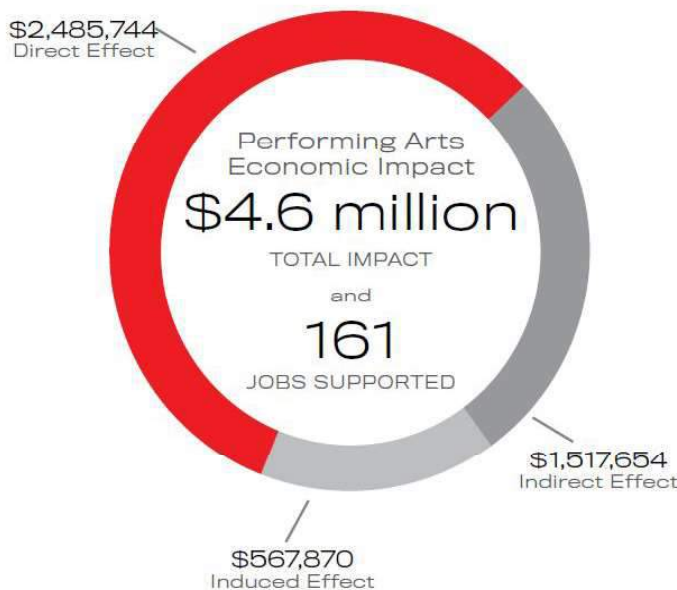
Results

Excluding IU Auditorium, the remaining three organizations contributed direct effects of \$2,485,744, indirect effects of \$1,517,654 and induced effects of \$567,870 into the regional economy for a total of \$4,571,268, supporting 161 jobs and 73,569 ticket holders.

In addition, spending in Bloomington was estimated to be \$2.3 million generating \$154,928 in government revenue.

Methodology

To start, we removed the aspects of Cardinal's spending associated with renting space. We needed to do this because Cardinal's primary rental spaces are the Buskirk-Chumley Theater and the John Waldron Arts Center, meaning that this spending does not go outside the sector and isn't part of direct payments - it is a transfer within the sector itself. After doing this, we added

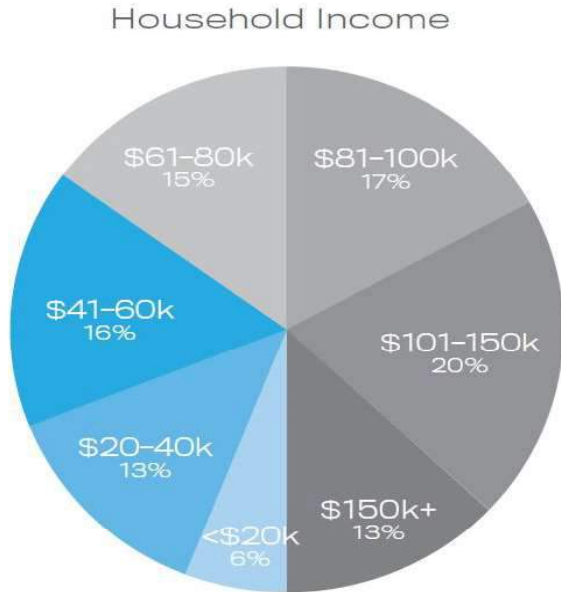


the results of the 4 organizations together to obtain the total economic impact for all four organizations. It may be hasty to say that this would amount to 40% of the total performing arts impact of the region because we obtained data from four out of ten organizations that were asked, and then used these figures to try and estimate the other 60%. It is more likely that the share of all economic impact is much larger than 40%, considering that IU Auditorium is the university's main performing arts venue, Buskirk-Chumley Theater is another large venue, and Cardinal Stage is the largest theater production company in Monroe County, demonstrating that these four

organizations likely account for larger than 40% of the total performing arts economic impact in Monroe County. We did not include estimates for other organizations because we did not have their data nor were we able to obtain their permission to be participants in this study in this way. Lastly, we attempted to create a speculative estimate of Bloomington's entire performing arts sector, not just the 4 organizations we acquired data from, by calculating the ratio of the number of jobs used in this analysis to the number of performing arts sector jobs as a whole, but in this regard we were unsuccessful. That being said, the Economic Prosperity IV survey in 2012 found the entire arts and culture sector in Bloomington supported 3,430 jobs, although we believe this number to be unreasonable and inflated. It would mean that despite using the 4 largest

performing arts organizations in the county, our estimate is only 10% of total impact. If we instead used the median number of jobs in the sector nationally for similarly populated areas (489 supported jobs), then we get a more reasonable estimate of 66% of the overall impact for the sector.

Survey Results Analysis

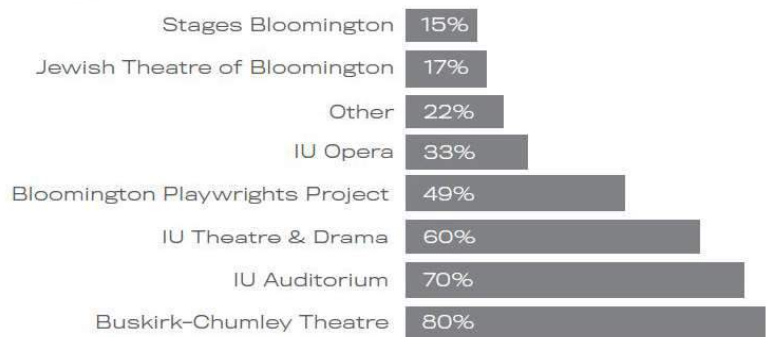


In order to further research the impact of performing arts on Monroe County’s economy, we developed a set of survey questions that focus on residents of Monroe County and surrounding areas. The method is an online survey, through the media channels of performing arts companies in Bloomington. The survey has a total of 32 questions, divided into four sections. Details of the questionnaire are shown in Appendix A.1. The total number of survey responses is 450. The survey results are an essential component to building data for analyzing the effects of performing arts, in addition to presenting some information through the following statistics.

The focus age of survey respondents is from 31-80 years (accounting for 82.45%), of which the age group accounts for the highest proportion of 45-65 years (37%), two groups of 31-45 and 65-80 21% and 24% respectively. This data is explainable because it is also the age group that has a stable job and income, and is also the main target group for the performing arts industry. Also, potential age groups (18-30), newly graduated young people, or recently employed, with only 64/450 responding, taking over 14%.

Among the survey respondents, 85% are residing in Monroe County. However, only 62.2% are working in Monroe County, the rest 37.8% have jobs in other regions. 68.5% of respondents are women (307/450), only 28% are men.

What performance venues have you attended?

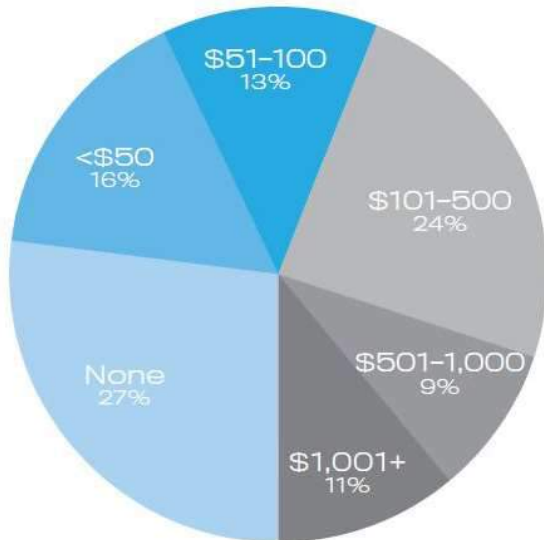


The statistics on the working status of respondents showed that the rate of employed people was 63% (284/450), of which 9% were self-employed. A quarter of the respondents are retired

people. The rest is homemaker and student (about 10%). The highest level of education of the respondents is Ph.D. (about 11%. 70% of the numbers are concentrated in the Master's Degree and Bachelor's Degree, 40% and 30% respectively. This data is consistent with age statistics above, and it illustrates that the main people interested in performing arts are those who have worked, earned income or who have retired and have plenty of time to participate on the art activities. In terms of income, respondents' data spread across income groups. If one does not

include the 76/450 people who prefer not to answer this question, the most responded income group is from \$ 101,000 to \$ 150,000 (about 20%). A trend from this statistic is that the more income is generated, the more attention will be given to performing arts activities. This trend can be considered reasonable, as higher and more stable income, will be able to participate in many activities of performing arts.

Annual Donation to Performing Arts Organizations

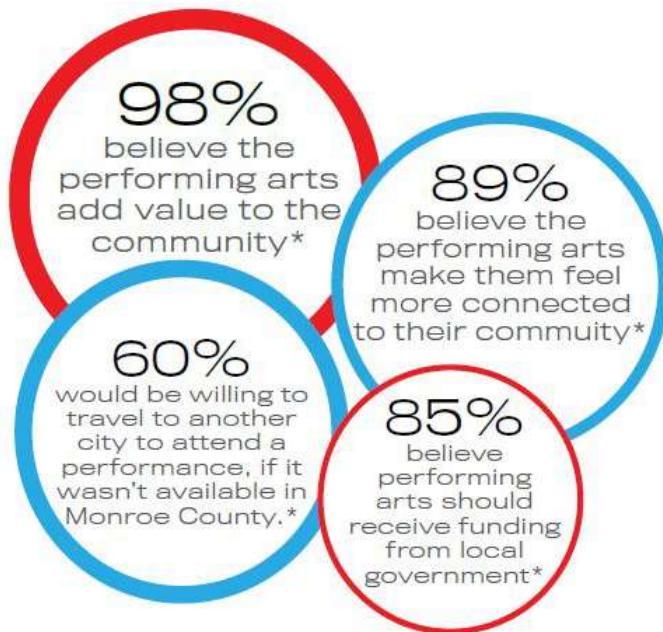


The attend performances location statistics, in all venues mentioned in the survey, took the lead in popularity as Buskirk-Chumley Theater, with more than 80% of the respondents each, followed by IU-Auditorium with about 70% of the attendees answered attendees. Next is IU-Theater & Drama with Ivy-Tech John Waldron Arts Center with 60%. Other locations like IU-Opera, Jewish Theater of Bloomington, Stages Bloomington, etc. only 10-35% of respondents attended each attendee.

Part of the explanation for this is also because the performing genre and the venue's scale are different. Besides, this question also reflects a similarity with the problem of venue popularity ("Which of these organizations have you heard of?"). IU venues like IU-Auditorium or IU Theater & Drama, Cardinal Stage, Ivy-Tech John Waldron Arts Center or Buskirk-Chumley Theater all achieved very high popularity (over 94%), while other venues only 40-60% of respondents know.

With the question: "If there was not a performing event happening in Monroe County, would you go to a different community to attend a similar performance?", 60% of the respondents answered "Yes, I would travel to a different community to attend a similar performance"; only 25% answered "No, I would have done something in Monroe County"; 15% answered, "No, I would skip a similar performance in a different community ". This percentage shows the interest of respondents in general performing arts activities, not just in Monroe County. While there are advantages, because there are many art performance facilities, without maintaining and improving the quality of these facilities, Monroe County may face competition from neighboring areas in this area.

When asked what activity respondents would spend their money on instead of attending a performance, the highest ranked response was for eating out while attending other events and sports-related activities were the second highest option.



Statistics on the amount of donated to the performing arts last year, 27% of the respondents said they had no donations. However, up to 24% of people said they contributed between \$ 101- \$ 500 for performing arts activities, equal to the number of contributors \$ 11- \$ 100. The number of contributors over \$ 500 also reaches 20%. Survey of the amount can pay for a single event ticket, and most respondents are willing to give up \$ 41- \$ 60 (26%), \$ 61- \$ 80 (24%), even more than \$ 81 (24%). These numbers partly reflect that the audience cares about the quality of performing arts compared to the ticket price. Also shown in the survey section, the question, "Do you

prefer a season subscription over single tickets?", received a response of nearly $\frac{3}{4}$ of respondents either not agreeing or staying neutral on this opinion. One reason is that the audience understands the price will come with the quality of the show, and they are willing to spend a reasonable amount of money to enjoy a show they like.

Regarding the survey of the economic impact of art performance activities, 97% agree that these activities bring great value to the community. 89% of respondents admit participating in performing arts activities that make them feel more connected to the community, including 56% who strongly agree. Additionally, 87% of respondents said that performing arts helped them to understand other cultures, and 89% of respondents felt art performances should receive help from local governments.

Also, on average, each respondent will always attend a performance with 1-2 others (1.7 according to the calculation), and on average each person will see about 11 performances a year (nearly 1 session/month). In terms of gender, men tend to see more performances than women (15 versus 9), and in terms of the residential area, people in Monroe County outperform non-residences (12 versus 7). However, only about 4% of respondents need to stay overnight before or after the show. Reasons for this may be because people do not need to drive far to Monroe County or that the accompanying services are not attractive.

Discussion and Recommendations

The overall impact of theatrical arts on Bloomington is significant. Strong demand from the denizens creates interested buyers and clientele, which leads to revenue and capital benefiting the region. This means jobs, demand for goods, and more purchases for the surrounding area. All of this benefits the region by providing income for workers and purchases that provide economic advancement for local businesses. Cardinal Stage, Buskirk-Chumley Theater, John Waldron Arts Center, and IU Auditorium all have a significant impact on the economic region and therefore will impact the interests and needs of the region.

IU Auditorium is probably Cardinal's biggest competition on the theater landscape. It brings in more money and has a larger economic impact than the smaller company. This does not necessarily mean that IU prevents individuals from going to cardinal, but its impact is larger. Any attempts to move forward by trying to attract donors on an economic impact basis will need to keep that in mind, but this also does offer opportunities for Cardinal when working with the company.

Also, this study shows that the arts are extremely important to the Bloomington economy. It brings in added GDP value of \$8,165,718.28. This is not only the arts, but includes increases for surrounding businesses. The overall monetary economic impact meanwhile is at \$17,044,624.30. Bloomington is greatly helped by its artistry.

A good metric for comparison would be with agriculture. Agricultural products are important for the Indiana economy as they bring in over \$8 billion. However, for Monroe, they bring in significantly less at a total of \$14.5 million in added GDP in 2012, which is still significant as that's more than \$6 million higher than the arts. In addition, agricultural impacts bring in 630 jobs while the performing arts bring in 324 jobs after totaling direct, indirect, and induced effects. Still, the agricultural impact is actually greater in the northern region of the state due to land differences between the two ("Agriculture in Indiana Counties," 2015).

The comparison is important to remember as although agriculture is still strong in the southern part of the state, it is not as significant to Monroe's economy as it would be to Tippecanoe or Kosciusko. There is a greater need than for an alternative to the economy to bring in the amount of production and jobs that are found in other counties. Arts does fill in that need as there is significant opportunity for talent in areas like IU, but not always the demand from the city. There are a lot of potential opportunities for growth and economic development in the area.

It is important to also compare the four theaters to other spending on artwork as well. The Arts and Economic Prosperity IV report states that the economic impact of the arts and culture industry of Bloomington has a direct impact of over \$72 million and hires around 3,430 people. That is above the national median which is around \$49 million at 1,533 jobs ("Arts and

Economic Prosperity IV,” 2012). Of the total impact found, the four organizations we analyzed have a direct impact of over \$9.67 million with direct 228 jobs; that is over 13.43% of direct economic impact and over 14.87% of the number of jobs for the region in this market. Since we only obtained data and permission to analyze 4 of 10 intended organizations, this likely means that the performing arts make up a significant chunk of Bloomington’s art economy.

Of note, the performing arts still see a greater economic impact in Bloomington than the national average for a local region. The median of regions with a similar population saw a direct economic impact of slightly under \$10.9 million in direct expenditures which are slightly above the overall impact of the four theaters by roughly \$1.2 million (“Arts and Economic Prosperity IV,” 2012). This means the total performing arts direct impact is at least comparable to the total direct impact of all the arts in a similarly populated region, if not much higher since we only obtained information from a maximum of 40% of Bloomington’s total performing arts sector. That said, they make up only about half the hires with the normal direct jobs being 489, meaning that they do not hire as many even if the total economic impact is similar. This could mean that Bloomington’s performing arts sector is much more efficiently run than the national average, uses more volunteers, or the national average included contractors and independent artists, which our study did not include as organizational employees. Still, this shows performing arts are extremely significant in the region.

Our recommendations for Cardinal are as follows:

1. Share the Economic Impact and Survey Results one-pager with potential donors/sponsors
2. Include a summary of these results in the next email newsletter
3. Share the results with Monroe County/Bloomington Arts Commission
4. Incorporate Data results into marketing and materials

There are only a few ways that the economic impact on the region could be increased. Cardinal could spend more money, they could purchase more local products in sectors with higher local spending multipliers, or they could induce audiences to spend more before and after shows. This could be achieved through partnering with local retailers to offer discounts for people that bought tickets. Lastly, Fisher & Preece (2002) found that arts organizations actually function as complements of each other rather than substitutes for most people. Montgomery & Fisher (2006) have found a similar result relating to local sports events. As long as performances and sporting event times do not overlap, the core audience members tend to be similar because they are focused on community engagement. If showtimes can be coordinated with other arts and sports organizations to create a master list of events so that as few of them overlap as possible, all organizations will benefit from a potential for higher demand.

Appendix

A. Economic Impact Group Resources and Notes

A.1: Cardinal Budget Based Production Function Categories

Implan Code	Industry	Regional Purchase Coefficient
49	Electric power transmission and distribution	23.54%
50	Natural gas distribution	64.39%
51	Water, sewage and other systems	56.97%
139	Wood windows and door manufacturing	69.91%
154	Printing	1.00%
399	Retail - Building material and garden equipment and supplies stores	99.89%
400	Retail - Food and beverage stores	93.30%
402	Retail - Gasoline stores	66.48%
405	Retail - General merchandise stores	82.66%
417	Newspaper publishers	93.13%
424	Sound recording industries	30.51%
430	Data processing, hosting, and related services	29.96%
432	Internet publishing and broadcasting and web search portals	78.65%
434	Nondepository credit intermediation and related activities	30.54%
436	Other financial investment activities	32.84%
440	Real estate	95.83%
450	Specialized design services	22.30%
451	Custom computer programming services	75.42%
454	Management consulting services	25.93%
457	Advertising, public relations, and related services	34.49%
458	Photographic services	89.76%
474	Other educational services	99.89%
477	Offices of other health practitioners	96.19%
488	Performing arts companies	99.47%
491	Promoters of performing arts and sports and agents for public figures	81.91%
492	Independent artists, writers, and performers	55.66%
500	Other accommodations	0.29%
503	All other food and drinking places	99.88%
518	Postal service	97.53%

A.2: Cardinal Stage Multipliers

Implan Code	Industry	Indirect Output	Induced Output
49	Electric power transmission and distribution	0.713819	0.117189
50	Natural gas distribution	0.129214	0.132156
51	Water, sewage and other systems	0.388029	0.218799
139	Wood windows and door manufacturing	0.181171	0.153984
154	Printing	0.148958	0.202605
399	Retail - Building material and garden equipment and supplies stores	0.235536	0.263281
400	Retail - Food and beverage stores	0.203244	0.278527
402	Retail - Gasoline stores	0.249781	0.335
405	Retail - General merchandise stores	0.189128	0.237911
417	Newspaper publishers	0.188246	0.253389
424	Sound recording industries	0.406873	0.105883
430	Data processing, hosting, and related services	0.44853	0.176655
432	Internet publishing and broadcasting and web search portals	0.444145	0.160858
434	Nondepository credit intermediation and related activities	0.422202	0.305508
436	Other financial investment activities	0.457676	0.155555
440	Real estate	0.149035	0.064326
450	Specialized design services	0.236342	0.244585
451	Custom computer programming services	0.254687	0.300971
454	Management consulting services	0.309613	0.328825
457	Advertising, public relations, and related services	0.300354	0.155704
458	Photographic services	0.293152	0.274285
474	Other educational services	0.249763	0.401023
477	Offices of other health practitioners	0.109509	0.450476
488	Performing arts companies	0.429964	0.095885
491	Promoters of performing arts and sports and agents for public figures	0.538644	0.159255
492	Independent artists, writers, and performers	0.538935	0.203645
500	Other accommodations	0.164918	0.406273
503	All other food and drinking places	0.177013	0.427606
518	Postal service	0.08759	0.512954

A.3: John Waldron Arts Center Production Categories and Coefficients.

Implan Code	Industry	Regional Purchase Coefficient
49	Electric power transmission and distribution	23.54%
50	Natural gas distribution	64.39%
51	Water, sewage and other systems	56.97%
154	Printing	1.00%
399	Retail - Building material and garden equipment and supplies stores	99.89%
400	Retail - Food and beverage stores	93.30%
402	Retail - Gasoline stores	66.48%
405	Retail - General merchandise stores	82.66%
430	Data processing, hosting, and related services	29.96%
437	Insurance carriers	26.87%
445	Commercial and industrial machinery and equipment rental and leasing	52.42%
454	Management consulting services	25.93%
488	Performing arts companies	99.47%
492	Independent artists, writers, and performers	55.66%
511	Dry-cleaning and laundry services	30.01%
518	Postal service	97.53%

A.4: John Waldron Arts Center Multipliers.

Implan Code	Industry	Indirect Output	Induced Output
49	Electric power transmission and distribution	0.713819	0.117189
50	Natural gas distribution	0.129214	0.132156
51	Water, sewage and other systems	0.388029	0.218799
154	Printing	0.148958	0.202605
399	Retail - Building material and garden equipment and supplies	0.235536	0.263281
400	Retail - Food and beverage stores	0.203244	0.278527
402	Retail - Gasoline stores	0.249781	0.335
405	Retail - General merchandise stores	0.189128	0.237911
430	Data processing, hosting, and related services	0.44853	0.176655
437	Insurance carriers	0.560021	0.174264
445	Commercial and industrial machinery and equipment	0.155179	0.291569
454	Management consulting services	0.309613	0.328825
488	Performing arts companies	0.429964	0.095885
492	Independent artists, writers, and performers	0.538935	0.203645
511	Dry-cleaning and laundry services	0.251544	0.299057
518	Postal service	0.08759	0.512954

A.5: IMPLAN Performing Arts Function.

Implan Code	Total Commodity Demand	% of Expenditures
492	Independent artists, writers, and performers	29.69%
440	Real estate buying and selling, leasing, managing, and related services	16.63%
457	Advertising, public relations, and related services	8.30%
491	Promotional services for performing arts and sports and public figures	7.35%
454	Management consulting services	4.80%
437	Insurance	3.05%
464	Employment services	2.54%
448	Accounting, tax preparation, bookkeeping, and payroll services	2.26%
461	Management of companies and enterprises	1.91%
512	Other personal services	1.65%
442	Automotive equipment rental and leasing services	1.58%
474	Other educational services	1.47%
462	Office administrative services	1.33%
447	Legal services	1.07%
154	Printed materials	0.98%
455	Environmental and other technical consulting services	0.91%
395	Wholesale trade distribution services	0.79%
445	Commercial and industrial machinery and equipment rental and leasing services	0.70%
49	Electricity transmission and distribution	0.65%
427	Wired telecommunications	0.63%
27	Copper ore	0.62%
415	Couriers and messengers services	0.61%
428	Wireless telecommunications (except satellite)	0.61%
411	Truck transportation services	0.57%
414	Scenic and sightseeing transportation services and support activities for transportation	0.54%
465	Business support services	0.45%
434	Nondepository credit intermediation and related activities	0.38%
449	Architectural, engineering, and related services	0.37%
129	Other cut and sew apparel	0.37%
433	Monetary authorities and depository credit intermediation	0.37%
408	Air transportation services	0.36%
518	US Postal delivery services	0.36%
471	Waste management and remediation services	0.32%
416	Warehousing and storage services	0.29%
436	Other financial investment services	0.27%
443	General and consumer goods rental services except video tapes and discs	0.27%
468	Services to buildings	0.26%
530	Noncomparable imports	0.25%
438	Insurance agencies, brokerages, and related services	0.24%
501	Full-service restaurant services	0.23%
432	Internet publishing and broadcasting and web search portals	0.22%
430	Data processing, hosting, and related services	0.20%
507	Commercial and industrial machinery and equipment repair and maintenance	0.19%
156	Refined petroleum products	0.18%
467	Investigation and security services	0.18%

A.5: IMPLAN Performing Arts Function (Cont.)

506	Electronic and precision equipment repair and maintenance	0.18%
499	Hotels and motel services, including casino hotels	0.16%
502	Limited-service restaurant services	0.15%
26	Lead and zinc ore	0.14%
463	Facilities support services	0.13%
453	Other computer related services, including facilities management services	0.13%
469	Landscape and horticultural services	0.13%
452	Computer systems design services	0.13%
526	Other products and services of Local Govt enterprises	0.11%
508	Personal and household goods repair and maintenance	0.11%
504	Automotive repair and maintenance, except car washes	0.11%
51	Water, sewage and other systems	0.10%
394	All other miscellaneous manufactured products	0.09%
326	Lighting fixtures	0.08%
412	Transit and ground passenger transportation services	0.08%
460	Marketing research and all other miscellaneous professional, scientific, and technical services	0.07%
392	Brooms, brushes, and mops	0.07%
50	Natural gas distribution	0.06%
62	Maintained and repaired nonresidential structures	0.06%
148	Paperboard from pulp	0.06%
431	News syndicates, libraries, archives and all other information services	0.05%
106	Bottled and canned soft drinks and water	0.04%
261	Other fabricated metals	0.04%
488	Performing arts	0.04%
149	Paperboard containers	0.04%
422	Software publishers	0.03%
429	Satellite, telecommunications resellers, and all other telecommunications	0.03%
410	Water transportation services	0.03%
446	Leasing of nonfinancial intangible assets	0.03%
124	Hosiery and socks	0.03%
496	Other amusement and recreation	0.02%
435	Securities and commodity contracts intermediation and brokerage	0.02%
497	Fitness and recreational sports center services	0.02%
209	Other concrete products	0.02%
503	All other food and drinking place services	0.02%
277	Air conditioning, refrigeration, and warm air heating equipment	0.02%
389	Gaskets, packings, and sealing devices	0.02%
213	Cut stone and stone products	0.02%
20	Natural gas and crude petroleum	0.02%
108	Beer, ale, malt liquor and nonalcoholic beer	0.02%
134	Dimension lumber	0.02%
420	Directories, mailing lists, and other published materials	0.01%
206	Ready-mix concrete	0.01%
423	Motion pictures and videos	0.01%
515	Business and professional services	0.01%
241	Sheet metal work (except stampings)	0.01%
190	Plastics pipes and pipe fittings	0.01%
353	Motor vehicle transmission and power train parts	0.01%
260	Fabricated pipes and pipe fittings	0.01%
409	Rail transportation services	0.01%
450	Specialized design services	0.01%
255	Plumbing fixture fittings and trims	0.01%
340	Wiring devices	0.01%
489	Commercial sports except racing	0.01%
276	Heating equipment (except warm air furnaces)	0.01%
195	Other plastics products	0.01%
140	Cut stock, resawn and planed lumber	0.01%
238	Fabricated structural metal products	0.01%
170	Phosphatic fertilizer	0.01%
418	Periodicals	0.01%
470	Other support services	0.01%
523	Other products and services of State Govt enterprises	0.01%
240	Metal windows and doors	0.01%
505	Car washes	0.01%
169	Nitrogenous fertilizer	0.01%
207	Concrete blocks and bricks	0.01%
220	Steel wire	0.01%
242	Ornamental and architectural metal products	0.00%
139	Wood windows and doors	0.00%
136	Veneer and plywood	0.00%
135	Preserved wood products	0.00%
137	Engineered wood members and trusses	0.00%
141	Other millwork, including flooring	0.00%
138	Reconstituted wood products	0.00%
107	Manufactured ice	0.00%
208	Concrete pipes	0.00%

A.6: IMPLAN Performing Arts Function Multipliers

Implan Code	Industry	Indirect Output	Induced Output
20	Extraction of natural gas and crude petroleum	0.052749	0.373416
49	Electric power transmission and distribution	0.713819	0.117189
50	Natural gas distribution	0.129214	0.132156
51	Water, sewage and other systems	0.388029	0.218799
62	Maintenance and repair construction of nonresidential structures	0.223978	0.231738
106	Bottled and canned soft drinks & water	0	0
108	Breweries	0.141598	0.051619
134	Sawmills	0	0
136	Veneer and plywood manufacturing	0.296573	0.151707
137	Engineered wood member and truss manufacturing	0	0
138	Reconstituted wood product manufacturing	0	0
139	Wood windows and door manufacturing	0.181171	0.153984
140	Cut stock, resawing lumber, and planing	0	0
141	Other millwork, including flooring	0	0
149	Paperboard container manufacturing	0	0
154	Printing	0.148958	0.202605
156	Petroleum refineries	0	0
170	Phosphatic fertilizer manufacturing	0	0
195	Other plastics product manufacturing	0.125564	0.120995
206	Ready-mix concrete manufacturing	0.181727	0.166905
207	Concrete block and brick manufacturing	0	0
208	Concrete pipe manufacturing	0	0
209	Other concrete product manufacturing	0.208458	0.202274
213	Cut stone and stone product manufacturing	0.173073	0.282597
220	Steel wire drawing	0	0
238	Fabricated structural metal manufacturing	0.127759	0.114257
240	Metal window and door manufacturing	0	0
241	Sheet metal work manufacturing	0	0
242	Ornamental and architectural metal work manufacturing	0	0
261	Other fabricated metal manufacturing	0	0
277	Air conditioning, refrigeration, and warm air heating equipment manufacturing	0.120569	0.113711
353	Motor vehicle transmission and power train parts manufacturing	0	0
394	All other miscellaneous manufacturing	0	0
395	Wholesale trade	0.209719	0.218536
408	Air transportation	0.287641	0.073238
409	Rail transportation	0.164248	0.190518
411	Truck transportation	0.281847	0.242218
412	Transit and ground passenger transportation	0.227347	0.268539
414	Scenic and sightseeing transportation and support activities for transportation	0.323296	0.273597
415	Couriers and messengers	0.18844	0.266989
416	Warehousing and storage	0.276382	0.294714
418	Periodical publishers	0.388503	0.126022
420	Directory, mailing list, and other publishers	0.18224	0.159454

A.6: IMPLAN Performing Arts Function Multipliers (Cont.)

422	Software publishers	0.270263	0.170837
423	Motion picture and video industries	0.282411	0.086456
427	Wired telecommunications carriers	0.303493	0.135486
428	Wireless telecommunications carriers (except satellite)	0	0
429	Satellite, telecommunications resellers, and all other telecommunications	0.285384	0.418761
430	Data processing, hosting, and related services	0.44853	0.176655
431	News syndicates, libraries, archives and all other information services	0.292449	0.055377
432	Internet publishing and broadcasting and web search portals	0.444145	0.160858
433	Monetary authorities and depository credit intermediation	0.248401	0.248599
434	Nondepository credit intermediation and related activities	0.422202	0.305508
435	Securities and commodity contracts intermediation and brokerage	0.290797	0.305729
436	Other financial investment activities	0.457676	0.155555
437	Insurance carriers	0.560021	0.174264
438	Insurance agencies, brokerages, and related activities	0.789816	0.241503
440	Real estate	0.149035	0.064326
442	Automotive equipment rental and leasing	0.173926	0.35369
443	General and consumer goods rental except video tapes and discs	0.189166	0.381348
445	Commercial and industrial machinery and equipment rental and leasing	0.155179	0.291569
446	Lessors of nonfinancial intangible assets	0.494189	0.106787
447	Legal services	0.209966	0.261083
448	Accounting, tax preparation, bookkeeping, and payroll services	0.145703	0.362571
449	Architectural, engineering, and related services	0.236756	0.354221
450	Specialized design services	0.236342	0.244585
452	Computer systems design services	0.263956	0.40802
453	Other computer related services, including facilities management	0.221664	0.336607
454	Management consulting services	0.309613	0.328825
455	Environmental and other technical consulting services	0.264	0.469208
457	Advertising, public relations, and related services	0.300354	0.155704
460	Marketing research and all other miscellaneous professional, scientific, and technical services	0.317905	0.273062
461	Management of companies and enterprises	0.192645	0.348487
462	Office administrative services	0.215868	0.403769
463	Facilities support services	0	0
464	Employment services	0.105035	0.35345
465	Business support services	0.261797	0.400155
467	Investigation and security services	0.180109	0.390461
468	Services to buildings	0.183552	0.333084
469	Landscape and horticultural services	0.135915	0.310705
470	Other support services	0.407956	0.261707
471	Waste management and remediation services	0.204007	0.193876
474	Other educational services	0.249763	0.401023
488	Performing arts companies	0.429964	0.095885
489	Commercial Sports Except Racing	0.287634	0.110389
491	Promoters of performing arts and sports and agents for public figures	0.538644	0.159255
492	Independent artists, writers, and performers	0.538935	0.203645
496	Other amusement and recreation industries	0.341793	0.193228
497	Fitness and recreational sports centers	0.446238	0.162664
499	Hotels and motels, including casino hotels	0.205647	0.198853
501	Full-service restaurants	0.19062	0.288831
502	Limited-service restaurants	0.19404	0.15318
503	All other food and drinking places	0.177013	0.427606
504	Automotive repair and maintenance, except car washes	0.163796	0.325665
505	Car washes	0.278037	0.367048
506	Electronic and precision equipment repair and maintenance	0.208483	0.273224
507	Commercial and industrial machinery and equipment repair and maintenance	0.124144	0.301726
508	Personal and household goods repair and maintenance	0.156382	0.30906
512	Other personal services	0.40565	0.347152
515	Business and professional associations	0.277501	0.190203
518	Postal service	0.08759	0.512954
523	Other state government enterprises	0	0
526	Other local government enterprises	0.312186	0.2609

A.7: Audience Survey Questions

Introduction

The following survey has been compiled by a group of students at IU's School of Public and Environmental Affairs for their graduation Capstone project. Currently, they are working for Cardinal Stage to improve your experience and examine the economic impacts of the performing arts sector on the Bloomington community and Monroe County. Please take a few brief moments to fill out the survey and answer each question as completely as you are able. Your answers will be anonymous.

For the purposes of this survey, the performing arts are considered plays, musicals, operas, and orchestra or symphony performances.

Thank you again for your continued support of the performing arts.

Economic Impact Analysis Questions

1 How did you hear about this survey?

- Cardinal Stage;
- Arts Alliance of Greater Bloomington;
- Buskirk-Chumley Theater;
- Ivy-tech John Waldron Arts Center;
- Bloomington Playwrights Project;
- Stages Bloomington;
- Jewish Theatre of Bloomington;
- IU Auditorium;
- IU Opera;
- IU Theatre & Drama
- Other

2 How old are you? If younger than 18, please have a parent or guardian fill out the survey instead.

- 1-17
- 18-30
- 31-45
- 45-65
- 66-80
- 81+

3 What is your work status? Are you currently...

- Employed
- Self-employed
- Out of work and looking for employment
- Out of work but not currently looking for employment
- A homemaker
- A student
- Military
- Retired

- Unable to work

4 What is your highest level of education?

- Some or no High School
- High school Diploma/GED
- Associate Degree/2 years of college
- Trade/Technical/Vocational Training
- Bachelor's Degree
- Master's Degree
- Professional Degree
- Ph.D.

5 What is your household income?

- Less than \$20,000
- \$20,000-40,000
- \$41,000 - 60,000
- \$61,000 - 80,000
- \$81,000 - \$100,000
- \$101,000 - \$150,000
- \$151,000+

6 Do you reside in Monroe County?

- Yes
- No

7 Do you work in Monroe County?

- Yes
- No

8 How would you describe your gender? (optional)

- Male
- Female
- Non-binary/Third Gender
- Other _____

9 On average, how many people go with you to attend performances (include plays, musicals, operas, and orchestra/symphony performances)? _____

10 On average, how many performances do you attend per year? _____

11 Where do you attend these performances?

- Cardinal Stage;
- Arts Alliance of Greater Bloomington;
- Buskirk-Chumley Theater;
- Ivy-tech John Waldron Arts Center;

- Bloomington Playwrights Project;
- Stages Bloomington;
- Jewish Theatre of Bloomington;
- IU Auditorium;
- IU Opera;
- IU Theatre & Drama
- Other

12 If there were not performing arts events in Monroe County would you travel to another county to attend a performance?

- No, I would skip a similar performance in a different community
- No, I would have done something else in Monroe County
- Yes, I would travel to a different community to attend a similar performance

13 Please list the estimated amounts of money that you, and the people that travel with you, will spend in Monroe county specifically as a result of attending a performance:

13. A. Food, drinks, or meals purchased before or after a performance \$_____

13. B. Souvenirs, gifts, books, recordings, and/or art purchased before or after a performance \$_____

13. C. Clothing or accessories to be worn specifically for a performance or purchased because of the performance \$_____

13. D. Transportation costs spent to attend a performance (e.g. gas, parking, tolls, bus fare, taxi, rental car - not airfare) \$_____

13. E. Child-care specifically spent to attend a performance (cost for one night only)\$_____

13. F. Overnight accommodations to attend a performance (cost for one night only)\$_____

13. G. Other (Please provide description) _____ \$_____

14 How many nights away from your primary residence will you spend in a hotel in Bloomington or Monroe County specifically because of your attendance at a Bloomington performing arts event?

15 How much money have you donated to the performing arts in the last year?

- None
- \$1-\$10
- \$11-50
- \$51-100
- \$101-\$500
- \$501-\$1000
- \$1001+

16 If you had to choose something other than the performing arts to donate to, what would it be?

- _____

17 How much time do you volunteer to the performing arts per year on average? _____

18 How much time do you volunteer to a non-performing-arts organization per year on average? _____

The following questions are optional, however, could help the performing arts in Bloomington.

The Performing Arts:

19 Which of these organizations have you heard of? (Check all that apply)

- Cardinal Stage;
- Arts Alliance of Greater Bloomington;
- Buskirk-Chumley Theater;
- Ivy-tech John Waldron Arts Center;
- Bloomington Playwrights Project;
- Stages Bloomington;
- Jewish Theatre of Bloomington;
- IU Auditorium;
- IU Opera;
- IU Theatre & Drama
- Other

Ticket Subscription and Pricing Questions

20 What is the most you would spend on a single event ticket?*

- \$0-\$20
- \$20-\$40
- \$40-\$60
- \$60-\$80
- \$80+

21 Do you prefer season subscription over single tickets?

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

22. Please indicate why you agree or disagree: _____

23 Which of the following is most influential in your willingness to purchase a season subscription to a live performing arts show? Please rank order the following (1-most influential; 7-least influential)

- Special Parking
- Ticket Substitutions

- Savings on tickets
- Access to special events [meet and greet with actors, galas]
- Passion for performing arts
- Early access to best seats

24. Please indicate whatever other reason from number 23: _____

25 What is the most you would spend on a season subscription?*

- \$0-\$50
- \$50-\$100
- \$100-\$200
- \$200-\$300
- \$300-\$400
- \$400-\$500
- \$500-\$600
- \$600+

26 What recreational activity would you spend your money on instead of attending a live performance?

What is your attitude toward the performing arts?

27 Make me feel more connected to the community

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

28 Add value to the community

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

29 Help me better understand other cultures

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

30 Should receive funding from local governments

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

31 Should receive support from local governments

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

32 What is your email address or phone number if you'd like to be in the raffle for tickets to see a Cardinal Stage show? (Optional)

A8. Total Economic Results - All 4 Organizations

Direct and Indirect Effects:		Overall Total	
Estimated Employment Effects		Estimated Employment Effects	
Direct Employment Effects	228	Direct Employment Effects	N/A
Employment Ripple Effects	74.38	Employment Ripple Effects	22.43
Total Employment Effects	302.38	Total Employment Effects	22.43
Multiplier	1.326	Multiplier	N/A
Estimated Output Effects		Estimated Output Effects	
Direct Output Effects	\$ 9,597,317.40	Direct Output Effects	N/A
Output Ripple Effects	\$ 4,599,816.28	Output Ripple Effects	\$ 2,686,990.92
Total Output Effects	\$ 14,197,133.68	Total Output Effects	\$ 2,686,990.92
Multiplier	1.479	Multiplier	N/A
Estimated GDP Effects		Estimated GDP Effects	
Direct Value Added Effects	\$ 4,117,249.16	Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 2,455,005.67	Value Added Ripple Effects	\$ 1,561,627.36
Total Value Added Effects	\$ 6,572,254.8	Total Value Added Effects	\$ 1,561,627.36
Multiplier	1.596	Multiplier	N/A

Total Effects:

Estimated Employment Effects	
Direct Employment Effects	228
Employment Ripple Effects	96.81
Total Employment Effects	324.81
Multiplier	1.425
Estimated Output Effects	
Direct Output Effects	\$ 9,597,317.40
Output Ripple Effects	\$ 7,286,807.20
Total Output Effects	\$ 16,884,124.60
Multiplier	1.759
Estimated GDP Effects	
Direct Value Added Effects	\$ 4,117,249.16
Value Added Ripple Effects	\$ 4,016,633.03
Total Value Added Effects	\$ 8,133,882.19
Multiplier	1.976

A9. Total Economic Impact Results without IU Auditorium

Direct and Indirect Effects:		Overall Total	
Estimated Employment Effects		Estimated Employment Effects	
Direct Employment Effects	113	Direct Employment Effects	N/A
Employment Ripple Effects	25.36	Employment Ripple Effects	22.43
Total Employment Effects	138.36	Total Employment Effects	22.43
Multiplier	1.224	Multiplier	N/A
Estimated Output Effects		Estimated Output Effects	
Direct Output Effects	\$ 2,485,744.40	Direct Output Effects	N/A
Output Ripple Effects	\$ 1,517,654.58	Output Ripple Effects	\$ 567,870.42
Total Output Effects	\$ 4,003,398.98	Total Output Effects	\$ 567,870.42
Multiplier	1.611	Multiplier	N/A
Estimated GDP Effects		Estimated GDP Effects	
Direct Value Added Effects	\$ 1,066,384.35	Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 822,133.94	Value Added Ripple Effects	\$ 330,035.36
Total Value Added Effects	\$ 1,888,518.3	Total Value Added Effects	\$ 330,035.36
Multiplier	1.771	Multiplier	N/A

Total Effects:

Estimated Employment Effects	
Direct Employment Effects	113
Employment Ripple Effects	47.79
Total Employment Effects	160.79
Multiplier	1.423
Estimated Output Effects	
Direct Output Effects	\$ 2,485,744.40
Output Ripple Effects	\$ 2,085,525.00
Total Output Effects	\$ 4,571,269.40
Multiplier	1.839
Estimated GDP Effects	
Direct Value Added Effects	\$ 1,066,384.35
Value Added Ripple Effects	\$ 1,152,169.30
Total Value Added Effects	\$ 2,218,553.65
Multiplier	2.080

A10. Cardinal Stage Economic Impact Results

Cardinal Stage

Direct and Indirect Effects:

Estimated Employment Effects	
Direct Employment Effects	25
Employment Ripple Effects	9.91
Total Employment Effects	35
Multiplier	1.396
Estimated Output Effects	
Direct Output Effects	\$ 927,703.00
Output Ripple Effects	\$ 645,165.34
Total Output Effects	\$ 1,572,868.34
Multiplier	1.695
Estimated GDP Effects	
Direct Value Added Effects	\$ 397,984.59
Value Added Ripple Effects	\$ 320,209.17
Total Value Added Effects	\$ 718,193.76
Multiplier	1.805

Induced Effects:

Estimated Employment Effects	
Direct Employment Effects	N/A
Employment Ripple Effects	1.28
Total Employment Effects	1.28
Multiplier	N/A
Estimated Output Effects	
Direct Output Effects	N/A
Output Ripple Effects	\$ 152,896.50
Total Output Effects	\$ 152,896.50
Multiplier	N/A
Estimated GDP Effects	
Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 88,860.50
Total Value Added Effects	\$ 88,860.50
Multiplier	N/A

Cardinal Stage

Total Effects:

Estimated Employment Effects	
Direct Employment Effects	25
Employment Ripple Effects	11.19
Total Employment Effects	36.19
Multiplier	1.448
Estimated Output Effects	
Direct Output Effects	\$ 927,703.00
Output Ripple Effects	\$ 798,061.84
Total Output Effects	\$ 1,725,764.84
Multiplier	1.860
Estimated GDP Effects	
Direct Value Added Effects	\$ 397,984.59
Value Added Ripple Effects	\$ 409,069.67
Total Value Added Effects	\$ 807,054.26
Multiplier	2.028

A11. John Waldron Arts Center Economic Impact

Waldron Arts Center

Direct and Indirect Effects:

Estimated Employment Effects	
Direct Employment Effects	21
Employment Ripple Effects	1.90
Total Employment Effects	23
Multiplier	1.091
Estimated Output Effects	
Direct Output Effects	\$ 656,831.40
Output Ripple Effects	\$ 107,443.85
Total Output Effects	\$ 764,275.25
Multiplier	1.164
Estimated GDP Effects	
Direct Value Added Effects	\$ 281,780.67
Value Added Ripple Effects	\$ 50,903.33
Total Value Added Effects	\$ 332,684.00
Multiplier	1.181

Induced Effects:

Estimated Employment Effects	
Direct Employment Effects	N/A
Employment Ripple Effects	1.36
Total Employment Effects	1.36
Multiplier	N/A
Estimated Output Effects	
Direct Output Effects	N/A
Output Ripple Effects	\$ 163,075.56
Total Output Effects	\$ 163,075.56
Multiplier	N/A
Estimated GDP Effects	
Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 94,776.39
Total Value Added Effects	\$ 94,776.39
Multiplier	N/A

Waldron Arts Center

Total Effects:

Estimated Employment Effects	
Direct Employment Effects	21
Employment Ripple Effects	3.27
Total Employment Effects	24.27
Multiplier	1.156
Estimated Output Effects	
Direct Output Effects	\$ 656,831.40
Output Ripple Effects	\$ 270,519.41
Total Output Effects	\$ 927,350.81
Multiplier	1.412
Estimated GDP Effects	
Direct Value Added Effects	\$ 281,780.67
Value Added Ripple Effects	\$ 145,679.72
Total Value Added Effects	\$ 427,460.39
Multiplier	1.517

A12. Buskirk-Chumley Theater Results

Buskirk-Chumley Theater	
Direct and Indirect Effects:	
Estimated Employment Effects	
Direct Employment Effects	67
Employment Ripple Effects	13.54
Total Employment Effects	81
Multiplier	1.202
Estimated Output Effects	
Direct Output Effects	\$ 975,420.00
Output Ripple Effects	\$ 851,335.09
Total Output Effects	\$ 1,826,755.09
Multiplier	1.873
Estimated GDP Effects (\$ mil)	
Direct Value Added Effects	\$ 418,455.18
Value Added Ripple Effects	\$ 451,021.44
Total Value Added Effects	\$ 869,476.62
Multiplier	2.078
Induced Effects:	
Estimated Employment Effects	
Direct Employment Effects	N/A
Employment Ripple Effects	2.10
Total Employment Effects	2.10
Multiplier	N/A
Estimated Output Effects	
Direct Output Effects	N/A
Output Ripple Effects	\$ 251,898.36
Total Output Effects	\$ 251,898.36
Multiplier	N/A
Estimated GDP Effects	
Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 146,398.47
Total Value Added Effects	\$ 146,398.47
Multiplier	N/A

Buskirk-Chumley Theater	
Total Effects:	
Estimated Employment Effects	
Direct Employment Effects	67
Employment Ripple Effects	15.64
Total Employment Effects	82.64
Multiplier	1.233
Estimated Output Effects	
Direct Output Effects	\$ 975,420.00
Output Ripple Effects	\$ 1,103,233.45
Total Output Effects	\$ 2,078,653.45
Multiplier	2.131
Estimated GDP Effects	
Direct Value Added Effects	\$ 418,455.18
Value Added Ripple Effects	\$ 597,419.91
Total Value Added Effects	\$ 1,015,875.09
Multiplier	2.428

A13. IU Auditorium

IU Auditorium	
Direct and Indirect Effects:	
Estimated Employment Effects	
Direct Employment Effects	115
Employment Ripple Effects	49.03
Total Employment Effects	164
Multiplier	1.426
Estimated Output Effects	
Direct Output Effects	\$ 7,111,573.00
Output Ripple Effects	\$ 3,082,161.70
Total Output Effects	\$ 10,193,734.70
Multiplier	1.433
Estimated GDP Effects	
Direct Value Added Effects	\$ 3,050,864.82
Value Added Ripple Effects	\$ 1,632,871.73
Total Value Added Effects	\$ 4,683,736.55
Multiplier	1.535
Induced Effects:	
Estimated Employment Effects	
Direct Employment Effects	N/A
Employment Ripple Effects	17.69
Total Employment Effects	17.69
Multiplier	N/A
Estimated Output Effects	
Direct Output Effects	N/A
Output Ripple Effects	\$ 2,119,120.50
Total Output Effects	\$ 2,119,120.50
Multiplier	N/A
Estimated GDP Effects	
Direct Value Added Effects	N/A
Value Added Ripple Effects	\$ 1,231,592.00
Total Value Added Effects	\$ 1,231,592.00
Multiplier	N/A

IU Auditorium	
Total Effects:	
Estimated Employment Effects	
Direct Employment Effects	115
Employment Ripple Effects	66.71
Total Employment Effects	181.71
Multiplier	1.580
Estimated Output Effects	
Direct Output Effects	\$ 7,111,573.00
Output Ripple Effects	\$ 5,201,282.20
Total Output Effects	\$ 12,312,855.20
Multiplier	1.731
Estimated GDP Effects	
Direct Value Added Effects	\$ 3,050,864.82
Value Added Ripple Effects	\$ 2,864,463.73
Total Value Added Effects	\$ 5,915,328.55
Multiplier	1.939