

Economic Impact Study of the Clay Center for Arts and Sciences of West Virginia



Prepared for:
Clay Center for the Arts and
Sciences of West Virginia



Prepared by:
Center for Business and
Economic Research
Marshall University

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**ECONOMIC IMPACT STUDY OF THE CLAY CENTER FOR THE
ARTS AND SCIENCES OF WEST VIRGINIA**

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ECONOMIC IMPACT STUDY OF THE CLAY CENTER FOR THE ARTS AND SCIENCES OF WEST VIRGINIA

Executive Summary

West Virginia is very fortunate to have the Clay Center for the Arts and Sciences within its borders. To find a similar world-class facility with the programs and facilities the Clay Center possesses, one would have to travel long distances and discover that there are only a tiny handful which provide the range of amenities which are available at the Clay Center. Few combine a world-class performance hall with a symphony orchestra, planetarium, art gallery, science center and educational programs targeted primarily for youth. While similar features might be found in major urban areas, they would be housed in different locations under alternative forms of organization rather than within a single, easily accessible location.

The kids enjoy it – that’s the most important thing.

– Clay Center Attendee surveyed in June 2011

The West Virginia Symphony Orchestra (WVSO) is housed at the Clay Center. While the WVSO is a separate organization and operates independently from the Center, its major performances take place in the

Clay Center’s performance hall. The WVSO’s headquarters are also in the Clay Center.

While the Clay Center is often considered to be the premier cultural and arts center for the State, the economic impact of the Center also makes it a major business enterprise, creating jobs and income which would not be available if it were not for its presence. Marshall University’s Center for Business and Economic Research was employed by the Center to prepare a study to document these impacts for the year 2009-2010. What follows are highlights from the full report.

- Roughly 227,000 attendees to the Clay Center within the study year including:
 - Over 50,000 school age children flocking to the Clay Center for hands on experiences in science and the arts
 - Roughly 77,000 visitors attending the museum and galleries
 - Nearly 31,000 experiencing WVSO performances
 - Another 31,000 patrons enjoying the talents of performers appearing at the Center
- Total employment of 379 positions generated by activities related to the Clay Center and the WVSO
- Over \$16 million in output added to the State’s economy from activities of the Center and the WVSO
- \$6.7 million of personal income for West Virginia residents from Clay Center and WVSO operations

- Total volunteer hours of 4,252 represent an annual value of \$30,827 if these volunteers were paid the federal minimum wage of \$7.25
- Community enthusiasm and support for the Clay Center and WVSO is evidenced by \$4 million in contributions and memberships
- The Clay Center is a cultural amenity which attracts and retains highly-skilled workers and technology industries to the State
- Those who attend the functions at the Clay Center are unanimous in endorsing its value and consider it to be a State “treasure.”

*I am very pleased we have the Clay Center.
I have had nothing but good experiences there.*

– Clay Center Attendee surveyed in June 2011

Many of the major benefits of the Clay Center and the WVSO cannot be fully expressed in quantifiable terms alone. But that failure should not serve to discount the contribution those benefits make to enrich the lives of West Virginians and visitors

to the region. Programs for children in the arts and sciences create excitement and enthusiasm which will open new doors of possibility for their future lives. The outreach programs of the Center bring educational and cultural opportunities to areas of the State which would otherwise be missing. The esteem a community and state enjoy from having a facility which is virtually unique in its scope and program is yet another way in which the Clay Center contributes to the positive image of the State. As more than one respondent to the patron survey responded, West Virginia is indeed fortunate to have the Clay Center.

Introduction to the Clay Center

The **Clay Center for the Arts and Sciences** opened July 12, 2003 in Charleston, West Virginia, and provides visual arts, performing arts and the sciences. The Clay Center presents the community and the region with performances, art and science programs and workshops, educational opportunities for students and an art gallery.

Included within the Clay Center’s 240,000 square foot premises are the **Maier Foundation Performance Hall, the Bessie and Rome H. Walker Theater** and the **Charles M. Avampato Discovery Museum**. The Maier Foundation Performance Hall is a 1,900 seat theater that not only hosts a wide variety of performances but is also home to the West Virginia Symphony Orchestra. The black box theater, the Walker Theater, can accommodate approximately 150-200 people. A black box theater can be configured in a variety of ways, as a theater in the round, a cabaret setting or a classroom.

The Performance Hall is magnificent! The museum is a jewel.
 – Clay Center Attendee surveyed in June 2011

The Avampato Discovery Museum is an innovative facility which provides two floors of interactive science exhibits for children and families. Also included within the Museum is the 9,000 square foot **Juliet Museum of Art** that features both traveling exhibitions and portions of the Museum’s Permanent Collections. **The ElectricSky™ Theater**, also located within the Museum, presents planetarium shows and large format films on a large domed screen. The **Douglas V. Reynolds Intermezzo Café** is also a part of the Museum which offers food options for Museum visitors. Attendance, as measured by ticket sales and member visits, to the Clay Center for FY 2009-10 is illustrated in Table 1.

Table 1: Clay Center Attendance

Admission Category	Annual Attendance (FY 2009-10)
Museum only	35,486
Museum and film	13,564
Museum and planetarium	6,371
Museum, film and planetarium	11,098
Planetarium only	2,679
Film only	7,127
Film and planetarium	171
Total museum/gallery attendance	76,496
Clay Center performances	31,099
Clay Center school performances	6,680
WVSO performances	30,645
WVSO school performances	5,909

Along with daily ticket sales, the Clay Center also provides an opportunity for patrons to become supporting members. With seven membership levels¹, patrons can choose a membership category suitable to their preferences. For FY 2009-10, the Clay Center sold 2,100 memberships. The Clay Center is also supported by 120 volunteer ushers, art docents and teen museum volunteers representing 4,252 hours annually. The volunteer hours represent an annual value of \$30,827 if these volunteers were paid the federal minimum wage of \$7.25.

The Maier Foundation Performance Hall hosts a wide variety of performances every year. Performances include comedic performers, dance performances, theater shows, music performers and Broadway shows. For FY 2009-10, the Clay Center performance season, including eight season performances, four headliners and Broadway shows, had a total attendance of 31,099. The Clay Center partnered with organizations such as the Charleston Light Opera Guild for the performances of Peter Pan and the Unity Church for the Woody Hawley Concert Series. The Clay Center also hosts a number of school performances such as interactive performances,

It's Fantastic! Lucky to have the Clay Center.
– Clay Center Attendee surveyed in June 2011

theatre productions and educational performances. These school performances had attendance of 6,680 for FY 2009-10.

Besides hosting performances, the Clay Center facilities can be rented for special events such as weddings and/or wedding receptions, convention receptions, parties, meetings, lectures, community theater productions and many other events. All the public spaces in the Center are available for rental including the Maier Performance Hall, the Walker Theater, the Founders' Lounge, the Benedum Grand Lobby, Clay Center Classrooms, the Clark Performance Place Terrace, the ElectricSky™ Theater, the Juliet Museum of Art, the Greater Kanawha Valley Foundation Science Center, the Douglas V. Reynolds Intermezzo Café, and the Susan Runyan Maier Sculpture Garden. For FY 2009-10, 198 people, groups or organizations rented some portion of the Clay Center. Seventy-six of those rentals were in the Maier Performance Hall and 43 were West Virginia Symphony Orchestra-related rentals.

In addition to its normal operations, the Clay Center also provides a wide variety of programs and workshops for children, families and adults. Programs include hands-on art and science projects, live science demonstrations, after school programs, summer programs, book clubs, educational lectures and many others. Table 2 illustrates the programs, number of offerings and attendance for these programs in FY 2009-10. Descriptions of the following programs are detailed in the Intangible Benefits section of this report.

¹ <http://theclaycenter.org/membership/memberbenefits/default.aspx>

Table 2: Program and Workshop Attendance for FY 2009-10

Program	Number of Offerings	Annual Attendance
Lunchtime Lectures	11	665
Science Café at Taylor Books	5	121
Adult Workshops	9	130
Reading Art Book Club	6	48
Summer Discovery Camps	7 (full week programs)	135
2nd Saturdays at Capitol Market	12	220
After School Explorers	12	216
Whizbang Workshops	10	185
Clay Community Arts	n/a	400
Milton's Marvels Demos	780	5,800
Family Gingerbread	2	110

Many of the programs, workshops and other events are made possible by contributions from community members, including corporations, foundations and individuals, in-kind gifts and museum membership. Other groups, including the Collectors Club and Friends of the Clay Center, also raised funds to support the Center. Collectors Club works to contribute financial support to acquire works of art for the permanent collection of the Museum. The Friends of the Clay Center is a membership support group which is responsible for the Center's fundraising events. In FY 09-10, these gifts, memberships and support contributed over \$789,300 to the Clay Center's revenue. These contributions represent approximately 18 percent of the Clay Center's total revenues for FY 09-10. Without this community support, the Clay Center would not provide either the quality or number of programs it currently provides. The bullets below detail the revenue support categories:

- Annual support campaign contributed over \$60,000
- Over \$211,000 in major gifts were donated
- The Collectors Club supported the Center with over \$100,000
- Donations of in-kind gifts and other gifts totaled over \$17,300
- Friends of the Clay Center funded over \$88,000
- Over \$313,000 contributes to the Clay Center from membership sales
- Corporate sponsorships of over \$325,000
- Grants and Foundation support of \$1.5 million.

The West Virginia Symphony Orchestra

Also housed within the Clay Center facility is the West Virginia Symphony Orchestra (WVSO). With 230 musicians, the WVSO presents more than 50 concerts annually throughout the State

including concerts in Beckley, Elkins, Fairmont, Martinsburg, Lewisburg, Hurricane, Monroe County, Parkersburg and other WV communities. The WVSO has performed programs such as the Capitol Conference Center Symphonic Series, the ZMM Pops Series and the City National Bank Family Discovery Series. The WVSO has also participated in collaborations with the Charleston Ballet and other West Virginia art organizations. For FY 2009-10, the WVSO had an attendance of 30,645. The WVSO also hosted school shows which had an attendance of 5,909.

A Review of the Cultural Amenities Literature

Cultural amenities such as the Clay Center have been subject for investigation to determine the impacts they have on the economic, social and cultural vitality of a region. These studies were consulted to determine the methodologies used for making these determinations and to compare the results of this study with those found elsewhere. What follows is a synthesis of those inquiries.

Cultural industries are a subtle necessity for an enriched community. Culture within a given area can be used to cultivate pride, to create a regional identity and ultimately to capture and promote public value (Gard 1970). Socially, such industries provide entertainment and a means of community networking. Economically, they create a competitive advantage by fostering a creative workforce (National Governors Association Center for Best Practices 2009). Combined attributes arising from the presence of strong cultural industries “represent an increasingly potent source of localized competitive advantage and are a critical element of the contemporary creative city” (Scott 2006).

To grow in an increasingly global economy, communities must employ skilled workers whose jobs cannot be outsourced to cheaper labor markets. A culturally rich society attracts the entrepreneurs and workers at the heart of these advanced jobs.

According to Bayard (2005), creative industries “create a highly desirable quality of life that draws businesses and knowledge workers to further stimulate the economy.” When a community nurtures its cultural sector, it is nurturing its own long-term economic development.

Love the Clay Center, glad it's here, it has made a world of difference in Charleston.

– Clay Center Attendee surveyed in June 2011

The cultural industry is comprised of art museums, science museums, performance halls and heritage events, to name just a few. 2005 national estimates of these industries show direct employment of roughly 2.6 million full-time equivalent jobs (Americans for the Arts 2007). Furthermore, it is a sector rich in volunteer labor; Oklahoma’s nonprofit culture organizations received nearly 850,000 hours of volunteer work in 2008 (Oklahoma Arts Council 2010).

Studies to measure the economic impact of cultural organizations are key when art and creative centers compete for government-based funding. When more demands are placed on state budgets, expenditures on cultural amenities are often the first to be cut (Cohen, Schaffer and

Davidson 2003). In order to gain policy-makers' approval, the cultural sector must prove its ability to generate jobs, create government revenue and increase spending in the region.

However, it is often difficult to assign a dollar value to cultural goods and services. Throsby (2004) recognizes that there are "fundamental issues at stake concerning the true value of cultural goods and how that value should be constructed." The intrinsic benefits of the arts are often difficult to define tangibly as they "lie beyond the traditional quantitative tools of the social sciences" (McCarthy, et al. 2004, 37).

Cultural goods also behave differently than other products in the market place. For example, there is an 'option demand' where an individual values the choice of using and an existence value from the worth of the cultural amenity to the community as a whole (Clark and Kahn 1988). The estimation of the value derived from "arts and culture is complicated by the fact that much of this value is not tied up in the use of the good" and is further complicated as portions of benefits from the arts contains an element of value derived in the present from the heritage created for future generations (Brooks 2004). Considering the unique characteristics of cultural goods, a broad scope of information and various approaches to analysis are required to get a complete picture of a cultural institution's economic impact.

Different methods provide alternate perspectives on the functions of an institution. For example, willingness-to-pay analysis captures social externalities, and input-output analysis captures financial benefit to other businesses. A brief explanation of a sampling of the various methods and how they have been applied to similar studies, as well as potential problems associated with each follows below.

Surveys

Surveys of the audience and organization itself are a means of accessing a range of information. Questionnaires for the organization are often needed to provide financial statistics about payroll, expenditures and sources of revenue. It is important that financial records be measured consistently for accurate comparison. A nation-wide study, Arts & Economic Prosperity III, surveyed 6,080 organizations in 156 regions

The public speaks...

I agree that this museum rivals museums in other cities. I travel a lot and would easily put this museum up against most of the others I have seen.



...the Clay Center was the first place I actually listened to a symphony live. Yes I know you all are thinking... but it's in West Virginia! I know... but this center is beautiful inside and the orchestra can rival the offerings in many states.



This is a unique place compared to other performing arts venues in that it includes not only an 1800 seat theatre/black box theatre, but also an art gallery, an IMAX, and a kids science/learning museum....it's fun and there is a place for the "audience" ... definitely worth the stop.

- Retrieved from yelp.com on July 5, 2011.

regarding expenses and revenue sources (Americans for the Arts 2007). Of the 156 regions, 152 included some variation of audience surveys.

To maintain accuracy, audience surveys must be carefully constructed due to the variety of patrons and the different impacts produced by certain types of patrons. Thoughtfully developed surveys provide objective data that may be deployed to produce reliable studies. Survey data can be used in place of projections and/or estimates of consumer participation, activities and expenditures. Survey data increases the reliability of study results.

In using surveys it is important to isolate participants by residence. Visitors from outside the region of the museum bring in outside dollars to the community. Local visitor expenditures may have been spent in the community on other activities regardless of the existence of the cultural institution. The existence of a cultural facility, however, may keep local dollars at home rather than having residents seek the cultural amenity elsewhere.

To illustrate the problem posed by relying upon surveys, Vander Stoep's (2004) assessment of Michigan's museums used audience surveys to calculate the economic impact of all museums in the state of Michigan. An analysis of that survey data showed that over-night visitors were over-represented in the survey sample and biased expenditure numbers upward. The choice to employ expenditure data acquired from audience surveys must be weighed against the potential biases inherent in the collected data.

Input/output Models

The economic impact goes beyond the cultural facility's payroll and attendance costs. When an organization pays salaries or makes other expenditures those payments are re-spent by those who receive them. This process continues through a process known as an economic multiplier. Input/output models are used to track these transactions. IMPLAN² (IMpact analysis for PLANning) is one of the most widely used multiplier calculators. It uses social accounting matrices to estimate the total effect of economic transactions using historical data from 440 industry categories. Among the many examples, Lawton and Rowe (2010) employed this model in their study of Maine

*West Virginia is extremely, extremely fortunate
to have the Clay Center.*

– Clay Center Attendee surveyed in June 2011

museums. The 14 museums involved in the study and the visitors to these museums spent \$71 million, but the total impact of this spending was estimated at \$148 million, resulting in a crude spending multiplier of 2.1.

Outputs such as Employment

and Payroll each have their own multiplier as well, and tax revenue generated is calculated for the total impact of all sales, jobs and income created.

Contingent Valuation

While input/output models calculate actual monetary contributions to the economy of an arts facility, there is still a cultural value to the community which remains unaccounted. Typically,

² <http://implan.com/V4/Index.php>

contingent-valuation models, such as willingness-to-pay (WTP) calculate the market value of a good provided to the public at a discounted rate or free. These models place a value on the good or service based on what the user would have paid if the service had been offered at market price.

The implicit theoretical framework for contingent valuation considers the utility function of an individual or household based upon a level of a public good or service in the market (Noonan 2003). These methods are most commonly used to evaluate non-priced goods and services by examining the economic implications of not having them (Griffiths, King and Aerni 2006). However, traditional WTP models are controversial in their application to cultural amenities because of the “priceless” nature of such amenities. Furthermore, WTP assumes that consumers have complete information. Yet with arts and other cultural amenities, demand for the good is based on an acquired taste and hence “dynamically unstable” (Throsby 2003).

Conclusions Drawn from the Literature

Ultimately, a community that encourages a strong cultural sector enhances the long-term potential for economic development. Further, the value that a “community can obtain from the arts is based on the benefits that the community as a whole realizes from the esteem in which the community is held because of the arts available in the local area” (McCarthy, et al. 2004). One extensive review of economic studies found that next to the availability of a qualified labor force, quality of life, including cultural amenities, was the most important factor in the location of business using high skilled workers (Portland Development Commission 2002). Beyond creative achievements, arts entities and projects are expected to produce impacts on local social capital that are measurable and positive. This presents significant challenges to those who wish quantify such impacts (Newman, Curtis and Stephens 2003).

Methodology

In order to determine the economic value of the Clay Center and the WVSO, CBER used the IMPLAN© model. IMPLAN© (see Footnote 2) is an input-output model which takes the mathematical relationships between industries in a regional economy and relates them to the socio-economic characteristics of that economy. Based on these relationships, the economic impacts of an industry or organization can be determined. The result is an estimate of the income, output and jobs which can be attributed to that entity. For the purposes of this analysis, the region is the State of West Virginia.

It is a very nice facility for West Virginia...I would give it a 10.

– Clay Center Attendee surveyed in June 2011

Economic Impact Analysis

The most important component of an economic impact study is output, which estimates the total production of goods and services from the presence of an organization in an area. Output is the result of direct spending on labor, supplies, equipment and services. That spending creates income for workers and suppliers that is re-spent many times in the region. Spending on a project

is redistributed as those who receive the income use it to purchase goods and services elsewhere in the region. Their spending creates even more spending from the incomes received. This is called a “multiplier effect.” Economic impact analysis measures the extent of this spending as it passes through many rounds of redistribution. Of course, not all income is spent in any single area as individuals demand goods and services from other areas, resulting in spending leakages. Re-spending has both “indirect” and “induced” effects which create the additional impact. Indirect spending arises from establishments that provide employment and materials in support of the spending of the direct income they received. The induced effect measures the spending of income by households as a result of the employment generated from direct and indirect spending.

Operating Impact

The analysis of operating impacts is the estimate of permanent output, income and jobs created by the Clay Center and the WVSO. These results are annual based on the fiscal year ending June 2010. The primary operating activities of the Clay Center are those associated with contracting for independent artists and performers, advertising performances and events, maintaining electronic and communications equipment, payments to utilities and building services. The Center’s primary expense is for artists and performers. Because a significant portion of the expenses associated with performers occur outside West Virginia, that spending is “leaked” outside the State’s economy.

Table 3 describes the employment impact of the Clay Center and the WVSO in the fiscal year ending June 2010. The Clay Center employs 59 people full-time and several part-time that equate to five full-time equivalents. The WVSO employs 18 people full-time plus 230 part-time musicians. From a combined perspective this forms a base of 312 full and part-time positions. The distribution of salaries, income and benefits paid out to these individuals, as they are later re-spent within the economy, produce 67 additional jobs in other industries for a total employment impact is 379 full and part-time jobs. Table 4 describes the distribution of these jobs by groups of industries, including the base employment by the Center and the WVSO.

Table 3: Employment Impact

	Jobs
Direct Impact	312 jobs (Full and Part-time)
Additional Impact	67 jobs in other industries
Total Employment Impact	379

Table 4: Total Employment Impact by Industry

Jobs by Industry Group		
	Direct Employment	Additional Employment
Agriculture, Mining, Utilities, Construction, Manufacturing		5
Wholesale Trade, Transportation, Retail		12
Healthcare, Professional and Business Services		26
Arts & Recreation	312 (full and part-time)	4
Accommodations, Food and Other Services		13
Government		7
TOTAL		67

Table 5 provides estimates of the impact in terms of personal income. The distribution of salaries, income, and benefits paid out to Center and WVSO employees (roughly \$4.5 million) creates an additional \$2.2 million in income within the regional economy. This equates to a total impact on personal income in the State of West Virginia of roughly \$6.7 million.

Table 5: Personal Income Impact

Personal Income	
Direct Impact	\$4.5 million
Additional Impact	\$2.2 million
Total Income Impact	\$6.7 million

Averaging figures from the last two years of operations provides an annualized figure of total expenditures for the Clay Center and WVSO at approximately \$9.4 million. While a portion of that amount goes to import goods and services (from other states), the portion that stays in the West Virginia economy is used to buy local goods, services and labor. The net additional economic activity, the estimated amount of output added to the State economy after leakages of business and household income, and the positive multiplier effects of demand are both taken into account.

Clay Center and WVSO patrons/visitors also spend money at other establishments, primarily restaurants and retail, as part of their visits. Estimates from prior attendance and surveying by CBER as part of this analysis suggest that roughly 9 percent of these patrons/visitors are not West Virginia residents. Thus, their spending can be considered an additional impact resulting from the presence of the Clay Center. West Virginia patrons/visitors, on the other hand, would likely be making such expenditures within the state regardless of the existence of the Clay Center and to attribute this spending to the Clay Center would thus be inappropriate. Expenditure patterns for Center and WVSO patrons/visitors residing in other states were estimated at roughly \$190,000 annually. Approximately 70 percent of that figure arose from restaurant and hotel spending, while the balance was made of retail and related expenditures.

Table 6 illustrates the direct expenditures and additional impacts from those expenditures by type. The total direct output (expenditures) of \$9.4 million creates \$6.7 million of additional output within the state of West Virginia. The estimated \$190,000 from out-of-state patron/visitor expenditures creates \$110,000 of added local output within the state. This produces a total impact to the state from Center and WVSO operations (and their indirect/induced benefits) in the fiscal year ending June 30, 2010 of roughly \$16.4 million.

Total Direct Output		\$9.4 million
Direct Output	\$4.5 million (made up of \$2.0 million of local business spending and \$2.5 million of household spending)	
Multiplier Effects	\$2.2 million of additional local business and household income spent within West Virginia	
Additional State Output		\$6.7 million
Spending by Out-of-State Patrons		\$0.2 million
Additional Impact of Local Spending by Out-of-State Patrons		\$0.1 Million
Total Output		\$16.4 Million

Intangible Benefits

The Clay Center provides a variety of services such as special events and programs, classes and lectures, book clubs, outreach events and much more. Such programs and events are available for children, families and adults. The programs and events provide a variety of intangible benefits to those patrons who attend, including increased education and stronger communities. It is difficult to attach a specific dollar amount to the programs and the benefits provided by the Clay Center to the surrounding community and its residents.

The programs and events of the Clay Center are illustrated below. These events and programs provide many social and community benefits. Many are free to the public or are available as part of admission to the museum.

We love that they have all the hands on things for the children.

– Clay Center Attendee surveyed in June 2011

- *Family Fun Days* are special events that occur throughout the year with science and art activities. Themes for Family Fun Days include exploring the science of water, solving a mystery with clues, an Earth Day event, interactive lab projects and a dinosaur night. Most Family Fun Days activities are included in the price of gallery admission.
- *Fun Lab* is a regular program that provides educational experiences for children, including art projects, music projects, and other hands-on activities. Most Fun Lab activities are included in the price of gallery admission.
- *Milton's Marvels of Science* provides live science demonstrations, including topics such as earth science, biology, physics and chemistry. Milton's Marvels activities are included in the price of gallery admission. Milton's Marvels was offered 780 times in FY 09-10 with an estimated attendance of 5,800.
- *Wee Wednesdays* is a program for preschoolers every Wednesday. This program includes story time and related activities designed especially for preschool-aged children. Wee Wednesdays activities are included in the price of gallery admission.
- *Kidstronomy* is a program designed to introduce children to earth science and astronomy. The Starlab portable planetarium is utilized in many of these sessions. Kidstronomy activities are included in the price of gallery admission.
- *After School Explorers Club* is a workshop that is designed for children in grades 2-6. The workshop includes a science demonstration, hands-on experiments and other activities. The After School Explorers Club ranges in price from \$12-\$15 per session or \$60-\$75 for an entire series. The After School Explorers Club was offered 12 times in FY 09-10 and had attendance of 216 students.
- *Summer Discovery Camps* include a variety of week long summer programs for school-aged children. The Camps include such topics such as physics, acting, filmmaking and interactive art. The prices for the Summer Discovery Camps range from \$30-\$75, depending on the camp. In FY 09-10, Summer Discovery Camps were offered seven times with an attendance of 135 children.
- *Science Café* is a program for adults, which includes guest presenters discussing a wide variety of science-related topics. For FY 09-10, Science Café was offered five times with an attendance of 121.
- *Adult Workshops* provide a wide variety of educational opportunities for adults, including acting workshops, business practices, stained glass, digital photography, open drawing studios and others. The cost to attend an adult workshop ranges from \$30-\$60. For FY 09-10, adult workshops were offered nine times with an attendance of 130.
- *Reading Art Book Club* is a book club for adults that focuses on books about the exciting world of art and includes art lectures, discussions and a view of the permanent art collection of the Clay Center. The cost of the Reading Art Book Club ranges from \$12-\$15. Reading Art Book Club was offered six times with an attendance of 48 during FY 09-10.
- *Lunchtime Lectures* provides adults with a lecture series of community presenters on a wide variety of topics including gardening, outdoor events and history. Lunchtime Lectures are free to the public. For FY 09-10, the Lectures were offered 11 times with an attendance of 665.
- *Outdoor Programs* include an opportunity for community members to experience the outdoors including the New River Gorge, campfires at the Kanawha State Forest, family hikes and other events.

- *Student Workshops* provide students with a hands-on experience in the Clay Center. Topics for the student workshops include Under the Sea, Crime Busters, Grand Canyon, Space Science and science demonstrations. These workshops cost approximately \$2 per student.
- *Summer Fun Day* is a day free of admission that the Clay Center and WVSO provide to the community each year. It includes visits the galleries, attending performances and films and playing with instruments.

Assigning a value to free or reduced-price programs requires estimating the difference in charges levied by the Clay Center and the potential price charged in the market for activities. If a difference between the price charged by the Clay Center and the market price exists, a Contingency Valuation methodology can measure that uncompensated benefit received by the community. To do this, the fees for similar programs must be compared to the fees charged by the Clay Center. Since the Clay Center is unique in the U.S. in the programs it offers, it was impossible to find comparable venues for purposes of comparison.

While the Clay Center hosts a number of educational programs within its facility, it also hosts many outreach activities. In an effort to enhance the quality of life throughout the State, the Clay Center provides educational opportunities beyond its walls. The Clay Center and the WVSO also distribute access funds to schools within the State and outside of the State to allow students to visit the Clay Center and attend WVSO and Clay Center performances. During FY 2009-

I really enjoy it for myself and our grandchildren enjoy it!

– Clay Center Attendee surveyed in June 2011

2010, the Clay Center distributed \$136,161 in access funds and the WVSO distributed \$19,777 allowing students who may not otherwise have access to visit and experience the Clay Center.

In 2006, Clay Community Arts was created to provide community-based educational opportunities in the arts throughout the State. This program provides students with music lessons from local instructors for instruments such as the guitar, keyboard, violin, steel drums, dulcimer and variety of brass and woodwind instruments. In addition to free lessons, students are given free instruments to continue their learning. Currently, this program has provided lessons to over 650 students in Clay, Kanawha, Lincoln, Mason and Mingo counties. In FY 09-10, 400 students attended weekly lessons or summer camps.

As an additional outreach activity, the Clay Center hosts *2nd Saturdays at the Capitol Market*. On the second Saturday of every month, the Clay Center provides an art or science activity for the entire family. These activities are also free to the general public. For FY 09-10, *2nd Saturdays at the Capitol Market* were offered 12 times with an estimated attendance of 220 people.

Another method of outreach for the Clay Center includes bringing an art or science session to a classroom or special event. These outreach events can be geared for any age group or number of students. Sample outreach events include interactive presentations, hands-on workshops or assembly demos on a variety of topics such as chemistry, physics, insects, the Solar System, health presentations and many more.

The Clay Center also provides opportunities for distance learning. Distance learning allows students to interact with museum educators through live videoconferencing. Distance learning provides students the opportunity to learn about topics such as global warming, animal adaptations, chemistry, health science and more.

While outreach activities and distance learning are provided by the Clay Center, a number of students visit the Clay Center every year. Table 7 illustrates the number of students who visited the Clay Center in FY 2009-10. To support teachers and educators, the Clay Center also provides teacher training, related curriculum for teachers, educators’ guides and additional resources. The materials help the students learn interactively when visiting the Clay Center.

Table 7: School Attendance for FY 2009-10

	Museum	Museum and a Performance
Total school attendance	27,716	32,262

Constituent Profile

In an effort to better understand the behavior and expenditure patterns of the visitors to the Clay Center, the CBER conducted a survey of 2009-2010 attendees using a list of more than 6,900 visitors and attendees as provided by Clay Center Staff. Conducted by telephone using trained interview consultants, the survey was administered throughout the month of June 2011. It should be noted that while the contact list of attendees was from 2009-2010, the attendees answered the questions based on information from 2010-2011. The economic impact data discussed previously is based on FY2009-2010. A total of 439 valid survey responses were gathered. Overall results from that data collection, as well as responses disaggregated by respondent type where appropriate, are provided below.

Respondent Type and Location

The contact list supplied to CBER was broken down into three classifications: performance attendees, museum/galleries visitors and patrons of both performances and the museum/galleries. A comparison of the contact list with respondents to the survey is provided in Table 8. Respondents to the survey, by type, are illustrated in Figure 1.

Table 8: Contact List and Respondent Comparison

Classification	Original Contact List Percentage	Respondent Percentage
Performance attendees	45.7%	50.6%
Museum/galleries visitors	44.8%	37.8%
Patrons of both performances and the museum/galleries	9.5%	11.7%

Using the contact list provided, the zip code and corresponding city were calculated for all respondents. Charleston, WV, zip codes reasonably dominated the observations across all respondent types with surrounding communities such as South Charleston, St. Albans and Hurricane, WV, also well represented. The zip codes with the highest representation for each respondent type are illustrated in Table 9.

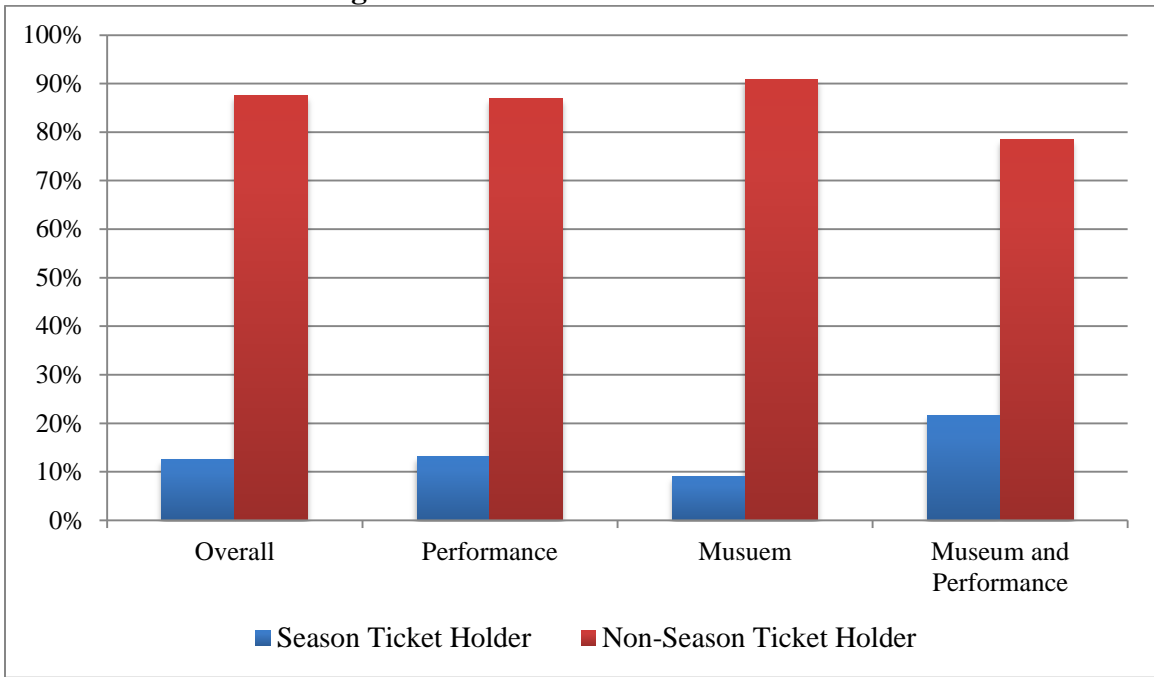
Table 9: Largest Zip Code Representation by Respondent Type

Overall					
25314	Charleston, WV	12.2%	25304	Charleston, WV	4.4%
25177	St. Albans, WV	5.5%	25309	South Charleston, WV	3.9%
25311	Charleston, WV	5.5%	25313	Charleston, WV	3.0%
25302	Charleston, WV	5.1%	25560	Scott Depot, WV	3.0%
25526	Hurricane, WV	4.6%	7 Zip Codes with 1.8%		
Performance Attendees Only					
25314	Charleston, WV	10.0%	25309	South Charleston, WV	5.0%
25311	Charleston, WV	6.8%	25302	Charleston, WV	4.1%
25526	Hurricane, WV	5.9%	26105	Vienna, WV	2.7%
25177	St. Albans, WV	5.0%	5 Zip Codes with 2.3%		
Museum Patrons Only					
25314	Charleston, WV	12.8%	25302	Charleston, WV	4.3%
25177	St. Albans, WV	6.7%	25526	Hurricane, WV	3.7%
25304	Charleston, WV	6.7%	25705	Huntington, WV	3.7%
25311	Charleston, WV	4.9%	25306	Charleston, WV	3.1%
25313	Charleston, WV	4.9%	25560	Scott Depot, WV	3.1%
Museum Patrons and Performance Attendees					
25314	Charleston, WV	19.6%	25071	Elkview, WV	3.9%
25302	Charleston, WV	11.8%	25177	St. Albans, WV	3.9%
25304	Charleston, WV	5.9%	25301	Charleston, WV	3.9%
25560	Scott Depot, WV	5.9%	25309	South Charleston, WV	3.9%
25064	Dunbar, WV	3.9%	19 Zip Codes with 2.0%		

Respondent Behavior Related to Clay Center Performances

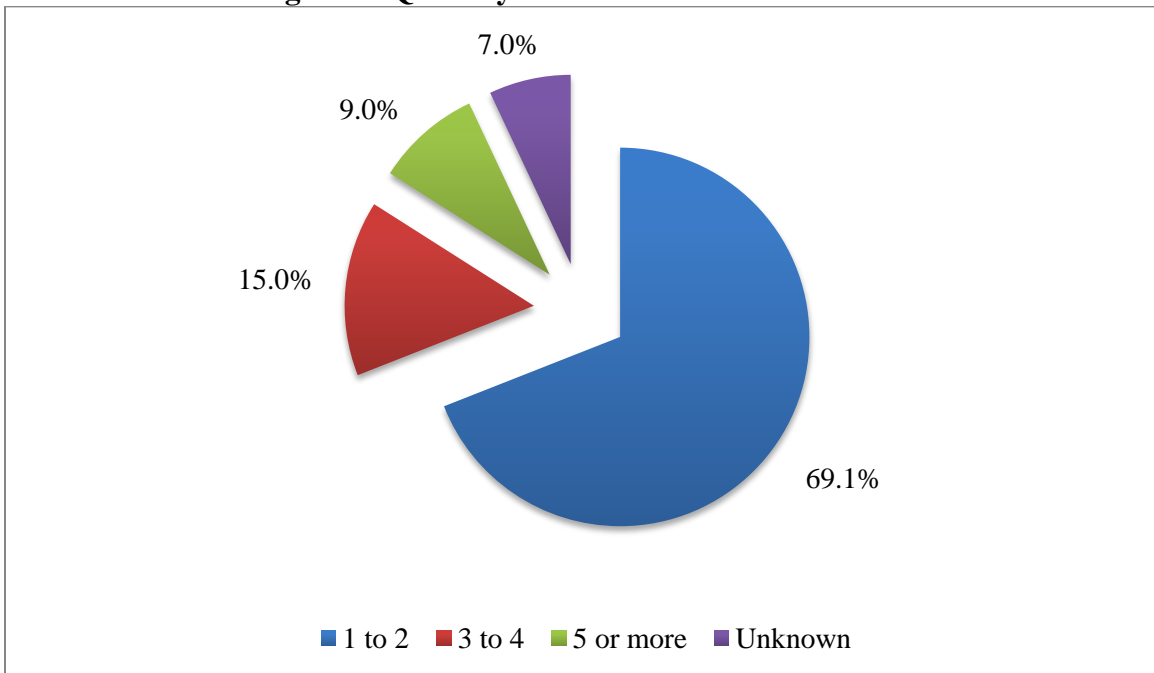
Respondents were asked if they were Clay Center season ticket holders, and if so, how many season tickets they purchased. An overwhelming majority (87.5 percent) of total respondents indicated that they were not season ticket holders. The percentage of respondents denoting that they were not season ticket holders ranged between 9.1 (for museum visitors) and 21.6 percent (for patrons of both the performances and the museum) respectively. This data is represented graphically in Figure 1.

Figure 1: Season Ticket Holder Status



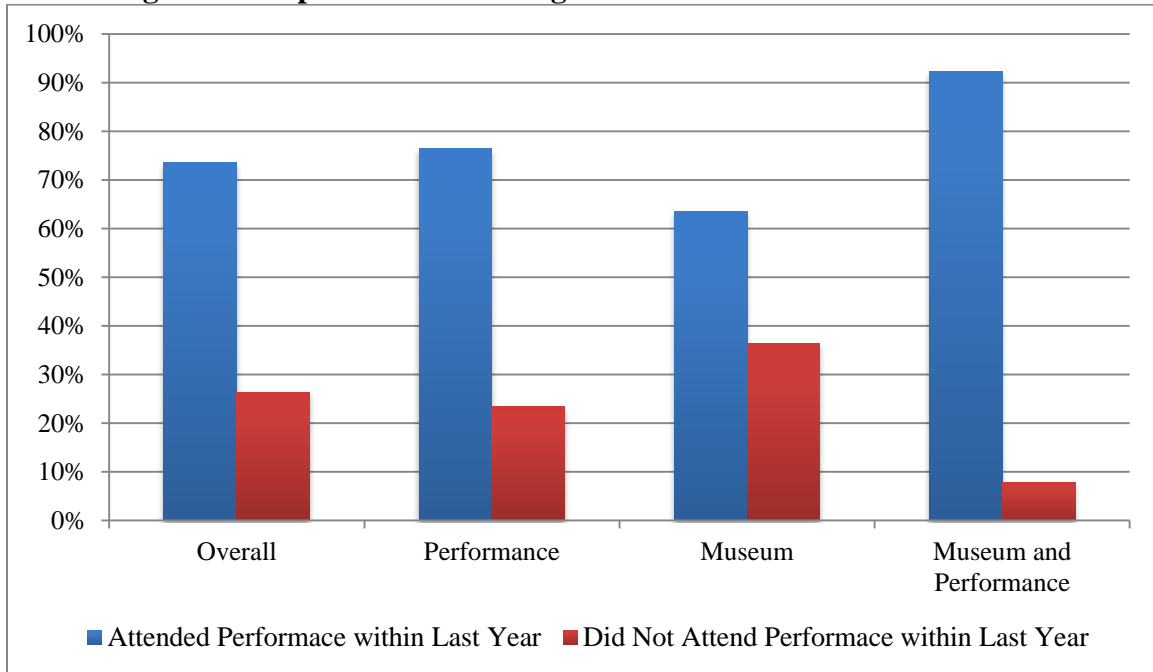
Of those respondents indicating that they were season ticket holders, approximately 69 percent replied that they purchased two tickets or fewer. Figure 2 provides additional detail. The low number of responses for season ticket holders across the different respondent types makes further disaggregation of this variable unadvisable.

Figure 2: Quantity of Season Tickets Purchased



Nearly three-quarters of total respondents reported attending a Clay Center Performance within the last year. The corresponding figures for Performance attendees only and Museum visitors only were approximately similar. However, more than 90 percent of the patrons of both the performances and the museum indicated that they had attended a performance over the same time span. This is illustrated in further detail in Figure 3.

Figure 3: Respondents Attending Performances within the Last Year



When asked if they were season ticket holders for any other performing arts series, an overwhelming majority provided a negative response. Detailed responses across respondent type are provided in Table 10.

Table 10: Season Ticket Holders for Other Performing Arts Series

Respondent Type	Yes	No
Overall	1.8%	98.2%
Performance	1.2%	98.8%
Museum	3.8%	96.2%
Museum and Performance	0.0%	100.0%

The primary methods respondents reported for obtaining information about upcoming Clay Center performances were remarkably consistent across the various respondent types. Mailings were reported with the highest frequency for all types of respondents (25.8 to 47.1 percent). Three methods in particular (mailings, newspaper, and email notifications) accounted for the majority of responses across all visitor types. Further detail is provided in Table 11.

Table 11: Primary Method for Obtaining Information Regarding Upcoming Performances

Overall		Performance		Museum		Museum and Performance	
Mailing	29.3%	Mailing	28.2%	Mailing	25.8%	Mailing	47.1%
Newspaper	16.7%	Newspaper	18.3%	E-Mail	17.7%	E-Mail	17.6%
E-Mail	16.0%	E-Mail	14.1%	Newspaper	16.1%	Newspaper	11.8%
Brochure	10.0%	Word of Mouth	11.3%	Brochure	11.3%	Brochure	5.9%
Word of Mouth	9.3%	Brochure	9.9%	Word of Mouth	8.1%	Radio	5.9%
						Television	5.9%
						Word of Mouth	5.9%

Respondents were prompted to think back to their most recent visit to the Clay Center for a performance and describe any ancillary activities they undertook during the outing and report approximate levels of expenditures for each of those activities. Only 13.2 percent of total respondents provided full details regarding extra activities or expenditures. The total observations for these variables are small and warrant caution in their interpretation. While these estimates should not be extrapolated to the wider population of total respondents, they are provided for illustrative purposes in Table 12. Of those reporting additional activities undertaken during a visit to the Clay Center for a performance, the most common activity was visiting a restaurant, accounting for more than half of the responses. Per client expenditures here represent the average expenditure for each activity across all respondents undertaking additional activities.

Table 12: Additional Activities and Errands during Latest Visit to Clay Center Event

Additional Activities	Percentage	Per Client Expenditure
Visit restaurant	58.6%	\$29.48
Visit bar/nightclub	1.7%	\$0.26
Overnight hotel stay	1.7%	\$0.00
Parking	15.5%	\$0.59
Retail shopping	15.5%	\$3.28
Souvenir shopping	3.4%	\$0.00
Visiting other attraction	0.0%	\$0.00
Other	3.4%	\$0.52
		\$34.13

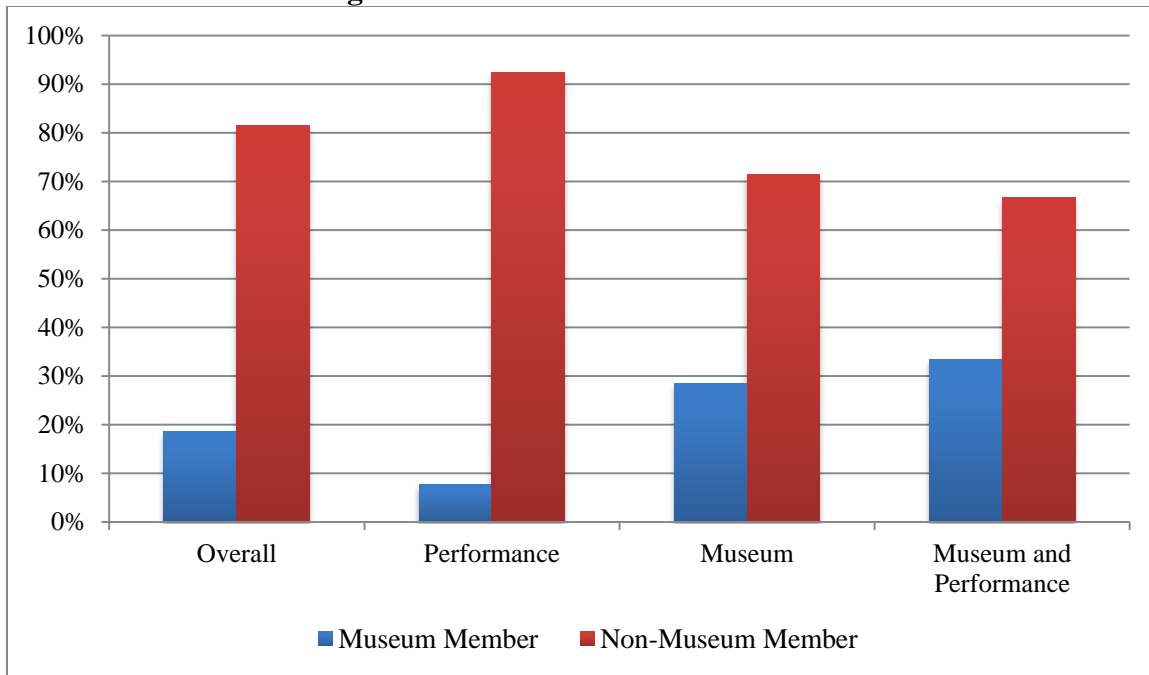
Respondent Behavior Related to Clay Center Museum Activities

Respondents were asked to indicate whether or not they were a Clay Center Museum member. Table 13 and Figure 4 illustrate the vast majority of respondents replied that they were not museum members. Overall, only 18.5 percent of respondents classified themselves as museum members.

Table 13: Status as a Museum Member

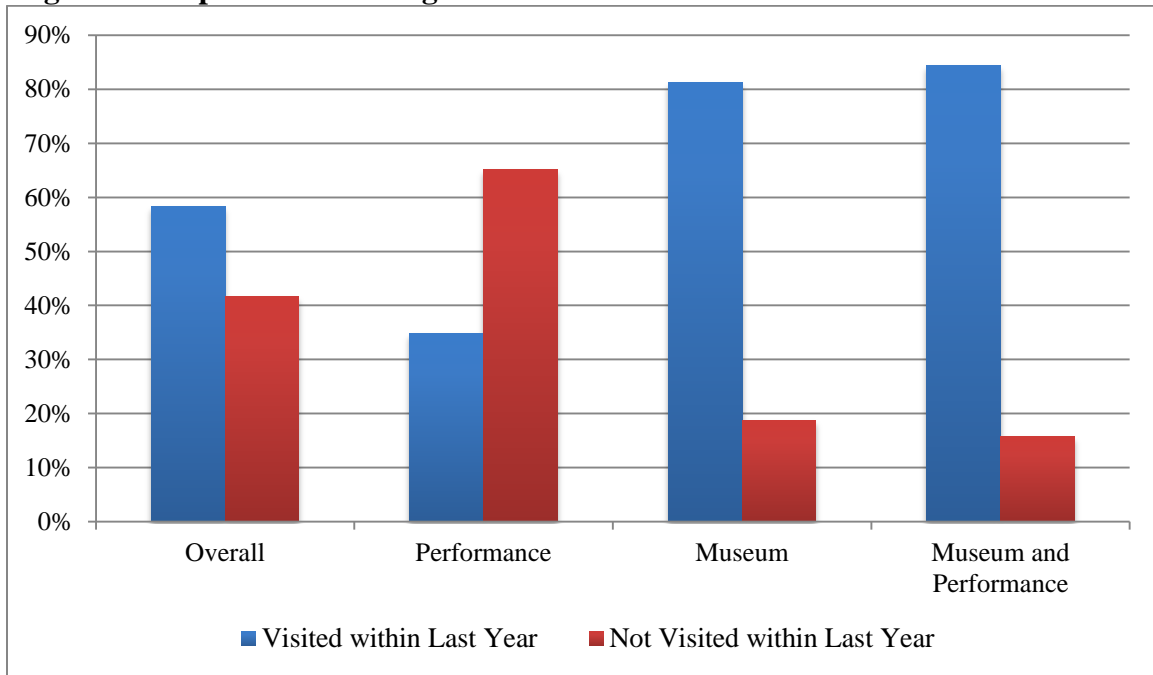
Respondent Type	Yes	No
Overall	18.5%	81.5%
Performance	7.7%	92.3%
Museum	28.5%	71.5%
Museum and Performance	33.3%	66.7%

Figure 4: Status as a Museum Member



More than half of total respondents indicated that they had visited the Clay Center museum, galleries or theater within the last year. While only a little more than one-third of performance-only attendees reported visiting the museum (etc.), more than 80 percent of museum (only) visitors and patrons of both the museum and performances reported a visit within the last year. Figure 5 provides additional detail.

Figure 5: Respondents Visiting the Museum/Galleries/Theater within the Last Year



Of those respondents indicating that they had visited the Clay Center museum, galleries or film theater within the last year, more than half reported between two and five visits. Across the respondent types, answers reflecting either one or two to five visits accounted for at least two-thirds of respondents. Patrons of both the museum and performances reported the highest rates of visits in the ‘six to ten’ or ‘more than ten’ categories. Additional detail is provided in Table 14.

Table 14: Visits to the Clay Center Museum, Galleries or Film Theater within the Past Year

Number of Visits	Overall	Performance	Museum	Museum and Performance
Just once	26.2%	35.1%	21.6%	23.3%
Two to Five	55.5%	58.4%	57.5%	44.2%
Six to ten	7.4%	2.6%	8.2%	14.0%
More than ten	9.8%	2.6%	11.2%	18.6%
Unsure or no answer	1.2%	1.3%	1.5%	0.0%

Table 15 presents responses regarding the typical size of visitor groups to the Clay Center museum, galleries or film theater as provided by survey respondents. Across all respondent types, the most common party size is three to four total in each group, ranging from 44 percent (for museum only visitors) to nearly 70 percent (for patrons of both the museum and performances).

**Table 15: Typical Party Size for Visitors to the Clay Center Museum,
Galleries or Film Theater**

Additional Visitors	Overall	Performance	Museum	Museum and Performance
No additional / just myself	1.6%	3.9%	0.7%	0.0%
One	13.7%	14.3%	14.9%	7.0%
Two or three	50.0%	50.6%	44.0%	69.8%
Four or five	27.3%	22.1%	31.3%	23.3%
Six to ten	4.7%	3.9%	6.7%	0.0%
More than 10	2.3%	5.2%	1.5%	0.0%
Unsure or no answer	0.4%	0.0%	0.7%	0.0%

Respondents were prompted to think back to their most recent visit to the Clay Center museum, galleries or film theater to describe any ancillary activities they undertook during the outing and report approximate levels of expenditures for each of those activities. 33.9 percent of total respondents provided full details regarding extra activities or expenditures in association to visits to the museum, galleries or film theater. The total observations for these variables warrant caution in their interpretation. While these estimates should not be extrapolated to the wider population of total respondents, they are provided for illustrative purposes in Table 16. Of those reporting additional activities undertaken during a visit to the Clay Center museum, galleries or film theater, the most common activity was visiting a restaurant, which accounted for more than half of the responses. Per client expenditures here represent the average expenditure for each activity across all respondents undertaking additional activities.

**Table 16: Additional Activities and Errands during Latest Visit
to Clay Center Museum, Galleries or Film Theater**

Additional Activities	Percentage	Per Client Expenditure
Visit restaurant	59.1%	\$24.27
Visit bar/nightclub	0.7%	\$0.00
Overnight hotel stay	2.0%	\$1.34
Parking	13.4%	\$0.32
Retail shopping	12.1%	\$9.03
Souvenir shopping	3.4%	\$0.13
Visiting other attraction	0.7%	\$1.01
Other	8.7%	\$1.71
		\$37.81

The primary methods respondents reported for obtaining information about upcoming Clay Center activities, films or exhibits were consistent across the various respondent types and also mirror those methods referenced by respondents regarding Clay Center performances. Mailings were reported with the highest frequency for all types of respondents (24.6 to 29.4 percent). Three methods in particular (mailings, newspaper and email notifications) accounted for the majority of responses across all visitor types. Further detail is provided in Table 17.

Table 17: Primary Method for Obtaining Information Regarding Upcoming Activities, Films or Exhibits

	Overall	Performance	Museum	Museum and Performance
Mailing	27.6%	Mailing 27.2%	Mailing 29.4%	Mailing 24.6%
E-Mail	16.0%	E-Mail 17.5%	E-Mail 15.0%	E-Mail 18.5%
Newspaper	15.2%	Newspaper 15.5%	Newspaper 15.0%	Newspaper 13.8%
Brochure	12.1%	Brochure 12.6%	Brochure 11.7%	Brochure 13.8%
Word of Mouth	8.5%	Word of Mouth 9.7%	Word of Mouth 6.5%	Word of Mouth 12.3%
			Other 6.5%	Other 12.3%

Demographics

For classification purposes, respondents were asked a set of questions regarding demographics concerning their household size, age and household incomes. While virtually all respondents provided answers to the household size and age grouping questions, nearly a quarter of respondents declined to provide information regarding their household incomes.

The majority of respondents indicated the presence of two adults and no children in their household. Museum only visitors and patrons of both the museum and performances reported higher rates of children under 18 in their households. Please see Table 18 and Table 19 for additional detail.

Table 18: Adults in Respondent Households

Adults in Household	Overall	Performance	Museum	Museum and Performance
One	21.3%	24.8%	14.9%	26.0%
Two	65.3%	58.4%	75.2%	64.0%
Three	8.9%	10.7%	6.2%	10.0%
Four	4.2%	5.6%	3.7%	0.0%
Five	0.2%	0.5%	0.0%	0.0%

Table 19: Children Under 18 Years of Age in Respondent Households

Children in Household	Overall	Performance	Museum	Museum and Performance
Zero	60.5%	72.3%	50.3%	40.8%
One	13.4%	14.6%	10.6%	18.4%
Two	17.2%	9.4%	23.6%	30.6%
Three	5.9%	2.3%	9.9%	8.2%
Four	1.9%	1.4%	2.5%	2.0%
Five	0.5%	0.0%	1.2%	0.0%
Six	0.7%	0.0%	1.9%	0.0%

Slightly higher rates of respondents within the “35 to 44” age category were observed for museum visitors and patrons of both the museum and performances when compared to performance-only attendees. The reverse held true for the “55 to 64” age grouping, seeing higher rates for performance-only attendees in that grouping when compared to patrons of both the museum and performances. Details of responses regarding age grouping are provided in Table 20.

Table 20: Respondents by Age Grouping

Age Group of Respondent	Overall	Performance	Museum	Museum and Performance
18 to 24	2.3%	2.7%	2.4%	0.0%
25 to 34	12.3%	13.6%	12.1%	7.8%
35 to 44	20.5%	12.2%	27.9%	31.4%
45 to 54	20.0%	23.5%	15.2%	21.6%
55 to 64	23.2%	27.6%	18.8%	17.6%
65 and over	18.2%	15.8%	21.8%	17.6%
No answer	3.4%	4.5%	1.8%	3.9%

More than one quarter of total respondents declined to provide household income information. Noteworthy among the income responses was the rate of incomes in the “\$200,000 or more” who were identified as patrons of both the Clay Center museum and performances. A full breakdown of household income ranges by respondent type is provided in Table 21.

Table 21: Respondents by Household Income Grouping

Household Income Range	Overall	Performance	Museum	Museum and Performance
Under \$25,000	3.4%	2.3%	4.8%	3.9%
\$25,000 to \$49,999	15.3%	14.0%	17.0%	15.7%
\$50,000 to \$74,999	18.9%	18.1%	21.8%	13.7%
\$75,000 to \$99,999	9.3%	10.9%	7.9%	7.8%
\$100,000-\$199,000	17.1%	21.3%	12.7%	13.7%
\$200,000 or more	8.2%	5.9%	6.1%	25.5%
No answer	27.8%	27.6%	29.7%	19.6%

Future Activity and Commentary

Respondents were also asked to rate the likelihood of attending future performances, visiting the museum, galleries or film theater and becoming a museum member or season ticket holder using a five-point Likert scale. The scale provided choices ranging from “Highly Unlikely” to “Highly Likely”, with additional options of both “Somewhat Unlikely”, “Somewhat Likely” and a neutral midpoint.

The majority of those surveyed across all types of respondents indicated that they were either “Somewhat Likely” or “Highly Likely” to attend future Clay Center performances. Only 6.3 percent of total respondents indicated they were not likely to attend in the future. A full breakdown by respondent type regarding future attendance to Clay Center performances is provided in Table 22.

Table 22: Likelihood of Attending Future Performances

Attend Performances in the Future	Overall	Performance	Museum	Museum and Performance
Highly Unlikely	4.4%	2.3%	6.8%	5.9%
Somewhat Unlikely	1.9%	1.4%	3.1%	0.0%
Neither	6.0%	5.1%	8.6%	2.0%
Somewhat Likely	13.0%	8.8%	21.0%	5.9%
Highly Likely	74.8%	82.5%	60.5%	86.3%

Again, the majority of those surveyed across all types of respondents indicated that they were either “Somewhat Likely” or “Highly Likely” to attend the Clay Center museum, galleries or film theater in the future. This held in higher rates for museum visitors and patrons of both performances and the museum in comparison to performance-only attendees. Nearly one-third of performance-only attendees provided a neutral response in regards to future visits to the museum, galleries or film theater. Please see Table 23 for more detail.

Table 23: Likelihood of Visiting Museum, Galleries, or Film Theater

Visit Museum, Galleries, or Film Theater in the Future	Overall	Performance	Museum	Museum and Performance
Highly Unlikely	6.7%	9.2%	4.3%	3.9%
Somewhat Unlikely	5.6%	8.3%	1.9%	5.9%
Neither	21.5%	32.3%	11.7%	7.8%
Somewhat Likely	14.8%	14.7%	17.3%	5.9%
Highly Likely	51.4%	35.5%	64.8%	76.5%

When asked about the likelihood of becoming either a museum member or season ticket holder, a large number of respondents across most respondent types indicated that it was “Highly Unlikely”. It should be noted, however, that nearly half of those respondents identified as patrons of both the museum and performances indicated that they were “Highly Likely” to either retain or pursue that status in the future. Full detail regarding future museum membership and/or season ticket purchases is provided in Table 24.

Table 24: Likelihood of Becoming a Museum Member or Purchasing Season Tickets

Become a Museum Member or Purchase Season Tickets in the Future	Overall	Performance	Museum	Museum and Performance
Highly Unlikely	36.3%	46.1%	29.6%	17.6%
Somewhat Unlikely	12.5%	11.1%	16.0%	5.9%
Neither	17.1%	18.4%	14.2%	19.6%
Somewhat Likely	9.0%	7.8%	11.1%	7.8%
Highly Likely	25.0%	16.6%	29.0%	49.0%

Upon completing the survey, respondents were given the opportunity to provide any comments regarding the Clay Center. More than three-quarters of respondents provided some form of additional comment.

Focus Group Insights

In an effort to collect additional intangible information pertaining to the Clay Center and its operations, a focus group discussion was conducted with 14 Clay Center board members. The discussion hour allowed members to state effective operations of the Clay Center, how the organization can improve and visions for the future.

The attending members of the board did not lack answers when questioned about the benefits of the Clay Center. The board members noted that the organization provides quality educational outreach programs, exposure to arts and science for the community and school children and music outreach programs. Members also noted that the Clay Center provides a wide variety of

performances which have been successful. Members also discussed that the Clay Center provides more than just performances, but provides an infusion of culture, diversity and new experiences into the local area. While it was mentioned that this is difficult to quantify, the change in West Virginia culture benefits both individuals and businesses.

While the Clay Center has been successful in many areas, the board members in attendance also noted areas where the organization and its operations can improve. Multiple members discussed the idea that more memberships should be sold to improve the financial situation of the Clay Center. Another idea mentioned was to create partnerships with other museums through brochure distribution and website links to increase visitor numbers and awareness. Other ideas mentioned to specifically improve the financial position of the Clay Center included raising more money for the endowment fund, increasing membership revenues and expanding government support.

Members were also asked to describe their vision and ideas for the Clay Center. One member proposed adding a small theater which would seat about 500 to 600 people. Another member recommended initiating a Junior Board to incorporate younger patrons from middle school age to the college level. The members were largely in agreement of future recommendations for the Clay Center, including additional community outreach projects, co-branded events and partnerships with other businesses and increasing visibility of the Clay Center.

Conclusions

The results of the research are robust. As one major study reported:

“...high-skilled technical workers can choose where they want to live... Because they can pick and choose their locations, they choose those with quality amenities... Managers like to live in nice places just as much as workers... Executives consistently rank both labor supply and quality of life as top location factors... [Regions] can build their economic base by focusing on what is desirable to technology workers” (Portland 2002).

The Clay Center and the WVSO provide an important art, science and cultural amenity which are consistent with what is needed for West Virginia’s economic development. As demonstrated in this report, when a community nurtures its cultural sector, it is nurturing its own long-term economic development.

The Clay Center is having a significant economic impact on the region, in addition to the amenity value it creates. The 227,000 attendees who visited the Clay Center and enjoyed the WVSO testify to its worth and importance to the State. Providing an enriching opportunity for 60,000 youth creates the prospect of a new creative and technology savvy workforce.

If the Clay Center was a traditional business its economic impact would be impressive. With 379 jobs created, over \$16 million in output and \$6.7 million in personal income, the Center and the WVSO are major businesses. Add to these figures the unpaid hours of the volunteers and the economic impact is obvious.

The value of the Clay Center to those who visited and participated was established by the responses received from the answers provided by patrons to a phone survey. Many of these answers have been provided throughout the report. Over 86 percent of those attending a performance and visiting the museum are “highly likely” to continue to participate in the future. This percentage speaks to the value the patrons place on the activities of the Clay Center.

This study has shown that the Clay Center and the WVSO are an essential part of the cultural vitality of the State. Without the Clay Center, a significant business would not be present and jobs would be lost. The contribution the Clay Center makes to attract the types of jobs and firms the State needs for economic development cannot be overlooked. Unfortunately, while not all the benefits of having a world class facility are capable of being expressed in terms of money, such benefits are real. The positive image of the State to which the Clay Center makes a major contribution sends a message that West Virginia values the quality of life of its residents.

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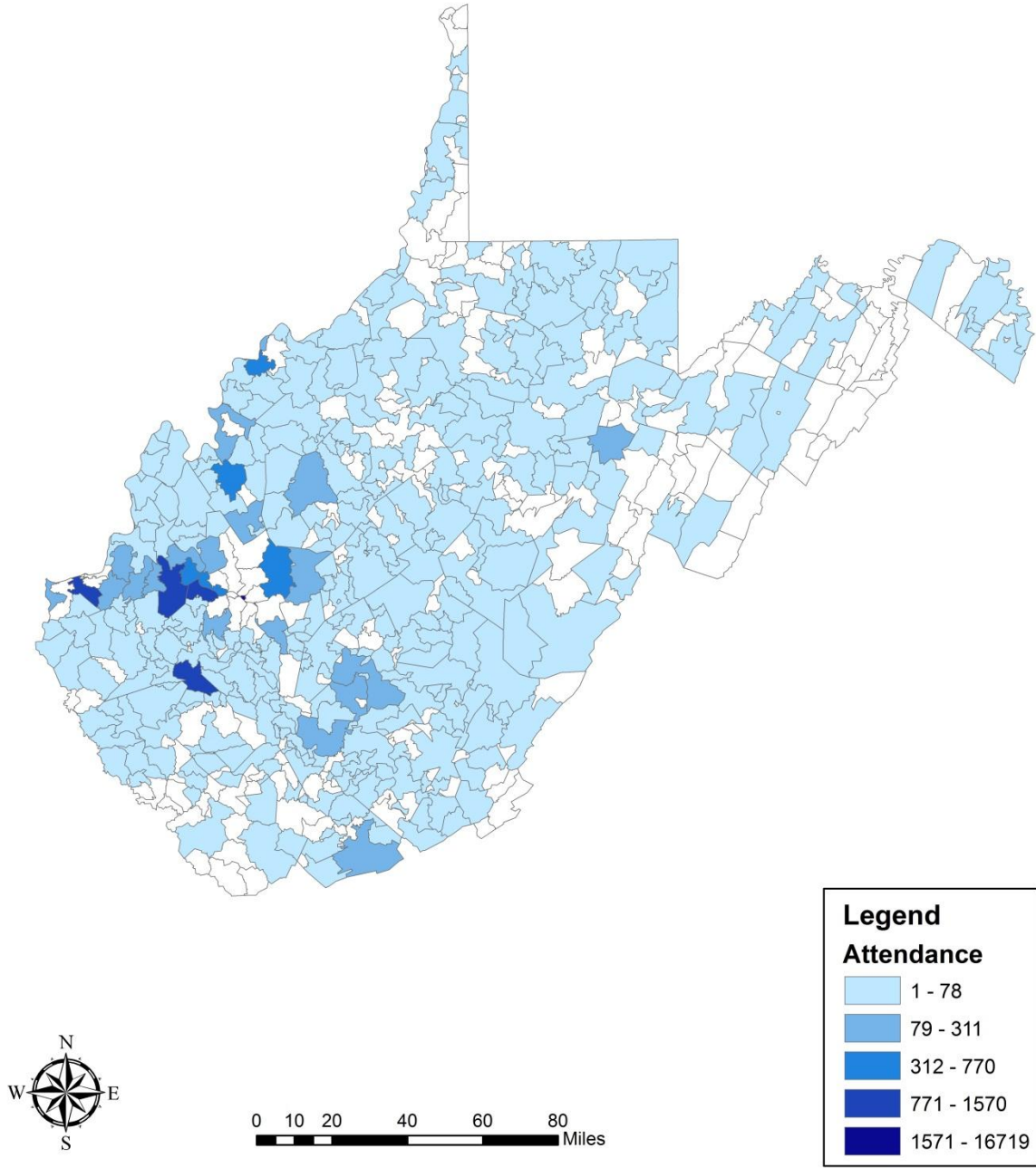
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Appendix A – Attendee Origin by Zip Code

Clay Center Attendance by West Virginia Zip Code



Appendix B – Attendee Survey

CLAY CENTER FOR THE ARTS AND SCIENCES IN WEST VIRGINIA - Attendee Survey

Hello! My name is _____ and I'm calling from Marshall University's Center for Business and Economic Research on behalf of the Clay Center for the Arts and Sciences of West Virginia. We are contacting visitors to help us understand their experiences with the Center. Would you be willing to help us out by answering a few questions?

Our interviews must be with an adult 18 or over. Are you at least 18 years of age? YES NO

(SURVEYOR, IF NO, ask if someone else in the household is available to answer the questions.

IF NO ONE ELSE is available, then thank and ask if there is a better time to reach someone to respond to the survey.)

1. Are you a current Clay Center Season Ticket Holder? YES NO

2. Have you attended a Clay Center performance within the past year? YES NO

NOTE: IF NO to BOTH Q1 and Q2, skip to Q9.

IF YES then continue to Q3.

3. For Clay Center Season Ticket Holders – how many season tickets do you buy? _____

4. Approximately how many Clay Center performances have you attended in the past year? _____

5. Approximately how many performances at the Clay Center have you attended in total? _____

6. Are you a season ticket holder to any performing arts series *other than* at the Clay Center? YES NO

7. How do you usually hear about upcoming Clay Center performances?

- | | | |
|--|---|--|
| <input type="checkbox"/> Clay Center Website | <input type="checkbox"/> Performer/Artist Website | <input type="checkbox"/> Other Website |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> Brochure | <input type="checkbox"/> E-Mail |
| <input type="checkbox"/> Television | <input type="checkbox"/> Radio | <input type="checkbox"/> Mailing |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Word of Mouth | <input type="checkbox"/> Other _____ |

8. Thinking of your last visit to the Clay Center for an event, what other activities or errands did you undertake?

NOTE: For affirmative answers: Approximately how much money did you spend during that activity?

Activity	Expenditure	Activity	Expenditure
<input type="checkbox"/> Visit restaurant		<input type="checkbox"/> Retail shopping	
<input type="checkbox"/> Visit bar/nightclub		<input type="checkbox"/> Souvenir shopping	
<input type="checkbox"/> Overnight hotel stay		<input type="checkbox"/> Visiting other attraction	
<input type="checkbox"/> Parking		<input type="checkbox"/> Other _____	

9. Are you a current Clay Center museum member? YES NO

10. Have you visited the Clay Center museum, galleries or film theater within the past year? YES NO

NOTE: IF YES THEN ASK Q11. IF NO SKIP TO Q15.

11. Approximately how many times have you visited the Clay Center museum, galleries or film theater within the past year?

- | | | |
|--|--|-------------------------------------|
| <input type="checkbox"/> Just once | <input type="checkbox"/> Two to Five | <input type="checkbox"/> Six to ten |
| <input type="checkbox"/> More than ten | <input type="checkbox"/> Unsure or no answer | |

12. Thinking about your typical visit to the Clay Center museum, galleries or film theater, how many people (in addition to yourself) generally accompany you?

- | | | |
|--|-------------------------------------|---------------------------------------|
| <input type="checkbox"/> None/just myself | <input type="checkbox"/> One | <input type="checkbox"/> Two or three |
| <input type="checkbox"/> Four or five | <input type="checkbox"/> Six to ten | <input type="checkbox"/> More than 10 |
| <input type="checkbox"/> Unsure or no answer | | |

13. Now thinking about your last visit to the Clay Center museum, galleries or film theater, what other activities or errands did you undertake?

NOTE: For affirmative answers: Approximately how much money did you spend during that activity?

Activity	Expenditure	Activity	Expenditure
<input type="checkbox"/> Visit restaurant		<input type="checkbox"/> Retail shopping	
<input type="checkbox"/> Visit bar/nightclub		<input type="checkbox"/> Souvenir shopping	
<input type="checkbox"/> Overnight hotel stay		<input type="checkbox"/> Visiting other attraction	
<input type="checkbox"/> Parking		<input type="checkbox"/> Other_____	

14. How do you usually hear about upcoming activities, films or exhibits at the Clay Center galleries?

- | | | |
|--|---|--|
| <input type="checkbox"/> Clay Center Website | <input type="checkbox"/> Performer/Artist Website | <input type="checkbox"/> Other Website |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> Brochure | <input type="checkbox"/> E-Mail |
| <input type="checkbox"/> Television | <input type="checkbox"/> Radio | <input type="checkbox"/> Mailing |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Word of Mouth | <input type="checkbox"/> Other _____ |

The remaining questions are for classification purposes only.

15. Including yourself, how many persons 18 years of age and older live in your household?

- _____ (Number) Don't know Refused

16. How many children 17 years of age or younger live in your household?

- _____ (Number) Don't know Refused

17. Please indicate into which of the following broad age groups you fall.

- | | | |
|-----------------------------------|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> 18 to 24 | <input type="checkbox"/> 25 to 34 | <input type="checkbox"/> 35 to 44 |
| <input type="checkbox"/> 45 to 54 | <input type="checkbox"/> 55 to 64 | <input type="checkbox"/> 65 and over |

18. In which of the following ranges does your household income fall?

- | | | |
|---|---|---|
| <input type="checkbox"/> Under \$25,000 | <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$74,999 |
| <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$100,000-\$199,000 | <input type="checkbox"/> \$200,000 or more |

19. Please rate the following statements on a scale of 1 to 5, with 1 being “Highly unlikely” and 5 being “Highly likely”.

	Highly Unlikely	Somewhat Unlikely	Neither Likely or Unlikely/Unsure	Somewhat Likely	Highly Likely
I will attend performances at the Clay Center in the future.	1	2	3	4	5
I will visit the museum, galleries, or film theater in the future.	1	2	3	4	5
I will buy/renew a membership to the Clay Center.	1	2	3	4	5

20. What comments, if any, do you have regarding your experiences with the Clay Center for the Arts and Sciences of West Virginia?

Thank you very much for your participation! We appreciate your assistance in helping us better understand the relationship between the Clay Center and its patrons. Should you have any questions regarding this survey please contact Kent Sowards at (304) 696-4817.