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Staging Cleveland: A Theater Industry Study

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**STAGING
CLEVELAND:
A THEATER
INDUSTRY
STUDY**

**CENTER FOR
ECONOMIC
DEVELOPMENT**

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EXECUTIVE SUMMARY

INTRODUCTION

The impact of theater is traditionally discussed in the emotion someone feels from seeing a live show on stage or the nostalgia of remembering the experience of seeing one's favorite movie come to life for the first time. Theaters are one of a city's most beautiful treasures, often constructed with high levels of architectural appeal which can take audiences out of their normal life and lead them into the world of the performance. However, besides beautiful buildings and fond memories, what is the impact of the theater sector on a region?

This study uses a quantitative framework to examine the economic impact of the theater industry in Cuyahoga County. Using qualitative and quantitative data, this study examines the occupations and businesses associated with the Cleveland theater sector, analyzes the landscape of theaters in Cuyahoga County, investigates the strengths and challenges of the sector, and quantitatively determines the economic impact of the sector.

***"If we bring a little joy into your humdrum lives,
it makes us feel as though our hard work ain't been in vain for nothin'."***
— Betty Comden and Adolph Green, *Singin' in the Rain*

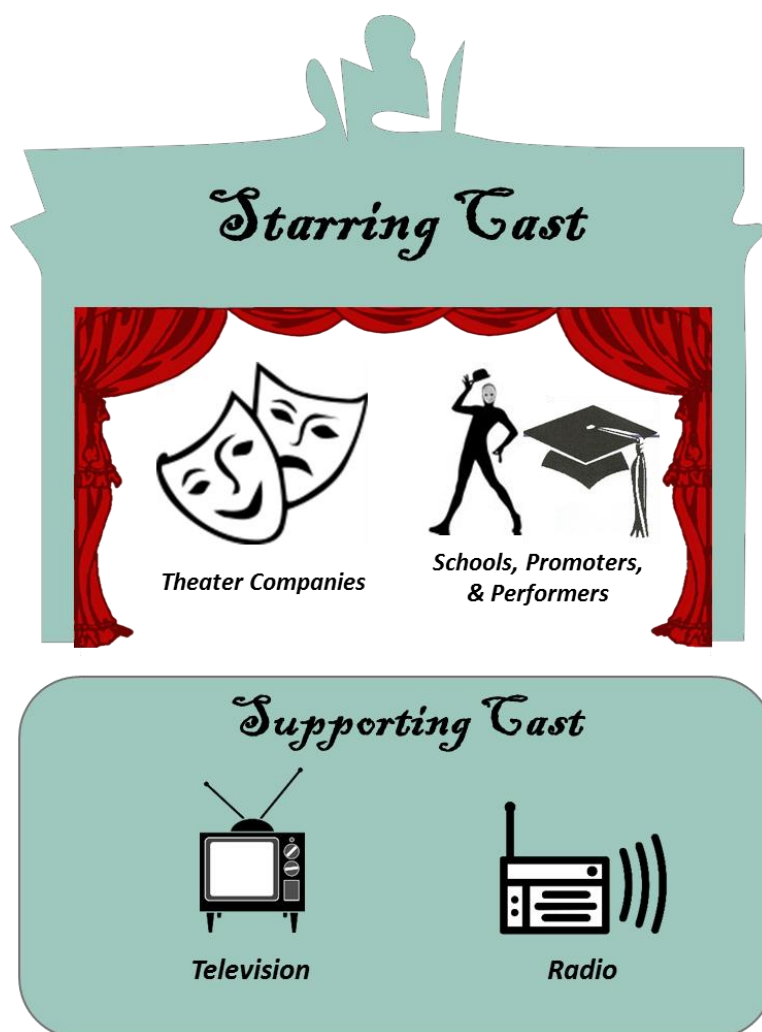
TREND ANALYSIS

The theater sector in Cleveland and the trends over the past 11 years were examined to give a picture of the entirety of the sector in the local economy. Overall, there were two industry groupings that categorized the core function of the theater industry and two industry groupings that categorized peripheral functions of the theater industry. The core categories are *Theater* and *Schools, Promoters, & Performers*, and the peripheral categories are *Television* and *Radio* (Figure I).

These four groupings were created to best describe the businesses contained in the theater sector in Cuyahoga County. First, the *Theater* grouping was singled out since this is a main component of the sector. The category *Schools, Promoters, & Performers* includes four North American Industry Classification System (NAICS) subsectors of independent artists, promoters, and other performing arts companies; these sectors were included because they provide a service needed among theater companies and theaters. *Fine Arts Schools* was also included in *Schools, Promoters, & Performers* since these institutions provide the core function of training students in the theater craft. They also employ current or retired theater talent and expand employment opportunities for theater professionals. The typology of the theater sector was created by examining the individuals who work in the theater industry and then extrapolating that to businesses and industries.

Understanding that there are other industries that employ individuals from the theater sector, *Television* and *Radio* sectors were also included because strong sectors here may help expand job opportunities for on-stage or technical talent and may sustain their theater careers with steady work. Beyond this, examining the occupational profile of the radio and television industries reveals that *Producers and Directors* account for 12% of employment in the industry, on average, across the United States.¹ Moreover, technicians and other support staff cross between these industry categories.

Figure I. Typology of Theater Sector



¹ Data derived from examining the national occupational profile of Performing Arts Companies (NAICS 7111) and Radio and Television Broadcasting (NAICS 5151).

The theater sector in Cuyahoga County had 2,339 employees in 2015. This sector has declined by 14.2% during the study period (2005 to 2015). The sector also declined in Ohio (17.9%) and the broader United States (1.4%). On a positive note, the Cuyahoga County theater sector saw employment growth of 1.7% between 2014 and 2015, whereas employment decreased by 1.2% in Ohio and only grew slightly in the U.S. (0.6%). The largest employment subsector was *Television* with 31.1% of 2015 employment, closely followed by *Schools, Promoters, & Performers* (29.4%) and *Radio* (28.4%). *Theater* was the smallest (11.1%).

Total payroll in the theater sector also declined during the recession (2007-2009). However, payroll has steadily increased in the county, state, and country from 2011 to 2014. In 2014, payroll saw a sharp decline in Cuyahoga County and a mild decline in Ohio, while the United States showed only a marginal decline. During the study period, three of the four subsectors in Cuyahoga County experienced a negative change in payroll (all except *Schools, Promoters, & Performers*). *Television* comprised over half of the payroll (50.1%) in 2015. The second largest subsector share was *Radio* (32.0%), followed by *Schools, Promoters, & Performers* (12.1%). Again, Theater was the smallest with only 5.9% of the total payroll.

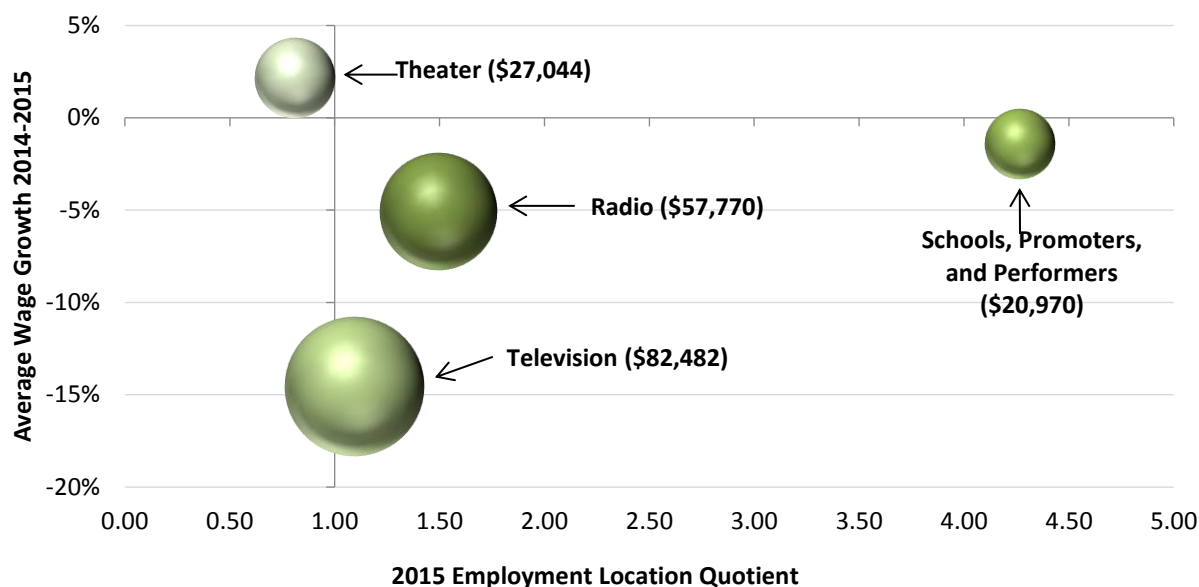
The number of theater establishments in the Cuyahoga County theater sector changed significantly from 2005 to 2015. The number of establishments for the state and the country was smoother and less volatile than the county. The theater sector in Cuyahoga County had negative growth (-6.3%) from 2005 to 2015, while it experienced growth of 6.2% and 6.8% in Ohio and the U.S., respectively. The largest growth in number of establishment of the Cuyahoga County theater subsector was *Television* with 33.3% and the largest decline was *Radio* with 19.0% during the study period. From 2014 to 2015, the subsector of *Theater* had the largest growth (20.0%), closely followed by *Television* subsector (14.3%).

Figure II shows the 2015 Location Quotient (LQ) for Cuyahoga County's theater sector and the average wage growth from 2014 to 2015. The LQ assesses the Cleveland theater sector's employment in each subsector, comparing it with the employment of theater subsectors in the U.S. in 2015. LQ describes the local concentration of an industry compared to the national average concentration of said industry; if an LQ is greater than 1, then the subsector in Cuyahoga County has a proportionally higher level of employment in the subsector than the U.S., indicating regional specialization. Three out of four subsectors in the Cuyahoga County theater sector have LQs above 1. The largest LQ of the subsectors is *Schools, Promoters, & Performers* with 4.27. The second largest subsector is *Radio* with 1.5, closely followed by *Television* with 1.1. The *Theater* subsector was the only one to have a LQ less than 1.

The vertical axis of Figure II indicates the growth in average wages in the Cleveland theater sector from 2014 to 2015 with the size of the bubble representing the average wage. The larger

the bubble, the higher the average wage. The subsector with the highest average wage in Cleveland's theater sector is *Television* (\$82,482), while *Schools, Promoters, & Performers* has the lowest (\$20,970). Three out of four subsectors experienced a decline in average wages, with *Television* having the largest decline during the last two years.

Figure II: Employment Location Quotient and Average Wage Growth of the Cleveland Theater



Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data.

***“Movies will make you famous; Television will make you rich;
But theatre will make you good.” — Terrence Mann***

OCCUPATIONAL ANALYSIS

An important first step in understanding the theater sector in Northeast Ohio is to examine the ways in which occupations related to theater—in terms of both raw numbers and percentages—compared to all occupations in the area. This analysis examines occupational employment for the Cleveland-Elyria Metropolitan Statistical Area (MSA), a U.S. Census Bureau designation that encompasses Cuyahoga, Lorain, Lake, Medina, and Geauga counties.² The MSA

² It is important to note that average wages in the trend analysis section of this report reported 2015 average wages of \$20,970. The trend analysis was based upon establishment data and wages derived from establishments in Cuyahoga County. As compared to occupational wages which are based upon data from a national survey of businesses and represent a 5-county area.

level data was used since data for a smaller geography was not available. Table I shows theater and total employment over the six-year period from 2010 to 2015.

Table I: Theater and Total Occupational Employment in the Cleveland MSA, 2010-2015

	2010	2011	2012	2013	2014	2015
Theater Employment	3,706	3,955	3,899	4,096	3,986	4,137
Total Employment	968,160	978,400	994,380	1,010,190	1,014,440	1,020,190
Share of Theater Employment of Total Employment	0.38%	0.40%	0.39%	0.41%	0.39%	0.41%

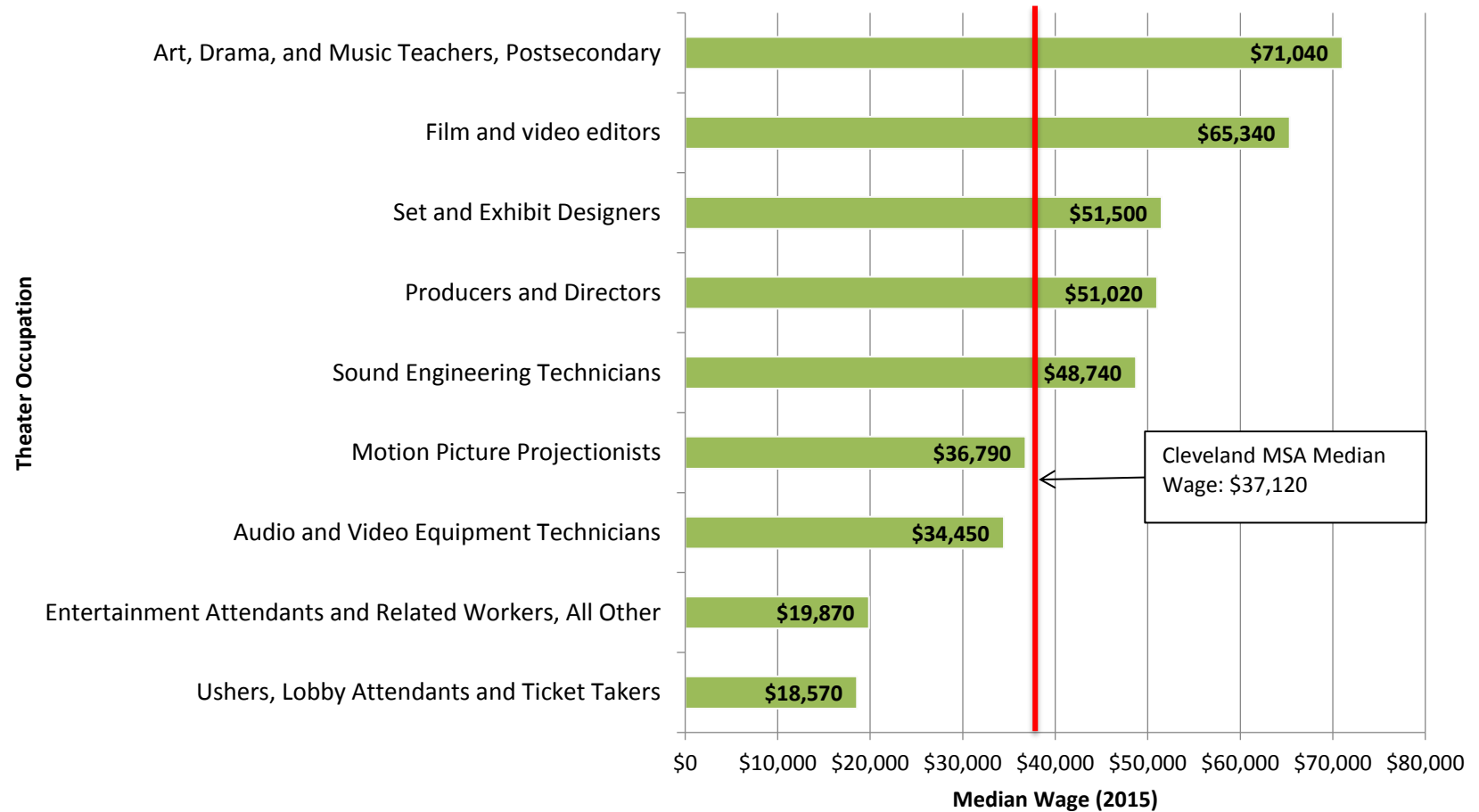
Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Next, the data was broken down into job groups—showing which fields within theater had the most employees—with over 66% falling into the top four categories of: *Art, Drama, and Music Teachers, Postsecondary; Musicians and Singers; Ushers, Lobby Attendants, and Ticket Takers; and Producers and Directors*. Different professions experienced varied levels of growth in the Cleveland MSA over the six-year span; overall, the theater professions saw an increase of roughly 11.6% versus the 5.4% growth across all professions in the MSA over the same period.

Although not normally associated with high wages, data for this report indicated that there are five theater occupations where median wages in Northeast Ohio are higher than \$37,120, which is the median wage for all occupations in the MSA (see Figure III). The results of this analysis show that not only does the category of *Art, Drama, and Music Teachers, Postsecondary* represent the largest number of workers in the theater in Cleveland, it is also the most lucrative from a financial standpoint, with median wages of \$71,040.

In order to more fully understand how and where the Cleveland theater sector fits into the regional economy, the Center expanded its area of analysis, comparing the results of the occupational analysis for the Cleveland MSA with that of a handful of similar MSAs nearby: Columbus and Cincinnati, Ohio; Pittsburgh, Pennsylvania; and Indianapolis, Indiana. Out of the five MSAs, Cleveland was the only one to see an increase in theater jobs between 2010 and 2015. Although Pittsburgh started and ended with more employees overall, it also sustained the greatest loss in overall theater-related jobs over the period.

Figure III: Theater Occupations Median Wage, Cleveland MSA, 2015



Note: Not all occupations are displayed because of disclosure limitations; wages in 2015 dollars

Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

When the moon is in the seventh house and Jupiter aligns with Mars, then peace will guide the planet and love will steer the stars. This is the dawning of the age of Aquarius.

- James Rado & Gerome Ragini, *Hair*

LANDSCAPE

The theater sector’s presence in Northeast Ohio is profound. Cuyahoga County is home to 63 theater companies, and the city of Cleveland claims 22 of them. Of these theaters, two can be classified as ‘presenters,’ meaning they host shows and individual talent from outside the area, while the rest are ‘performers,’ all organized around putting on their own shows. Of the 61 performers, 11 are youth theater companies, half of which are concentrated in the Cleveland Heights area. Nineteen belong to community theater companies, with productions almost exclusively staffed by volunteers. Twenty-two of the remaining theaters are professional spaces— with paid actors and employees—some of whom are members of the union that represents theater professionals, the Actors Equity Association (often called “Equity”).

Table II. Listing of Theaters in Cuyahoga County

Organization	City
82nd Street Theatre	North Royalton
Academy for Dramatic Arts	Olmsted Falls
Allen Theatre Complex at Cleveland State University	Cleveland
Alma Theater at Cain Park	Cleveland Heights
Beck Center for the Arts	Lakewood
Blank Canvas Theatre	Cleveland
Brecksville Theater on the Square	Brecksville
Brecksville’s Little Theatre	Brecksville
Broadview Heights Spotlights	Broadview Heights
Cassidy Theatre Inc.	Parma Heights
Cesear's Forum	Cleveland
Chagrin Academy for the Performing Arts	Chagrin Falls
Chagrin Valley Little Theatre	Chagrin Falls
Clague Playhouse	Westlake
Cleveland Opera Theater	Cleveland
Cleveland Play House	Cleveland
Cleveland Public Theatre	Cleveland
Cleveland School of the Arts	Cleveland
Cleveland Shakespeare Festival	Cleveland Heights
Comedy Project Alliance	Mayfield
convergence-continuum	Cleveland
Dobama Theatre	Cleveland Heights
Dover Players	North Olmsted
East Cleveland Theater	East Cleveland

Source: Cleveland Stage Alliance, Center for Economic Development Data Collection

Table II. Listing of Theaters in Cuyahoga County (Continued)

Organization	City
Eastern Campus Theater at Tri-C	Highland Hills
Eldred Theatre at Case Western Reserve University	Cleveland
Ensemble Theatre at Coventry Arts	Cleveland Heights
Garfield Players	Garfield Heights
Great Lakes Theater	Cleveland
Happy Ending Lyric Players	Shaker Heights
Hathaway Brown Theatre Institute	Shaker Heights
Heights Youth Theatre	Cleveland Heights
Hilarities 4th Street Theatre	Cleveland
Independence Community Theatre	Independence
Interplay Jewish Theatre	Cleveland Heights
Karamu House	Cleveland
Kliest Center for Art and Drama at Baldwin Wallace University	Berea
Kulas Auditorium at John Carrol University	University Heights
Kulture Kids	Cleveland Heights
Lantern Theatre	Valley View
Mamai Theatre Company	Cleveland
Man Cry Productions	Cleveland
Mercury Theatre Company	South Euclid
Metro Campus Theater at Tri-C	Cleveland
Near West Theatre Inc.	Cleveland
Ohio City Theatre Project	Cleveland
Olmsted Performing Arts	Olmsted Falls
Playhouse Square	Cleveland
Playmakers Youth Theatre	Beachwood
Playwrights Local	Cleveland
Regina Hall at Notre Dame College	South Euclid
Royalton Players	North Royalton
SignStage	Cleveland
Silhouette Productions	Euclid
Solon Center for the Arts	Solon
Something Dada	Lakewood
Stagecrafters Youth Theatre	Pepper Pike
Strongsville Community Theatre	Strongsville
Talespinner Children's Theatre	Cleveland
The Musical Theater Project	Lakewood
Theater Ninjas	Bratenahl
Upstage Players	Cleveland
Western Campus Theater at Tri-C	Parma

Source: Cleveland Stage Alliance, Center for Economic Development Data Collection

It is important to consider the geographic dispersion of theaters across the county, as they tend to cluster in certain key areas worth noting. The most prominent case of this clustering is Playhouse Square, a nexus of activity in the heart of Cleveland's downtown, featuring 9 theaters of which 3 have capacities of 1000+ seats. Additional pockets of activity include the Gordon Square Arts District on the near west side of the city as well as Cleveland Heights, an inner ring suburb home to an eclectic mixture of contemporary, religious, and classical theater.

As mentioned, community theaters in Northeast Ohio are an important asset to the overall ecosystem. These facilities provide fertile training grounds for young actors looking to cut their teeth as well as a sense of artistic community and camaraderie in many of the smaller communities in Cuyahoga County. These theaters can occupy interesting physical venues, engage in experimental performance methods, and cater to niche markets in a way that larger and more traditional organizations might not be able.

For the patron of the arts who would prefer the traditional theater experience, Playhouse Square offers an outstanding variety of productions. It is the nation's second largest theater district (behind only Lincoln Center in New York City).³ This district has a long and storied history stretching back to the 1920s, when the State, Ohio, Hanna, Allen, and Palace theaters were built to house vaudeville, screen, and stage shows.⁴ After a period of decline and disuse, the district got a new lease on life, thanks in part to the efforts of the Playhouse Square Association. This association was able to raise enough money from public, private, and nonprofit sources to revitalize the theaters and the area, creating the city of Cleveland's first Business Improvement District (BID) in the process.

Playhouse Square is often the first stop for touring Broadway productions taken on the road, and is a theatrical bellwether used to determine the probable success or failure of traveling Broadway shows. As the region's two leading professional companies in Playhouse Square, Cleveland Play House and Great Lakes Theater distinguish Cleveland as one of only 11 US cities to be home to at least two League of Resident Theatres (LORT) members.⁵ LORT theaters often use a large amount of local talent across a wide range of genres, and these two, who can count alumni such as actor Tom Hanks as supporters, certainly exemplify that commitment to professional integrity and local involvement. Besides the theaters themselves, Playhouse Square is also home to the world's largest permanent outdoor chandelier, a 20-foot-tall centerpiece suspended directly over the center of Playhouse Square at the intersection of East

³ Playhouse Square. (2017). About Playhouse Square. Retrieved from <http://www.playhousesquare.org/about-playhousesquare-main/about-playhousesquare>

⁴ Playhouse Square. (2017). History. Retrieved from <http://www.playhousesquare.org/about-playhousesquare-main/history>

⁵ League of Resident Theatres (n.d.) Member Theatres. Retrieved from http://www.lort.org/LORT_Member_Theatres.html

14th Street and Euclid Avenue – a fixture in many evening and nighttime photographs of the area and a destination for tourists and other visitors to downtown Cleveland.

Just a short drive west of Playhouse Square lies the Gordon Square Arts District (GSAD), a collaborative effort between several theaters, art spaces, public officials, and the surrounding Detroit Shoreway neighborhood which has spurred impressive revitalization—incorporating physical redevelopment, streetscape improvements, and numerous business development opportunities. With over \$30 million in capital raised for various improvement efforts in recent years, GSAD continues to garner national attention, playing host to CNBC’s 2016 television show “Cleveland Hustles”, a reality television show that has entrepreneurs compete for seed money to grow their business which is executive produced by Northeast Ohio’s most famous son, Cleveland Cavaliers’ LeBron James.

What began in 1978 as an effort by the Detroit Shoreway Community Development Organization to stabilize and rehabilitate some of the neighborhood’s historic buildings, including the Capitol Theatre, has since morphed into a community-wide commitment to preserving and fostering the unique artistic and architectural traits that set GSAD apart. Significant achievements include the conversion of the upper floors of several retail spaces into affordable housing units and the placement of several buildings on the National Register of Historic Places.⁶

GSAD’s theater presence includes Cleveland Public Theatre (CPT), founded in 1981 as a volunteer organization for artists, which has since become one of the city’s most well-known professional performing arts spaces, focused on community involvement and participation.⁷ Like CPT, Near West Theatre began in the late 1970s as a volunteer organization just down the road, and—like CPT—it takes pride in its commitment to putting on performances that challenge both the players and audience to consider issues of social justice and community.

While the GSAD has commanded a large share of the press concerning theater in recent years, the eastern suburb of Cleveland Heights can lay claim to a longer tradition of theater activity. In a unique arrangement, the city of Cleveland Heights operates and curates professional theater productions at a pair of theaters, the Alma and the Evans Amphitheater, located in Cain Park, a public park used in part for theater since 1934.

⁶ Source: Keating, D. W. (2014). The Gordon Square Arts District in Cleveland’s Detroit Shoreway Neighborhood Cleveland: Cleveland State University. Retrieved from

http://engagedscholarship.csuohio.edu/cgi/viewcontent.cgi?article=2164&context=urban_facpub

⁷ The Encyclopedia of Cleveland History (2004, Dec 4). Cleveland Public Theatre. Retrieved from <http://ech.case.edu/cgi/article.pl?id=CPT1>

Founded in 1959, Dobama Theatre shares the spotlight with Cain Park in Cleveland Heights, is Northeast Ohio's only Equity theater outside of Playhouse Square, and focuses on premiering shows to new audiences.⁸ A city as small as Cleveland Heights having this many theaters is indicative of the level of support city residents can provide.

Linking Cleveland Heights back to the east side of the city of Cleveland itself, Dobama recently announced a collaboration with Karamu House. Karamu House is a historic theater company known for its strong neighborhood ties, due in large part to the organization's beginnings in 1915 as a settlement house for recent African-American migrants from the southern United States during the Great Migration. Weathering a century of change in Cleveland, Karamu has gone through several stages of activity, hosting poet Langston Hughes, enjoying a reputation as one of the nation's best amateur theaters, surviving the burning down of its original space, and educating generations of young actors—all while maintaining its core mission of preserving, celebrating, and evolving African-American culture.⁹ With the new partnership with Dobama, Karamu is poised to begin its second century with a renewed commitment to artistic collaboration and civic engagement.

⁸ Dobama Theatre (n.d.) An Equity Theatre. Retrieved from www.dobama.org/an-equity-theatre/

⁹ The Encyclopedia of Cleveland History (2012, Nov 02). Karamu House. Retrieved from <http://ech.cwru.edu/ech-cgi/article.pl?id=KH>

***“All the world's a stage,
And all the men and women merely players;
They have their exits and their entrances,
And one man in his time plays many parts”***
— William Shakespeare, *As You Like It*

WORKFORCE

The development of a local workforce is key to any industry, and the theater industry is no different. Theaters and theater companies are always looking to staff their houses and their productions with top-quality professionals and talent. Northeast Ohio is fortunate to have a deep array of institutions working to further the craft; three universities in Cuyahoga County alone have four-year degrees in theater: Baldwin Wallace University, Cleveland State University (CSU), and Case Western Reserve University (CWRU). CWRU also has the only graduate-level Masters of Fine Arts (MFA) in Theater and Acting, which matriculates individuals directly into the Actor’s Equity Association. Additionally, Cuyahoga Community College (Tri-C) has a two-year theater program.

Theaters and theater companies throughout the region have great working relationships with youth and undergraduates interested in the performing arts. The MFA program at CWRU has a strong partnership with the Cleveland Play House, where students spend their third year working as understudies. CSU also has a partnership with the Cleveland Play House, sharing space in the Allen Theater where CSU performances take place. Additionally, staff from Cleveland Play House teach coursework at CSU, and students engage in mentoring experiences that include production and marketing internships.

Talent drain is a real issue for many in the sector. Survey results showed that 55% of respondents indicated that it was *somewhat difficult* or *extremely difficult* to find work in Cuyahoga County. This suggests that although there are a variety of training opportunities available, including the institutions of higher education and the many youth theater programs, jobs may not be available for all graduates.

Theater jobs in Cleveland offer many positive benefits, not the least of which is a low cost of living for developing artists. There is also a high concentration of both theaters and playwrights in the city, which offers a level of national recognition and many opportunities for work. Finally, the theater sector in Cleveland has a strong network, allowing individuals to work across spaces and groups in an interconnected and welcoming environment.

“Check coming today?”

— Lorraine Hansberry, *A Raisin in the Sun*

ECONOMIC IMPACT

Economic impact analysis measures the change in an economy due to a stimulus. In the case of the theater sector, we might envision that it came into existence one day, stimulating the economy and producing an impact. Arguably, the opposite is true as well, as the economic impact can show the effect on the economy if the sector suddenly ceased to exist. As with any industry, theater is linked to other businesses through buy-sell relationships. To produce shows, theaters and theater companies buy intermediary goods and services from other companies (e.g. construction material providers, food services, parking and security labor, utilities, landlords, etc.) both within the theater sector and outside of it. Five measures of impact estimated by the model are analyzed here: *employment*, *labor income*, *value added*, *output*, and *taxes*. Employment measures the number of jobs that are present because of the Cleveland theater sector. Labor income is payroll paid to employees and proprietors' income. Value added measures the value of goods and services produced, minus the cost of intermediary goods. Output measures the total value of goods and services produced. Taxes include federal, state, and local tax revenues. Each of these impacts is the sum of *direct impact*, *indirect impact*, and *induced impact*. The direct impact is the initial value of goods and services the theater sector purchases, the indirect impact measures the jobs and production needed to manufacture goods and services required by the theater sector, and the induced impact is the increase in spending of local households due to the income received through their work as theater employees or suppliers.

The overall economic impact of the Cleveland theater sector in 2015 includes a total of 2,382 direct employees and an associated \$58.9 million in labor income, as well as \$471.7 million in output impact. From this direct impact, the theater sector accounted for 5,065 total jobs (Table III). 1,815 indirect jobs represent the supply chain and are comprised of industries that sell their products and services to the theater sector. 868 jobs identified in the induced effect reflect employment in Cuyahoga County due to household purchases of those employed in the theater sector and its supply chain. The total labor income of the theater sector was \$234.8 million. The total value-added impact of the theater sector was \$377.9 million. The total output impact was \$903.2 million. In terms of taxes, the theater sector was responsible for \$67.9 million in 2015. Of the total \$67.9 million, \$23.6 million was in state and local taxes, and \$44.3 million was in federal taxes.

Table III: Total Economic Impact of the Cleveland Theater Sector, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	2,382	\$58,880,078	\$113,826,198	\$471,654,509	\$18,346,317
Indirect Effect	1,815	\$133,269,673	\$188,643,409	\$309,444,127	\$34,160,120
Induced Effect	868	\$42,651,237	\$75,427,881	\$122,104,711	\$15,429,930
Total Effect	5,065	\$234,800,988	\$377,897,488	\$903,203,347	\$67,936,367

The economic impact of the theater sector was examined per its five subsectors: *performers* (from the survey), *theater companies*, *television stations*, *schools* (related to the theater), and *radio stations* (Table IV). The largest subsector in terms of all measures of impact (employment, labor income, value added, output, and taxes) was *television* (32%). *Radio* (29%) and *schools* (26%) were the next largest subsectors in terms of economic impact. *Theater companies* represented approximately 12% of the total employment impact, and *performers* were very underrepresented—representing only 1% of the total employment impact.¹⁰

Table IV: Economic Impact of Cleveland Theater Sector by Subsector

Impact Type	Employment	Labor Income	Value Added	Output	Total Taxes
Performers	57	\$1,894,346	\$2,350,042	\$3,625,540	\$451,206
Theater Companies	590	\$19,554,232	\$39,954,351	\$78,323,830	\$7,006,854
Television	1,635	\$93,985,506	\$135,922,971	\$328,315,815	\$24,734,375
Schools	1,309	\$38,689,136	\$85,580,160	\$196,018,778	\$14,286,946
Radio	1,474	\$80,677,768	\$114,089,964	\$296,919,384	\$21,456,986
Total	5,065	\$234,800,988	\$377,897,488	\$903,203,347	\$67,936,367

Table V shows the multipliers for the theater sector. Multipliers show how one job or one dollar can circulate through the economy. Interestingly, theater companies had the highest employment multiplier (2.27). For each job created in a theater company, an additional 1.27 jobs were added in the local economy.

¹⁰ The category of performers is under counted in this study due to data limitations; only performers who answered the survey were included in the analysis.

Table V: Total Multipliers for Cleveland Theater Sector by Subsector¹¹

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Performers	1.30	1.59	1.95	1.98	1.93
Theater Companies	2.27	3.61	2.22	1.78	2.25
Television	2.25	3.81	4.13	2.07	4.83
Schools	1.90	4.16	2.14	1.60	2.38
Radio	2.22	4.41	5.25	2.05	5.52
Overall	2.13	3.99	3.32	1.91	3.70

In terms of the financial measures, for each \$1 invested, the multiplier shows the total economic impact (Table V). For example, for each \$1 invested in performers, there is an additional \$0.59 impact on labor income, \$0.95 impact on value added, \$0.98 impact on output, and \$0.93 impact on taxes.

“And all that jazz”

— John Kander & Fred Ebb, Chicago

CONCLUSION

Beyond the economic attributes of the Cleveland theater sector, there are interesting components that should be highlighted and discussed. Through interviews, surveys, and data collection, a vast amount of information was assembled on the Cleveland theater sector. These discussions included the market’s total audience and absorption rate for additional theater productions, the sources of revenue available for theater art, how a theater artist can plausibly make a living on their art alone, whether enough theater artists live in Cleveland to support the demand for its productions, and how the image of Cleveland’s theater sector is understood by the local community and by thespians nationwide. Some points of discussion are new, and others are ongoing. However, it is important to reflect on the challenges and opportunities for the sector to maintain its visibility and influence.

Assets include:

- A robust and vibrant theater sector far reaching across Cuyahoga County with all types and levels of theater represented indicating that place-based art, which is important to

¹¹ Note: These numbers cannot be summed as they represent the multiplier for each indicator.

the region. Moreover, audiences participate in and support the variety of talent in the county.

- Excellent university theater programs exist such as Cuyahoga Community College's two-year theater program, Baldwin Wallace University's theater and music theater programs, Case Western Reserve University's theater program and Master of Fine Arts, and Cleveland State University's theater program and partnership with the Cleveland Play House. All of these educational strengths draw talent to the region to learn their craft.
- Collaboration and connectivity within the theater sector between theater companies and educational institutions, which is unlike other comparable regions across the country.

Opportunities Include:

- The workforce development pipeline of talented students graduating from Northeast Ohio universities; currently, jobs may not be available for them when they graduate, and they must move away. Harnessing these graduates for opportunities to innovate in Cuyahoga County is essential to the sector's success.
- As a mid-sized city, Cleveland has a disproportionately high level of national recognition related to its theater assets. Cleveland's reputation, along with the city's low cost of living and high concentration of theaters and playwrights, can be leveraged to attract and retain workforce talent.
- Opportunities for skilled trades labor beyond on-stage talent to transition their skills into much needed costume design, set design, lighting design, sound design, and stage management. There have been indications that more technical and design staff are needed in the Cleveland theater sector.

Interviewees agreed that, amongst the population of Cuyahoga County, people are not aware of the theater sector's breadth and depth; however, to those aware of theater inside and outside of the county, Cleveland is definitely "on the map." Cleveland's theater prowess engages individuals across the nation who benefit from its rich cultural and economic environment. All of this creates specific opportunities and challenges for the audience and workers.

CHAPTER 1

TYPOLOGY AND TREND ANALYSIS OF THE CLEVELAND THEATER SECTOR

The analysis of industrial trends within the Cleveland theater sector has two goals: first, to create a typology of the theater sector based on classification of theater activities by industry affiliation, and second, to describe the economic trends of the theater sector from 2005 to 2015. To achieve these objectives, the U.S. Census Bureau's North American Industry Classification System (NAICS) codes were used in the analyses. The theater sector was conceptualized as an industrial sector employing people with skills to be used in companies developing performances and supporting them. For this study, the Cleveland theater sector refers to all of Cuyahoga County, not only the city of Cleveland. The data for the trend analysis is derived from a comprehensive database based on the Quarterly Census of Employment and Wage data (QCEW). For a detailed methodology, see Appendix B.

THEATER TYPOLOGY

The typology of the theater sector was created by examining the individuals who work in the theater industry and then extrapolating that to businesses and industries. Overall, there were two industry groupings that categorized the core function of the theater industry and two industry groupings that categorized peripheral functions of the theater industry. The core categories are *Theater* and *Schools, Promoters, & Performers* and the peripheral categories are *Television* and *Radio* (Table 1, Figure 1).

Since the theater is not a large sector and only encompasses eight NAICS categories, some categories were combined to ensure confidentiality for individual businesses. These four groupings were created to best describe the businesses contained in the theater sector in Cuyahoga County. The *Theater* grouping was singled out because this is a main component of the sector. The category *Schools, Promoters, & Performers* includes four NAICS subsectors of independent artists, promoters, and other performing arts companies; these sectors were included because they provide a service needed among theater companies and theaters. *Fine Arts Schools* was also included in *Schools, Promoters, & Performers* since these institutions provide a core function of training students in the theater craft, and employing current or retired theater talent to teach students and expand employment opportunities for theater professionals.

Understanding there are supporting industries that employ individuals from the theater sector, *Television* and *Radio* sectors were also included because strong sectors here may help expand

job opportunities for on-stage or technical talent, and sustain their theater careers with steady work. Beyond this, examining the occupational profile of the radio and television industries indicate that *Producers and Directors* account for 12% of employment in the industry, on average, across the United States.¹² Moreover, technicians and other support staff cross between these industry categories.

Table 1. Theater Industries by NAICS

	Theater Category	NAICS Subsector	NAICS Description
Core Theater Industries	Theater	711110	Theater Companies and Dinner Theaters
	Schools, Promoters, & Performers	711190	Other Performing Arts Companies
	Schools, Promoters, & Performers	711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
	Schools, Promoters, & Performers	711510	Independent Artists, Writers, and Performers
	Schools, Promoters, & Performers	611610	Fine Arts Schools
Periphery Theater Industries	Television	515120	Television Broadcasting
	Radio	515111	Radio Networks
	Radio	515112	Radio Stations

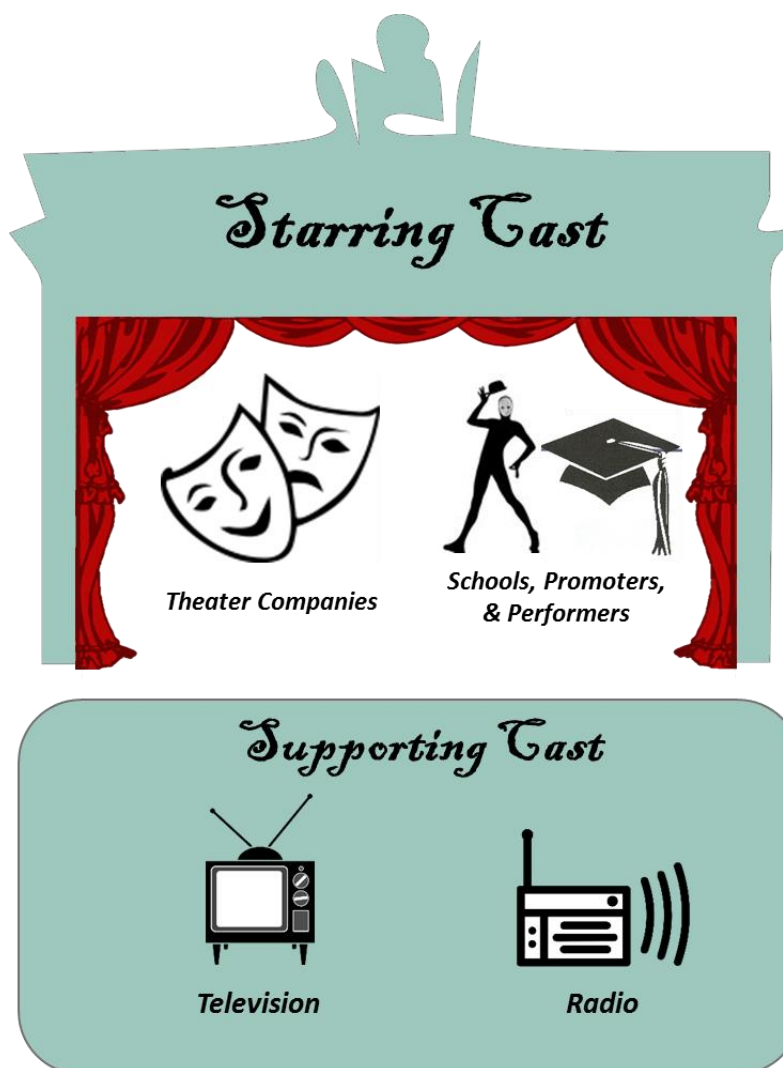
Note: NAICS 711110 is described as “Theater Companies and Dinner Theaters”

Two categories, *Theater* and *Television*, consist of only one NAICS subsector, while *Radio* consists of two NAICS subsectors. The locations that physically house the performances that typically characterize the theater sector are contained within *Theater*. This category is defined by the NAICS subsector “Theater Companies and Dinner Theaters.” *Television*, on the other hand, solely consists of the NAICS subsector “Television Broadcasting.” Radio consists of the NAICS subsector “Radio Networks” and “Radio Stations.” *Schools, Promoters, & Performers* is comprised of several NAICS industries grouped together to ensure confidentiality. First, this category contains the NAICS subsector of “Fine Arts Schools,” as it is not uncommon for individuals in the theater industry to teach as well as participate in productions. Second, individuals who promote theater are integral to its existence, so “Promoters of Performing Arts, Sports, and Similar Events with Facilities” is also combined. The final set of categories was comprised of independent artists, independent actors, small theater companies, and members of private households. This data encapsulated “Other Performing Arts Companies” and “Independent Artists, Writers, and Performers.” The data from “Other Performing Arts Companies” and “Independent Artists, Writers, and Performers” may be greatly undercounting

¹² Data derived from examining the the national occupational profile of Performing Arts Companies (NAICS 7111) and Radio and Television Broadcasting (NAICS 5151).

individuals who are independent performers in this sector since they would have to officially file as an individual company.

Figure 1. Typology of Theater Sector



TREND ANALYSIS

This section of the report contains the economic trend analysis of the Cleveland theater sector in Cuyahoga County. This analysis offers information on the establishments, employment, and wages in the Cleveland theater sector and how this sector has changed over the last 11 years (2005 to 2015).

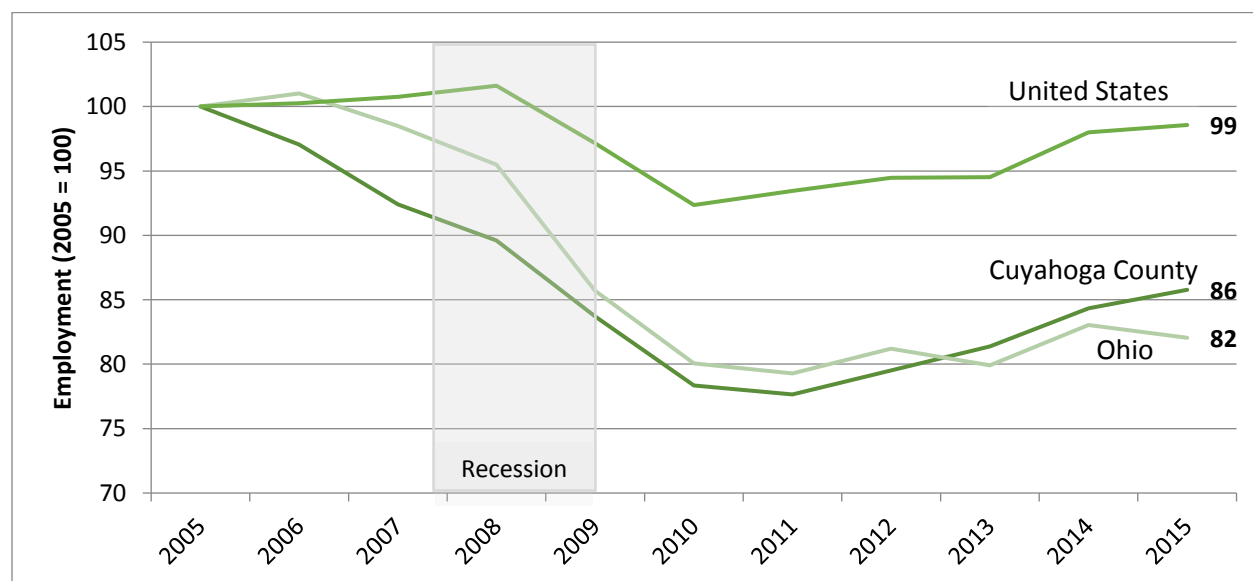
EMPLOYMENT

Figure 2 presents an employment index of the theater sector for Cuyahoga County (Cleveland theater sector), the state of Ohio, and the United States from 2005 to 2015. An index is used to

compare locations of different sizes to each other, as well as to see growth or decline over time. The base year of the index is assigned as 2005, shown at a base rate of 100, and all subsequent employment is expressed in relation to this base. For example, the employment index of Cuyahoga County in 2015 is 86, indicating a decline of 14 percent in the employment of the theater sector from 2005 to 2015.

The Cleveland theater sector has seen significant decline in employment levels from 2005 to 2015, and the levels still have not rebounded to 2005 levels. The sector lost a large amount of employment between 2005 and 2011, especially during the recession (-9.4% from 2007 to 2009),¹³ and hit its trough in 2011 with 2,117 employees. Since 2011, employment in the sector has started to rise and has increased by 7% to 2,339. Employment in the state of Ohio and the United States followed a similar trend to that of Cuyahoga County. Theater employment in the state of Ohio and across the U.S. had significant losses during the recession, declining by 13% and 4%, respectively, from 2007 to 2009. However, employment in the state of Ohio in the theater sector has not recovered as quickly as employment in Cuyahoga County or the United States. Over the last 11 years, the theater industry in the United States has mostly gained back its employment to 2005 levels (a decline of 1% over 11 years), while Cuyahoga County and the state of Ohio have around 15% less employment than in 2005.

Figure 2. Theater Employment in Cuyahoga County, Ohio & U.S., 2005-2015



Source: Quarterly Census of Employment and Wages (QCEW)

¹³ The most recent recession began in December 2007 and ended June 2009. For more information see <http://www.nber.org/cycles.html>.

As seen in Table 2, the theater sector in Cuyahoga County had 2,339 employees in 2015. This sector declined by 14.2% during the study period (2005 to 2015). The sector also declined in Ohio (17.9%) and the U.S. (1.4%). On a positive note, the Cuyahoga County theater sector saw employment growth of 1.7% between 2014 and 2015, whereas employment decreased by 1.2% in Ohio and barely grew in the U.S. (0.6%).

Beyond showing overall employment for the theater sector in the three geographies, Table 2 also outlines the categories included within the overall theater sector as described in the typology; they include *Radio, Schools, Promoters, & Performers, Television, and Theater*. Over the last ten years, all categories reported a double-digit decline in employment, and only *Schools, Promoters, & Performers* reported a decline of less than 90 employees. The more recent history of the categories show some rebound (2014 to 2015). Detailed data on employment for each sector in Cuyahoga County and total theater employment for all three geographic regions can be found in Appendix Table C1.

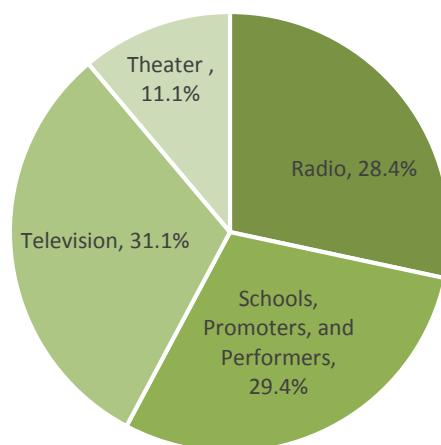
Table 2. Theater Category and Total Employment, 2005, 2014 & 2015

Theater Category	2005	2014	2015	2005-2015 % Change	2014-2015 % Change
Radio	843	659	663	-21.3%	0.7%
Schools, Promoters, & Performers	706	641	688	-2.5%	7.4%
Television	820	733	727	-11.4%	-0.9%
Theater	358	266	260	-27.3%	-2.3%
Total in Cuyahoga County	2,727	2,299	2,339	-14.2%	1.7%
Total in Ohio	10,552	8,762	8,658	-17.9%	-1.2%
Total in U.S.	317,038	310,688	312,479	-1.4%	0.6%

Source: Quarterly Census of Employment and Wages (QCEW)

Figure 3 breaks out the percentage size of each Cleveland theater category for 2015. The largest employment category was *Television* with 31.1% of 2015 employment, closely followed by *Schools, Promoters, & Performers* (29.4%) and *Radio* (28.4%).

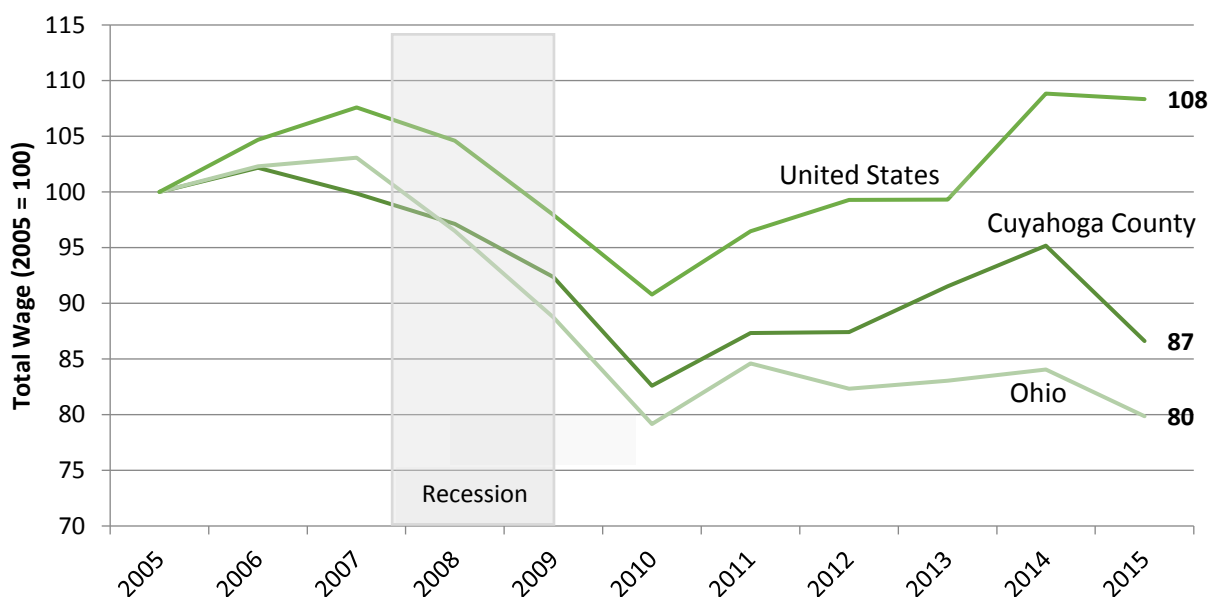
Figure 3. Theater Employment by Category in Cuyahoga County, 2015



PAYROLL

Like the employment trend seen in Figure 2, the total payroll of the theater sector in Cuyahoga County also declined during the recession (Figure 4). However, payroll has steadily increased in all three geographies from 2011 to 2014. It is interesting to note that the theater sector in the U.S. experienced a peak in payroll in 2014. In 2014, payroll saw a sharp decline in Cuyahoga County and a mild decline in Ohio, while the United States showed only a marginal decline.

Figure 4. Theater Total Payroll in Cuyahoga County, Ohio & U.S., 2005-2015



Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data.

All three geographic regions follow very similar total payroll change patterns from 2005 to 2015. The total payroll in Cuyahoga County and Ohio saw negative percent changes of 13.4% and 20.1%, respectively, while the U.S. saw positive payroll growth of 8.4% (Table 3). During the study period, three of the four categories in Cuyahoga County experienced a negative change in payroll. Detailed data on payroll for each sector in Cuyahoga County and total theater employment for all three geographic regions can be found in Appendix Table C2.

Table 3. Theater Category Total Payroll, 2005, 2014 & 2015 (in \$ Millions)

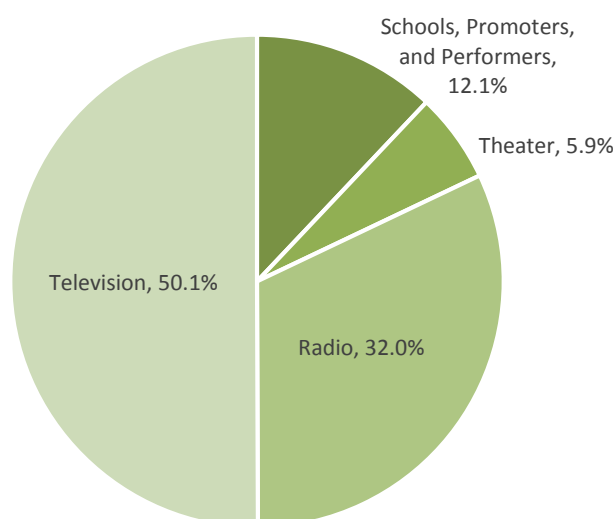
Theater Category	2005 (\$Mil)	2014 (\$Mil)	2015 (\$Mil)	2005- 2015 %Change	2014- 2015 %Change
Radio	\$47.4	\$40.1	\$38.3	-19.1%	-4.4%
Schools, Promoters, & Performers	\$14.1	\$13.6	\$14.4	2.4%	5.9%
Television	\$67.8	\$70.8	\$59.9	-11.6%	-15.3%
Theater	\$9.0	\$7.1	\$7.0	-21.3%	-0.2%
Total in Cuyahoga County	\$138.3	\$131.6	\$119.7	-13.4%	-9.0%
Total in Ohio	\$505.1	\$424.5	\$403.3	-20.1%	-5.0%
Total in U.S.	\$19,440.4	\$21,158.4	\$21,064.5	8.4%	-0.4%

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data.

In 2015, *Television* comprises over half of the payroll (50.1%) (Figure 5). The second largest category was *Radio* (32.0%), followed by *Schools, Promoters, & Performers* (12.1%).

Figure 5. Theater Total Payroll by Category in Cuyahoga County, 2015



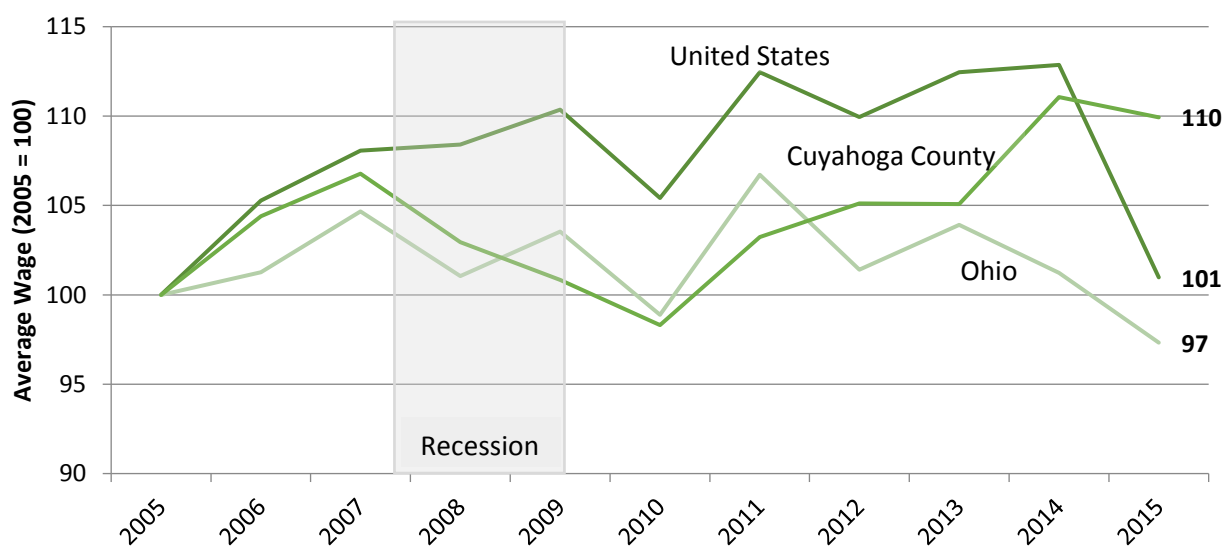
Source: Quarterly Census of Employment and Wages (QCEW)

AVERAGE WAGES

As seen in Figure 6, average wage in all three geographic regions fluctuated during the period from 2005 to 2015. Like payroll, the average wage of the Cuyahoga County theater sector also declined during the recession. However, the decline in Cuyahoga County is not mirrored in either the state of Ohio or the U.S.—two geographies that saw an increase in 2009.

Interestingly, the average wage trend between 2011 and 2015 was more erratic across all three geographies. Cuyahoga County saw the greatest increase in wages of 10% from 2005 to 2015, as compared to 1% in the United States, and a decline of 3% in the state of Ohio.

Figure 6. Theater Average Wages in Cuyahoga County, Ohio & U.S., 2005-2015



Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

The 2015 average wage of the Cuyahoga County theater sector was \$51,197 (Table 4). The average wage in the theater sector for the state of Ohio is roughly 10% lower than Cuyahoga County; the U.S. average wage is highest of the three. The average wage in Cuyahoga County from 2014 to 2015 decreased by 10.5%; wages declined in Ohio (3.9%) and the U.S. (1.0%) as well. Table 4 presents wages by category in the Cuyahoga County theater community. As was the case for payroll, the Television category experienced the largest negative percent change in average wage (-14.6%) during the last two years. Detailed data on average wages for each sector in Cuyahoga County and total theater employment for all three geographic regions can be found in Appendix Table C3.

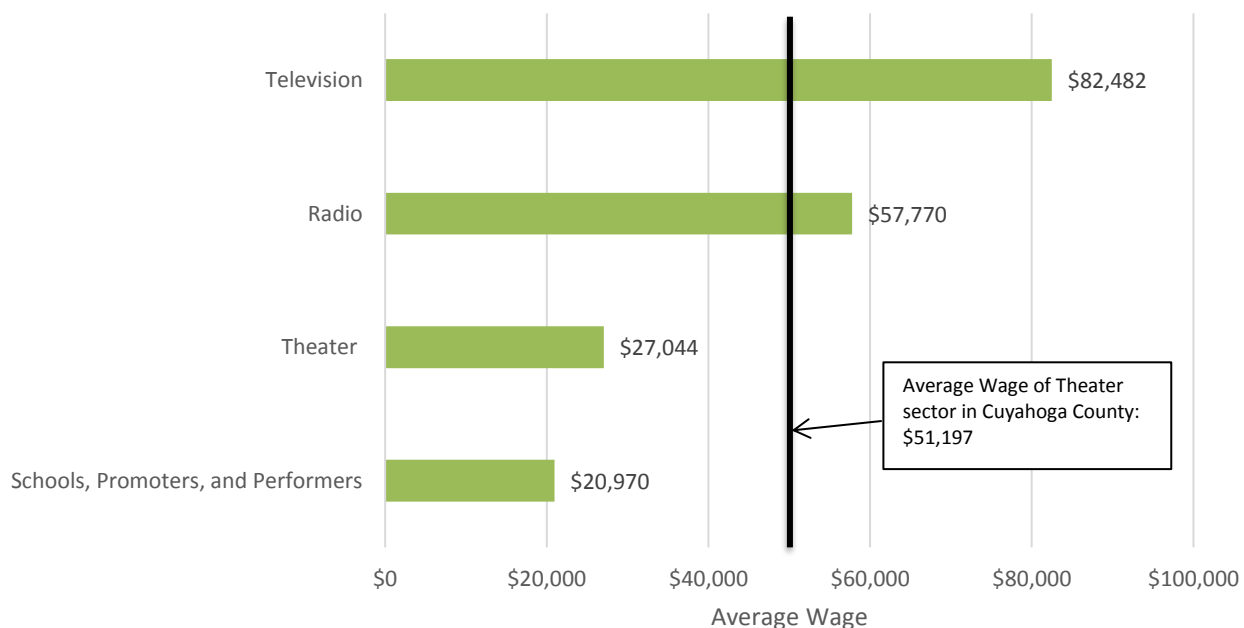
Table 4. Theater Total and Category's Average Wage, 2005, 2014 & 2015

Theater Category	2005	2014	2015	2005-2015 % Change	2014-2015 % Change
Radio	\$56,235	\$60,852	\$57,770	2.7%	-5.1%
Schools, Promoters, & Performers	\$19,971	\$21,273	\$20,970	5.0%	-1.4%
Television	\$82,705	\$96,548	\$82,482	-0.3%	-14.6%
Theater	\$25,003	\$26,481	\$27,044	8.2%	2.1%
Total in Cuyahoga County	\$50,705	\$57,227	\$51,197	1.0%	-10.5%
Total in Ohio	\$47,863	\$48,449	\$46,583	-2.7%	-3.9%
Total in U.S.	\$61,319	\$68,102	\$67,411	9.9%	-1.0%

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data.

Figure 7 presents average wages of the theater categories in Cuyahoga County for 2015. The *Television* category had the highest average wage in 2015 of \$82,482. The second highest category is *Radio* with \$57,770. This category is followed by *Theater* (\$27,044) and *School, Promoters, and Performers* (\$20,907).

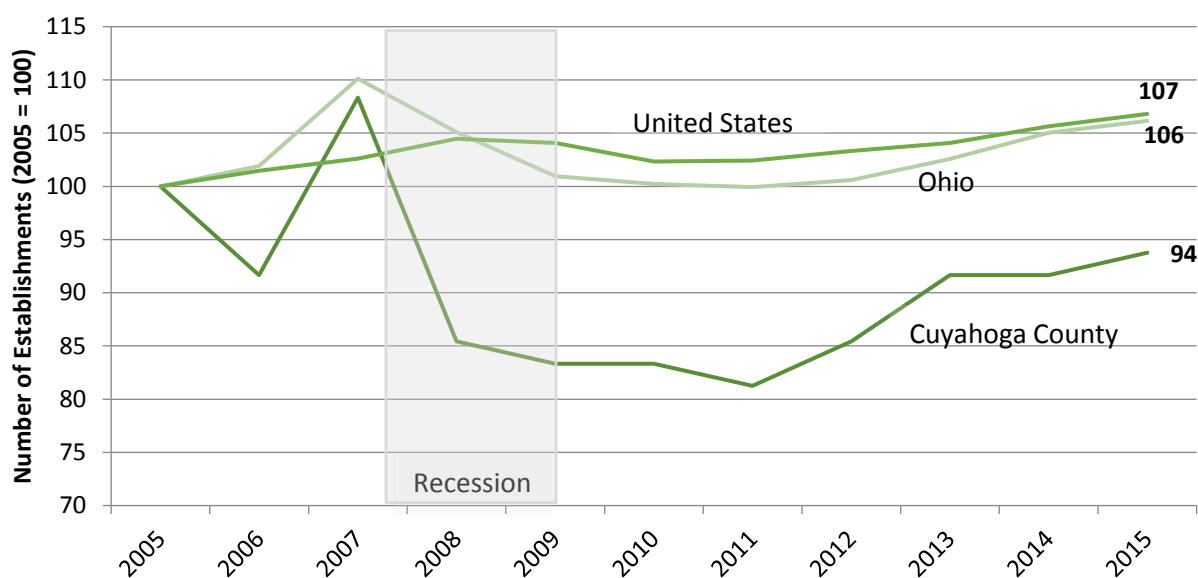
Figure 7. Theater Average Wages by Category in Cuyahoga County, 2015

Source: Quarterly Census of Employment and Wages (QCEW)

NUMBER OF ESTABLISHMENTS

Figure 8 depicts the trends in establishment counts for Cuyahoga County, the state of Ohio, and the United States. The establishment count in the Cuyahoga County theater sector was very volatile from 2005 to 2015. Over this time, there was a spike in establishments from 2006 to 2007, a significant decline from 2007 to 2008 during the recession, and a slow climb to near 2005 levels. The trend of number of establishments for the state of Ohio and the United States was smoother and less volatile than Cuyahoga County. Both geographies reported an increase in establishments from 2005 to 2015 (7% for Ohio; 6% for the U.S.).

Figure 8. Theater Number of Establishments Trend in Cuyahoga County & U.S., 2005-2015



Source: Quarterly Census of Employment and Wages (QCEW)

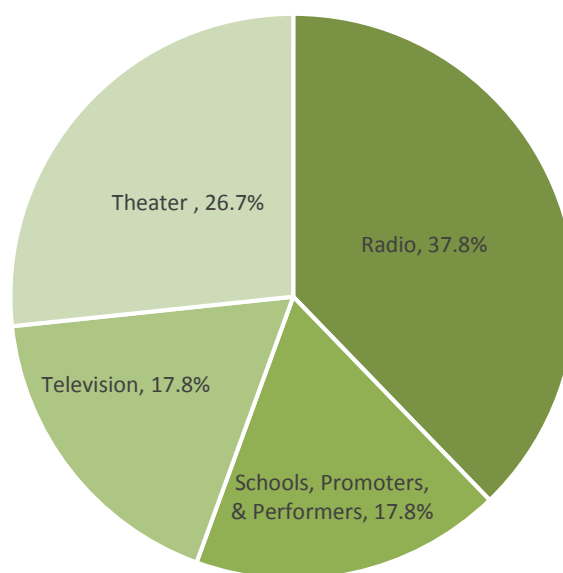
Theater establishments in Cuyahoga County showed negative growth (-6.3%) from 2005 to 2015, while it experienced growth of 6.2% and 6.8% in Ohio and the U.S., respectively (Table 5). The largest growth in number of establishments of the Cuyahoga County theater category was *Television* with 33.3%, while the largest decline was *Radio* with 19.0% during the study period. From 2014 to 2015, the category of *Theater* had the largest growth (20.0%), closely followed by *Television* category (14.3%). Detailed data on the number of establishments for each sector in Cuyahoga County and total theater employment for all three geographic regions can be found in Appendix Table C4.

Table 5. Theater Total and Subsectors' Number of Establishments, 2005, 2014 & 2015

Theater Category	2005	2014	2015	2005-2015 % Change	2014-2015 % Change
Radio	21	18	17	-19.0%	-5.6%
Schools, Promoters, & Performers	9	9	8	-11.1%	-11.1%
Television	6	7	8	33.3%	14.3%
Theater	12	10	12	0.0%	20.0%
Total in Cuyahoga County	48	44	45	-6.3%	2.3%
Total in Ohio	293	307	311	6.2%	1.1%
Total in U.S.	13,083	13,822	13,974	6.8%	1.1%

Source: Quarterly Census of Employment and Wages (QCEW)

Figure 9 displays the shares of establishments by category of the Cuyahoga County theater sector. *Radio* had the largest share with almost 40% of all establishments, while *Theater* had the second largest share (26.7%).

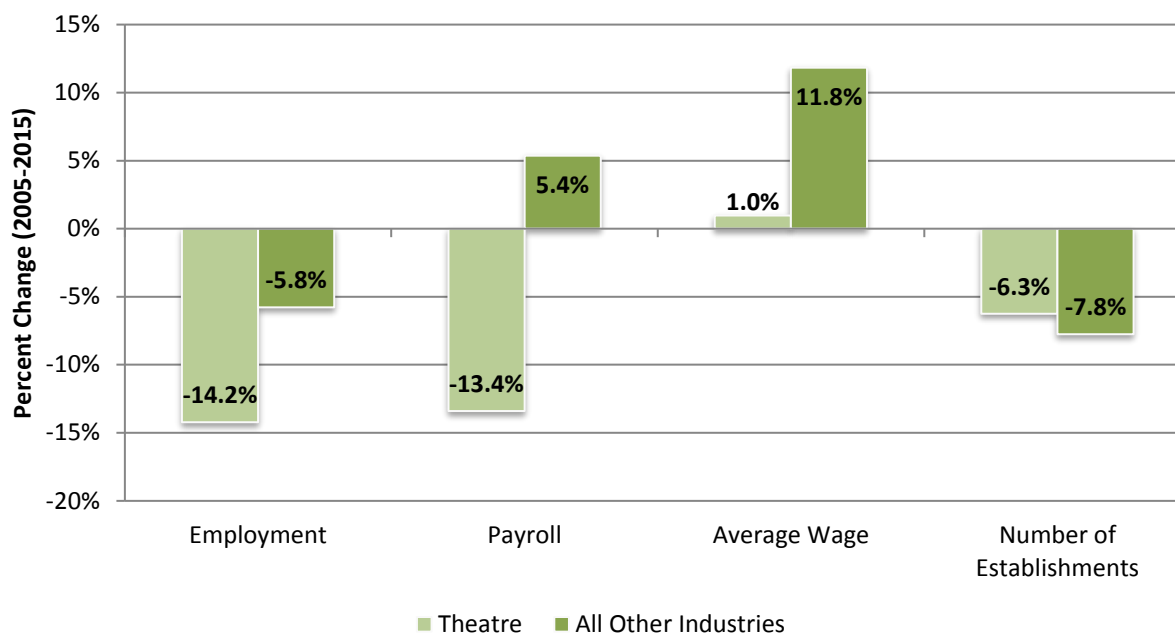
Figure 9: Theater Establishments by Category in Cuyahoga County, 2015

Source: Quarterly Census of Employment and Wages (QCEW)

THEATER SECTOR VS. ALL INDUSTRIES

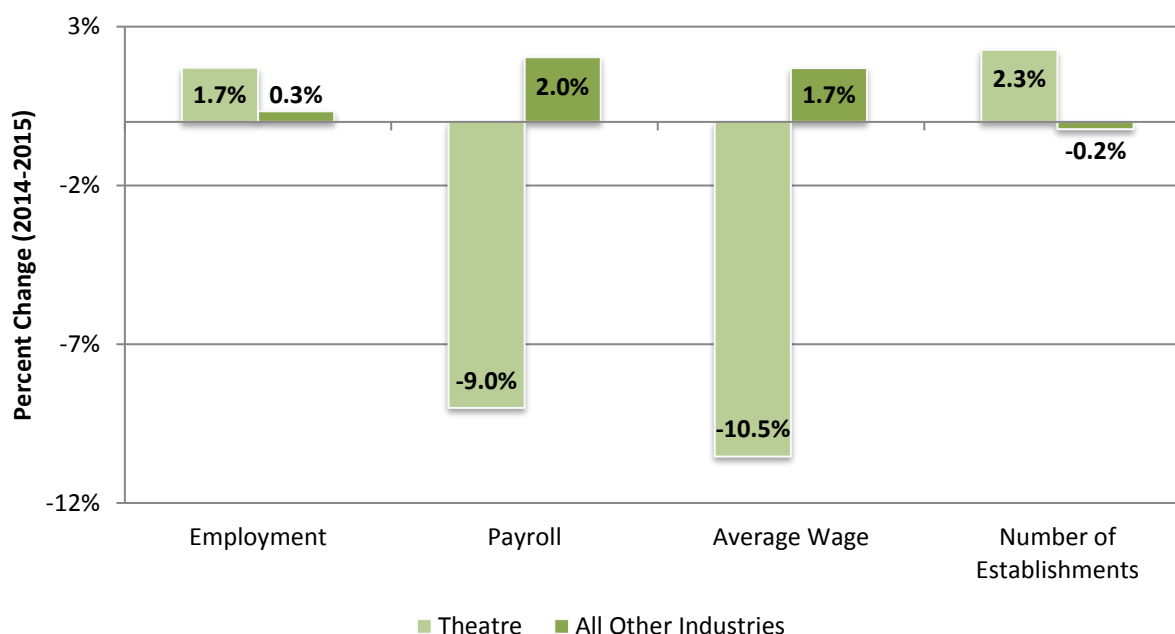
Over this eleven-year timeframe, the theater sector experienced negative growth in all measures except average wage (Figure 10). Amongst all other industries in Cuyahoga County, the theater sector is faring worse in all measures except the number of establishments, which is falling at a slightly lower rate. Employment and payroll of the theater sector experienced a decline of 14.2% and 13.4%, respectively.

Figure 10. Cuyahoga County Theater & All Other Industries Percentage Change, 2005-2015



Source: Quarterly Census of Employment and Wages (QCEW)

Figure 11 displays the Cuyahoga County theater and all other industries in all measures over the last two years. The Cuyahoga County theater sector experienced a positive increase in employment and the number of establishments, while payroll and average wage declined for the last two years. All other industries experienced positive percent change in all measures except number of establishments.

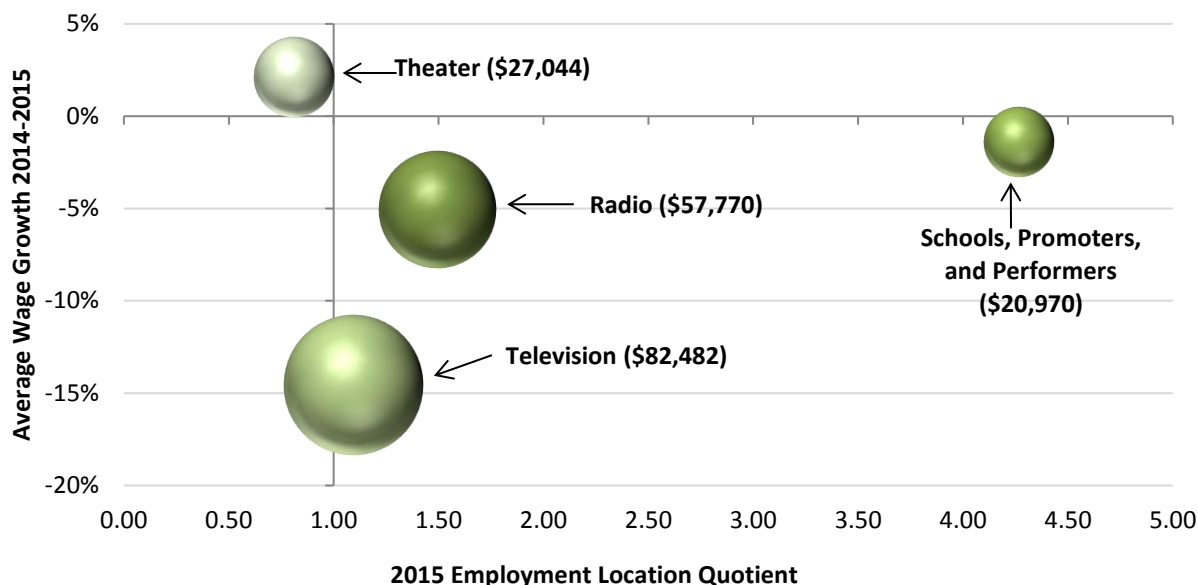
Figure 11. Cuyahoga County Theater & All Other Industries Percentage, 2014-2015

Source: Quarterly Census of Employment and Wages (QCEW)

Figure 12 shows the 2015 Location Quotient (LQ) for Cuyahoga County's theater sector and average wage growth from 2014 to 2015. The LQ assesses Cleveland theater employment in each subsector, comparing it with the employment of theater subsectors in the U.S. in 2015. An LQ describes the local concentration of an industry compared to the national average concentration of said industry; if an LQ is greater than 1, then the subsector in Cuyahoga County has a proportionally higher level of employment in the subsector than the U.S., indicating regional specialization. As Figure 12 displays, three out of four subsectors in Cuyahoga County theater sector have LQs above 1. The largest LQ of the subsectors is *Schools, Promoters, & Performers* with 4.27. The second largest subsector is *Radio* with 1.5, closely followed by *Television* with 1.1. The subsector of *Theater* had the LQ less than 1 in the subsectors of Cleveland theater.

The vertical axis of Figure 12 indicates the average wage growth of the Cleveland theater sector from 2014 to 2015. The bubble size represents the average wage. The larger the size of the bubble, the higher the average wage of the subsector that bubble represents. The subsector with the highest average wage in Cleveland's theater sector is *Television* (\$82,482), while the subsector of *Schools, Promoters, & Performers* has the lowest (\$20,970). Three out of four subsectors experienced a decline in average wages, with *Television* having the largest decline during the last two years.

Figure 12. Employment Location Quotient and Average Wage Growth of the Cleveland Theater



Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data.

From 2005 to 2015, the trends in employment, payroll, and the number of establishments had similar patterns in all three geographies (Cuyahoga County, the state of Ohio, and the U.S.). The three geographies all experienced a decline in employment and payroll during the recession (2007 to 2009). During the last two years, the theater sector in Cuyahoga County grew in employment and number of establishments, while payroll and average wages did not. It is interesting to note that the subsector of *Television* had the largest total payroll (50.1%) and the highest average wage (\$82,482), yet it had the least establishments.

CHAPTER 2

OCCUPATIONAL ANALYSIS

Examining what people do is just as important as examining where they work. The industrial analysis (Chapter 1) studied what businesses were central to the theater sector, as well as the employment and wages in these businesses. This section investigates the occupations (i.e. jobs or professions) involved in the theater sector. An occupational analysis is important since it highlights individuals' roles in the economy. The research team gathered keywords that reflected theater occupations and compiled a list of theater occupations based on a literature review of theater occupations.¹⁴ In total, 20 occupations comprise the theater sector. The unit of measurement used for this analysis was the Cleveland-Elyria Metropolitan Statistical Area (MSA), a U.S. Census Bureau designation that encompasses Cuyahoga, Lorain, Lake, Medina, and Geauga counties. For more information on this study's methodology, see Appendix B.

OCCUPATIONAL ANALYSIS

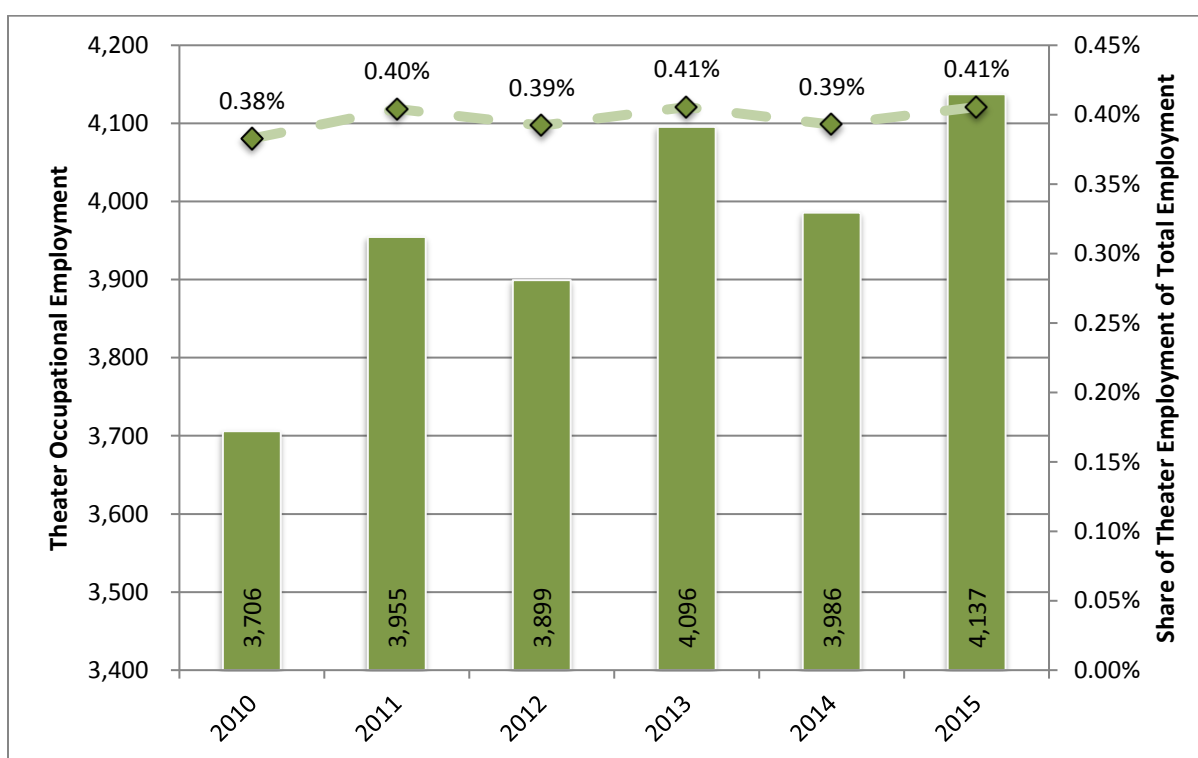
Table 6 presents the total occupational employment of the theater sector, the total employment of all occupations, and the share the theater sector represents out of all occupational employment in the Cleveland MSA. Over the last five years, employment in theater occupations hovered around 4,000 workers, constituting less than 0.50% of the total MSA. However, there has been a 12% increase in employment since 2010 (3,706 in 2010 versus 4,137 in 2015). Figure 13 graphically depicts Table 6. The Cleveland MSA experienced a peak in theater occupational employment in 2015 with 4,137. This is also the peak year for total employment in the MSA.

¹⁴Literature on the occupations comprise of the theater sector were derived from: McMillen, S., Helming, T., Qaiser, S., Sheridan, M., Finkle, V., & Saha, M., (2006), *The Economic Impact of the Arts, Film, History and Tourism Industries in Connecticut* (No. 2006-Dec-01) University of Connecticut, Connecticut Center for Economic Analysis http://www.cultureandtourism.org/cct/lib/cct/CCT_Impact_Report_Web_.pdf
Texas Cultural Trust, (2009), *The role of the innovation workforce & creative sector in the Texas Economy*. http://txculturaltrust.org/wp-content/uploads/2010/11/tct_creative_021809.pdf
Harris, C., Collins, M., & Cheek, D., (2013), *America's Creative Economy: A Study of Recent Conceptions, Definitions, and Approaches to Measurement Across the USA*. Kansas City, OK: National Creativity Network. <https://www.arts.gov/sites/default/files/Research-Art-Works-Milwaukee.pdf>
Raven Consulting Group, (2015), *Creative Economic Impact Report*. <http://www.artsunited.org/wp-content/uploads/2015/01/CREATIVE-ECONOMIC-IMPACT-REPORT-PRELIM-FINDINGS-07.14.15.pdf>

Table 6. Theater and Total Occupational Employment in the Cleveland MSA, 2010-2015

	2010	2011	2012	2013	2014	2015
Theater Employment	3,706	3,955	3,899	4,096	3,986	4,137
Total Employment	968,160	978,400	994,380	1,010,190	1,014,440	1,020,190
Share of Theater Employment of Total Employment	0.38%	0.40%	0.39%	0.41%	0.39%	0.41%

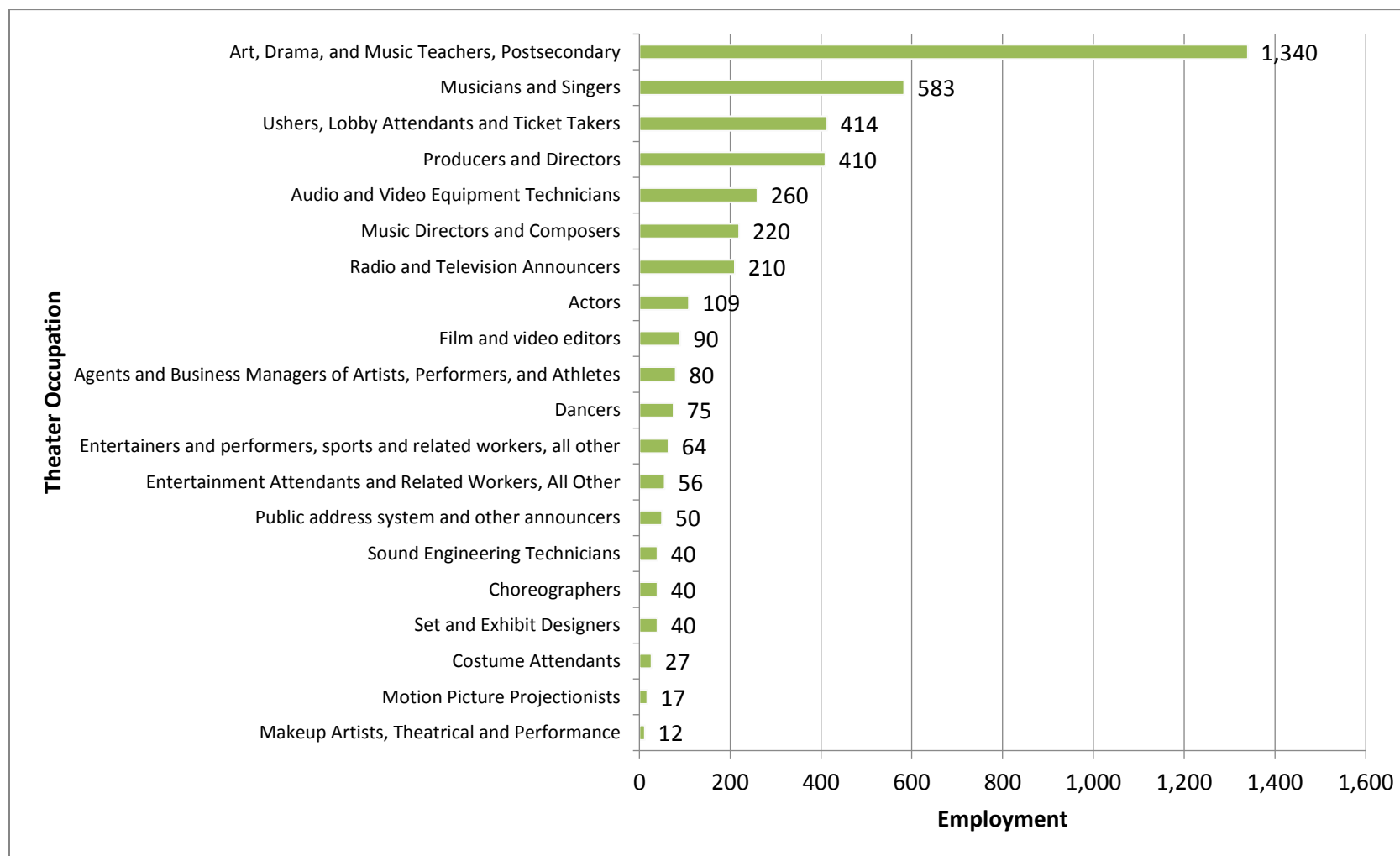
Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Figure 13. Theater Employment and Share in the Cleveland MSA, 2010-2015

Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

The breakdown of all theater occupational employment in 2015 can be found in Figure 14. The largest employment of theater occupations is *Art, Drama, and Music Teachers, Postsecondary* with 1,340 jobs. This occupation holds the largest share (over 32%) of all theater occupations. The second largest employment of all theater occupations is *Musicians and Singers*, with 583 workers. This occupation is closely followed by *Ushers, Lobby Attendants and Ticket Takers* with 414 employees and *Producers and Directors* with 410 jobs. A vast majority of all theater occupations work in the top four categories out of twenty (over 66%). See Appendix Table C5 for all the listings of theater employment by occupation by year for the Cleveland MSA.

Figure 14. Theater Employment in the Cleveland MSA, 2015



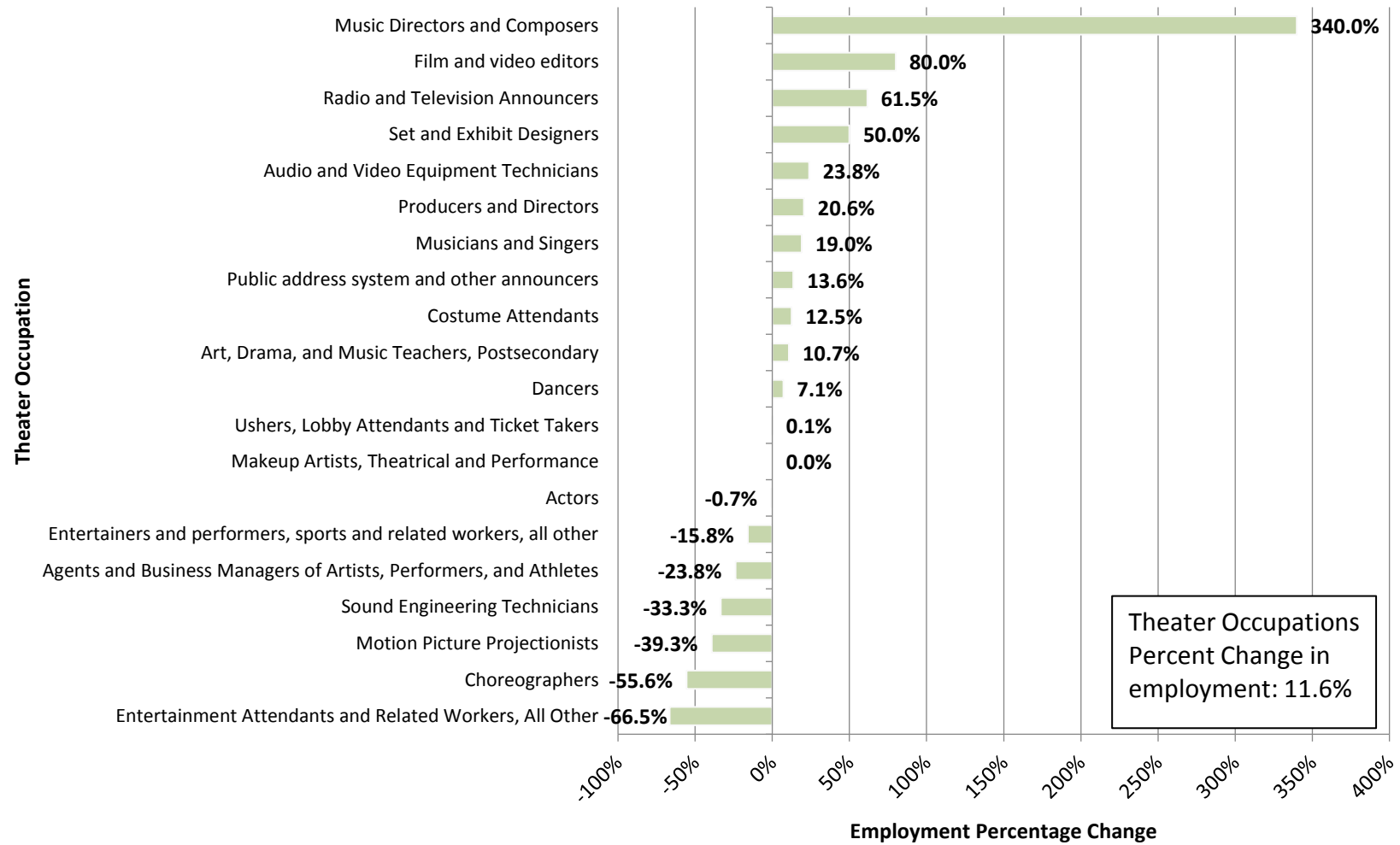
Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Twelve of the 20 theater occupations listed in Figure 15 experienced employment growth from 2010 to 2015 in the Cleveland MSA. Of the four highest occupations; *Art, Drama and Music Teachers Postsecondary* experienced a 10.7% employment growth from 2010 to 2015. *Musicians and Singers* experienced 19.0% employment growth during that period with *Ushers, Lobby Attendants and Ticket Takers* and *Producers and Directors* experiencing 0.1% and 20.6% employment growth, respectively, from 2010 to 2015. While *Music Directors and Composers* ranked sixth in theater occupations employment in 2015, this occupation experienced triple digit employment growth from 2010 to 2015 (340%). It is important to note that all occupations in the Cleveland MSA saw employment growth of 5.4% from 2010 to 2015, while theater occupations' employment grew by 11.6%.

Figure 16 examines the median wage for theater occupations that contained wage data, as well as all occupations in the Cleveland MSA.¹⁵ The occupation of *Art, Drama, and Music Teachers, Postsecondary* had the highest median wage in 2015 (\$71,040). This occupation also had the highest employment of theater occupations in 2015 (Figure 14). The second highest median wage occupation is *Film and Video Editors* (\$65,340). Overall, five of the nine theater occupations had higher median wages in 2015 than the overall median wages for all occupations in the region (\$37,120).

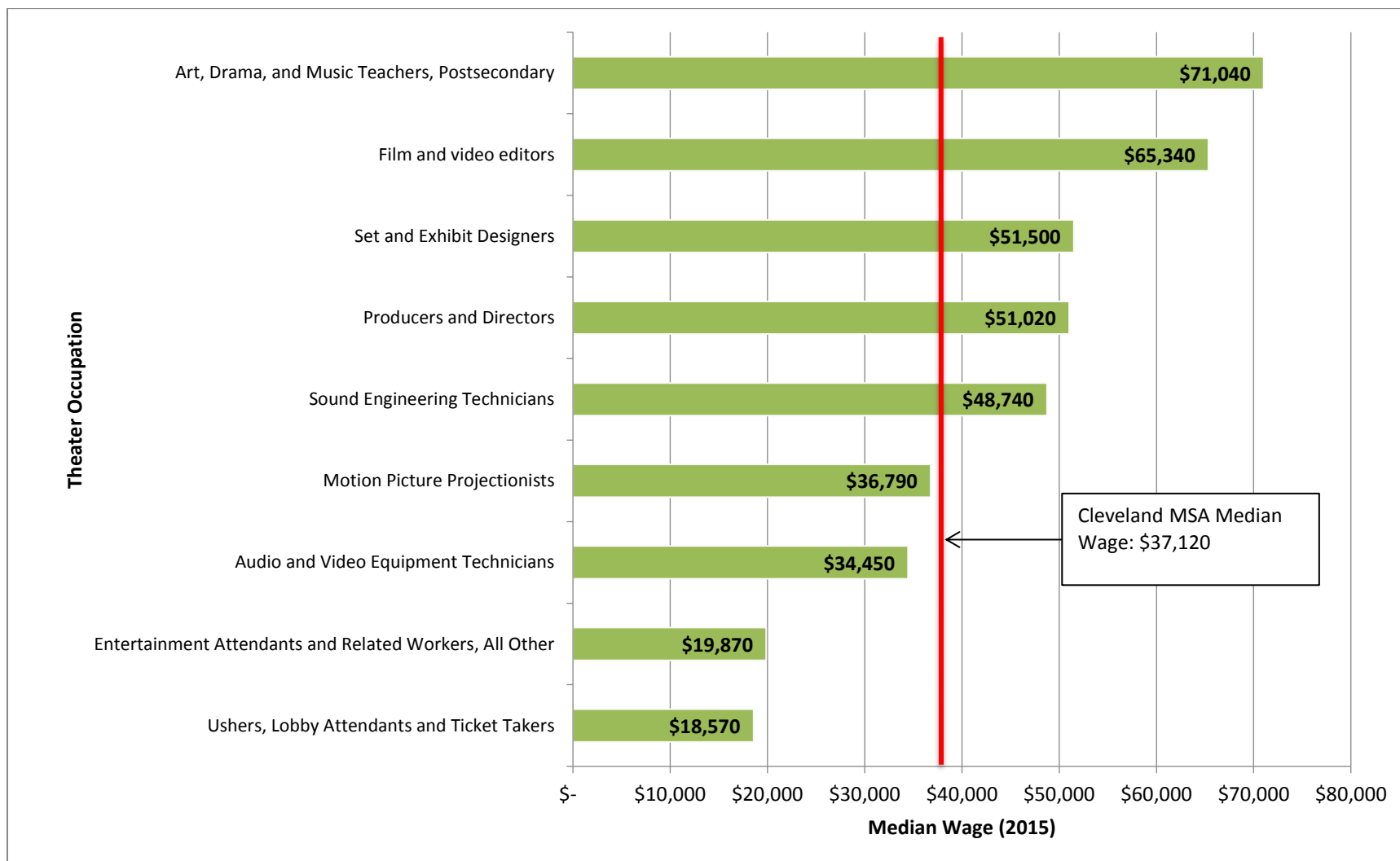
¹⁵ It is important to note that average wages in the trend analysis section (Chapter 1) of this study reported 2015 average wages of \$20,970. The trend analysis was based upon establishment data and wages derived from establishments in Cuyahoga County. This chapter's occupational wages are based upon data from a national survey of businesses and represent a 5-county area.

Figure 15. Theater Employment Change, Cleveland MSA, 2010-2015



Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

Figure 16. Theater Occupations Median Wage, Cleveland MSA, 2015



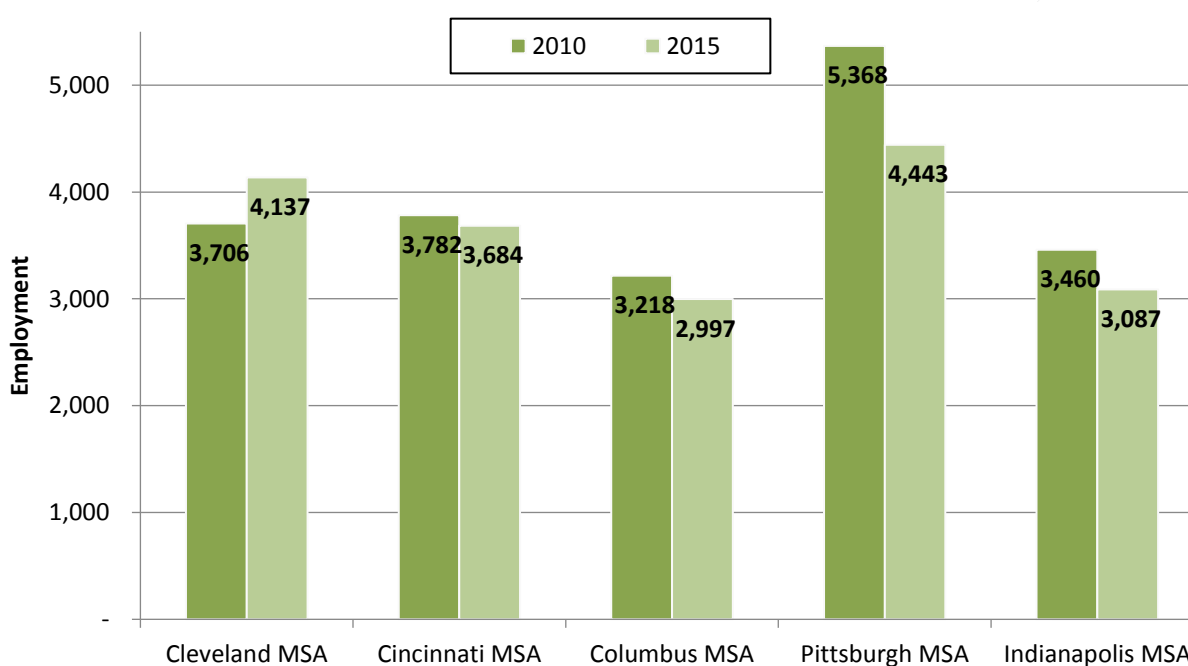
Note: Not all occupations are displayed because of disclosure limitations; wages in 2015 dollars.

Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

CLEVELAND MSA VS. COMPARABLE MSAs

Figure 17 displays theater occupational employment of the Cleveland MSA in relationship to four other comparable MSAs for 2010 and 2015. The Pittsburgh MSA had the highest employment in theater occupations for 2010 and 2015 (5,368 and 4,443, respectively), whereas the Columbus MSA had the smallest number of workers (3,218 and 2,997, respectively). It is interesting to note that the Cleveland MSA was the only MSA to increase occupational employment in theater occupations from 2010 to 2015; theater employment declined in all the other comparable MSAs over the same period.

Figure 17. Cleveland and Comparable MSAs Theater Employment, 2010 and 2015



Source: US Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

Table 7 presents the top 5 theater occupations for all MSAs in this analysis. The top four occupations with the largest employment in 2015 in Cleveland were: *Art, Drama, and Music Teachers, Postsecondary* (1,340); *Musicians and Singers* (583); *Ushers, Lobby Attendants and Ticket Takers* (414); and *Producers and Directors* (410). The top theater occupations for the Cincinnati MSA, Columbus MSA, Pittsburgh MSA, and Indianapolis MSA were similar to the Cleveland MSA.

Table 7. Top 5 Theater Occupational Employment, 2015

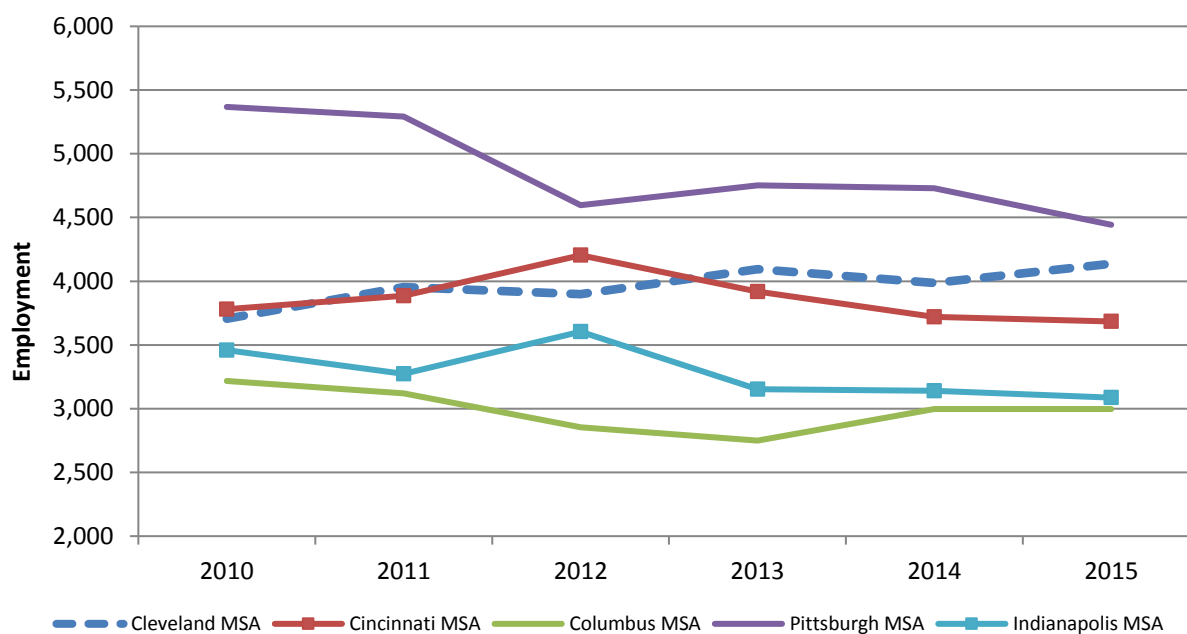
Region	Rank	SOC Code	Occupation	Primary/ Secondary	Emp.	% of Theater Emp.
Cleveland MSA	1	25-1121	Art, Drama, and Music Teachers, Postsecondary	Primary	1,340	40.0%
	2	27-2042	Musicians and Singers	Secondary	583	17.4%
	3	39-3031	Ushers, Lobby Attendants and Ticket Takers	Primary	414	12.4%
	4	27-2012	Producers and Directors	Primary	410	12.2%
	5	27-4011	Audio and Video Equipment Technicians	Secondary	260	7.8%
	Total					3,349
Cincinnati MSA	1	39-3031	Ushers, Lobby Attendants and Ticket Takers	Primary	740	24.8%
	2	25-1121	Art, Drama, and Music Teachers, Postsecondary	Primary	680	22.7%
	3	27-2042	Musicians and Singers	Secondary	461	15.4%
	4	27-2012	Producers and Directors	Primary	430	14.4%
	5	27-4011	Audio and Video Equipment Technicians	Secondary	190	6.4%
	Total					2,989
Columbus MSA	1	25-1121	Art, Drama, and Music Teachers, Postsecondary	Primary	490	19.4%
	2	27-2012	Producers and Directors	Primary	410	16.2%
	3	39-3031	Ushers, Lobby Attendants and Ticket Takers	Primary	360	14.3%
	4	27-2011	Actors	Primary	346	13.7%
	5	27-2041	Music Directors and Composers	Secondary	160	6.3%
	Total					2,523
Pittsburgh MSA	1	25-1121	Art, Drama, and Music Teachers, Postsecondary	Primary	940	24.4%
	2	39-3031	Ushers, Lobby Attendants and Ticket Takers	Primary	850	22.1%
	3	27-4011	Audio and Video Equipment Technicians	Secondary	470	12.2%
	4	27-2012	Producers and Directors	Primary	440	11.4%
	5	27-2042	Musicians and Singers	Secondary	410	10.7%
	Total					3,845
Indianapolis MSA	1	27-2012	Producers and Directors	Primary	510	19.4%
	2	27-4011	Audio and Video Equipment Technicians	Secondary	430	16.4%
	3	39-3031	Ushers, Lobby Attendants and Ticket Takers	Primary	370	14.1%
	4	25-1121	Art, Drama, and Music Teachers, Postsecondary	Primary	300	11.4%
	5	27-2011	Actors	Primary	220	8.4%
	Total					2,629

Source: Bureau of Labor Statistics Occupation Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

Top occupations in the Cincinnati MSA were: *Ushers, Lobby Attendants and Ticket Takers* (740); *Art, Drama, and Music Teachers, Postsecondary* (680); *Musicians and Singers* (461); and *Producers and Directors* (430) (Table 7). The top occupations in the Columbus MSA in 2015 were: *Art, Drama, and Music Teachers, Postsecondary* (490); *Producers and Directors* (410); and *Ushers, Lobby Attendants and Ticket Takers* (360). Likewise, in the Pittsburgh MSA, the top occupations in 2015 were: *Art, Drama, and Music Teachers, Postsecondary* (940); *Ushers, Lobby Attendants and Ticket Takers* (850); *Audio and Video Equipment Technicians* (470); *Producers and Directors* (440); and *Musicians and Singers* (410). As with the other MSAs, the Indianapolis MSA's top occupations in 2015 were: *Producers and Directors* (510); *Audio and Video Equipment Technicians* (430); *Ushers, Lobby Attendants and Ticket Takers* (370); and *Art, Drama, and Music Teachers, Postsecondary* (300).

The Pittsburgh MSA had the highest employment in theater occupations in 2010, but lost almost 1,000 workers by 2015 (Figure 18). Peak employment of theater occupations was reached in 2012 and 2013 in the Cincinnati, Indianapolis, and Cleveland MSAs. The Pittsburgh MSA lost significant employment in 2012, but bounced back in 2013. The Cleveland MSA has had more theater occupation employment than the Columbus MSA and Indianapolis MSA since 2010 and more than the Cincinnati MSA since 2013.

Figure 18. Cleveland and Comparable MSAs Theater Employment, 2010-2015



Source: US Bureau of Labor Statistics, Occupational Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

Data about the Cleveland MSA's theater sector revealed that about 4,000 workers contributed to the theater sector in the Cleveland MSA in 2015. At its peak in 2015, the theater sector employed 4,137 people and made up 0.41% of the Cleveland MSA's total employment. The largest category of theater occupations in the Cleveland MSA was in *Art, Drama, and Music Teachers, Postsecondary* with 1,340 jobs; this occupation holds the largest share (over 32%) of all theater occupations.

Beyond employment, *Art, Drama, and Music Teachers, Postsecondary* had the highest median wage in 2015 (\$71,040). Five of the nine theater occupations had higher median wages in 2015 than the overall median wages for all occupations (\$37,120).¹⁶ The top occupations for the comparable MSAs were similar to the Cleveland MSA. The Pittsburgh MSA had the highest employment of theater occupations in 2010; whereas the Columbus MSA had the lowest number of theater occupations.

¹⁶ It is important to note that average wages in the trend analysis section (Chapter 1) of this study reported 2015 average wages of \$20,970. The trend analysis was based upon establishment data and wages derived from establishments in Cuyahoga County. This chapter's occupational wages are based upon data from a national survey of businesses and represent a 5-county area.

CHAPTER 3

THE LANDSCAPE OF THEATERS

The goal of this section of the analysis is to catalog and describe the landscape of theaters and theater companies within Cuyahoga County. Theaters—as a physical space—are a prominent component to the theater sector, as theater is a primarily place-based art with the theater being the hub of activity. It was important to understand the geography of place for theater co-location and the different types of theaters across Cuyahoga County. For more information on the methodology behind assembling the theaters in this section, see Appendix B.

LANDSCAPE OF THEATERS IN CUYAHOGA COUNTY

Examining the landscape of theaters in Cuyahoga County reveals interesting patterns in regards to the location and co-location of theaters, as well as the variety of theater types. In all, Cuyahoga County is home to 63 theater companies, 22 of which are in Cleveland’s city limits (Table 8). Figures 19 & 20 are maps of these theaters in Cleveland and Cuyahoga County, respectively.

It is important to delineate that there are two types of theater companies in Figure 19 & 20: organizations that present and organizations that perform. Two companies identified in Cleveland’s Theater Landscape map are presenters; these are organizations that solicit and host on-stage talent from other places around the country. These two organizations are Playhouse Square and Hilarities 4th Street Theatre.

One of the companies identified, Comedy Project Alliance, stands out from the other theaters in that it produces local, on-stage, stand-up comedy and teaches the craft to aspiring amateurs. The company’s operations resemble a community theater company, but it was distinguished from the other theater companies with its own type, “Comedy”.

Eleven theaters on the map were identified as Youth Theaters. Youth theaters are designated as companies that are designed to teach youth and aspiring talent how to hone their acting skills on the stage and technical skills behind the stage. Nearly half of them are concentrated in and around Cleveland Heights.

Nineteen theater companies were identified as community theaters, or companies that produce local productions and include a high proportion of unpaid talent; they are often the only stage theater venue in their municipality. This report’s classifications between professional and community theater follows the designations assigned in the Cleveland Stage Alliance

(CSA).¹⁷ An exception was made in the case of Karamu House, which is listed as a community theater, but formed an artistic partnership with Dobama Theatre in late 2016. All but three community theaters in Cuyahoga County are located outside of Cleveland's city limits, Near West Theatre Inc., SignStage and Man Cry Productions.

Table 8. Listing of Theaters in Cuyahoga County

Organization	City
82nd Street Theatre	North Royalton
Academy for Dramatic Arts	Olmsted Falls
Allen Theatre Complex at Cleveland State University	Cleveland
Alma Theater at Cain Park	Cleveland Heights
Beck Center for the Arts	Lakewood
Blank Canvas Theatre	Cleveland
Brecksville Theater on the Square	Brecksville
Brecksville's Little Theatre	Brecksville
Broadview Heights Spotlights	Broadview Heights
Cassidy Theatre Inc.	Parma Heights
Cesear's Forum	Cleveland
Chagrin Academy for the Performing Arts	Chagrin Falls
Chagrin Valley Little Theatre	Chagrin Falls
Clague Playhouse	Westlake
Cleveland Opera Theater	Cleveland
Cleveland Play House	Cleveland
Cleveland Public Theatre	Cleveland
Cleveland School of the Arts	Cleveland
Cleveland Shakespeare Festival	Cleveland Heights
Comedy Project Alliance	Mayfield
convergence-continuum	Cleveland
Dobama Theatre	Cleveland Heights
Dover Players	North Olmsted
East Cleveland Theater	East Cleveland
Eastern Campus Theater at Tri-C	Highland Hills
Eldred Theatre at Case Western Reserve University	Cleveland
Ensemble Theatre at Coventry Arts	Cleveland Heights
Garfield Players	Garfield Heights
Great Lakes Theater	Cleveland
Happy Ending Lyric Players	Shaker Heights

Source: Cleveland Stage Alliance, Center for Economic Development Data Collection

¹⁷ Cleveland Stage Alliance. (2016). Northeast Ohio Theatre Listing. Retrieved from <http://www.clevelandstagealliance.com/NEO-theatres>

Table 8. Listing of Theaters in Cuyahoga County (Continued)

Organization	City
Hathaway Brown Theatre Institute	Shaker Heights
Heights Youth Theatre	Cleveland Heights
Hilarities 4th Street Theatre	Cleveland
Independence Community Theatre	Independence
Interplay Jewish Theatre	Cleveland Heights
Karamu House	Cleveland
Kleist Center for Art and Drama at Baldwin Wallace University	Berea
Kulture Kids	Cleveland Heights
Lantern Theatre	Valley View
Mamai Theatre Company	Cleveland
Man Cry Productions	Cleveland
Mercury Theatre Company	South Euclid
Metro Campus Theater at Tri-C	Cleveland
Near West Theatre Inc.	Cleveland
Ohio City Theatre Project	Cleveland
Olmsted Performing Arts	Olmsted Falls
Playhouse Square	Cleveland
Playmakers Youth Theatre	Beachwood
Playwrights Local	Cleveland
Regina Hall at Notre Dame College	South Euclid
Royalton Players	North Royalton
SignStage	Cleveland
Silhouette Productions	Euclid
Solon Center for the Arts	Solon
Something Dada	Lakewood
Stagecrafters Youth Theatre	Pepper Pike
Strongsville Community Theatre	Strongsville
Talespinner Children's Theatre	Cleveland
The Musical Theater Project	Lakewood
Theater Ninjas	Bratenahl
Upstage Players	Cleveland
Western Campus Theater at Tri-C	Parma

Source: Cleveland Stage Alliance, Center for Economic Development Data Collection

Figure 19. Theater Landscape of Cleveland

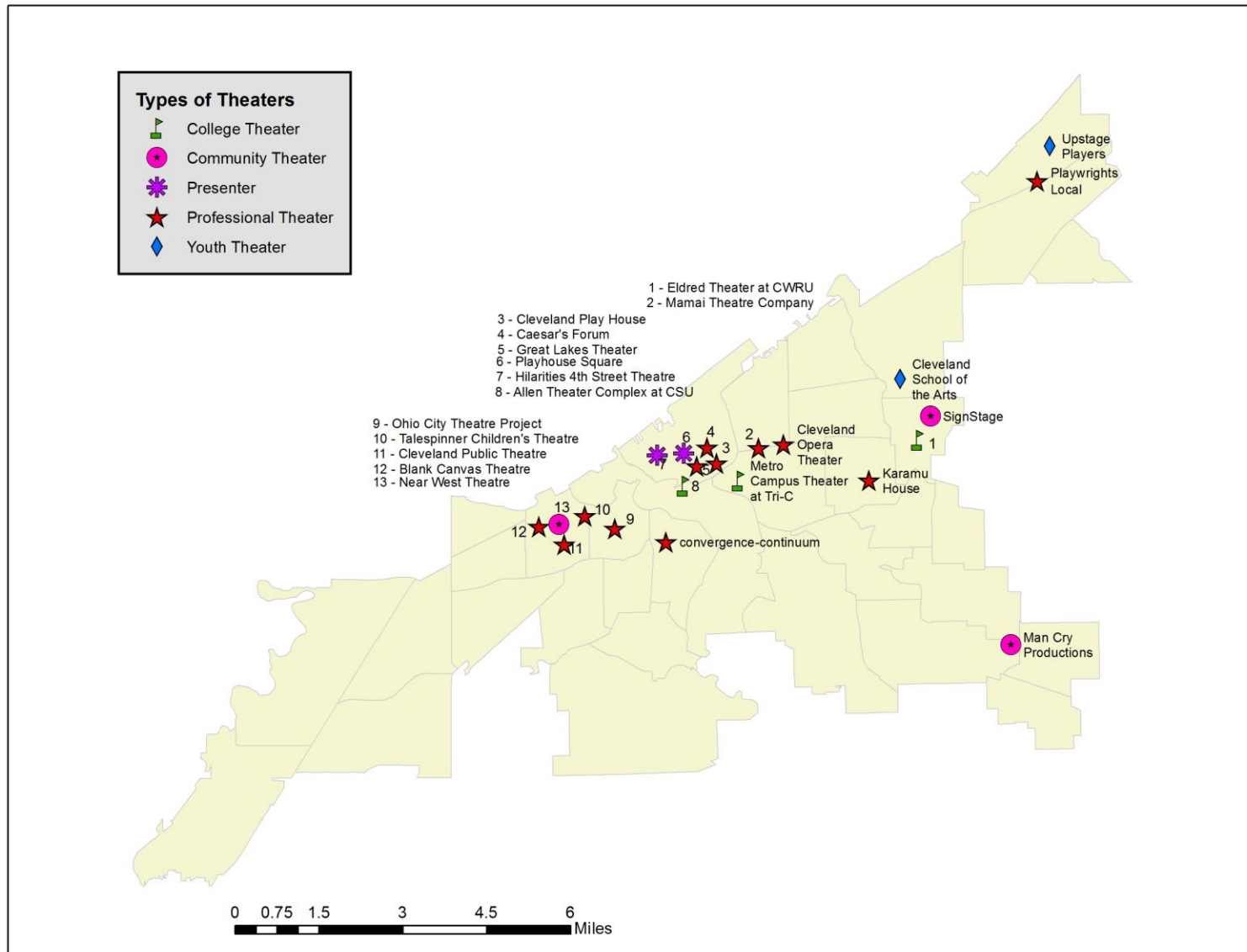
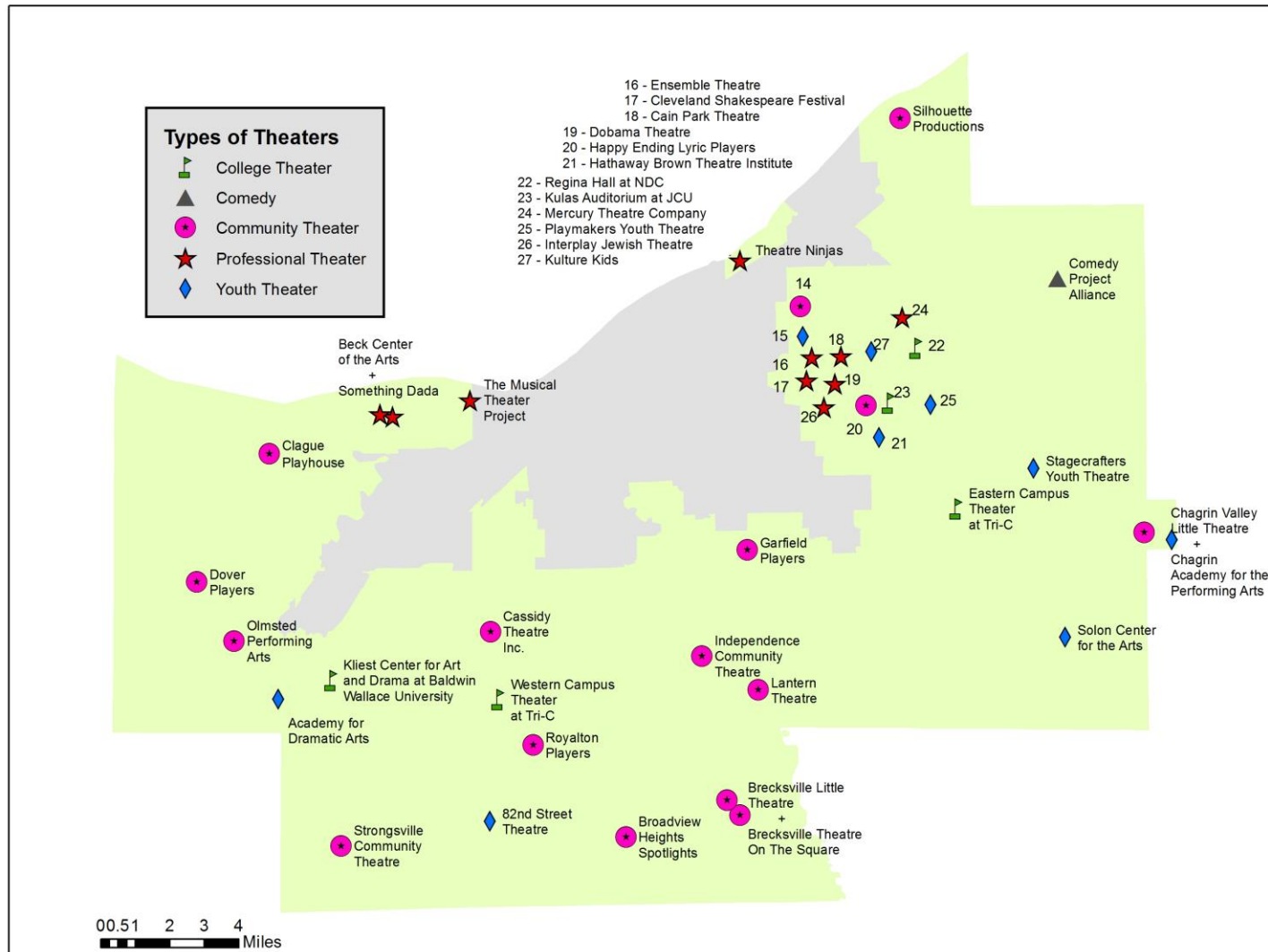


Figure 20. Theater Landscape of Cuyahoga County



Twenty-two theater companies were identified as professional theater companies,¹⁸ or companies that produce on-stage shows with a high proportion of paid local talent and whom hire actors belonging to the Actors Equity Association (the Actors' union known as "Equity"). Twelve are scattered between the near east side and far east side of the city of Cleveland. The remaining 10 in Cuyahoga County are concentrated in inner-ring suburbs, mostly Cleveland Heights and Lakewood.

It is interesting to note that there are areas within the city of Cleveland and Cuyahoga County where theaters are co-located. The first is the central area of Playhouse Square within the city of Cleveland. Playhouse Square is home to productions by three theater companies—Cleveland Play House, Great Lakes Theater, and Cleveland State University's Theater and Dance Department. The second area of note is the Gordon Square Arts District in Cleveland's Detroit Shoreway neighborhood. The Gordon Square Arts District is home to Cleveland Public Theatre, Near West Theatre, Tailspinner Children's Theatre on its eastern outskirt and Blank Canvas Theatre on its western outskirt.

The third area of note is within the city of Cleveland Heights. This area, referred to here as "Theater in the Heights" is home to Heights Youth Theatre, Ensemble Theatre, Alma Theater at Cain Park, Dobama Theatre, Interplay Jewish Theatre, and two touring companies: Cleveland Shakespeare Festival and Kulture Kids. Beyond these three areas there are a variety of theaters that dot the landscape and contribute to the overall quality of life in Cuyahoga County. The following vignettes explore some of these assets.

COMMUNITY THEATER COMPANIES

One area of the regional sector that is sometimes left out of discussion is Northeast Ohio's roster of community theaters. These are theater companies putting on shows not likely reviewed by theater critics, and whose talent includes unpaid members of the local community. Nevertheless, community theaters play a vital role in enhancing the sector's breadth of shows and training new waves of theater talent that couldn't normally get experience at a professional theater company.

Community theaters are one piece to the Cleveland theater sector's overall ecosystem. "We have a pretty strong ecosystem [in Cleveland]," said Eric Coble, a full-time local playwright that has produced works for many professional theater companies in and outside of Cleveland. "...you have the community theater level that don't necessarily pay their actors. But it allows people to get experience, training, and move up to the mid-level or bigger venues." Overall, as seen in Figure 19 & 20, there are 19 community theater companies in Cuyahoga County, all but

¹⁸ This report's classifications between professional and community theater follows the designations assigned in the Cleveland Stage Alliance (CSA).

three of which are outside of Cleveland's city limits. In many instances these theaters are often the only stage theater venue in their respective communities.

Community theaters can vary widely in composition, design, and target audience. Some take on civic missions, like SignStage in Cleveland's University Circle district, whose mission is to improve awareness and education of people who are deaf or hearing impaired. Others produce their work in unusual settings like The Lantern Theatre in Valley View, which reuses space inside a 1905 Wisconsin-style dairy barn in the Cuyahoga Valley National Park. Some community theater companies experiment with a mixture of performance mediums, one example being Man Cry Productions in Cleveland's Lee Harvard neighborhood, which mixes on-stage performances with filmed sectors and special effects throughout its shows.

One important function of community theater is to introduce the discipline to new audiences. Many small community theaters are a person's first interaction with professional theater. These theaters are a place to build future talent and train youth for the future. Additionally, community theater can build a sense of neighborhood and camaraderie that ties people to place.

PLAYHOUSE SQUARE

Cleveland's Playhouse Square is the nation's largest theater district outside of New York City's Lincoln Center.¹⁹ Anchoring the intersection of East 14th Street and Euclid Avenue in downtown Cleveland, Playhouse Square has a long and vibrant history. Its story begins in the 1920s with the construction and opening of the State, Ohio, Allen, Palace, and Hanna theaters.²⁰ These theaters held vaudeville productions, movies, and stage plays.²¹ However, in 1969 all but the Hanna Theater closed due to declining ticket sales. The Playhouse Square Association was formed the next year with the support of the Junior League of Cleveland, and three years later, a plan was formed to save and restore the theater district with financing from a combination of government, local foundations, and private corporations. Without the work of these pioneers, these theaters would have been destroyed.

The private/public partnership of the Playhouse Square Foundation raised \$40 million, and by 1998 all four of the closed theaters were reopened, marking the partnership as "the world's

¹⁹ Keating, D. W. (2014). *The Gordon Square Arts District in Cleveland's Detroit Shoreway Neighborhood*. Urban Publications. Paper 1162. Retrieved from http://engagedscholarship.csuohio.edu/urban_facpub/1162

²⁰ The Encyclopedia of Cleveland History (2015, February 2) Play House Square. Retrieved from <http://ech.case.edu/cgi/article.pl?id=PS3>.

²¹ Ibid.

largest theater restoration project.”²² That same year, the foundation launched the city’s first Business Improvement District, partnering with nearby property owners to spur the construction and development of restaurants, programming, and retail around the theaters.

The resurgence of Playhouse Square, like any historic theater district, has done more than improve the quality of life for residents; it has contributed to direct and indirect job growth for the region. As mentioned by Markusen & Gadwa (2010) in their article on creative placemaking, a major outcome of arts renaissance is livable areas that are fostered by economic development. In the article they note, “Sales, income, and property tax revenues paid to local governments rose, enabling better maintenance of and additions to public infrastructure like streets, lighting, sanitation, greenery, and public safety,” adding, “Additional jobs and incomes are generated in retail businesses that serve an expanded population of residents and visitors.”²³

In the present day, much of the attention being paid to Cleveland’s theater sector is focused on Playhouse Square, which is home to 9 stages and over 9,000 seats. Between its special events, dance performances, comedy shows, and theatrical productions, Playhouse Square draws more than 1 million people annually.²⁴ Most of the theatrical productions seen in Playhouse Square are touring Broadway shows based in New York City, which are a component of Playhouse Square’s Key Bank Broadway series. With approximately 32,000 season ticket holders, Playhouse Square maintains the largest number of season ticket subscribers in the country.

Many of the productions presented at Playhouse Square have a national reputation, such as the 2016 Tony nominated musical “Waitress,” which will begin its Broadway tour in Cleveland in October 2017. When asked how bringing the start of a touring Tony Award winning musical to Cleveland contributes to the theater sector, Gina Vernaci, Executive Producer at Playhouse Square, noted that “Whenever you launch tours like that, there’s a couple of things you have to bring to the table. You have to create an environment safe for artists to work in.” She continued “You need an audience that is going to show up, because when you’re launching a tour the eyes of the nation are watching you. That may not be the case for week 25 or 30 on a tour, but week number 1 speaks to the important role your community plays in the national arena.” Knowing

²² Playhouse Square. (2016). *History*. Retrieved from <http://www.playhousesquare.org/about-playhousesquare-main/history>.

²³ Markusen, A. & Gadwa, A., (2010). *Creative Placemaking*. The Mayors’ Institute on City Design. Retrieved from <https://www.arts.gov/publications/creative-placemaking>.

²⁴ Playhouse Square. (2016). *History*. Retrieved from <http://www.playhousesquare.org/about-playhousesquare-main/history>.

this, the non-profit organization expanded its Broadway season in 2016 from 16 performances per production (2 weeks) to 24 performances (3 weeks).

Additionally, Playhouse Square is home to the Cleveland Play House and Great Lakes Theater, the region's highest tier of professional theater companies. Both are members of the League of Resident Theatres (LORT), made up of 70 other theater companies across the nation that meet the following four characteristics: 1) are a non-profit, 2) have a self-produced production that is rehearsed for a minimum of three weeks, 3) have a playing season of at least 12 weeks, and 4) operate under designated LORT contracts.²⁵ LORT is the largest theater association of its kind in the United States, and it collectively issues more Equity contracts to actors than Broadway and commercial tours combined. Cleveland is one of only 11 cities that includes two or more LORT theaters.²⁶

Cleveland Play House and Great Lakes Theater are Cleveland's only two "resident theaters." Resident theaters attract talent from across the nation, but also use far more local talent on-stage and backstage than Broadway touring shows. Cleveland Play House produces a variety of productions in many different genres. Some of these productions are original works and are the product of its Playwrights Unit, a collection of Cleveland-based playwrights that meet and are supported by Cleveland Play House. In September 2011, Cleveland Play House moved into the Allen Theatre in Playhouse Square from its former home, retaining the distinction of being the nation's longest-running professional theater company. Great Lakes Theater, launched in 1962 (then known as the Great Lakes Shakespeare Festival), produces classic theatrical works on its home stage at the Hanna Theatre. Great Lakes Theater is also unique in that it has a strategic producing alliance with the Idaho and Lake Tahoe Shakespeare Festivals that maximizes return on organizational investment, increases production efficiencies and creates long term work opportunities for artists. Tom Hanks, the screen actor and one of Great Lakes' most notable alumni, reminisced about his time with them by saying to *Cleveland Magazine*, "Great Lakes was a rotating repertory, which meant the set had to be changed every night — and they were impossible to build. *Hamlet* was just a beast. But we were young, and I loved it. We could stay at the theater till 2 o'clock in the morning. It was a great summer job."²⁷

Capping every visitor's experience in Playhouse Square is the General Electric Chandelier, a 20-foot-tall centerpiece that hangs over the intersection of East 14th Street and Euclid Avenue. Purchased by the Playhouse Square Foundation with support from an exclusive sponsor, General Electric Lighting (based in nearby East Cleveland), the 8,500-pound chandelier is the

²⁵ For more information on the League of Resident Theatres, see http://www.lort.org/How_to_Join.html.

²⁶ League of Resident Theatres. (n.d.) *About LORT*. Retrieved from http://www.lort.org/About_LORT.html

²⁷ Smitek, C. (2009, August 20) Life According to Tom Hanks. *Cleveland Magazine*. Retrieved <http://clevelandmagazine.com/entertainment/life-according-to-tom-hanks>.

largest permanent outdoor chandelier in the world. The chandelier was part of the foundation's \$16 million campaign in 2014 to improve outdoor signage and the digital displays in and around the district.²⁸ While it may not attract many visitors on its own, the chandelier serves as a useful branding mechanism, creating a sense of place and providing a stunning background for countless photo opportunities and pre- and post-show crowds.

GORDON SQUARE ARTS DISTRICT

The Gordon Square Arts District, located on the city's west side, is a unique arts district often highlighted by city officials and others as a model for revitalizing distressed neighborhoods through creative placemaking.²⁹ In 2007, the Near West Theatre, Cleveland Public Theatre, and the Detroit Shoreway Community Development Organization (DSCDO), who are owners of the Capitol (movie) Theatre, came together to join in a capital campaign to invigorate the commercial core of the neighborhood using the arts as an economic catalyst.

By 2014, the three partner organizations raised \$30 million to build a new community theater, renovate several buildings, and improve the streetscape. This transformation included changes to the Capitol Theatre and the spaces owned by Cleveland Public Theatre. Other key accomplishments of the campaign included adding parking capacity to attract more visitors and enhancing the district's main thoroughfare, Detroit Avenue, with a new streetscape, lighting, and bus stops. The project also built a new home for Near West Theatre in a 25,550-square foot facility with 275 seats at the corner of Detroit Avenue and West 67th Street.

The revitalization of the Gordon Square Arts District has helped create over 80 new businesses, including a variety of arts-related enterprises in the 78th Street Studios, which offer the largest concentration of arts businesses in the city. The city of Cleveland contributed \$5.3 million to the campaign to restore the Capitol Theatre and complete the streetscape improvements, including adding parking spaces.³⁰ The attention and traffic in the neighborhood has grown continuously since the project was completed. Several well-regarded bars, restaurants, and retail establishments have opened in the past two years, helping to create one of Cleveland's most walkable and accessible neighborhoods. In the summer of 2016, the neighborhood was the setting for "Cleveland Hustles," a business-competition show on CNBC executive-produced by

²⁸ Litt, S. (2014, January 13) GE Lighting will sponsor Playhouse Square's new outdoor chandelier, to be lit May 2. *The Plain Dealer*. Retrieved from http://www.cleveland.com/arts/index.ssf/2014/01/ge_lighting_will_sponsor_playh.html.

²⁹ Litt, S. (2014, September 2) The Gordon Square Arts District finishes its \$30 million capital campaign- and launches a new master plan. *The Plain Dealer*. Retrieved from http://www.cleveland.com/architecture/index.ssf/2014/09/the_gordon_square_arts_distric.html.

³⁰ Bon, J. (2015, March 26). Gordon Square Arts District looks to future after completing \$30 million capital campaign. *Freshwater Cleveland*. Retrieved from <http://www.freshwatercleveland.com/features/gordonsquare032615.aspx>.

the internationally-known professional athlete and Northeast Ohio-native LeBron James of the Cleveland Cavaliers.

The neighborhood's main attraction is still theater, and the improvements to the physical and cultural landscape have helped to build interest and excitement for productions. The Gordon Square Arts District is home to a children's theater company (Talespinner Children's Theatre), a professional theater that produces experimental works (Cleveland Public Theatre), a community theater that showcases work from a broad range of genres (Near West Theatre), and a professional theater that takes on a similar broad theme (Blank Canvas Theatre). These organizations anchor Gordon Square's eclectic assortment of apartments, homes, restaurants, and churches. While a first-time visitor to the area today might marvel at the polished and picturesque streetscape, a mere two decades ago the neighborhood was facing a downward spiral of disinvestment and found itself at risk of losing one of its iconic three-story arcade buildings—which included the movie theater (the Capitol Theatre)—to neglect. In 1978, the parapet of the Gordon Square Arcade collapsed and damaged the marquee of the theater. Later, its roof began leaking. In 1979, DSCDO took the gamble of purchasing the declining arcade and theater with financing that included a federal Urban Development Action Grant, one of the first in the country for a neighborhood project. As a result, this landmark building was saved from demolition. In 1988, DSCDO converted the upper floors of the arcade into 64 units of subsidized, low-income apartments and turned the long-vacant market area into an atrium for offices. It was around this time that the arcade was placed on the National Register of Historic Places.³¹

Cleveland Public Theatre (CPT) was founded in 1981 as a volunteer organization that provided free theater. CPT's founder, James Levin, acquired an adjoining building, which had housed the Gordon Square Theatre in 1995. CPT grew even larger in 2009 when it purchased an adjacent property, the de-sanctified Romanian Orthodox Church.

Today, CPT is among Cleveland's roster of professional theater companies; it has garnered praise and recognition for producing outside-the-box works that prioritize neighborhood involvement and community service. In an interview with this report's authors, Raymond Bobgan, Executive Artistic Director of CPT, mentioned the importance of this set of priorities to him, claiming it as the primary reason he calls Cleveland home; "There's two pieces that kept me in Cleveland. One: You can find theaters that are doing edgy, outside-the-mainstream work, and you can find theaters that are connected to the community, but you rarely find the two things together." CPT practices community engagement and activism through partnerships with

³¹Keating, D. W. (2014). *The Gordon Square Arts District in Cleveland's Detroit Shoreway Neighborhood*. Urban Publications. Paper 1162. Retrieved from http://engagedscholarship.csuohio.edu/urban_facpub/1162

community development corporations and public agencies like the Cuyahoga Metropolitan Housing Authority.

The focus on community and public service continues down the street from CPT at the Near West Theatre. Near West Theatre was originally founded as the Near West Side Shared Ministry Youth Theatre in 1978 by Stephanie Morrison, Reverend George Hrbek, and Father Robert Scullin of St. Patrick's Church. The purpose of the theater was to allow local children to contribute to the community through performances. In 1982, the youth summer program was expanded to include adults, thanks in large part to funding from a seed grant from the George Gund Foundation. Like CPT, Near West's history is rooted in a commitment to social justice and fostering an inclusive environment receptive to diverse people and opinions.

Gordon Square's successes in recent years have been a combination of the work and effort of many individuals and organizations in the private, public, and nonprofit sectors. Groups like DSCDO are proud of the fact that redevelopment has not led to the levels of residential displacement often associated with what might be seen as gentrification to the outside observer. The arts, in particular the theaters and their focus on providing programming and other opportunities for historically marginalized communities, have had a significant hand in this community-centered dynamic. With any luck, the neighborhood's progress will continue, helping to stabilize and grow one of Cleveland's most dynamic districts.

THEATER IN THE HEIGHTS

The small inner-ring suburb of Cleveland Heights on the east side of Cleveland is known as a home to artists and actors (as well as patrons of the arts). This focus on and appreciation of the arts extends to the theater sector. Five theater companies perform within the city's border, and two more companies that produce touring productions call the city home. Cleveland Heights' municipal government operates and curates professional theater productions, an uncommon occurrence in local government.

One of the city's most prominent parks, Cain Park, has been used as a theatrical venue since 1934.³² Cain Park includes both a mid-size indoor facility for off-Broadway shows, the Alma Theater, and an outdoor covered amphitheater, Evans Amphitheater, for larger events—usually concerts. The park's programming spans from concerts and dance performances to theatrical and musical productions throughout the summer months. Cain Park also partners with other local theatrical organizations such as the Musical Theater Project, an area nonprofit dedicated

³² Rotman, M. (2016). *Cain Park*. Cleveland Historical. Retrieved from <https://clevelandhistorical.org/items/show/193>.

to “foster[ing] a deeper understanding and appreciation of the American musical through programs that educate as well as entertain...”³³

Another major player in the Heights since its founding in 1959 is Dobama Theatre. Dobama, located in the Cedar-Lee district, stands out as Northeast Ohio’s only Equity theater not located in Playhouse Square. In 2014, the leadership at Dobama began formally hiring almost exclusively actors with Equity membership to perform in Dobama’s contemporary theatrical works.³⁴

Cleveland Heights and the communities around it also have a base of theater enthusiasts who patronize numerous productions in Cuyahoga County. One possible explanation for ad-hoc patronage could be the city’s proximity to the University Circle neighborhood of Cleveland, home to many of the region’s cultural institutions, including Severance Hall, the Cleveland Museum of Art, the Museum of Contemporary Art, Cleveland Institute of Art, and Case Western Reserve University.

KARAMU HOUSE

Karamu House is a national and local treasure. On December 17, 1982, Karamu House was listed on the United States National Register of Historic Places,³⁵ and on June 16, 2003 it received an Ohio Historical Marker.³⁶ Several notable alumni have come through its historic doors during Karamu House’s rich history, including poet Langston Hughes, actors Ruby Dee, Ron O’Neal, and Robert Guillaume, and artists Charles L. Sallée, Jr., and William E. Smith.

The long history of Karamu House begins with its establishment in 1915 by Oberlin College graduates Russell Jelliffe and Rowena Woodham Jelliffe, social workers who named their creation Playhouse Settlement. Playhouse Settlement offered children’s theater and other social, recreational, and educational activities. The Jelliffes wanted to keep the spirit of the settlement house concept, creating a place for migrants and immigrants, and aimed to foster a space where people of different races, religions, social, and economic backgrounds could have common ground to come together to seek and share common ventures. In the early 1920s, there was a large migration of African-Americans to Cleveland from the American South. The

³³ The Musical Theater Project. (n.d.) *Mission*. Retrieved from <http://www.musicaltheaterproject.org/learn-more-about-tmtp/>.

³⁴ Simakis, A. (2014, April 4). Dobama Theatre to join Actors' Equity Association. *The Plain Dealer*. Retrieved from http://www.cleveland.com/onstage/index.ssf/2014/04/dobama_theatre_joins_actors_eq.html.

³⁵ National Park Service. (2013, November 3). *National Register of Historic Places*. Retrieved from <http://npgallery.nps.gov/nrhp/>

³⁶ Ohio History Connection. (n.d.). *Karamu House*. Retrieved from <http://remarkableohio.org/index.php?/category/306>.

Playhouse Settlement became a location for African-American artists to showcase their skills in dancing, acting, printmaking, and writing. It soon developed a partnership with the Dumas Dramatic Club, a local African-American theater company that later became known as the Gilpin Players. In 1924, educator and Gilpin Player Hazel Mountain Walker named the theater “Karamu,” a Kiswahili term for “place of joyful gathering.”³⁷ A fire destroyed the original building, at 2339 East 38th Street, in 1939. Karamu House was rebuilt in 1949 at its current location at East 89th Street and Quincy Avenue through the aid of Leonard Hanna, Jr. and the Rockefeller Foundation.³⁸

Over the years, Karamu House gained a reputation as one of the best amateur houses in the country.³⁹ In addition to being a community-based nonprofit arts and education institution, Karamu House has maintained its historic commitment to encouraging and supporting the preservation, celebration, and evolution of African-American culture. Programs range from drama and dance to music and art, in conjunction with before- and after-school programming.

While Karamu House continues to flourish and thrive with the annual holiday presentation of Langston Hughes’ “Black Nativity” and the hosting of an annual Martin Luther King, Jr. Day celebration, the company also manages to present a schedule of six plays every year. However, Karamu House will soon be expanding further on its offerings; starting with the 2016-17 season, Karamu House will partner with Dobama Theatre in Cleveland Heights to share facilities and personnel resources, offer joint ticket programs, and present co-productions. The partnership is a collaborative initiative between two historic theater institutions to enrich their theater-making, bring people together, and strengthen their community. Through shared resources, joint programming, artistic collaborations, civic engagement, and the creation of space for conversation, the Karamu/Dobama partnership will be a catalyst for community, enhancing the creative process and allowing those involved to more fully and immediately respond to the challenges they face in the world today. Tony Sias, Karamu president and CEO, noted in an article that “This partnership exemplifies true collaboration. We’re sharing resources and working together to remove barriers to make theater more accessible for the masses. We are

³⁷ Ohio History Connection. (n.d.). *Karamu House*. Retrieved from <http://remarkableohio.org/index.php?category/306>.

³⁸The Encyclopedia of Cleveland History. (2012, November 2). Retrieved from <http://ech.case.edu/cgi/article.pl?id=KH>.

³⁹ Ibid.

thrilled to work closely with Dobama as one of Cleveland’s professional theater companies that produce first-rate productions of cutting-edge new plays.”⁴⁰

The landscape of theaters in Cuyahoga County is vibrant and robust, with every corner of the county being represented with a theater or theater district. The representation of all levels of theater—from community to professional—show that place-based art is important to the region. The city of Cleveland’s concentration of theaters accounts for one-third of the live theater venues in the region—showcasing, presenting, and attracting actors, productions, and technical arts personnel. Theater co-location in neighborhoods like Playhouse Square, the Gordon Square Arts District, Theater in the Heights, and Karamu House brings people to the arts, supporting the unique and lively landscape of theater in Cuyahoga County.

⁴⁰American Theatre Editors. (2016, September 20). *Karamu House and Dobama Theatre Launch Partnership: The two Cleveland theatres will share facilities, resources, and artists begin with the 2016-17 season*. Retrieved from <http://www.americantheatre.org/2016/09/20/karamu-house-and-dobama-theatre-launch-partnership/>.

CHAPTER 4

CHALLENGES OF THE THEATER WORKFORCE

Workforce development—the process of training and re-training workers—is a constant topic of conversation in Cuyahoga County due to the importance of employee readiness for business growth and development as the regional economy reacts to larger macroeconomic trends. In this regard, the theater industry in Northeast Ohio is no different than any other. Like other industries, theater is looking for the best talent to staff positions—including actors, technical operators, directors, and so on. This section looks to highlight the competitive advantages and challenges of the Cleveland theater talent arena, which includes the Cleveland theater workforce pipeline, and its competitive advantages with regards to talent retention.

TALENT PIPELINE

When examining the Cleveland theater workforce development arena, it is first important to investigate how individuals enter and move through the system. This movement from early stages in the workforce development system to employment is known as the workforce pipeline.

Overall, there are significant assets in the form of excellent university theater programs that exist to support workforce development. Northeast Ohio's higher education institutions are significantly connected to the local sector, providing theater professionals options for steady employment and centers to train upcoming theater talent in Cleveland and elsewhere. Cuyahoga County alone is home to three universities that offer four-year degrees in theater: Baldwin Wallace University, Case Western Reserve University, and Cleveland State University.

Baldwin Wallace University's (BW) theater and music theater programs are educational treasures within the Cleveland theater sector. BW's music theater program ranked second in the nation in a review of the "Top 10 Colleges for Musical Theatre Majors."⁴¹ The faculty is composed of working professionals at Cleveland's Great Lakes Theater, Cleveland Public Theatre, Beck Center for the Arts, and Dobama Theatre, and other theaters across the nation. Baldwin Wallace's music theater program, under its Conservatory of Music, is recognized as a hotbed for national talent. The program partners with seven professional theater companies in the region, and 100 percent of its students have been signed by top agents in the past six years. This fall, BW launched a program for students to earn a Bachelor of Fine Arts (BFA) in Acting, partnering with Great Lakes Theater to offer understudy opportunities. The program, with an

⁴¹ Johnson, K. (2015, November 12). *College Magazine Ranks BW Music Theatre Program Second in Nation*. Retrieved from <https://www.bw.edu/news/2015/music-theatre-program-ranked-second-in-nation>

emphasis in classical drama, is the only BFA in acting in Northeast Ohio and only BFA in classical acting in the Midwest.

Another area institution of higher education offering undergraduate and graduate programming in theater is Case Western Reserve University (CWRU). The undergraduate program at CWRU includes concentrations in acting, dramatic writing, directing, design and technical theater, and general theater, in which a student studies a combination of the above. Undergraduate students produce a season of four theatrical productions every year at their on-campus Eldred Theater. It is important to note that CWRU is the only university in Cuyahoga County to offer graduate-level programming through a Masters of Arts (MFA) in Theater and in Acting. The MFA program accepts a class of eight actors every other year and is housed at Cleveland Play House, where students spend their third year as an understudy. Once a student finishes the three-year MFA program, they automatically join the Actors' Equity Association and can perform at Equity theaters.

Cleveland State University (CSU), particularly, has a close relationship with the Cleveland Play House, sharing classroom and rehearsal space with the regional theater in Playhouse Square's Middough Building and performing in the Allen Theatre Complex. Staff from Cleveland Play House also teach coursework at CSU's Department of Theatre and Dance, and CSU students are afforded opportunities to engage in mentoring experiences that include production and marketing internships.

Additionally, Cuyahoga Community College (Tri-C) has a two-year theater program; the college holds seasonal productions at five theater facilities across its campuses. Facilities include: the Black Box Theatre, the intimately-sized Mainstage Theatre, an 800-seat auditorium on its Metro Campus near downtown Cleveland, a 450-seat theater on its Western Campus in Parma, and a 600-seat theater on its Eastern Campus in Highland Hills.

Seen as the local theater anchor institution, the Cleveland Play House has an important role as a leader and a mentor to many students involved in educational programming. Christine McBurney, Co-Artistic Director at Mamá Theatre Company noted, "CSU and Case have great relationships with Cleveland Play House. They get their kids working on their shows, on-stage, off-stage." Not only do these universities provide training for individuals to learn and hone their craft, but they also provide employment opportunities for individuals within the theater industry. Laura Kepley, Artistic Director at the Cleveland Play House, indicated that "Many professional actors have full-time teaching jobs at universities, and some of those artists receive great support from their universities that enables them to both teach and act professionally. These artists are able to do their professional work, and that is valued by their universities."

However, as these educational institutions churn out eager graduates, there may not be jobs available in the Cleveland theater sector for them; where available, these jobs may also pay lower wages than those in comparable markets. Of the 234 individuals who responded to our survey on the Cleveland Theater sector, 55% indicated that it was *somewhat difficult* or *extremely difficult* to find work in Cuyahoga County. Therefore, the possibility arises that if these individuals cannot find work, they will obtain their training here and then simply move to a different area—potentially in a larger labor market. This possible scenario was given credence by Ms. McBurney, who said, “I have to shout out to youth theater because there’s 10 kids on Broadway right now. It is ridiculous. They are all from Cleveland, they’ve all grown up here. Some of them were or are my students at Shaker Heights. We’re a pipeline. With Baldwin Wallace, Kent, Akron, and other universities, and all of the youth theaters, Shaker and other high school programs. I really think Cleveland is a pipeline. I can name a bunch of people right now that I have either taught, or I know who are from Cleveland. It is really ridiculous. And every time I go to New York, I see people I know and I get a tour backstage. It’s great, it is amazing. I think the training here, the opportunity here, and the exposure here, and the experience here, is a major asset.”

Many professionals involved in the Northeast Ohio theater sector know that talent drain is an issue for Cleveland, leading many theaters and organizations to seek funding for expanded networking and mentoring programs aimed at fostering a supportive environment in Cleveland. Laura Kepley explained, “Creating professional mentorships is critical to the health and future of the theater sector. Cleveland Play House is doing this and I know other theaters are doing it as well. We have 16 apprentices that started two weeks ago and will be with us for our entire season, August through next May. These early career theater makers come from across the country to receive training in Cleveland. They are here for education, but we also provide them with housing, and a stipend to put toward living expenses.” Cleveland Play House is not the only theater company engaging in mentorship programs; so is the Cleveland Public Theatre (CPT). According to Raymond Bobgan, CPT is also engaging in a high-school engagement program for technical staff starting in 2016; “This year, we’re starting a program for teens who are in high-school to work 10 hours a week to work in the theater. Six (6) of those [hours] they will be paid minimum wage and doing work; and four (4) of [those hours they] will be learning about theater, seeing a show, and learning about technical theater skills. We believe this time next summer that our primary crew for Pandemonium [CPT’s annual fundraiser] is going to be hired out of this group. It is an apprenticeship program.”

WORKFORCE COMPETITIVE ADVANTAGES

Despite the Cleveland theater sector’s struggles with losing talent to larger markets, there are many competitive advantages in its portfolio to retain and attract a talented workforce. First, the low cost of living in the Cleveland area is a major draw for individuals looking to hone their

craft. Second, the concentration of theaters and playwrights in the Cleveland region helps to make it a mid-sized city that has a disproportionately high level of national recognition, which helps attract and retain talent. Finally, the collaboration and connectivity within the Cleveland theater sector is unlike other comparable regions across the country, creating a cooperative environment for show production.

Northeast Ohio's low cost of living is an excellent competitive advantage when positioned against more expensive theater cities such as New York City and Chicago. McBurney, speaking to how a low cost of living can help an artist perform and hone their craft, said, "Some of my artist friends in New York, they want to come to Cleveland because they cannot afford to live there. That's not a city of artists anymore, it is a city of people who have money."

Examining cost of living data for the Cleveland metropolitan area versus other prominent theater regions reveals that Cleveland has a significantly lower cost of living. The cost of living index (COLI) created by Moody's Analytics⁴² establishes 100 as a baseline that equals the average costs across the United States. The COLI for the Cleveland metropolitan area in 2010 was 90.7, the Chicago metropolitan area was higher at 101.0, and the Washington D.C. and the New York metropolitan areas were even higher (123.2 and 129.5, respectively). In addition to the low cost of living in Cleveland, there are additional benefits in terms of low costs for putting on productions.

The second major workforce competitive advantage is the concentration of nationally recognized theater activity in a mid-sized city. This concentration of theater activity creates a vibrancy which helps attract and retain theater talent in the region. This fact has not gone unnoticed. During its 100th anniversary season, the Cleveland Play House won the Regional Theatre Tony Award in 2015.⁴³ In addition, Fodor's Travel rated the Play House one of the 10 Best Regional Theaters in the United States.⁴⁴

When it comes to Cleveland theater, it is small but mighty—according to Raymond Bobgan, "For our size, we definitely punch above our weight." Based upon the U.S. Census Bureau's American Community Survey, it is estimated that the population of the city of Cleveland was just over 388,000 people in 2015, while boasting two residency theater companies.⁴⁵ This is

⁴² For more information, see Moody's Analytics at <https://www.economy.com/regions/us-states-and-metro-areas>

⁴³ Simakis, A. (2015, April 24) Cleveland Play House wins coveted 2015 Regional Theatre Tony Award in its 100th year. *The Plain Dealer*. Retrieved from http://www.cleveland.com/onstage/index.ssf/2015/04/cleveland_play_house_wins_cove.html

⁴⁴ Bruce, A. (2015, January 20). 10 Best Regional Theaters in the U.S. Fodor's Travel. Retrieved from <http://www.fodors.com/news/photos/10-best-regional-theaters-in-the-us#!1-intro>

⁴⁵ League of Resident Theatres. (n.d.) *Member Theatres*. Retrieved from http://www.lort.org/LORT_Member_Theatres.html

compared to the District of Columbia, with around 672,000 people and Chicago, with 2.7 million people, both of which also have two residency theaters.⁴⁶

It is not just the production side that is exceeding expectations; interviewed sources also describe the playwriting sector in the Cleveland area as exceptionally strong, with a handful of playwrights who have developed national profiles. Unlike other theater professions, playwriting can be done remotely, away from markets with a high cost of living. Eric Coble, a local playwright considered by *American Theatre Magazine* to be a “playwright to watch,” discussed his thoughts on the region; “It is a really good time to be in Cleveland’s theater sector. I don’t have a desire to be anywhere else. I can personally get all of my work done here and get to other places as needed. The quality of life is better here than in New York, Boston, or someplace else, where I do not think I could make a living as a playwright like I can in Cleveland.”

An additional competitive workforce advantage of Cleveland’s theater sector is collaboration between and among theater companies across Cuyahoga County. Collaboration can be observed across the sector through the agreements made between educational institutions and theaters, as well as at networking events organized by industry leaders within the sector, making it a draw for theater talent from both inside and outside the region.

Beyond formal collaborations, there are also informal collaborations which encourage a well-connected and vibrant theater ecosystem. Laura Kepley advocates for the Cleveland theater sector to artists, citing this collaboration and connectivity, stating, “I tell young artists that Cleveland is a place where there is opportunity. It isn’t as siloed as other theater communities are. You can work at different theaters in town. There’s sharing of resources.” What makes the cooperation and collaboration special is that it is not simply related to networking and talent mobility, but also the availability of resources and theater spaces. Kepley continued, “But there’s also space. There are many places you can get for little to no money and have a clean rehearsal space. When I was a young artist 20 years ago in Chicago, that was disappearing, but still possible. But now, it is a different story. [One of our fellows] has just come from Chicago and has spoken about how it is prohibitively expensive for a company to get together in a room there and work. That is not a problem for here in Cleveland.”

Overall, the Cleveland theater sector has a unique workforce development system with significant assets that allow for theater talent to perform and engage with important theater organizations. The cooperation between local theater organizations—such as the Cleveland Play House, Playhouse Square, and Great Lakes Theater, as well as with colleges and

⁴⁶ League of Resident Theatres. (n.d.) *Member Theatres*. Retrieved from http://www.lort.org/LORT_Member_Theatres.html

universities here in Northeast Ohio—stands out compared to other cities; this cooperation, combined with the low cost of living, makes Cleveland an excellent incubator for young talent. However, even with the workforce development pipeline of talented students graduating from Northeast Ohio universities, jobs may not be available for them when they graduate and they must move away. This illustrates that theater education is also one of Cleveland’s base industries, exporting education and bringing external funding to the region via tuition payments. Many theater stakeholders acknowledge this issue and are working to resolve it through mentorship and apprenticeship programs. At some point in time, however, the situation’s economics (supply versus demand of theater professionals) must be addressed in order for the industry to grow.

CHAPTER 5

THE ECONOMIC IMPACT OF THE CLEVELAND THEATER SECTOR

The following economic impact assessment of the Cleveland theater sector uses IMPLAN Professional and 2014 IMPLAN Data Files. IMPLAN Professional 3.0 is an economic impact assessment software system.⁴⁷ The IMPLAN Data Files allow for the creation of sophisticated models of local economies based on relationships between industries to estimate a wide range of economic impacts. As with any industry, theater is linked to other businesses through buy-sell relationships which contribute to its overall impact. To produce theater productions, theater organizations and businesses buy intermediary goods and services from other companies both within the theater sector and outside of it. The economic impact estimates assume that the Cleveland theater sector came into existence in 2015, and in doing so, instantly generated a demand for goods and services required for theater productions. The same is true for the opposite, as we can say that the economic impact shows what would be lost if the theater sector disappeared.⁴⁸

Five measures of impact estimated by the model are analyzed here: *employment*, *labor income*, *value added*, *output*, and *taxes*. Employment measures the number of jobs that are present because of the Cleveland theater sector. Labor income is payroll paid to employees and proprietors' income. Value added measures the value of goods and services produced, minus the cost of intermediary goods. Output measures the total value of goods and services produced. Taxes include federal, state, and local tax revenues.

Each of the impacts is a summation of *direct impact*, *indirect impact*, and *induced impact*. Direct impact is the initial value of goods and services the theater sector purchases. Indirect impact measures the jobs and production needed to manufacture goods and services required by the theater sector. Induced impact is the increase in spending of local households due to income received through their work in the theater and with the suppliers.

⁴⁷ IMPLAN Group, LLC, copyright 2016.

⁴⁸ For more information on the methodology behind the economic, impact see Appendix B.

OVERALL ECONOMIC IMPACT

The overall economic impact of the Cleveland theater sector in 2015 includes a total of 2,382 direct employees, an associated \$58.9 million in labor income, and \$471.7 million in output. From this direct impact, theater accounted for 5,065 total jobs (Table 9). The 1,815 indirect jobs represent the supply-chain and is comprised of industries that sell their products and services to the theater sector. The 868 jobs in the induced effect reflect the employment in Cuyahoga County due to household purchases of those employed in the theater sector and its supply chain.

Table 9. Total Economic Impact of the Cleveland Theater Sector, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	2,382	\$58,880,078	\$113,826,198	\$471,654,509	\$18,346,317
Indirect Effect	1,815	\$133,269,673	\$188,643,409	\$309,444,127	\$34,160,120
Induced Effect	868	\$42,651,237	\$75,427,881	\$122,104,711	\$15,429,930
Total Effect	5,065	\$234,800,988	\$377,897,488	\$903,203,347	\$67,936,367

As seen in Table 9, the total labor income associated with the theater sector was \$234.8 million. Of this total, \$58.9 million comprised the direct effect, \$133.3 million derived from the indirect effect, and \$42.7 million made up the induced effect.

In terms of value-added impact, the theater sector had a \$377.9 million effect. Almost \$114 million is in the direct effect, \$188.6 million came from the indirect effect, and \$75.4 million was from induced effect.

The total output impact in 2015 was \$903.2 million. The largest component was the direct effect with \$471.7 million. The indirect effect was \$309.4 million, and the induced effect was \$122.1 million.

In terms of taxes, the theater sector was responsible for \$67.9 million in revenue in 2015. Over \$18 million was in the direct effect, \$34.2 million in the indirect effect, and \$15.4 million in the induced effect. Of the total \$67.9 million, \$23.6 million was in state and local taxes, and \$44.3 million was in federal taxes.

ECONOMIC IMPACT OF THE CLEVELAND THEATER SECTOR SUBSECTORS

The economic impact of the theater sector was examined per its five subsectors: *performers* (from the survey), *theater companies*, *television stations*, *schools* (related to the theater), and *radio stations*. The largest subsector in terms of all measures of impact (employment, labor income, value added, output, and taxes) was *television* (Figure 21 and Table 10), which has the largest direct employment by a slight margin within this subsector in Cuyahoga County, just ahead of *schools* and *radio*. *Radio* (29%) and *schools* (26%) were the next largest subsectors in terms of economic impact. *Theater companies* represented approximately 12% of the total employment impact, and as noted earlier, *performers* were very underrepresented, representing only 1% of the total employment impact.

Figure 21. Employment Economic Impact by Cleveland Theater Sector, 2015

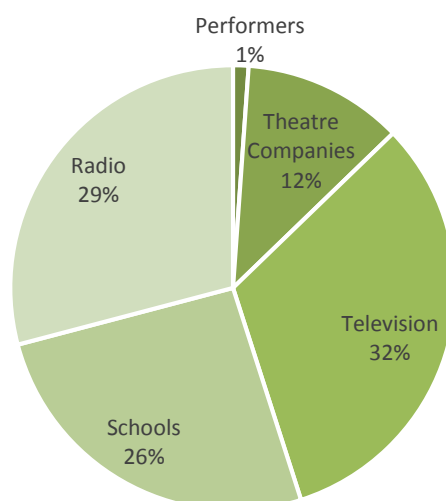


Table 10. Economic Impact of Cleveland Theater Sector by Subsector

Impact Type	Employment	Labor Income	Value Added	Output	Total Taxes
Performers	57	\$1,894,346	\$2,350,042	\$3,625,540	\$451,206
Theater Companies	590	\$19,554,232	\$39,954,351	\$78,323,830	\$7,006,854
Television	1,635	\$93,985,506	\$135,922,971	\$328,315,815	\$24,734,375
Schools	1,309	\$38,689,136	\$85,580,160	\$196,018,778	\$14,286,946
Radio	1,474	\$80,677,768	\$114,089,964	\$296,919,384	\$21,456,986
Total	5,065	\$234,800,988	\$377,897,488	\$903,203,347	\$67,936,367

OTHER AFFECTED INDUSTRIES

In terms of employment impact, many industries were affected by the Cleveland theater sector due to supply chain spending. Most notably were *Broadcasting* (1,652), *Performing arts and spectator sports* (1,483), *Professional- scientific and technical services* (256), *Administrative support services* (234), *Educational services* (174), and *Food service and drinking places* (144).⁴⁹

For labor income impact, the largest sector was *Broadcasting* (\$67.5 million). This was followed by *Performing arts and spectator sports* (\$63.2 million), *Professional- scientific and technical services* (\$23.1 million), *Administrative support services* (\$9.2 million), *Real estate* (\$6.3 million) and *Ambulatory health care* (\$5.3 million).

The value added impact had the largest impact on *Performing arts and spectator sports* (\$117.3 million). This was followed by *Real estate* (\$37.0 million), *Professional- scientific and technical services* (\$31.9 million), *Broadcasting* (\$30.4 million), *Administrative support services* (\$12.0 million), and *Rental and leasing services* (\$8.6 million).

Finally, the output impact materialized most through *Broadcasting* (\$360.6 million), *Performing arts and spectator sports* (\$239.0 million), *Real estate* (\$47.5 million), *Professional- scientific and technical services* (\$47.2 million), *Administrative support services* (\$16.0 million), and *Rental and leasing services* (\$12.7 million).

DETAILED ECONOMIC IMPACT OF THE CLEVELAND THEATER SECTOR SUBSECTORS

The tables below (Tables 11-15) show the breakdown by direct, indirect, and induced effect for each of the five theater sector subsectors.

Table 11. Economic Impact of Performers, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	44	\$1,195,019	\$1,205,967	\$1,834,247	\$233,184
Indirect Effect	6	\$368,906	\$559,384	\$845,168	\$98,529
Induced Effect	7	\$330,421	\$584,691	\$946,125	\$119,493
Total Effect	57	\$1,894,346	\$2,350,042	\$3,625,540	\$451,206

⁴⁹ These are aggregated 3-digit NAICS code industries from IMPLAN.

Table 12. Economic Impact of Theater Companies, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	260	\$5,423,005	\$18,034,654	\$44,017,468	\$3,112,294
Indirect Effect	254	\$10,426,323	\$15,371,534	\$23,701,674	\$2,553,761
Induced Effect	76	\$3,704,904	\$6,548,163	\$10,604,688	\$1,340,799
Total Effect	590	\$19,554,232	\$39,954,351	\$78,323,830	\$7,006,854

Table 13. Economic Impact of Television, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	727	\$24,642,104	\$32,947,093	\$158,685,232	\$5,121,857
Indirect Effect	565	\$52,450,288	\$73,096,179	\$121,265,602	\$13,501,657
Induced Effect	343	\$16,893,114	\$29,879,699	\$48,364,981	\$6,110,861
Total Effect	1,635	\$93,985,506	\$135,922,971	\$328,315,815	\$24,734,375

Table 14. Economic Impact of Schools, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	688	\$9,310,186	\$39,917,864	\$122,401,877	\$5,993,039
Indirect Effect	475	\$22,191,227	\$32,955,014	\$53,041,464	\$5,693,107
Induced Effect	146	\$7,187,723	\$12,707,282	\$20,575,437	\$2,600,800
Total Effect	1,309	\$38,689,136	\$85,580,160	\$196,018,778	\$14,286,946

Table 15. Economic Impact of Radio, 2015

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Direct Effect	663	\$18,309,764	\$21,720,620	\$144,715,685	\$3,885,943
Indirect Effect	515	\$47,832,929	\$66,661,298	\$110,590,219	\$12,313,066
Induced Effect	296	\$14,535,075	\$25,708,046	\$41,613,480	\$5,257,977
Total Effect	1,474	\$80,677,768	\$114,089,964	\$296,919,384	\$21,456,986

Examining the tables by subsector highlights the differences in what is called the multiplier effect – or how one dollar can circulate through the economy. Interestingly, theater companies had the highest employment multiplier (2.27) (Table 16). This means that for each job created in a theater company, 1.27 additional jobs will be created in the local economy. The employment multipliers for television (2.25) and radio (2.22) came in at a close second and third.

Table 16. Total Multipliers for Cleveland Theater Sector by Subsector⁵⁰

Impact Type	Employment	Labor Income	Value Added	Output	Taxes
Performers	1.30	1.59	1.95	1.98	1.93
Theater Companies	2.27	3.61	2.22	1.78	2.25
Television	2.25	3.81	4.13	2.07	4.83
Schools	1.90	4.16	2.14	1.60	2.38
Radio	2.22	4.41	5.25	2.05	5.52
Overall	2.13	3.99	3.32	1.91	3.70

⁵⁰ Note: These numbers cannot be summed as they represent the multiplier for each indicator.

In terms of the financial measures, the multiplier shows the total economic impact for each \$1 invested. For example, for each \$1 invested in performers, there is an additional \$0.59 impact on labor income, \$0.95 impact on value added, \$0.98 impact on output, and \$0.93 impact on taxes. Radio had the highest labor income, value added, and tax multipliers, while Television had the highest output multiplier. Of note is the high labor income multiplier on schools relative to the lower multipliers in the other measures. Performers had the lowest multipliers, except in terms of output.

Overall, the Cleveland theater sector is an important part of the economy of Cuyahoga County. In total, it represented 5,065 jobs, labor income of \$234.8 million, value added of \$377.9 million, output of \$903.2 million, and \$67.9 million in taxes. While theater is not as large in Cuyahoga County as the music sector or the visual arts, crafts, and design sector, it nonetheless represents an integral component of the artistic community.

CHAPTER 6

CONCLUDING DISCUSSION

Beyond the economic attributes of the Cleveland theater sector, there are interesting components that should be highlighted and discussed. Through interviews, surveys, and data collection, a vast amount of information was assembled on the Cleveland theater sector. This is a pivotal moment in the theater and arts sector as philanthropy—one of the major funding mechanisms of the sector—is changing. Across the country, foundations and government agencies are moving away from providing operational funding for theater organizations and moving towards project-based funding. This is a critical time for the sector to assess essential questions in order for it to move forward, such as “*What do audiences look like in the Cleveland market?*”; “*Is it possible for a theater artists to make a living on their art alone?*”; “*What is the environment like for essential back-stage talent of theater productions?*”; and “*What is the effect of Cleveland’s theater sector for insiders and outsiders?*” Some points of discussion are new, while others are on-going; however, it is important to consider these challenges and opportunities for the sector to maintain its competitive advantage.

AUDIENCE

As in other forms of business and entertainment, building a loyal customer base is essential to the continued success and existence of theater organizations. One area of investigation within the Cleveland theater sector is the relationship between the audience and theater companies. In other Northeast Ohio art sectors—for example, the Visual Art, Craft, and Design sector⁵¹—organizations, artists, and other members of the sector are trying to attract the same audience. So, are theater companies competing in a saturated marketplace?

While Cleveland can at least partially take comfort in the fact that the region is home to such a large concentration of theaters relative to its population, it is important to recognize the role national trends surrounding performing arts attendance have had and continue to have on theaters’ bottom lines. Cleveland is well-positioned amongst other American cities of similar size, geography, income, and demographics when it comes to theater attendance rates. Data from the market research firm SDRS revealed that roughly 580,000 individuals that lived in the Cleveland Designated Market Area⁵² attended a live theater event in 2013. This equates to 37

⁵¹ For more information, see *Forming Cleveland: A Visual Arts, Craft and Design Industry Study* at <http://cultureforward.org/Reference-Desk/Research-Library/Economy/Forming-Cleveland>

⁵² The difference between a Designated Market Area (DMA) and a Metropolitan Statistical Area (MSA) is that a DMA is a geographic area designated by The Nielsen Company to measure local television viewing (see

out of 100 households viewing live theater that year. This puts the area slightly behind Rochester, NY and Milwaukee, WI, both of which have 39 out of 100 households attending live theater events in the past year; it also ranks Northeast Ohio slightly above Pittsburgh, PA and Buffalo, NY, which claim between 35 and 36 per 100 households, respectively.

However, Cleveland's theater sector, particularly its audience, has unique qualities that may serve as bulwarks against various market forces behind the shrinking of theater audiences nationwide. Playwright and screenwriter Eric Coble noted that one of the area's strengths is that the theaters here are "competing a little less for audiences because each theater has a niche." Therefore, audiences by genre do not typically overlap. Different theaters are known for different genres, which allows each theater to focus on producing quality productions without having to worry too much about draining audience interest from other productions. While this distinction may not yield many more *new* patrons attending performances, at the very least it does indicate that the general likelihood of a person opting out of one performance in favor of others nearby is low.

Looking to the future, the Cleveland theater sector must look for opportunities to acquire new audience members. The 2015 National Endowment for the Arts report highlighted the declining percentage of U.S. adults attending at least one performing arts activity in the past year. For the category Musical Plays, the percentage fell from 17.1% in 2002 to 16.7% in 2008, and further to 15.2% in 2012. Non-musical plays fared even worse, with percentages dropping from 12.3% to 9.4% to 8.3% across the same timeframe. Cross-pollination between theatergoers could be used to recruit new members into a genre and buck the national trend of audience decline.

WAGES & EQUITY CONTRACTS

Throughout our conversations with individuals involved in the Cleveland theater sector, there was a significant amount of engagement surrounding the hiring of actors and their union status—as well as wage rates for those involved in the theater sector. The Actor's Equity Association was founded in 1913 as a labor union to represent actors and stage managers; today, under the AFL-CIO banner, the union represents over 50,000 individuals.⁵³ Individuals gain membership into the organization by securing a position at an Equity theater or by participating in a performing artist sister organization. Once a member obtains their Equity card, they are no longer able to take non-Equity work; moreover, there is a required minimum pay for these staff members. In 2013, the *Washington Post* reported that Equity contracts for

<http://www.nielsen.com/intl-campaigns/us/dma-maps.html> for more information). While a MSA is a labor market area delineated by the Office of Management and Budget.

⁵³ For more information on the Actors Equity Association see <http://www.actorsequity.org/>

touring actors under Short Engagement Touring (SET) Agreements were paid \$548 to \$890 a week, as compared to \$400-\$500 a week for non-Equity actors.⁵⁴

Union status (Equity v non-Equity) is a personal choice for each actor who qualifies for membership. Some actors and professionals choose to remain non-Equity for a variety of reasons, such as building up their resume or working for smaller or avant-garde productions. Also, some theater professionals have preexisting day-jobs which might make full membership detrimental.⁵⁵ Many times, roles may not be open to Equity actors because theaters only have so much money for a production, making Equity contracts not practical. The Equity status of an actor does not exclusively indicate their professional status as an actor or their ability to obtain full-or part- time work in this sector; rather, it solely indicates their choice to accept membership in the Equity union.

However, being a part of the Equity union does present some challenges since the union regulates the minimum wage an actor can receive for a production. Christine McBurney discussed this problem auditioning actors for roles in upcoming productions, noting “I am auditioning, and I want to hire these two actresses, but they’re both Equity. I can only have one. Or if this man or woman is amazing in a role; but I’ve already cast the Equity person and now I am filling in the rest of the company—that contract is gone. That person may be the best for that role, but I cannot use them. It is because, as a small 501(c)(3), we cannot afford wages for two contracts.” According to the U.S. Bureau of Labor Statistics, there were 105 *Actors* in the 5-county Cleveland metropolitan area; since not all actors are Equity, a count of Equity Actors would necessarily be smaller than that.⁵⁶

The issue of Equity membership feeds directly into the conversation surrounding low wages in the Cleveland theater sector. Over 50% of survey respondents (128 out of 234 respondents) indicated that it was *somewhat difficult* or *extremely difficult* to find work in Cuyahoga County. When these 128 respondents were asked to expand on this (“*Why is it difficult for you to get local work?*”), 28% stated it was due to low wages, while 6 individuals wrote in that there was a lack of opportunities for Equity Actors specifically.

⁵⁴ Pressley, N. (2014, March 22). National Theatre’s latest shows part of non-Equity trend. *The Washington Post*. Retrieved from https://www.washingtonpost.com/entertainment/theater_dance/national-theatres-latest-shows-part-of-non-equity-trend/2014/03/20/993619a4-aecf-11e3-9627-c65021d6d572_story.html

⁵⁵ Geoffrion, J. (2015, January 7). *I’m non-Equity and I already make a living wage, but thank you anyway*. DCTheatreSector.com. Retrieved from <http://dctheatresector.com/2015/01/07/im-non-equity-already-make-living-wage-thank-anyway/>

⁵⁶ For more information on employment by occupation in the Cleveland theater industry see Chapter 2.

The Equity/non-Equity issue and low wages is not unique to Cleveland; however, for individuals to make a living in the theater sector there must be options for all types of living. McBurney reiterated that actors in Cleveland can potentially limit themselves by having an Equity card, “Some people won’t go union here. It doesn’t make sense, even if they get the points or are offered the contract, because they could risk eliminating opportunities.” Other smaller-market cities like Kansas City, Minneapolis/St. Paul, and others have the same issues that Cleveland faces with small budgets for Equity contracts.⁵⁷ Over time the Equity Union has changed its contracting procedures; it now offers 17 different types of contracts in order to offer more flexibility.⁵⁸ The competitive landscape of theater in smaller markets and the draw of talent to larger markets presents an ongoing challenge for small theaters looking to present high-quality productions at costs the market will bear.

BEHIND THE CURTAIN

Cleveland’s theater sector has a steady pool of actors, writers, and directors, as well as a varied pool of technical staff who can assist in assembling productions for its audiences. This backstage talent includes theater artists who work in costume design, set design, lighting design, sound design, and stage managing. According to interviews with theater sector stakeholders, there have been indications that more technical and design staff are needed in the Cleveland theater sector.

Theater companies who do not already have their own designers and stage managers often compete against each other in recruiting and hiring talent. This is especially challenging during the summer months, when festivals add more demand to an already strained supply of technical and design staff. According to information gleaned from interviews, one of the most significant challenges for the Cleveland theater sector is its lack of designers and stage managers to staff productions.

This imbalance between theater productions and backstage talent is reflected in most markets; however, stakeholders believe the region’s educational institutions can do more to fix this need, especially considering the work and pay is steadier than other jobs in the theater sector. Offering more internships and learning opportunities in these fields to grow the supply of these professionals was a solution offered during a focus group and in interviews with four theater professionals; “One of the things Cleveland doesn’t have is advanced training programs for directors and designers,” said Laura Kepley, artistic director of Cleveland Play House. “We do not have the program that a city like Pittsburgh has through Carnegie Mellon. We have training

⁵⁷ Roberts, C. (2005, February 11) Looking for the union label. *Minnesota Public Radio*. Retrieved from http://news.minnesota.publicradio.org/features/2005/02/11_robertsc_equity/

⁵⁸ Ibid.

programs, fellowships, and mentorship opportunities for actors and writers in town; but we do not have many opportunities for directors and designers.”

Among higher education institutions in Northeast Ohio, Kent State University has the only theater program that offers a Bachelors of Fine Arts and Masters of Fine Arts (MFA) in Design and Technology. Kent State’s MFA program only offers specializations in costume design, scenic design, lighting design, and theater technology. Outside of Kent State, the theater programs at Cleveland State University, Case Western Reserve University, Youngstown State University, Baldwin Wallace University, and Oberlin College offer concentrations in design or technical skills.

It has also been speculated that Cleveland’s film sector and its growing work could be tied more closely to the region’s theater sector. Currently, the Greater Cleveland Film Commission is the facilitator of connections between individuals in need of training in the film industry and instructors. Such a relationship may enhance opportunities for Cleveland’s local talent pool in finding work with both stage productions and film projects.

In regards to the overlap of skills between film and theater, Raymond Bobgan said, “On the technical theater side, I think there’s a lot of things that can be applied. I think a stage manager can become a [Production Manager] pretty quickly. Not because they know how to do it, but because they’ve developed internal skills they can apply to the new job.”

Some college theater programs elsewhere, such as Carnegie Mellon University in Pittsburgh, PA, teach technology and design for applications to both film and stage; a similar model could be explored for one or more of Cleveland’s higher education institutions to grow its pool of backstage talent.

IMAGE OF CLEVELAND THEATER

While the Cleveland theater sector is not as well-known nationally, theater has been a longstanding part of the city’s history and culture. The theater sector in Cleveland dates to 1819, when a local group called the Theatre Royal Society performed their first (and only) show.⁵⁹ With the growth of the city’s economy in the following years, the theater sector similarly grew and saw traveling productions come to town.

Anchor theater companies like Playhouse Square, Cleveland Play House, and Great Lakes Theater are well-known inside the region. Performances are well-attended by locals and supported philanthropically in the community. Gina Vernaci, Executive Producer of Playhouse

⁵⁹ Mansfield, H. (1998, March 4). *Theater*. The Encyclopedia of Cleveland History. Retrieved from <http://ech.case.edu/cgi/article.pl?id=T4>.

Square and board member of Broadway League noted, “The fact that we here at Playhouse Square have more season ticket holders than any other city for touring Broadway in America says something.” And it *does* say something – Clevelanders strongly support the theater. Vernaci also noted, “When I go to NY, people tell me ‘What is going on in Cleveland? Your results are impressive.’”

Although traveling shows bring excitement to the Great Lakes region, the first roots of theater in Cleveland lie with its homegrown talent. Smaller theater groups, locally well-attended, are also gaining national attention. However, many locals do not know the depth and breadth of smaller, more avant-garde productions taking place in the region at venues such as Cleveland Public Theatre, Karamu House, or Mamaí Theatre Company; the variety and complexity of productions at these smaller venues represent untapped value. Cleveland theater is on the national stage and is ready to take center stage locally. The region is becoming a place where artists from around the country want to come to create new work. Unfortunately, the local sector does not yet have the same draw from outside the region as larger markets like Chicago and Washington, DC.

The theater sector in Cuyahoga County is very “Cleveland.” Theater goers are largely average people, and this—according to interviewed sources—in turn creates a different vibe in the theater house. Laura Kepley noted “I’ve been in other cities, like New York and Chicago, where you feel like you are doing work for other theater people. Here in Cleveland you feel like you are doing work for people you see in the local grocery store and you hear feedback from the people from your local grocery store.” There is a real connection between Cleveland art and the audience.

Kepley continued, “The theater sector wants to tell its story. We’re telling our story nationally and we’re getting heard nationally, but not locally.” These incredible venues, the anchor theaters as well as the more intimate spaces throughout Cuyahoga County, are truly a gem in terms of performance spaces and dramatics. While the new chandelier that illuminates Playhouse Square has become an icon representing Cleveland theater as a destination, there is still work to be done to spotlight local theater work across the county.

Interviewees agreed that around Cuyahoga County, the population is not aware of the theater sector’s breadth and depth; however, to those aware of theater inside and outside of the county, Cleveland is definitely “on the map.” Cleveland’s theater prowess engages individuals across the nation to come and explore its riches. All of this creates specific opportunities and challenges for the audience and for theater workers. These opportunities need to be embraced, and some key challenges must be addressed, for the greater Cleveland theater sector to move to the next level.

APPENDIX

APPENDIX A

ANALYSIS OF THE SURVEY OF THE THEATER SECTOR

The Survey of the Theater Sector engaged individuals within the theater community in Northeast Ohio to better inform the analysis on the Cleveland theater sector and its contribution to the region. Respondents were asked a variety of questions to further delineate the typology of the theater sector, quantify aspects of individuals' earnings and purchasing, and qualify further facets of life in the theater. For more information on the methodology, see Appendix B, and for the survey instrument, see Appendix D.

GENERAL CHARACTERISTICS

Determining the significance of response trends is partially a function of understanding where the respondents fall in the context of various professions associated with theater. With 256 surveys completed overall, it is important to recognize how geography can affect professional opportunities, income, and the size and frequency of productions in theater. The survey included a question about whether the respondent lived in Cuyahoga County and this answer was used to aggregate the data for several aspects of the survey analysis.

Table A1 presents the various jobs held by survey respondents, broken out into whether respondents lived within or outside of Cuyahoga County. With 30.2% of overall respondents, *Actor/Actress* was by far the most common occupation, regardless of county of residence. Other classifications that represent a large portion of the total include *Director* (20.3% in Cuyahoga County, 15.5% outside, 19.1% overall) and *Teacher/Instructor* (11.3%, 18.6%, and 13.1 overall). Almost all the other categories fell somewhere between 0-7% across the board, with one notable exception: *Playwright/Dramaturg/Writers* in Cuyahoga County represented 10.1% of the total.

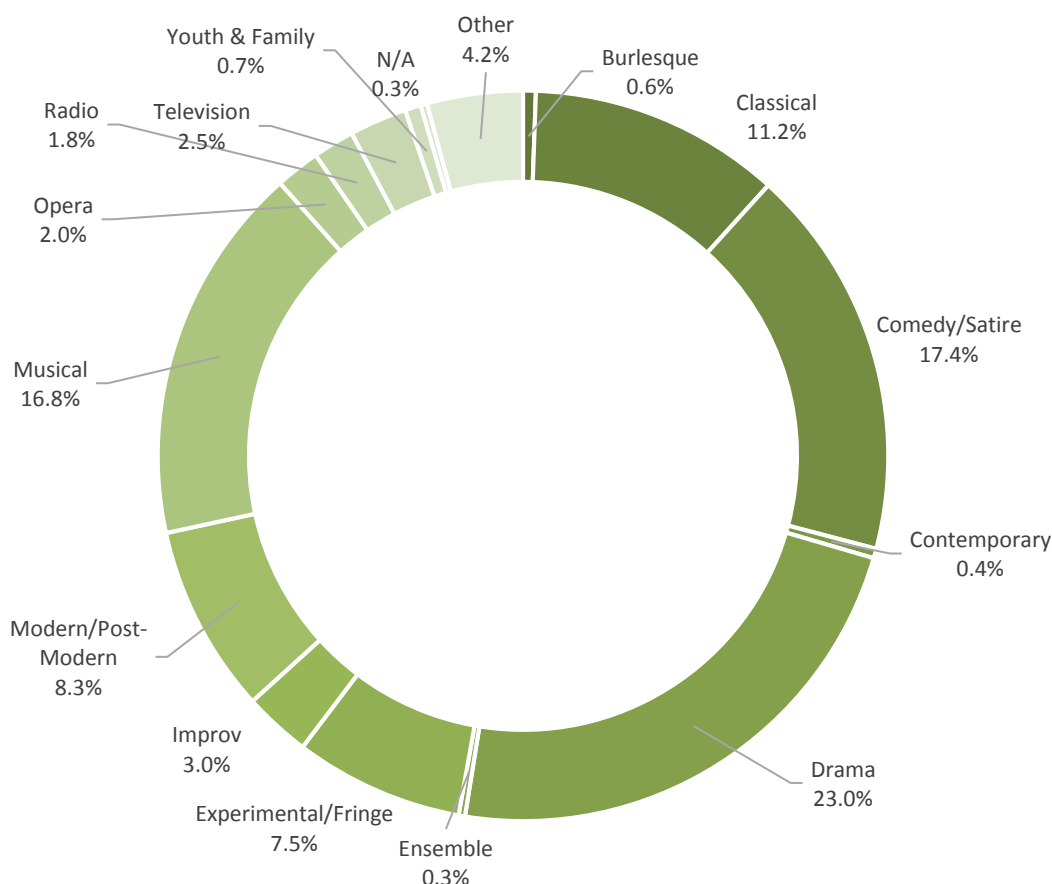
Table A 1. Theater Occupation Classification

Job Classification Status						
Theater Job Classification	Live within Cuyahoga County	% in Cuyahoga	Live outside Cuyahoga County	% Outside of Cuyahoga	Total	% of Total
Actor/Actress	108	32.2%	22	22.7%	134	30.2%
Administration	16	4.8%	1	1.0%	17	3.8%
Costumer	14	4.2%	5	5.2%	19	4.3%
Director	68	20.3%	15	15.5%	85	19.1%
Lighting Director	1	0.3%	5	5.2%	6	1.4%
Makeup/Hair Artist	2	0.6%	2	2.1%	4	0.9%
Marketing & Promotion	4	1.2%	1	1.0%	6	1.4%
Music director	6	1.8%	3	3.1%	10	2.3%
Playwright/Dramaturg/Writer	34	10.1%	2	2.1%	36	8.1%
Production Team	7	2.1%	2	2.1%	9	2.0%
Set & Scenery	5	1.5%	4	4.1%	10	2.3%
Sound engineer	4	1.2%	1	1.0%	6	1.4%
Stage Crew	5	1.5%	6	6.2%	11	2.5%
Teacher/Instructor	38	11.3%	18	18.6%	58	13.1%
Other	23	6.9%	10	10.3%	33	7.4%
Total Responses	335	100.0%	97	100.0%	444	100.0%

Note: Respondents were asked to select all that apply; 12 respondents did not indicate their residency location

Figure A1 presents a breakdown of survey respondents' employment based on which genre of theater they are primarily engaged. Almost a full quarter (23.0%) of respondents are primarily engaged in *Dramatic* productions. The next largest genres are *Comedy/Satire* at 17.4% and *Musical* at 16.8%. Together, these three genres account for roughly 57.2% of total survey responses. Other significant categories include *Classical* (11.2%), *Modern/Post-Modern* (8.3%), and *Experimental/Fringe* (7.5%).

Figure A 1. Respondents' Primary Genre of Theater

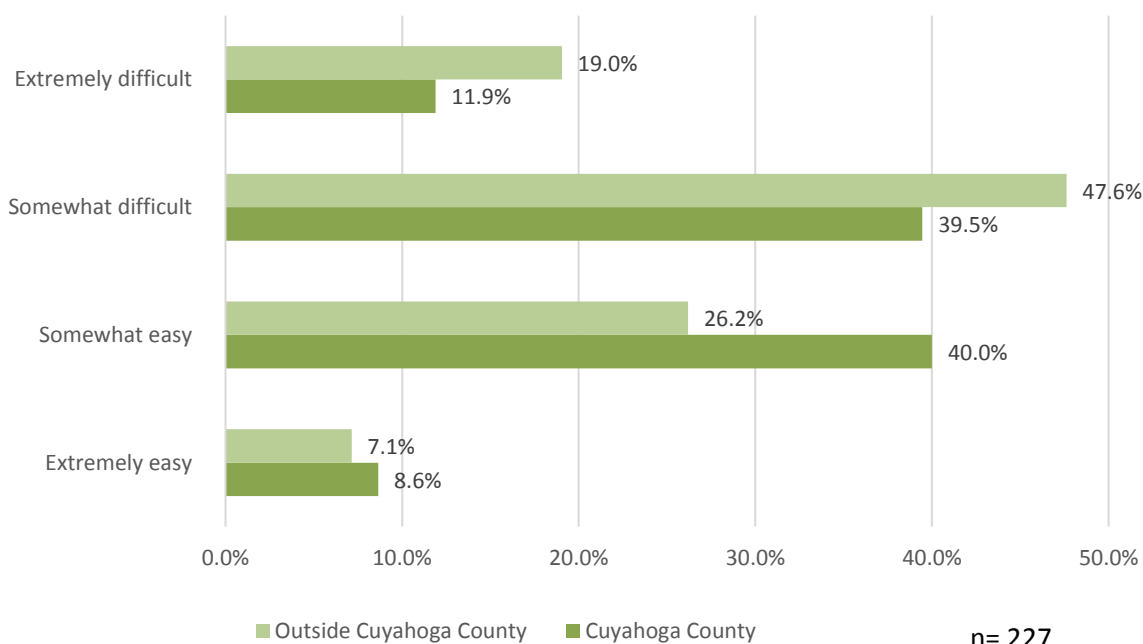


Note: Respondents were asked to select all that apply; Respondent Count = 708

DESCRIBING THE INDUSTRY

As with most arts-based employment, the level of difficulty in getting work in theater is an important concern for many in this sector. Survey respondents were asked to rate their ability to find theater-relevant work within Cuyahoga County on a four-part scale from *extremely easy* to *extremely difficult*. The results of this question were then categorized by whether the respondent was or was not a resident of Cuyahoga County (Figure A2). Almost half of those residing outside Cuyahoga County (47.6%) found it *somewhat difficult* to find work. Additionally, most survey respondents answered that it was either *extremely difficult* or *somewhat difficult* to find work in Cuyahoga County. It appears that it is at least somewhat easier for residents of the county to get work in their home county.

Figure A 2. Ease of Getting Work in Cuyahoga County



Respondents who indicated experiencing at least some degree of difficulty in the process of finding work were next asked to elaborate further on the question and specify what they believed the problem was. The answers to this question are presented below in Table A2. Respondents offered a wide variety of explanations, with a fair amount of similarity between the responses of those residing in Cuyahoga County and those who did not. The top concern for Cuyahoga County residents was that *wages are too low* in Cleveland for theater professionals—28.2% of respondents indicated that this was their main concern. While this was certainly true for a large portion of non-residents (21.9%), a larger share of non-residents (26.6%) said the primary difficulty they faced was *local venues not seeking local actors/hires*. Other popular choices included: *Not enough local theaters* (8.0% in county, 15.6% outside), *Not enough local productions* (10.9%, 14.1%) and *Other* (17.2%, 10.9%). It is interesting to note that *Lack of Actor’s Equity Jobs* and *Lack of Diverse Opportunities* were both write-in responses, but enough individuals indicated those responses to warrant a category of their own.

The almost 8 point difference in percentages for the response “Not enough local theaters” indicates the fact that having a large central city (Cleveland) with theatrical resources makes it more likely that an actor, director, or other theater professional will be able work at a nearby theater. In fact, each response with the word “local” in it scored higher among respondents from outside Cuyahoga County than those from inside.

Table A 2. Reasons for Difficulty of Getting Local Work

Reason	Cuyahoga County		Outside Cuyahoga County		All	
	Count	%	Count	%	Count	%
Not enough local theaters	14	8.0%	10	15.6%	24	9.8%
Not enough local productions	19	10.9%	9	14.1%	29	11.9%
Local venues are not seeking local actors/hires	30	17.2%	17	26.6%	47	19.3%
Not enough resources to promote myself	18	10.3%	6	9.4%	27	11.1%
Theater professionals' wages are too low in Cleveland	49	28.2%	14	21.9%	65	26.6%
Lack of Actor's Equity Jobs	6	3.4%	0	0.0%	6	2.5%
Lack of Diverse Opportunities	8	4.6%	1	1.6%	9	3.7%
Other	30	17.2%	7	10.9%	37	15.2%
Total	174	100.0%	64	100.0%	244	100.0%

Note: The question "Why is it difficult for you to get local work?" was only distributed to respondents who indicated "somewhat difficult" or "extremely difficult" to the question "Please rate your ability to find work in Cuyahoga County, from extremely easy to extremely difficult."

Respondents were asked to select all that apply; 12 respondents did not indicate their residency location.

Table A3 presents a breakdown of what percentage of respondents' income was derived from the theater. Survey results indicate that 40.1% of respondents earn their primary income from theater, while 59.9% must work second and sometimes even a third job to be able to make enough money to work in the profession. However, most respondents indicated that they earned little from their theater activities (0% to 10%, 39.7%) or almost all (91% to 100%, 21.9%).

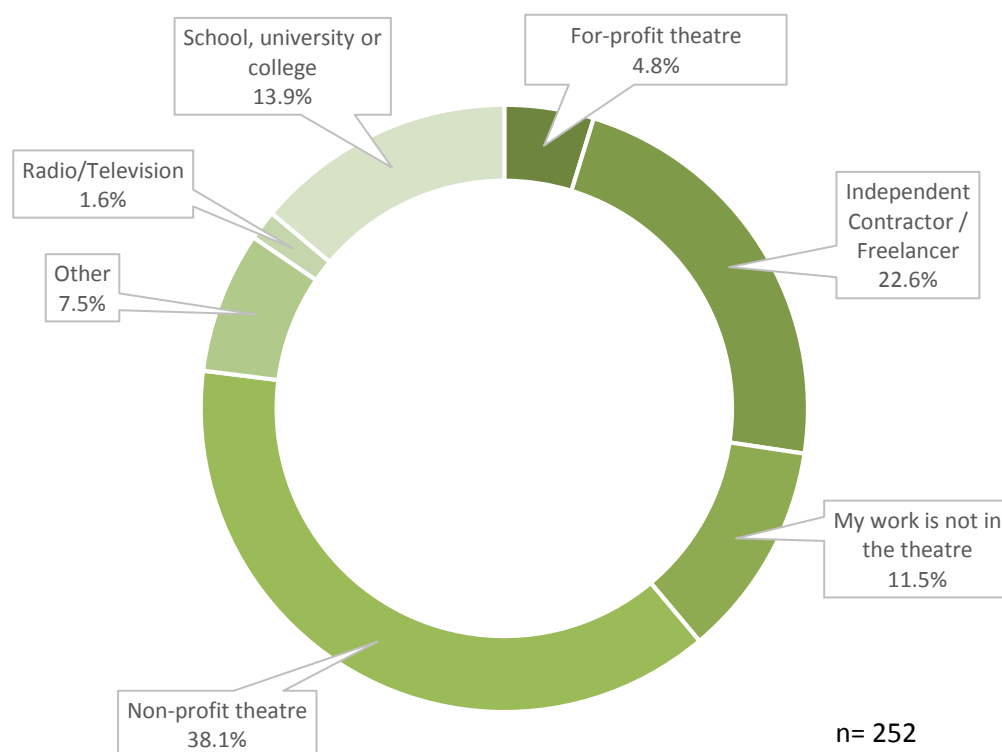
Table A 3. Portion of Incomes Derived from Theater

Percentage of Income	Count	Percentage
0%-10%	94	39.7%
11%-20%	23	9.7%
21%-30%	8	3.4%
31%-40%	6	2.5%
41%-50%	9	3.8%
51%-60%	16	6.8%
61%-70%	4	1.7%
71%-80%	10	4.2%
81%-90%	15	6.3%
91%-100%	52	21.9%
Total	237	100.0%

LOCATIONAL FACTORS

Another important set of factors to consider when examining the results of this survey was where people worked, both in terms of type of theater and location. There are several different kinds of theaters, including nonprofit, university-affiliated, and others. Figure A3 summarizes the results of the survey question “Where do you work?” to illustrate this diversity. The largest category for responses was *non-profit theater*, with 38.1% of the total (Figure A3). Combined with the *school/university/college* category (13.9%) these two make up slightly more than half the answers. The next largest group are *independents, contractors, and freelancers*, with a 22.6% segment of the total. Additionally, 11.5% of respondents indicated that their work is not in the theater itself.

Figure A 3. Survey Respondents’ Primary Place of Employment



Beyond this, respondents were asked to indicate their primary performance venue. A majority of respondents (55.4%) perform in a traditional theater, while 14.9% indicated they perform in educational/scholastic settings. Small numbers perform in places of worship (5.9%) and on television/film (6.8%) (Table A4).

Table A 4. Survey Respondents' Primary Performance Venue

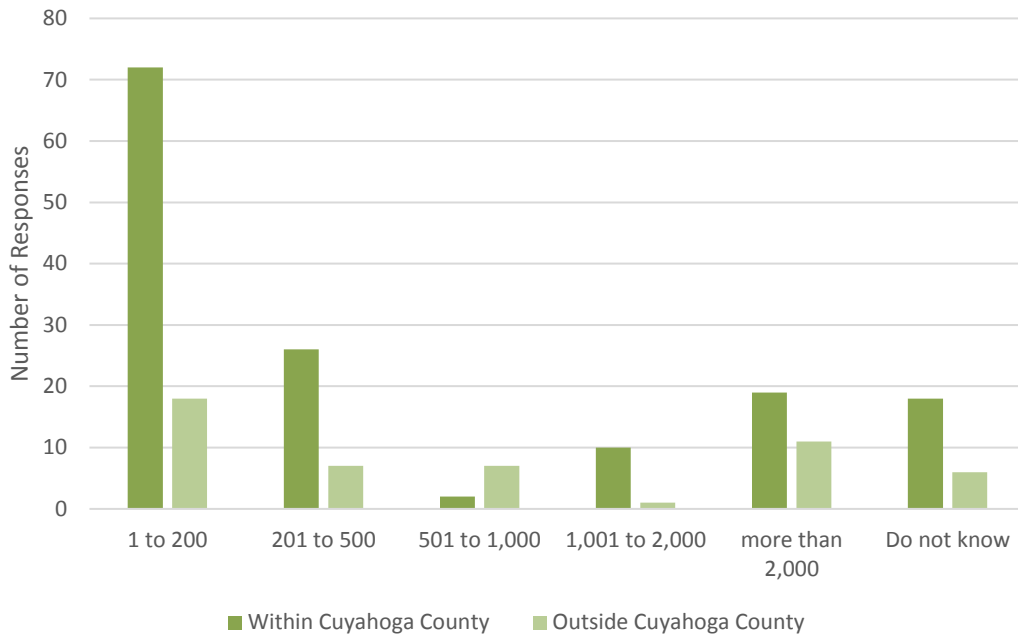
Primary Performance Venue		
Venue	Count	% of Total
Bar	16	3.8%
Online	11	2.6%
Other	39	9.2%
Place of Worship	25	5.9%
Radio	6	1.4%
School	63	14.9%
Television/Film	29	6.8%
Theater	235	55.4%
Total	424	100.0%

Note: Respondents were asked to select all that apply

The survey featured several questions concerning the size and frequency of performances both inside and outside of Cuyahoga County. According to the survey results, 71.1% of respondents primarily worked inside Cuyahoga County, with the remaining 28.9% outside county limits. Continuing this line of questioning, the survey also asked about average audience size for productions in and out of Cuyahoga County. These results are summarized in Figure A4. Most theater professionals across the board reported that productions they were involved in normally saw somewhere between 1 and 200 audience members in attendance. The middle two categories (501 to 1,000 and 1,001 to 2,000) had the least responses in both cases. However, a larger share of respondents indicated that they were a part of shows between 201 and 500 inside Cuyahoga County than shows featuring more than 2,000 audience members, while the reverse was true for those outside Cuyahoga County. This was the only major deviation between the two subgroupings in terms of percentage differences.

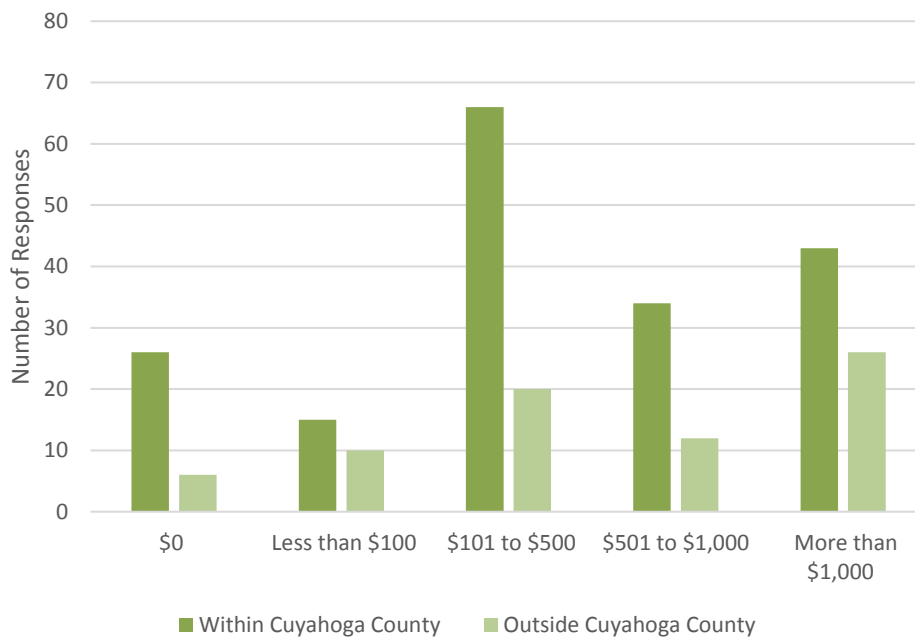
Survey responses in regards to the amount of money earned per production inside versus outside of Cuyahoga County are displayed in Figure A5. Figure A5 details these responses, again in the context of geographic differentiation. The results presented here indicate that the largest share of those professionals working in Cuyahoga County (36%) earn between \$101 and \$500 dollars per production while about 27% of those outside the county earn an amount in that range as well. Interestingly, the largest earnings category for those outside Cuyahoga County is the "more than \$1,000" group, with 35%. At the lower end of the earnings spectrum, the percentages for volunteer (no-wage) work and less than \$100 (low wage) work reverse, with free labor making up 14% of Cuyahoga County and 8% of non-Cuyahoga County productions.

Figure A 4. Average Audience Attendance Rates per Performance



Note: Within Cuyahoga County respondent count = 147; Outside Cuyahoga County respondent count = 50

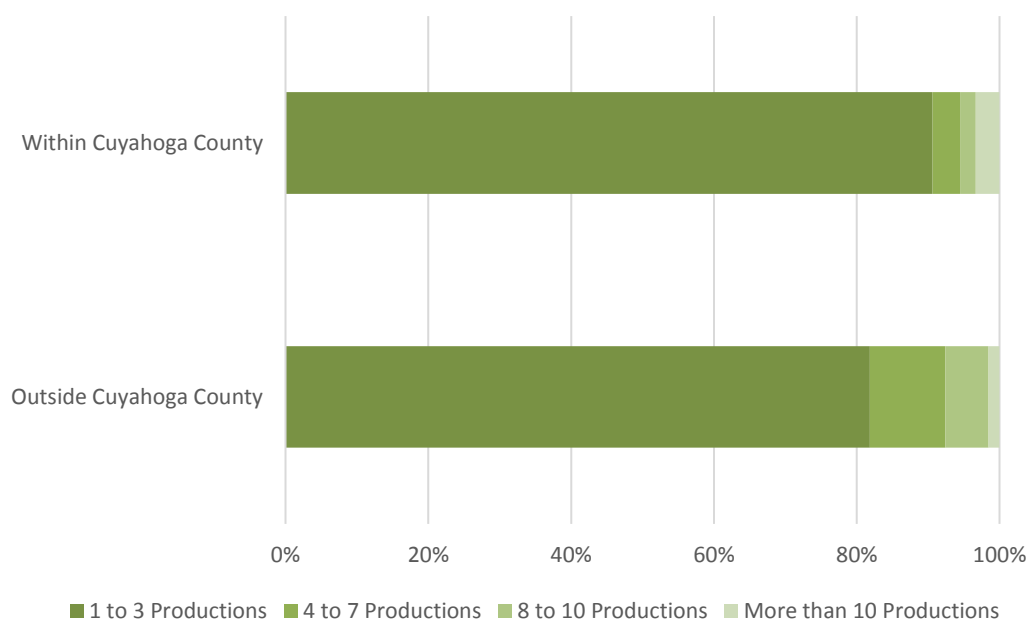
Figure A 5. Average Earnings per Production



Note: Within Cuyahoga County respondent count = 184; Outside Cuyahoga County respondent count = 74

Another consideration of the survey concerned the average number of productions worked in each month by respondents, a statistic which helps contextualize the amount of time and energy that goes into a single production. As seen below in Figure A6, the percentages inside and outside Cuyahoga County are similar, with slightly more (90.6% versus 81.8%, respectively) respondents indicating that they work 1 to 3 productions a month. Besides that, the shares for the other values 4 to 7, 8 to 10, and more than 10 all roughly amount to 10% or less of the total. Although slightly more than 10% of respondents said that they work 4 to 7 productions per month outside Cuyahoga County, this only represents 7 respondents out of a sample of 66.

Figure A 6. Average Productions Worked (per Month)



Note: Within Cuyahoga County respondent count = 181; Outside Cuyahoga County respondent count = 66

The breadth of response patterns laid out in this section helps to describe the diversity of the Northeast Ohio theater community. Actors, directors, writers, teachers, and many others are involved in productions ranging from dramas to comedies and satire to musicals. The majority perform in non-profit theaters and at schools and universities for smaller audiences, which speaks to the tight-knit community many respondents referenced both in their surveys and in interviews conducted by the research team.

Of significant interest were the responses to the question of what makes the Cleveland theater sector unique. This was left as an open-ended, text-based question, allowing the survey participants to respond with positive, neutral, and negative statements. The responses also pointed to several areas where the theater community could focus on improving and/or rethinking in the coming years.

Many respondents identified that the diversity and variety of the theater sector and its genres made it unique, and how the small size of many theaters gave them an intimate feel. In addition to the size of audiences and the multitude of smaller theaters to choose from, most respondents—both from within and outside of Cuyahoga County—indicated that they performed in a small number of productions per month. This is a possible explanation for the attention to detail and well-rehearsed quality many have come to expect from the Northeast Ohio sector.

One of the most pressing issues seems to be the sentiment many respondents, especially those outside Cuyahoga County, expressed regarding how difficult it is to find work in the area. The importance of this issue and the frustration surrounding the subject of local theaters and local hiring was brought up frequently in both the quantitative *and* the qualitative portions of the survey. An additional area of discontent—one that has potentially negative implications for the future vitality of the sector—was the low wages that pervade many aspects of the profession, in particular the wages paid to actors and writers. Again, this was expressed by respondents answering the question of “what is unique about the Cleveland theater sector as compared to other cities?” Even with the low cost of living one can expect when residing in a Midwestern metropolitan area such as Cleveland and its surrounding suburbs, many respondents expressed their dissatisfaction with their inability to earn enough to be able to claim theater as their primary means of income. While the small average number of productions per month can be seen as a strength—insofar as it leads to high quality productions—it can also be seen as compounding the low wage problem. This reinforces the trope of the “starving artist,” a romantic image: but also a problematic one in the context of theater as a driver of economic development in the region.

If Northeast Ohio’s theater sector is to continue to be as vibrant, varied, and dynamic as many participants feel it is now, those directly and indirectly involved at both the macro and the micro levels will need to draw their own conclusions about the data presented in this section of the report. Because of its strengths—and often despite its weaknesses—the Cleveland theater community is an important and valuable asset which cannot be taken for granted.

APPENDIX B

METHODOLOGIES USED

CHAPTER 1: TYPOLOGY AND TREND ANALYSIS

The data for the typology and trend analysis was derived from a comprehensive database based on the Quarterly Census of Employment and Wage data (QCEW).⁶⁰ The QCEW database includes information on 98% of the total employment and wages in the state of Ohio. For the purposes of this report, data on employment, total wages (or payroll), and the number of establishments were extracted for 2005 to 2015.⁶¹ The data is analyzed and described by industry subsectors, but not by individual company due to confidentiality restrictions associated with the data.

We identified theater-related industries through a literature review of previous studies⁶² and retrieved these industries' data from the QCEW database.⁶³ Out of our list of eight identified industries and conceptualized structure of the theater sector, we created four groupings of industries based upon their relationship to Cuyahoga County's theater sector. The first group of industries was created using *primary* theater NAICS. The primary NAICS code identifies sectors where all establishments belong to the theater sector because they clearly consist of theater

⁶⁰ For more information about the QCEW program; visit <http://www.bls.gov/cew/>.

⁶¹ An establishment is considered an individual economic unit, such as a store or a factory. A firm, or company, can be many establishments that participate in one economic activity. For more information see <http://www.bls.gov/cew/cewfaq.htm>

⁶² Literature on the industries that comprise the theater sector were derived from:

DeNatale, D., & Wassall, G. (2006, March 27). *Creative Economy Research in New England: A Reexamination*.

Grodach, C., Currid-Halkett, E., Foster, N., & Murdoch, J. (2013, November). *The location patterns of artistic clusters: A metro- and neighborhood-level analysis*.

Lendel, Iryna; Bliss, Sharon; Clouse, Candice; Piazza, Merissa; Austrian, Ziona; Hexter, Kathryn W.; Constantino, Renee; and Hrubey, Matthew, "Remix Cleveland: The Cleveland Music Sector and Its Economic Impact - Full Report" (2011). Urban Publications. Paper 427. Retrieved from http://engagedscholarship.csuohio.edu/urban_facpub/427

Lendel, Iryna; Clouse, Candi; Piazza, Merissa; Cyran, Ellen; Stewart, Fran; Glazer, Nikki; Lohr, Christopher; and Lang, Andrew, "Forming Cleveland: A Visual Arts, Craft and Design Industry Study: Full Report" (2014). Urban Publications. Paper 1197. Retrieved from http://engagedscholarship.csuohio.edu/urban_facpub/1197

Markusen, A., Wassall, G. H., DeNatale, D., & Cohen, R. (2006, November). *Defining the Cultural Economy: Industry and Occupational Approaches*. Retrieved from <http://edq.sagepub.com/content/22/1/24.abstract>

Nivin, S. R., & Plettner-Saunders, D. (2012, January). *The Economic Impact of the Creative Industry in Indian River County in 2010*. Retrieved from <http://cultural-council.org/docs/Creative-Industry-Economic-Impact-Study.pdf>

Rosenfeld, S. (2008, December). *The State of Colorado's Creative Economy*. Retrieved from

http://www.coloradocreativeindustries.org/sites/default/files/media/media/the_state_of_colorados_creative_economy_-_full_study.pdf

⁶³ For more information about NAICS (North American Industry Classification System); visit <http://www.census.gov/eos/www/naics/>.

businesses. For example, every establishment with the NAICS code 515120 “Television Broadcasting” was included in the database for the trend analysis (see Table B1).

As a next step, we identified *conditional* NAICS categories, pointing to industries that contained both theater and non-theater establishments. Each establishment in these industries was individually examined and a decision was made regarding whether it should be considered within the theater sector and included in the industry analysis database. For example, all establishments within NAICS 611610 “Fine Arts Schools” were individually examined and only theater-relevant fine arts schools were included in the database for this analysis.

Table B 1. Theater NAICS Codes by Subsector

NAICS Code	Description	Classification
Radio		
515111	Radio Networks	Primary
515112	Radio Stations	Primary
Schools, Promoters, & Performers		
611610	Fine Arts Schools	Conditional
711190	Other Performing Arts Companies	Primary
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	Conditional
711510	Independent Artists, Writers, and Performers	Conditional
Television		
515120	Television Broadcasting	Primary
Theater		
711110	Theater Companies and Dinner Theaters	Primary

In the next phase, we created a list of keywords that contained characteristics of the theater sector (Table B2), and searched the QCEW database for these keywords by searching establishments’ legal and trade names. This approach allowed us to include additional companies that related to the theater sector, but which are classified under non-theater-related NAICS codes selected in the first phase. Search results were then reviewed and compared with their individual websites to confirm their theater sector affiliation. Next, each company was divided into one of two categories: (1) a non-theater establishment, and therefore not included in the final dataset for this analysis; or (2) a theater establishment and assigned a *secondary* NAICS code. The secondary NAICS code was either a *primary* or *conditional* NAICS code, as determined by the definition described earlier.

Table B 2. Listing of Keywords

Keywords		
Actor	Fiction	Playwright
Actress	Folk	Producer
Adult	Footstep	Public Relations
Almanac	Imagesetting	Puppet
Archive	Improv	Radio
Ballet	Journalism	Reparatory
Binding	Journalist	Reporter
Book	Letterpress	State
Broadcasting	Library	Station
Broadway	Literary	Story
Burlesque	Lithographic	Studio
Cabaret	Magic	Talent
Carnival	Men's Club	Television
Choreographer	Mime Theaters	Theater
Circus	Model	Theatre
Columnist	News	Theatrical
Comedian	Novel	Vaudeville
Comedy	Opera	Write
Comic	Pageant	Writing
Dance	Pamphlet	
Designer	Paper	
Drama	Perform	
Editor	Performers	
Entertain	Periodical	

Note: Not all keywords produced establishments in Cuyahoga County for the theater sector; If an establishment contained a name that contained part of a keyword, the computer program would flag it. For example, one key word was "Comic;" if the establishment's name was "Comichouse," the data would still be retrieved.

To create comparable data at the state and national level, several techniques were applied to the QCEW database. All establishments considered primary NAICS categories were included in both Ohio and the U.S. databases. Economic indicators of establishments within conditional NAICS categories were treated differently depending on the companies' 2015 employment numbers. Every conditional NAICS establishment with employment over 50 employees in the remainder of Ohio in 2015 was individually reviewed. The research team then determined whether to include an establishment within the theater sector based on comparison with the establishment's website. The decision was made with 2015 data and then was applied to all years of the analysis.

For establishments with fewer than 50 employees in the conditional NAICS sectors in Ohio in 2015, we applied the ratio of theater-related versus non-theater-related conditional NAICS establishments based on the reviewed conditional NAICS data for Cuyahoga County and those with 50 or more employees in Ohio. For example, in the conditional data that was reviewed, if there were 100 employees in the reviewed establishments and 40 employees were included in the count for the conditional NAICS and 60 were not, only 40% of these employees were considered theater-related. The ratio of 40% was the same ratio of theater-related establishments in the same NAICS industry in Cuyahoga County and the larger 50 plus employers in Ohio, where all establishments were individually reviewed. This same proportioning process was performed with the establishment and wage data using their share of the included to non-included conditional NAICS data. The U.S. conditional NAICS industries' establishments were assigned to the theater data based on the same proportions as used for the remainder of Ohio establishments.

All data, including the Cleveland, state of Ohio, and U.S. theater sectors, was derived from the QCEW database. Four measures of economic activity from the QCEW were used for this analysis. These measures were employment, payroll, average wages, and number of establishments. The data from the QCEW excludes information for establishments with only one employee; therefore, there is likely some undercounting which occurred. Full- and part-time jobs were accounted for in the employment section, which provides the total number of jobs. Total payroll (or wages) was used to show the scale of the Cleveland theater sector and is a proxy for the total size of the theater industry. Average wages were calculated by dividing payroll and employment, and therefore show an individuals' average annual wage in a specific industry. The total number of businesses by location is accounted for by the number of establishments.

The typology of the theater sector was created by examining the individuals who work in the theater industry and then extrapolating that to businesses and industries (Table B3). Overall, there were four main groupings that categorized the theater typology: 1) *Radio*, 2) *Schools, Promoters, & Performers*, 3) *Television*, and 4) *Theater*. Since the theater is not a large sector and only encompasses eight NAICS categories, some categories were combined to ensure confidentiality for individual businesses.

Table B 3. Theater Industries by NAICS

Theater Category	NAICS Subsector	NAICS Description
Radio	515111	Radio Networks
Radio	515112	Radio Stations
Schools, Promoters, & Performers	711190	Other Performing Arts Companies
Schools, Promoters, & Performers	711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
Schools, Promoters, & Performers	711510	Independent Artists, Writers, and Performers
Schools, Promoters, & Performers	611610	Fine Arts Schools
Television	515120	Television Broadcasting
Theater	711110	Theater Companies and Dinner Theaters

CHAPTER 2: OCCUPATIONAL ANALYSIS

The data used for the occupational analysis was derived from the Occupational Employment Statistics (OES) Survey which is a semi-annual mail survey of nonfarm establishments constructed by the Bureau of Labor Statistics (BLS) using estimates of occupational employment and wages for both wage and salary workers.⁶⁴ All workers are classified into one of 840 detailed Standard Occupation Classification (SOC) codes.⁶⁵ This occupational analysis examines theater-related occupations in the Cleveland-Elyria-Mentor Metropolitan Statistical Area (MSA)⁶⁶ with four comparable MSAs (Pittsburgh, PA; Columbus, OH; Cincinnati-Middletown, OH-KY-IN; and Indianapolis-Carmel, IN).

To establish the occupations that describe the theater sector, the research team gathered keywords that reflected theater occupations and compiled a list of theater occupations based on a literature review of the theater occupation.⁶⁷ In total, 20 occupations comprise the theater

⁶⁴ Occupational Employment Statistics, The Bureau of Labor Statistics, U.S. Department of Labor, <http://www.bls.gov/oes/home.htm>

⁶⁵ Standard Occupational Classification, The Bureau of Labor Statistics, U.S. Department of Labor, <http://www.bls.gov/soc/home.htm>

⁶⁶ The Cleveland-Elyria, OH MSA includes Cuyahoga, Geauga, Lake, Lorain, and Medina Counties. The MSA level of analysis is used for this analysis because it is the smallest geography for which data is available.

⁶⁷ Literature on the occupations comprise of the theater sector were derived from: McMillen, S., Helming, T., Qaiser, S., Sheridan, M., Finkle, V., & Saha, M., (2006), *The Economic Impact of the Arts, Film, History and Tourism Industries in Connecticut* (No. 2006-Dec-01)

University of Connecticut, Connecticut Center for Economic Analysis.

http://www.cultureandtourism.org/cct/lib/cct/CCT_Impact_Report_Web_.pdf

Texas Cultural Trust, (2009), *The role of the innovation workforce & creative sector in the Texas Economy*.

http://txculturaltrust.org/wp-content/uploads/2010/11/tct_creative_021809.pdf

sector. These 20 occupations are categorized by primary and secondary occupations (Table B4). The primary occupations depict the core occupations of the theater industry, while secondary occupations are involved in the supply chain of the theater industry.

Table B 4. SOC Codes of Theater-Related Occupations

SOC Code		Occupation Title
Primary	13-1011	Agents and Business Managers of Artists, Performers, and Athletes
	25-1121	Art, Drama, and Music Teachers, Postsecondary
	27-1027	Set and Exhibit Designers
	27-2011	Actors
	27-2012	Producers and Directors
	27-2099	Entertainers and performers, sports and related workers, all other
	27-3011	Radio and Television Announcers
	39-3021	Motion Picture Projectionists
	39-3031	Ushers, Lobby Attendants and Ticket Takers
	39-3092	Costume Attendants
	39-3099	Entertainment Attendants and Related Workers, All Other
39-5091	Makeup Artists, Theatrical and Performance	
Secondary	27-2031	Dancers
	27-2032	Choreographers
	27-2041	Music Directors and Composers
	27-2042	Musicians and Singers
	27-3012	Public address system and other announcers
	27-4011	Audio and Video Equipment Technicians
	27-4014	Sound Engineering Technicians
27-4032	Film and video editors	

Source: US Bureau of Labor Statistics, Standard Occupational Classification

Due to confidentiality or margin of error limitations, the OES employment data includes missing values due to suppression. The research team estimated the missing values on the national matrix of occupational statistics and the Quarterly Census of Employment and Wage micro-data (QCEW), which is housed at the Center for Economic Development at Cleveland State University. The national and state shares of occupations to industry employment data from

Harris, C., Collins, M., & Cheek, D., (2013), *America's Creative Economy: A Study of Recent Conceptions, Definitions, and Approaches to Measurement Across the USA*. Kansas City, OK: National Creativity Network. <https://www.arts.gov/sites/default/files/Research-Art-Works-Milwaukee.pdf>

Raven Consulting Group, (2015), *Creative Economic Impact Report*. <http://www.artsunited.org/wp-content/uploads/2015/01/CREATIVE-ECONOMIC-IMPACT-REPORT-PRELIM-FINDINGS-07.14.15.pdf>

QCEW was applied. The only data collected was OES for the benchmarked Metropolitan Statistical Area (MSA). The researchers imputed the missing values to the prior or subsequent year's actual value for comparable MSAs with missing values.

CHAPTER 3: THE LANDSCAPE OF THEATERS

With no official service organization directly cataloging theater companies and theater buildings, we collected the information from various sources to gather a comprehensive catalogue of theaters in Cuyahoga County. One resource heavily used by this analysis was the theater company listing from the Cleveland Stage Alliance.⁶⁸ The research team also used data collected from the trend analysis and the survey. Each theater was assigned a "type," either college, comedy, educational, community, professional, or youth theater.

To geocode the theaters onto a map, an address was assigned to each theater and theater company. Each theater's location was determined based upon where the company primarily performs. Nine of the theater companies share stages with one another. Five of the companies (Ohio City Project, Royalton Players, Theater Ninjas, Cleveland Shakespeare Festival, and Kulture Kids), tour throughout the area and use different venues, and lack their own home theater; in these cases, the address was assigned to the company's office.

CHAPTER 5: ECONOMIC IMPACT

The economic impact assessment of the Cleveland theater sector is comprised of two types of data that were analyzed for Cuyahoga County. First, a set of theater-related businesses was collected through the Quarterly Census of Employment and Wages (QCEW) database. Organizations and businesses in this include performers, promoters, radio stations, schools, television stations, and theaters. Additionally, an online survey was conducted of individuals who participate in the Cleveland theater sector. It should be noted that the QCEW database only includes businesses with paid employees, so individual artists are not counted. The survey's aim was to capture this missing data. Data on the performers, from either data source, most assuredly undercounts the true scope of the county performers in number and income. With these limitations, it should be noted that the economic impact estimates presented here are quite conservative.

APPENDIX A: SURVEY OF THEATER SECTOR

The Center for Economic Development (the Center) collected 285 email addresses of individuals and organizations, who were then invited to participate in the *Survey of the Theater Sector*. The survey was conducted online and disseminated via email.⁶⁹ Using the internet-based survey software *Qualtrics*, online collection of the *Survey of the Theater Sector* was conducted over a

⁶⁸ For more information on Cleveland Stage Alliance see www.clevelandstagealliance.com.

⁶⁹ For more information on the survey instrument, please see Appendix D

four-week period starting on September 28, 2016. Potential respondents were emailed on consecutive Wednesdays.

In comparison to other arts surveys (i.e. Music and Visual Arts, Crafts, and Design) the research team had a limited directory to contact individuals; therefore, a viral marketing campaign was utilized. Local partners who participated in interviews were asked to pass along the survey to their contacts and post the survey link on their social media. The Center also publicized the survey via the internet, Facebook, and Twitter. The research team attempted to collect names and emails from all possible theater organizations in the Cleveland region to have the largest participation rate possible. The Center continued to collect new email addresses of individuals and groups throughout the survey process to maximize survey response numbers.

This survey did not use any sampling method to select participants, and did not have a survey frame to estimate a population of artists; from that, it is not possible to calculate any bias that may have occurred, but instead only acknowledge the types of bias that can be detected based upon survey responses. Survey participant selection bias may have occurred because individuals and groups that were solicited to participate in the survey were selected from a variety of internet sources where email addresses and contact information were available and this selection was not random. In addition, selection bias has occurred because of the method of dissemination and collection of this survey was via web and email. If a potential respondent did not have an email address or a computer, they were not able to participate in the survey and were therefore not reflected in the results.

APPENDIX C

ADDITIONAL TABLES

Table C 1. Employment by Theater Subsector, 2005-2015

Subsector	Year										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Radio	843	808	754	697	655	599	596	630	660	659	663
Schools, Promoters, & Performers	706	647	599	571	562	554	556	550	586	641	688
Television	820	823	820	835	755	683	682	688	721	733	727
Theater	358	368	347	340	311	300	284	300	252	266	260
Theater Total in Cuyahoga County	2,727	2,646	2,520	2,443	2,282	2,136	2,117	2,168	2,219	2,299	2,339
Theater Total in Ohio	10,552	10,659	10,392	10,076	9,042	8,448	8,366	8,568	8,431	8,762	8,658
Theater Total in U.S.	317,038	317,886	319,455	322,157	307,972	292,800	296,252	299,510	299,700	310,688	312,479

Source: Quarterly Census of Employment and Wages (QCEW)

Table C 2. Payroll by Theater Subsector, 2005-2015 (in \$ Millions)

Subsector	Year										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Radio	\$47.4	\$48.7	\$41.9	\$43.3	\$38.5	\$34.2	\$34.4	\$36.8	\$40.4	\$40.1	\$38.3
Schools, Promoters, & Performers	\$14.1	\$14.8	\$13.3	\$14.6	\$15.2	\$12.3	\$12.9	\$12.7	\$13.7	\$13.6	\$14.4
Television	\$67.8	\$68.3	\$73.9	\$68.3	\$65.5	\$59.8	\$66.0	\$64.4	\$65.4	\$70.8	\$59.9
Theater	\$9.0	\$9.4	\$9.0	\$8.1	\$8.5	\$7.9	\$7.5	\$7.0	\$7.0	\$7.1	\$7.0
Theater Total in Cuyahoga County	\$138.3	\$141.3	\$138.1	\$134.3	\$127.7	\$114.2	\$120.7	\$120.9	\$126.5	\$131.6	\$119.7
Theater Total in Ohio	\$505.1	\$516.7	\$520.6	\$487.3	\$448.1	\$399.8	\$427.3	\$415.8	\$419.4	\$424.5	\$403.3
Theater Total in U.S.	\$19,440.4	\$20,350.8	\$20,917.4	\$20,335.1	\$19,040.5	\$17,650.1	\$18,752.5	\$19,304.5	\$19,310.0	\$21,158.4	\$21,064.5

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Table C 3. Average Wage by Theater Subsector, 2005-2015

Subsector	Year										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Radio	\$56,235	\$60,284	\$55,595	\$62,113	\$58,737	\$57,089	\$57,669	\$58,404	\$61,173	\$60,852	\$57,770
Schools, Promoters & Performers	\$19,971	\$22,830	\$22,146	\$25,518	\$27,056	\$22,156	\$23,186	\$23,024	\$23,338	\$21,273	\$20,970
Television	\$82,705	\$83,039	\$90,112	\$81,823	\$86,829	\$87,560	\$96,825	\$93,578	\$90,786	\$96,548	\$82,482
Theater	\$25,003	\$25,597	\$25,972	\$23,809	\$27,373	\$26,342	\$26,258	\$23,398	\$27,899	\$26,481	\$27,044
Theater Total in Cuyahoga County	\$50,705	\$53,380	\$54,797	\$54,966	\$55,956	\$53,455	\$57,018	\$55,747	\$57,020	\$57,227	\$51,197
Theater Total in Ohio	\$47,863	\$48,471	\$50,097	\$48,364	\$49,557	\$47,325	\$51,077	\$48,532	\$49,740	\$48,449	\$46,583
Theater Total in U.S.	\$61,319	\$64,019	\$65,478	\$63,122	\$61,826	\$60,280	\$63,299	\$64,454	\$64,431	\$68,102	\$67,411

Source: Quarterly Census of Employment and Wages (QCEW)

Note: All data has been adjusted to 2015 dollars using CPI average for US cities, Midwest for Ohio, and Cleveland MSA for Cuyahoga County data

Table C 4. Establishments by Theater Subsector, 2005-2015

Subsector	Year										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Radio	21	16	25	18	16	17	16	20	20	18	17
Schools, Promoters & Performers	9	9	8	6	6	6	6	7	8	9	8
Television	6	6	7	6	5	6	6	5	6	7	8
Theater	12	13	12	11	13	11	11	9	10	10	12
Theater Total in Cuyahoga County	48	44	52	41	40	40	39	41	44	44	45
Theater Total in Ohio	293	298	322	308	295	293	292	294	300	307	311
Theater Total in U.S.	13,083	13,275	13,424	13,667	13,615	13,388	13,402	13,516	13,615	13,822	13,974

Source: Quarterly Census of Employment and Wages (QCEW)

Table C 5. Theater Occupational Employment, Cleveland MSA, 2010-2015

SOC Code		Occupation Title	2010	2011	2012	2013	2014	2015
Primary	13-1011	Agents and Business Managers of Artists, Performers, and Athletes	105	105	120	90	90	80
	25-1121	Art, Drama, and Music Teachers, Postsecondary	1,210	1,340	1,290	1,500	1,420	1,340
	27-1027	Set and Exhibit Designers	27	26	26	29	30	40
	27-2011	Actors	110	105	86	103	101	109
	27-2012	Producers and Directors	340	400	380	360	380	410
	27-2099	Entertainers and performers, sports and related workers, all other	76	68	69	60	63	64
	27-3011	Radio and Television Announcers	130	150	220	260	190	210
	39-3021	Motion Picture Projectionists	28	22	19	16	18	17
	39-3031	Ushers, Lobby Attendants and Ticket Takers	413	411	403	390	404	414
	39-3092	Costume Attendants	24	24	26	25	26	27
	39-3099	Entertainment Attendants and Related Workers, All Other	167	102	46	55	57	56
	39-5091	Makeup Artists, Theatrical and Performance	12	10	8	12	12	12
Secondary	27-2031	Dancers	70	70	72	70	74	75
	27-2032	Choreographers	90	77	52	39	42	40
	27-2041	Music Directors and Composers	50	60	90	90	110	220
	27-2042	Musicians and Singers	490	670	600	540	571	583
	27-3012	Public address system and other announcers	44	45	53	47	48	50
	27-4011	Audio and Video Equipment Technicians	210	170	240	290	250	260
	27-4014	Sound Engineering Technicians	60	30	30	30	30	40
	27-4032	Film and video editors	50	70	70	90	70	90

Source: Bureau of Labor Statistics Occupation Employment Statistics (OES) Survey; Quarterly Census of Employment and Wages (QCEW)

APPENDIX D

SURVEY INSTRUMENT



Maxine Goodman Levin
College of Urban Affairs



Dear Member of Cleveland Theatre Community:

The Center for Economic Development (the Center) at Cleveland State University's Levin College of Urban Affairs is conducting research on Cleveland's Dance, Literature and Theatre sectors commissioned by the Community Partnership for Arts and Culture (CPAC). The Center is looking to survey various members of the arts community within Cuyahoga County. On behalf of the CPAC, we are asking you to participate in this confidential survey.

Informed Consent:

"This survey will take 5-7 minutes. Taking this survey is voluntary. You may stop answering questions at any time. Your answers will be kept confidential within this research study. Taking this survey helps us learn about the theatre sector in Cleveland.

If you have any questions regarding your rights, you may contact Iryna Lendel, Ph.D. at 216-875-9967 or the Cleveland State University Institutional Review Board at 216-687-3630."

I have read the consent form and I am 18 years or older:

- Yes
 No (exit survey)

Questions:

1. What do you primarily classify yourself as?
 - a. Actor/Actress
 - b. Costumer
 - c. Director
 - d. Lighting director
 - e. Makeup artist
 - f. Music director
 - g. Sound engineer
 - h. Stage crew
 - i. Teacher/Instructor
 - j. Other _____

2. What do you consider as your primary genre of theatre? (Please select all that apply)
 - a. Burlesque
 - b. Classical
 - c. Comedy/Satire
 - d. Drama
 - e. Experimental/Fringe
 - f. Improv
 - g. Modern/Post-Modern
 - h. Musical
 - i. Opera
 - j. Radio
 - k. Television
 - l. Other _____

3. Where do you work?
 - a. For-profit theatre
 - b. Non-profit theatre
 - c. Independent Contractor / Freelancer (skip to question 5)
 - d. School, university or college
 - e. Radio/Television
 - f. My work is not in theatre (skip to question 5)
 - g. Other _____

4. What is its name of the company? (open ended)

5. In what types of locations do you primarily hold productions? (Please select all that apply)
 - a. Theater
 - b. Bar/Club
 - c. Church
 - d. School
 - e. Online
 - f. Radio
 - g. Television/Film
 - h. Other _____
6. Please rate your ability to find work in Cuyahoga County, on a scale of 1 to 5; 1 being easy, 5 being hard.
 - a. 1 (easy)
 - b. 2
 - c. 3 (If selected survey provides question 7)
 - d. 4 (If selected survey provides question 7)
 - e. 5 (hard) (If selected survey provides question 7)
7. Why is it difficult for you to get local work? (Please select all that apply)
 - a. Not enough local theatres
 - b. Not enough local productions
 - c. Local venues are not seeking local actors/hires
 - d. Not enough resources to promote myself
 - e. Theatre professionals' wages are too low in Cleveland
 - f. Other _____
8. Geographically, where do you primarily perform? (Please select all that apply)
 - a. Within Cuyahoga County (If selected survey provides question 9 & 10)
 - b. Outside of Cuyahoga County (If selected survey provides question 11 & 12)
9. On average, how many productions in Cuyahoga County are you in per month?
 - a. 1 to 3
 - b. 4 to 7
 - c. 8 to 10
 - d. More than 10
10. Approximately, how many people attend each production in Cuyahoga County? (open-ended)
11. On average, how many productions outside of Cuyahoga County are you in per month?
 - a. 1 to 3
 - b. 4 to 7
 - c. 8 to 10
 - d. More than 10

12. Approximately, how many people attend each production outside of Cuyahoga County?
(open-ended)
13. Is theatre your primary means of income?
- a. Yes (then survey gives question 14)
 - b. No (then survey gives question 15)
14. What portion of your income comes from theatre activities?
- a. 51%-60%
 - b. 61%-70%
 - c. 71%-80%
 - d. 81%-90%
 - e. 91%-100%
15. What portion of your income comes from theatre activities?
- a. 0%-10%
 - b. 11%-20%
 - c. 21%-30%
 - d. 31%-40%
 - e. 41%-50%
16. On average, how much money do you individually earn per production in Cuyahoga County? (Only given if answered "A" for question 8)
- a. \$0
 - b. Less than \$100
 - c. \$101 to \$500
 - d. \$501 to \$1,000
 - e. More than \$1,000
17. On average, how much money do you individually earn per production outside of Cuyahoga County? (Only given if answered "B" for question 8)
- a. \$0
 - b. Less than \$100
 - c. \$101 to \$500
 - d. \$501 to \$1,000
 - e. More than \$1,000
18. What is unique about the Cleveland theatre scene as compared to other cities? (open-ended)
19. Please describe the Cleveland theatre scene in 3 to 5 words:
- 1. _____
 - 2. _____
 - 3. _____
 - 4. _____
 - 5. _____

20. Do you live in Cuyahoga County?

- a. Yes
- b. No

21. If you would like to be included in the directory of the theatre industry provided to the Community Partnership for Arts and Culture, please click here. (Imbed link to spreadsheet to fill in name and address).

Exit Survey: Thank you for your participation in this survey theatre in Cleveland. Your participation is valuable and greatly appreciated.