

A photograph of a grand theater interior, showing the stage, audience seating, and ornate architectural details. The stage is lit with blue and red lights, and the audience seating is arranged in a semi-circle. The ceiling is high and features a large circular light fixture and ornate architectural details. The overall atmosphere is one of elegance and grandeur.

STAGING CLEVELAND

A THEATER INDUSTRY STUDY



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A THEATER INDUSTRY STUDY



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Front Cover: The Allen Theatre Complex in Playhouse Square is shared with Cleveland Play House, Cleveland State University's Department of Theatre and Dance and Case Western Reserve University's MFA Acting Program. Photo courtesy of Playhouse Square

This Page: The ensemble of *Objectively Reasonable Revival*. February–March 2017, Playwrights Local. Photo by Tom Kondilas

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The theater sector's presence in
Northeast Ohio is profound.



Case Western Reserve University undergraduate theater students performing in *The Addams Family* at Eldred Theater, 2016. Photo by Steve Wagner

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?

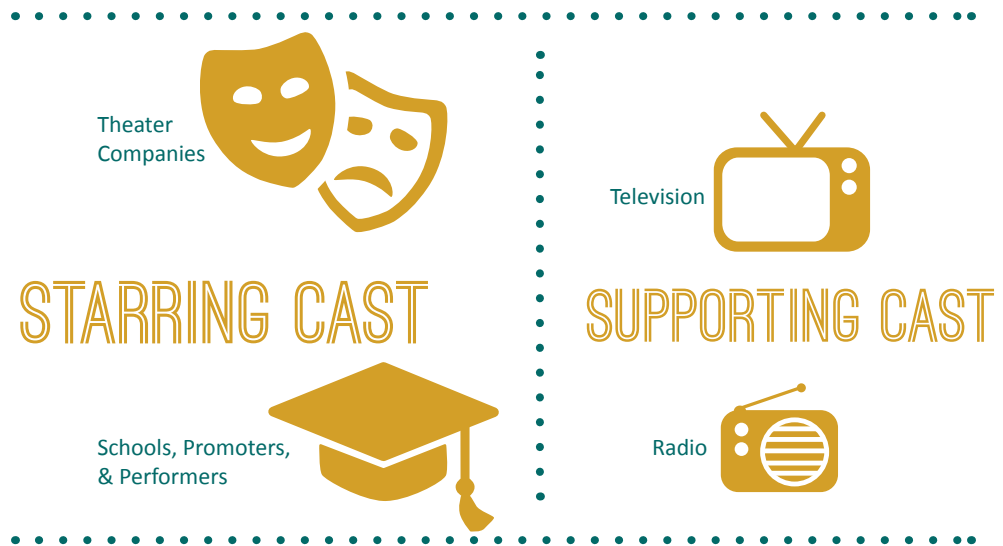
This study uses a quantitative framework to examine the economic impact of the theater industry in Cuyahoga County. Using qualitative and quantitative data, this study examines the occupations and businesses associated with the Cleveland theater sector, analyzes the landscape of theaters in Cuyahoga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

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).

FIGURE I. Typology of Theater Sector



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.

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 cast of *You Can't Take it With You*, 2017. Photo by Mark Horning

Karamu House stands tall in our nation's history as an inclusive institution that served as a common ground for Clevelanders of different races, religions, and social and economic backgrounds, as well as a trusted community resource for local families.

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%).

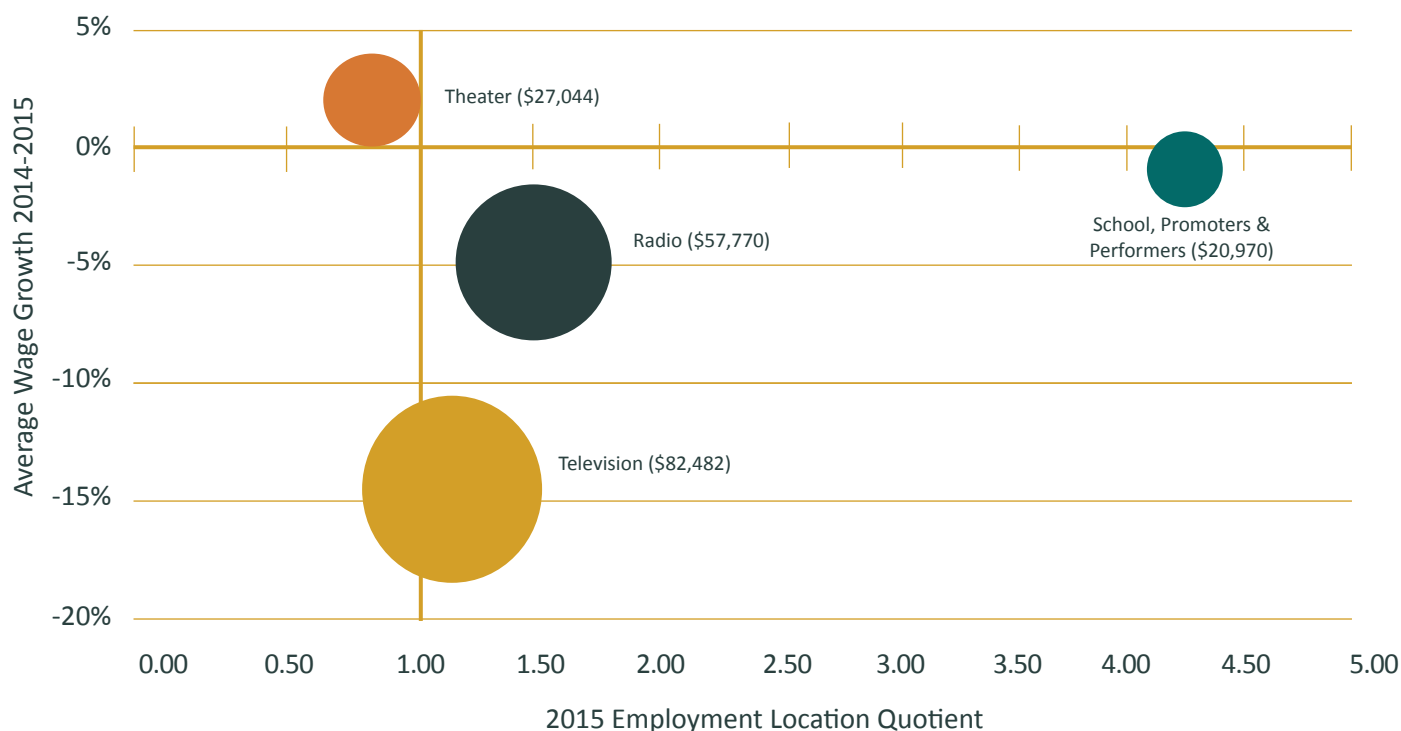
Figure II shows the 2015 Location Quotient (LQ) for Cuyahoga County's theater sector and the average wage growth from 2014 to 2015. The LQ assesses the Cleveland theater sector's employment in each subsector, comparing it with the employment of theater subsectors in the U.S. in 2015. LQ describes the 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.



The theater sector in Cuyahoga County had 2,339 employees in 2015.

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.

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 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.

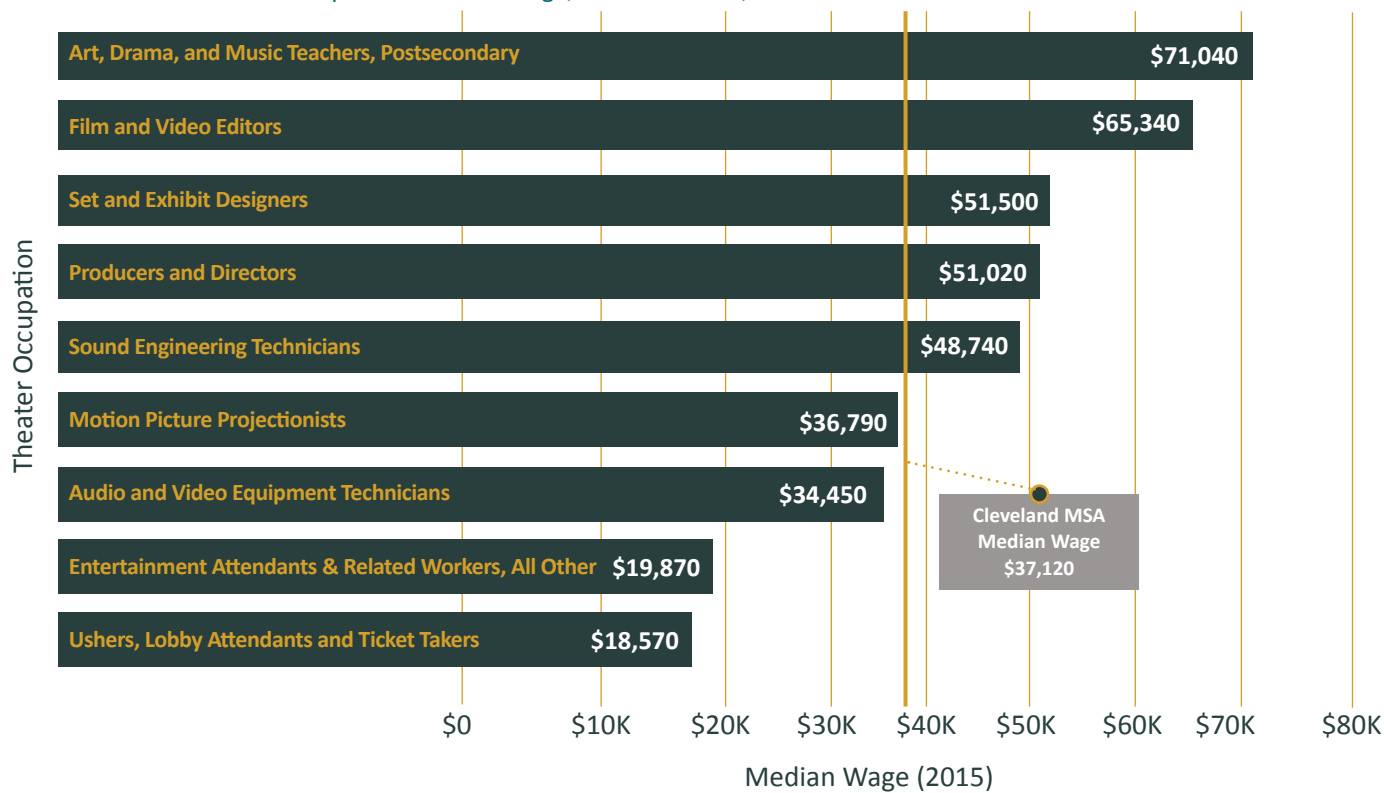
TABLE I: Theater and Total Occupational Employment in the Cleveland MSA, 2010-2015

	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

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.

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

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.



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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").

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.

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
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

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

Organization	City
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

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 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

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

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.

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.

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>

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

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.



Television and Radio sectors...may help expand job opportunities for on-stage or technical talent and may sustain their theater careers with steady work.

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

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

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.



Community theaters in Northeast Ohio are an important asset to the overall ecosystem.

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

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 IV: Economic Impact of Cleveland Theater Sector by Subsector

Impact Type	Employment	Labor Income	Value Added	Output	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.

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.

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



Gordon Square Arts District continues to garner national attention.

Opposite Page: *This is NOT About My Dead Dog*, Image of Amy Schwabauer. Photo by Dale Heinen

Playwrights Local is dedicated to supporting the dramatists of Northeast Ohio. As a playwrights' development and production center, they foster diverse talents and present locally written works. Playwrights Local strives to increase the impact of original theater on the community and to raise the profile of area playwrights both within Greater Cleveland and beyond.

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 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.

Students of the Cleveland School of the Arts in the Festival of New Works. Photo by Michael T. Thornburg

Cleveland School of the Arts is a specialty arts school in the Cleveland Municipal School District (CMSD) that incorporates all aspects of the arts into its teaching approach.



CHAPTER ONE

TYOLOGY 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

* View full appendices and methods at cultureforward.org/StagingCleveland

the theater industry. The core categories are *Theater* and *Schools, Promoters, & Performers* and the peripheral categories are *Television* and *Radio* (Table 1, Figure 1).

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”

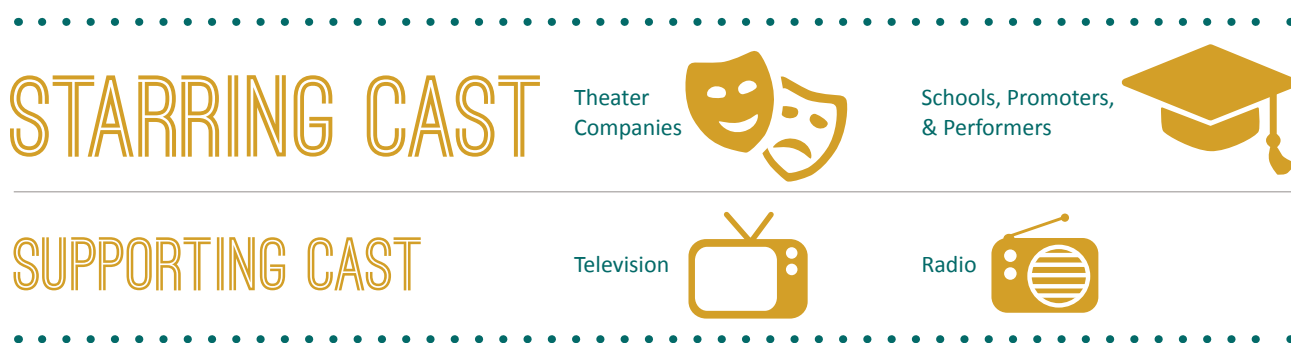
Since the theater is not a large sector and only encompasses eight NAICS categories, some categories were combined to ensure confidentiality for individual businesses. These four groupings were created to best describe the businesses contained in the theater sector in Cuyahoga County. The *Theater* grouping 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.

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 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



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

TREND ANALYSIS

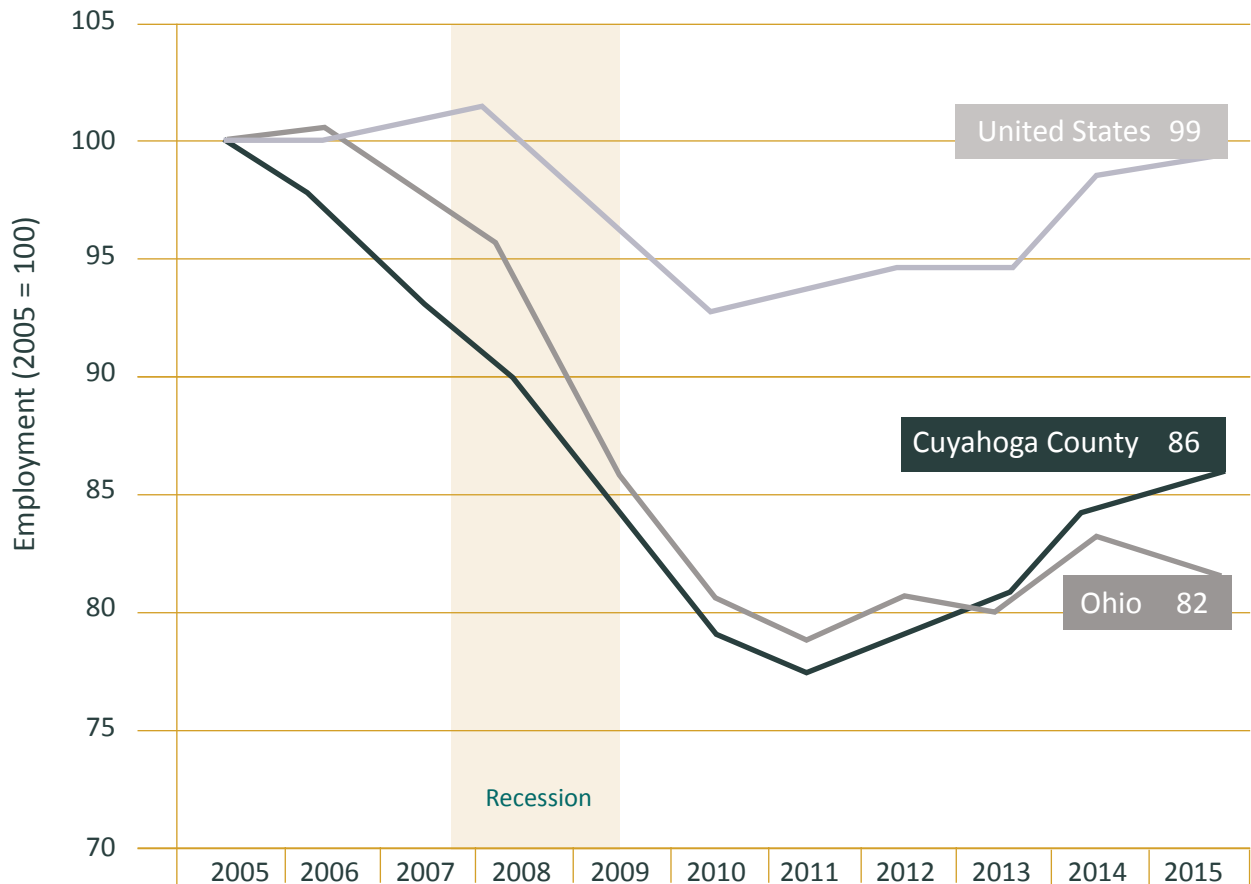
This section of the report contains the economic trend analysis of the Cleveland theater sector in Cuyahoga County. This analysis offers information on the establishments, employment, and wages in the Cleveland theater sector and how this sector has changed over the last 11 years (2005 to 2015).

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

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



Source: Quarterly Census of Employment and Wages (QCEW)

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)

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.

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.*

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

* View full appendices and methods at cultureforward.org/StagingCleveland

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

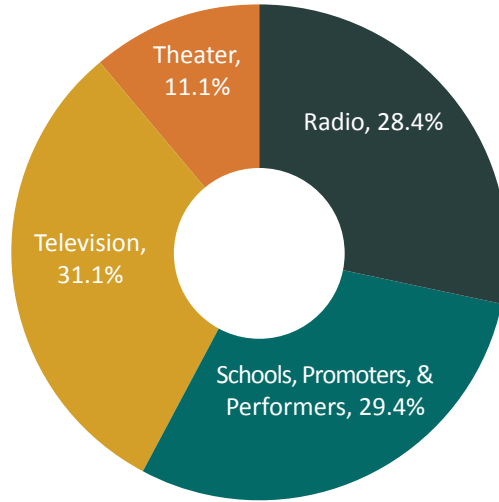
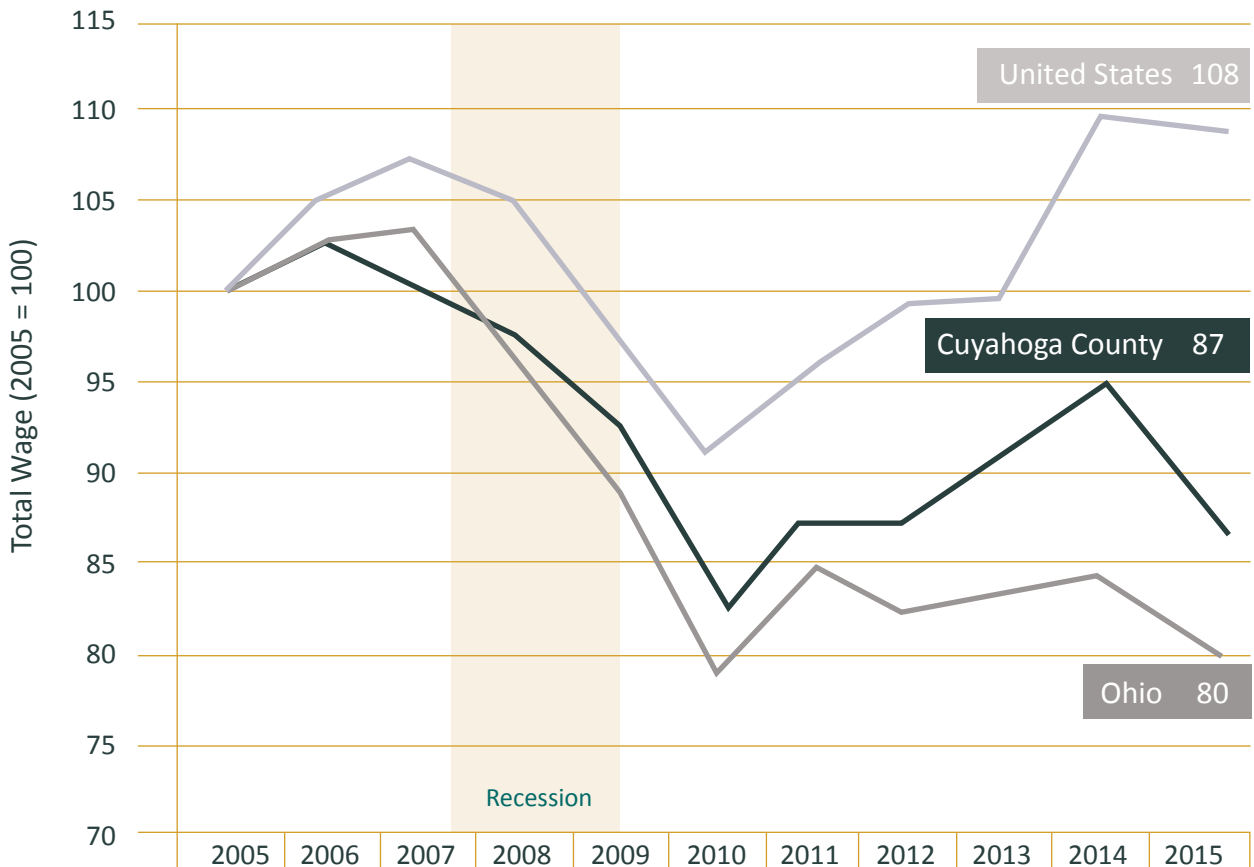


FIGURE 4. Theater Total Payroll in Cuyahoga County, Ohio & U.S., 2005-2015



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.

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.

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.*

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%).

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

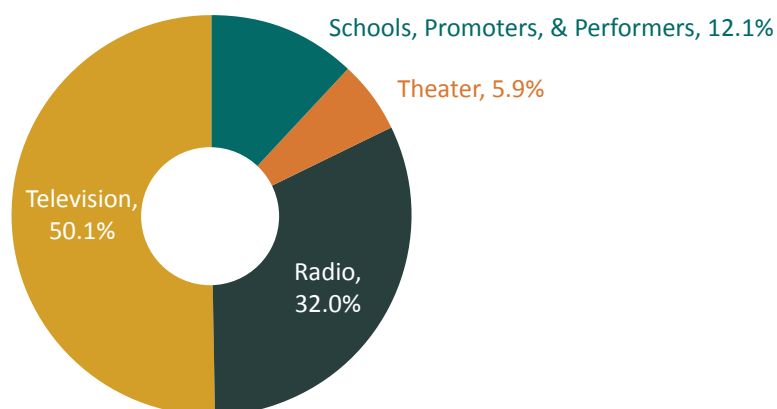
Theater Category	2005 (\$Mil)	2014 (\$Mil)	2015 (\$Mil)	2005-2015 % Change	2014-2015 % Change
Radio	\$47.4	\$40.1	\$38.3	-19.1%	-4.4%
Schools, Promoters, & Performers	\$14.1	\$13.6	\$14.4	2.4%	5.9%
Television	\$67.8	\$70.8	\$59.9	-11.6%	-15.3%
Theater	\$9.0	\$7.1	\$7.0	-21.3%	-0.2%
Total in Cuyahoga 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.

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

Source: Quarterly Census of Employment and Wages (QCEW)



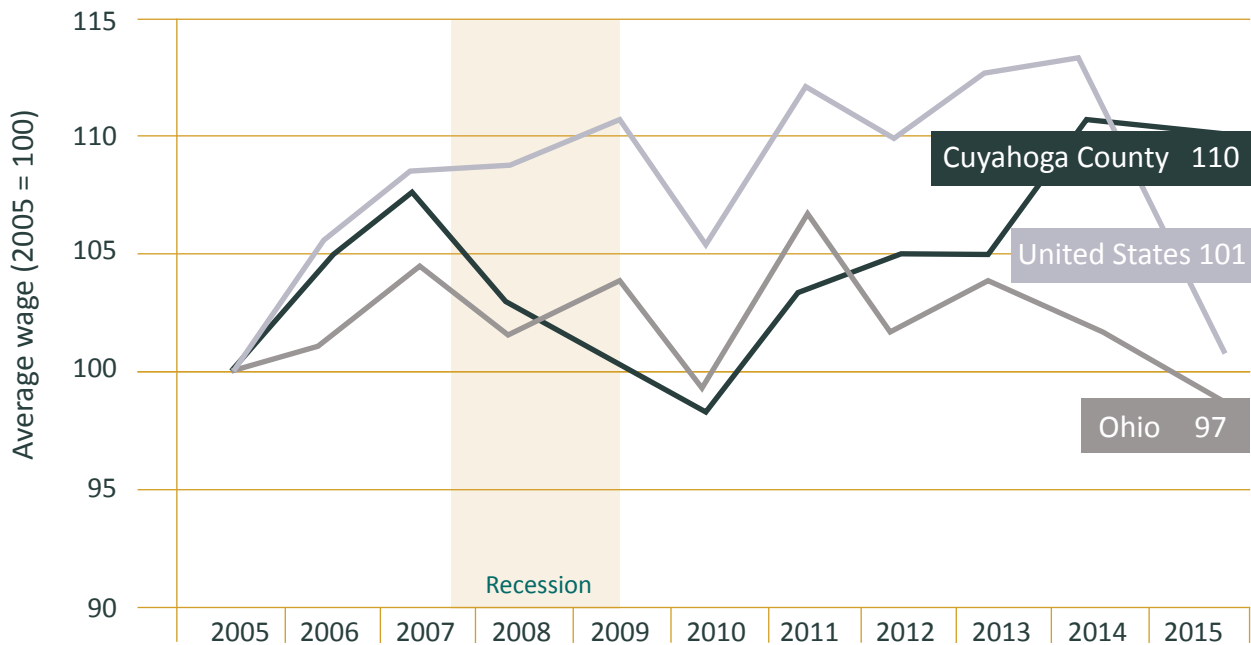
* View full appendices and methods at cultureforward.org/StagingCleveland

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.

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

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

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.*

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, & Performers* (\$20,907).

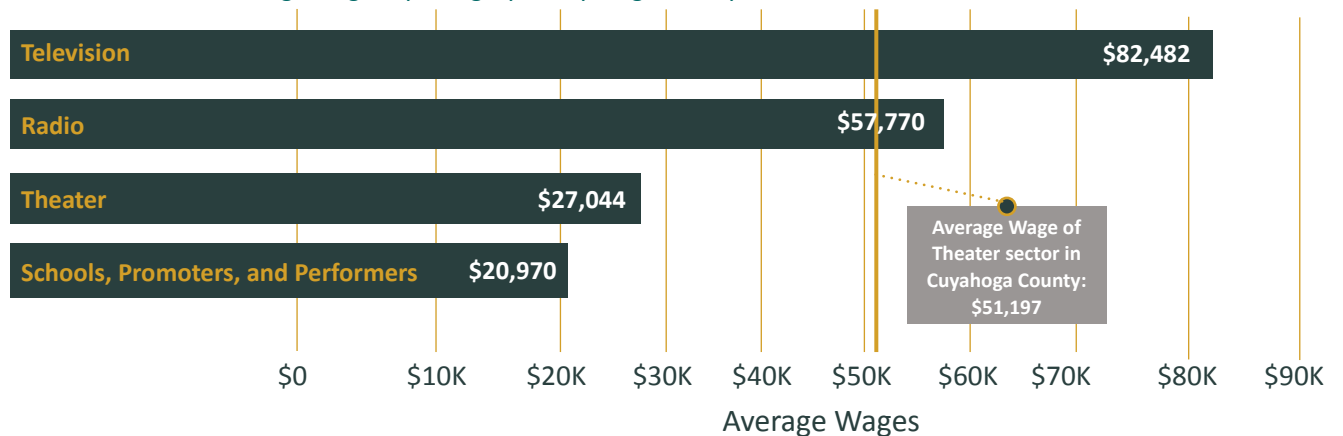
TABLE 4. Theater Total and Category’s Average Wage, 2005, 2014 & 2015

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. Theater Average Wages by Category in Cuyahoga County, 2015



Source: Quarterly Census of Employment and Wages (QCEW)

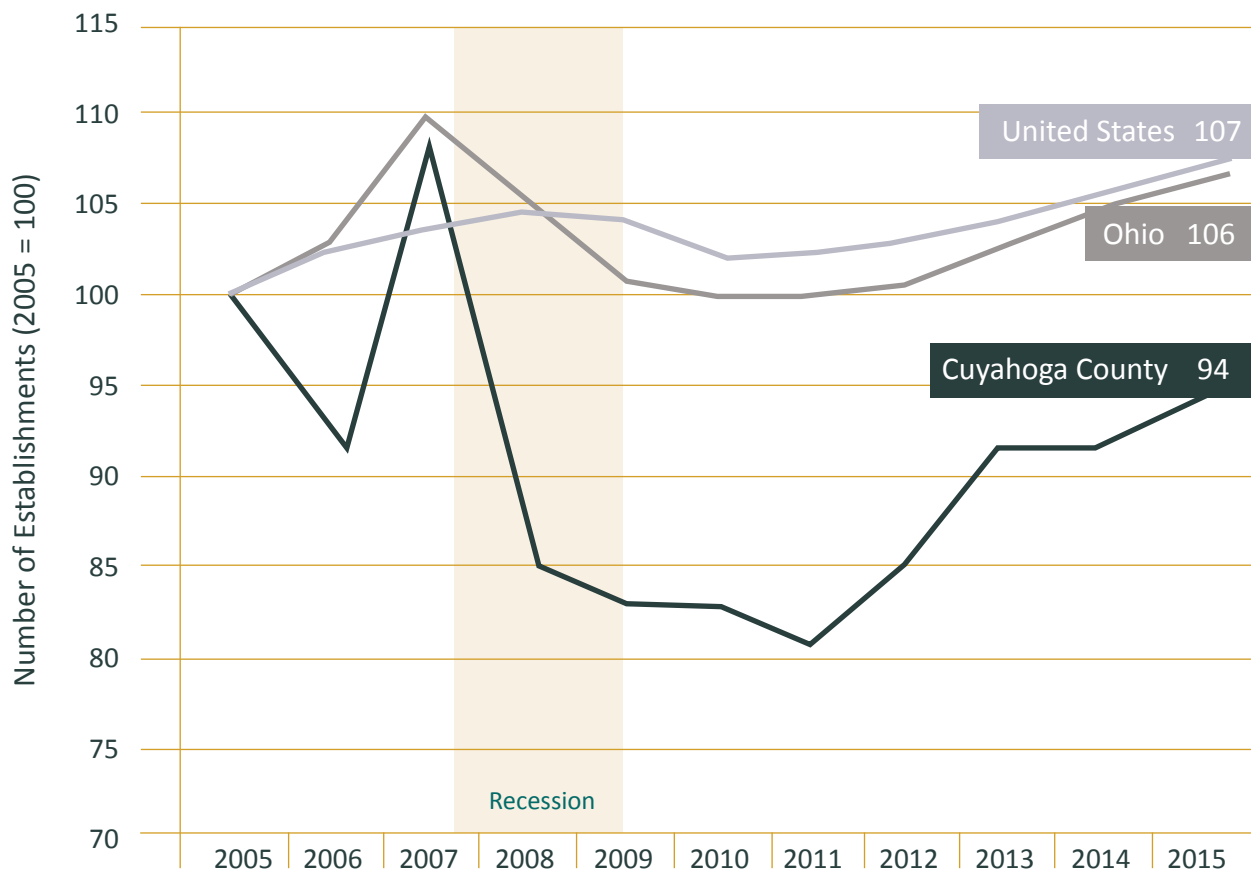
* View full appendices and methods at cultureforward.org/StagingCleveland

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.).

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

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



Source: Quarterly Census of Employment and Wages (QCEW)

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

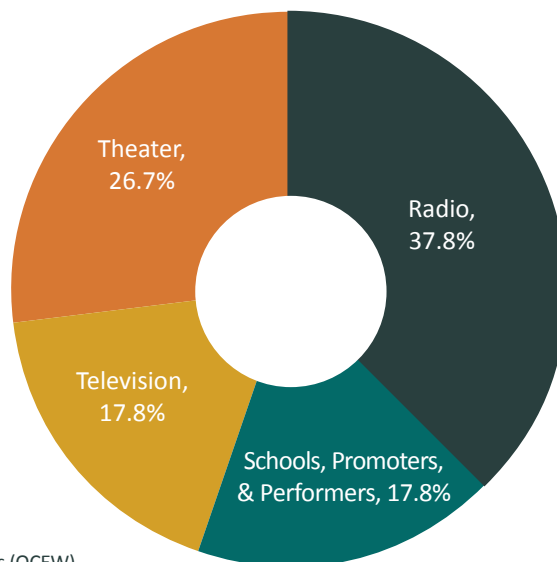
Theater Category	2005	2014	2015	2005-2015 % Change	2014-2015 % Change
Radio	21	18	17	-19.0%	-5.6%
Schools, Promoters, & Performers	9	9	8	-11.1%	-11.1%
Television	6	7	8	33.3%	14.3%
Theater	12	10	12	0.0%	20.0%
Total in Cuyahoga County	48	44	45	-6.3%	2.3%
Total in Ohio	293	307	311	6.2%	1.1%
Total in U.S.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

Source: Quarterly Census of Employment and Wages (QCEW)

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.*

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)

* View full appendices and methods at cultureforward.org/StagingCleveland



The cast of *In the Heights* performs on Beck Center's Mackey Theater stage. Photo by Roger Mastroianni

Beck Center for the Arts is a non-profit, performing arts and arts education organization dedicated to inspiring and enriching the quality of life for Northeastern Ohioans. Beck Center combines professional theatrical productions with comprehensive curriculum-based arts education in Creative Arts Therapies, dance, music, theater, and visual arts, serving over 60,000 annually in Cuyahoga, Lorain, Lake, Medina, and Summit Counties.

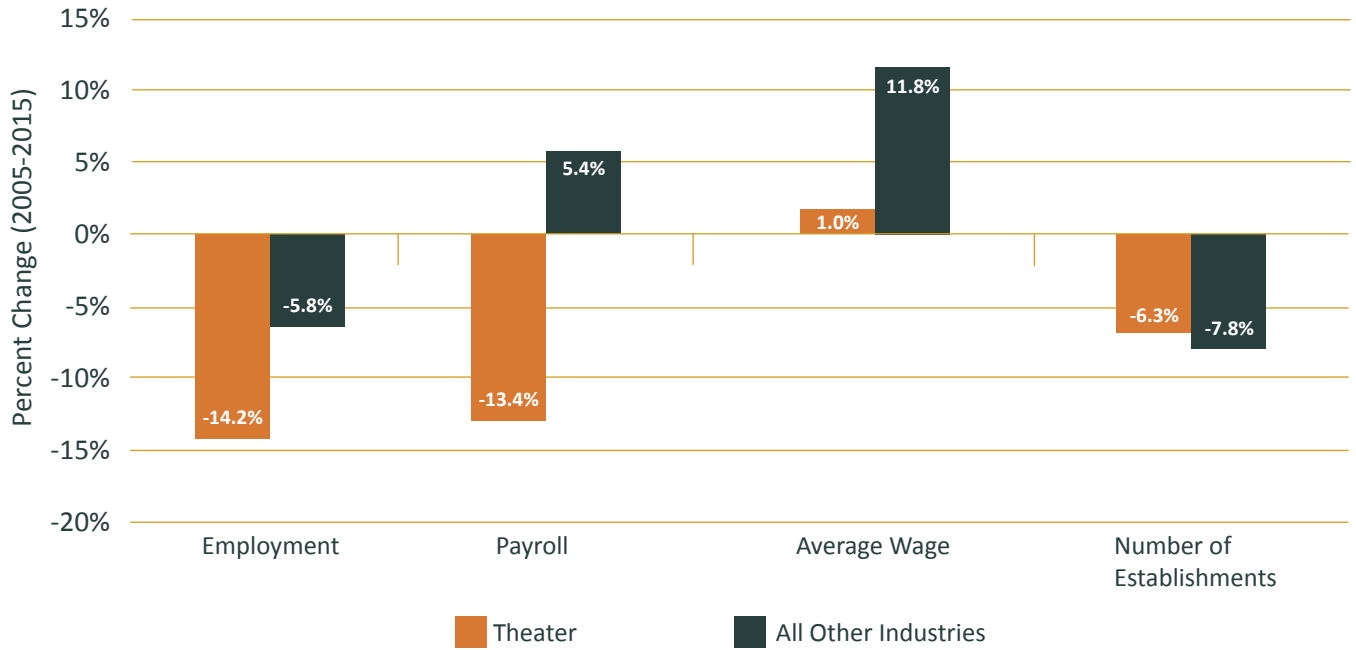
THEATER SECTOR VS. ALL INDUSTRIES

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 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.

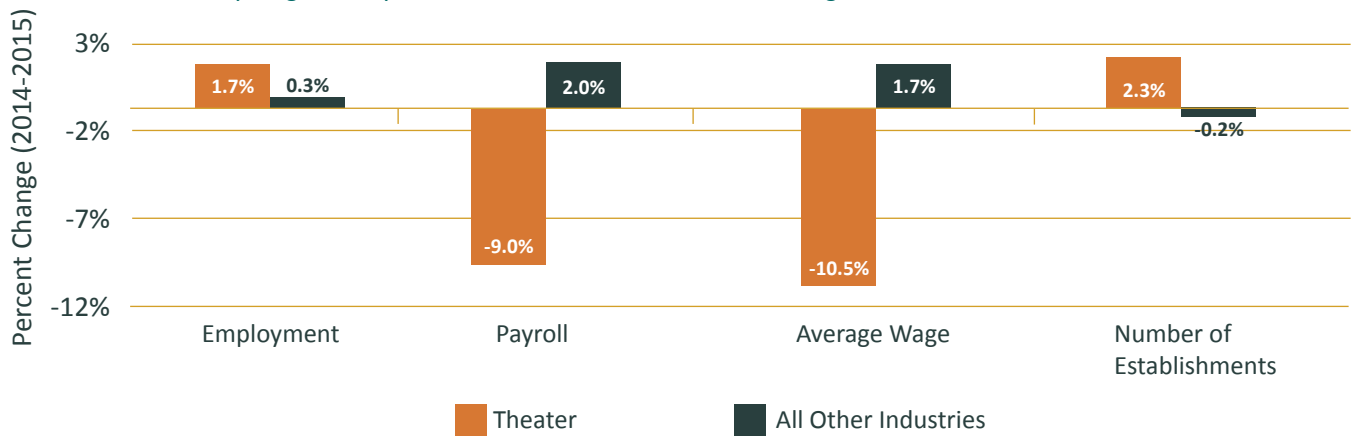
Figure 12 shows the 2015 Location Quotient (LQ) for Cuyahoga County's theater sector and average wage growth from 2014 to 2015. The LQ assesses Cleveland theater employment in each subsector, comparing it with the employment of theater subsectors in the U.S. in 2015. An LQ describes the local concentration 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

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



Source: Quarterly Census of Employment and Wages (QCEW)

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



Source: Quarterly Census of Employment and Wages (QCEW)

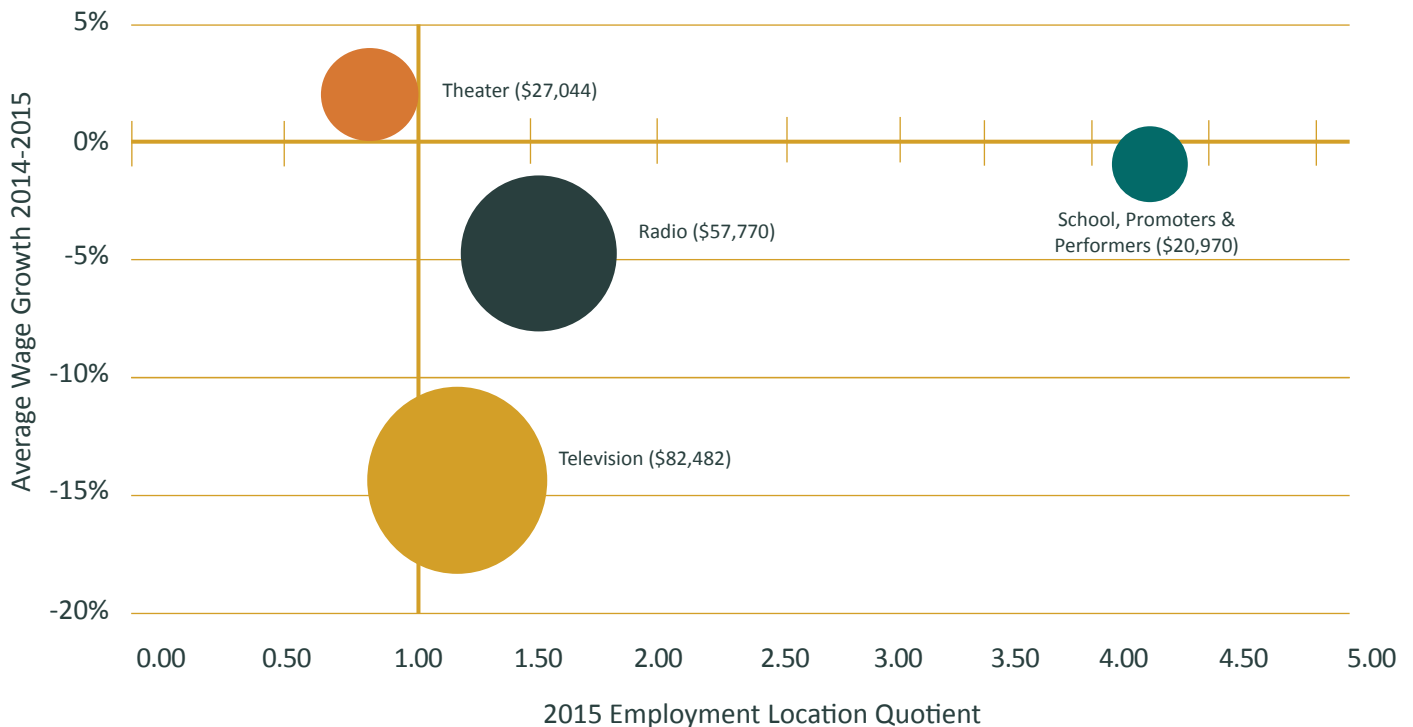
Opposite page: Production of *Hair*. Photo by Andy Dudik
 Blank Canvas Theatre provides professional quality productions, placing emphasis on entertainment at affordable prices.

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.

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.

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.





Heights Youth Theatre (HYT) Production of *Aladdin*, 2014.
Photo by Patrick R. Murphy/PRM Digital Productions

HYT is a non-profit organization that has been committed to providing quality children's theatre on the East Side of Cleveland for 64 years. Their Mission Statement says it best—HYT exists to create quality live theater that entertains its audiences and educates, encourages and inspires its young artists to grow!

CHAPTER TWO

OCCUPATIONAL ANALYSIS

Examining what people do is just 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.*

¹⁴ 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

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OCCUPATIONAL ANALYSIS

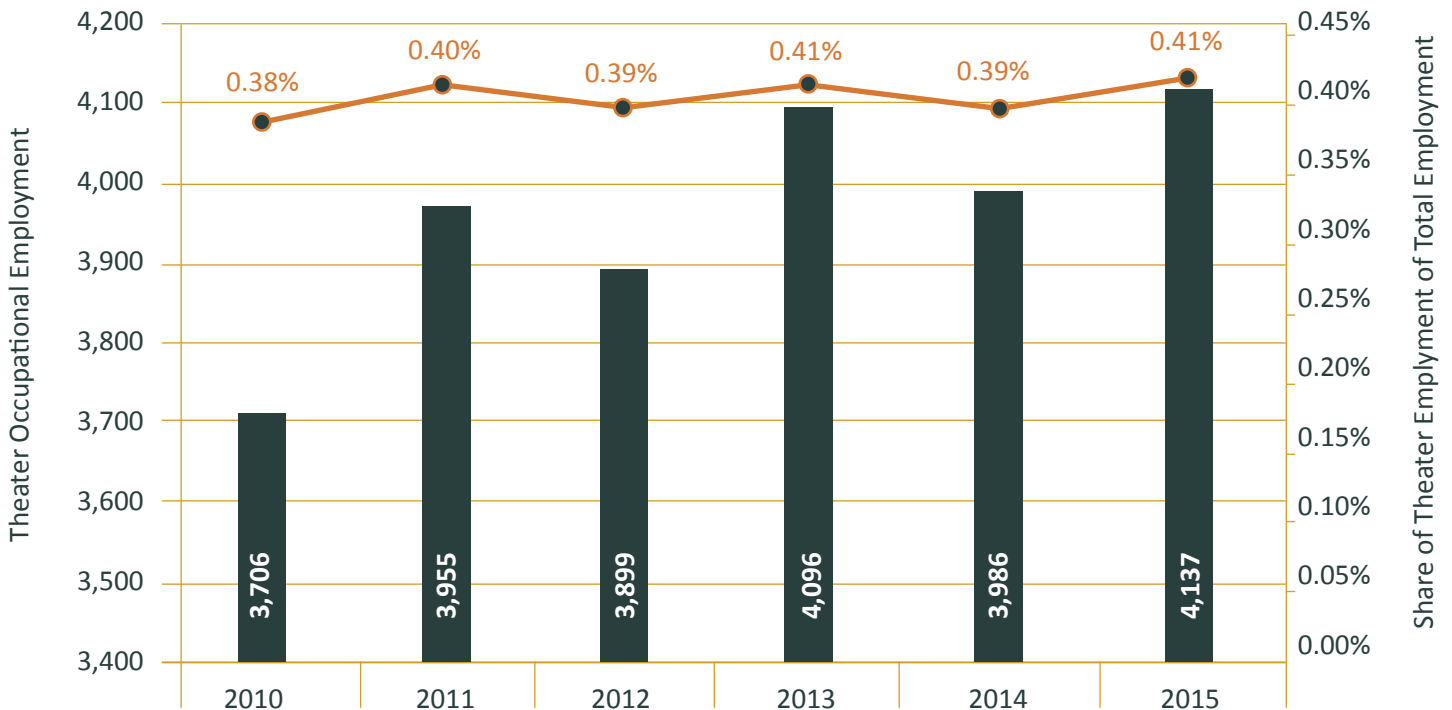
Table 6 presents the total occupational employment of the theater sector, the total employment of all occupations, and the share the theater sector represents out of all occupational employment in the Cleveland MSA. Over the last five years, employment in theater occupations hovered around 4,000 workers, 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.

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

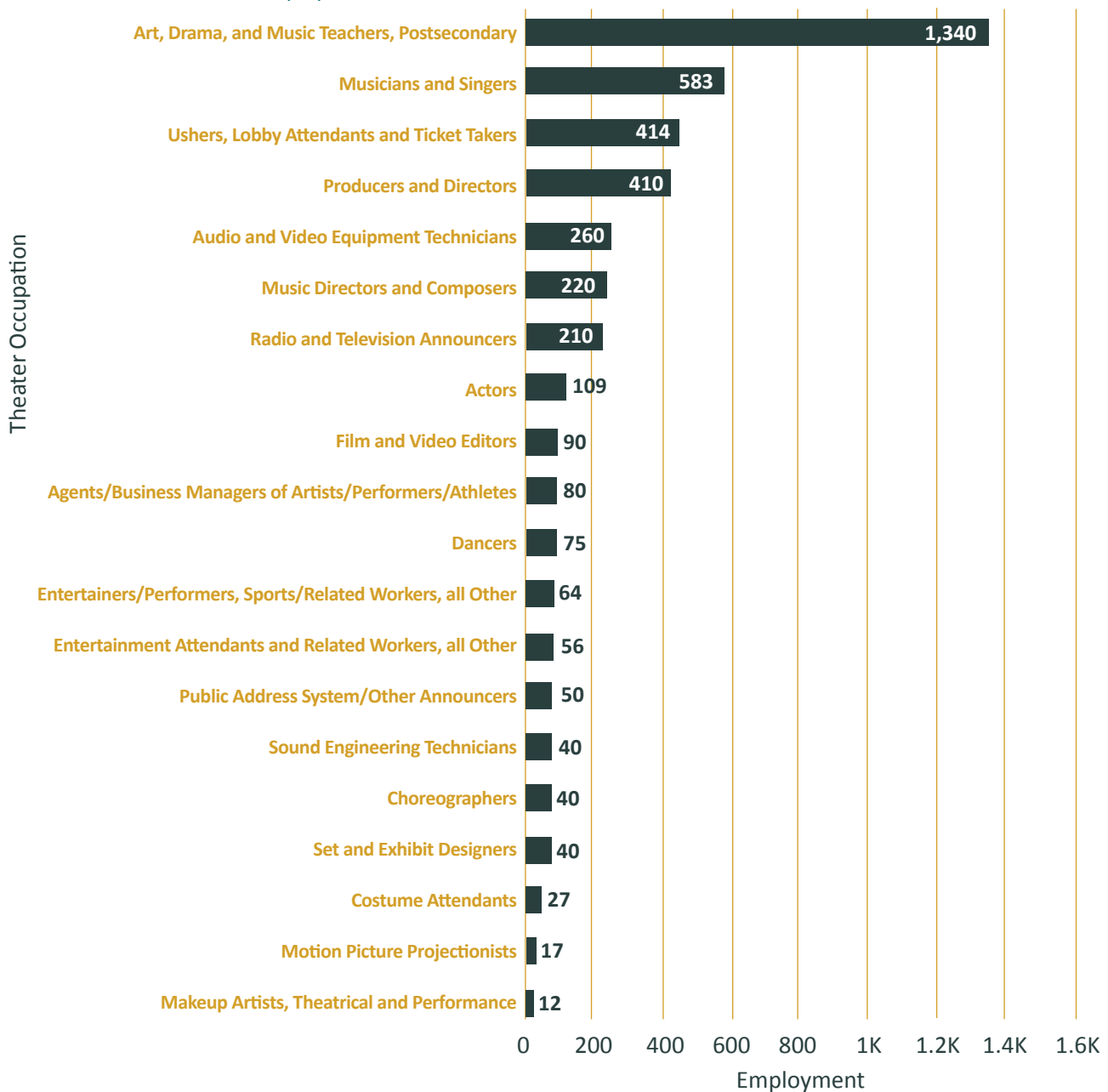
FIGURE 13. Theater Employment and Share in the Cleveland MSA, 2010-2015



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.

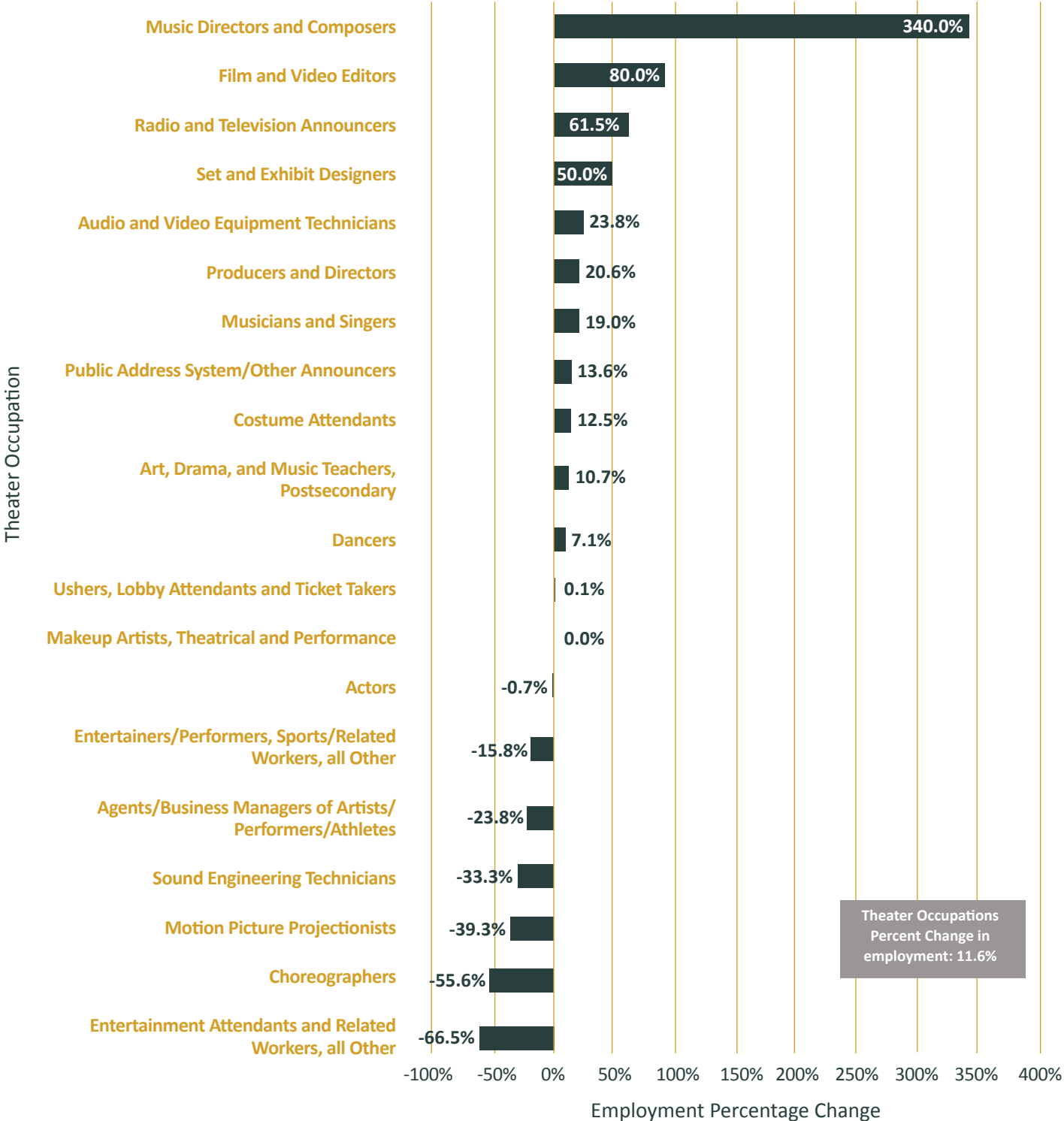
FIGURE 14. Theater Employment in the Cleveland MSA, 2015



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

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

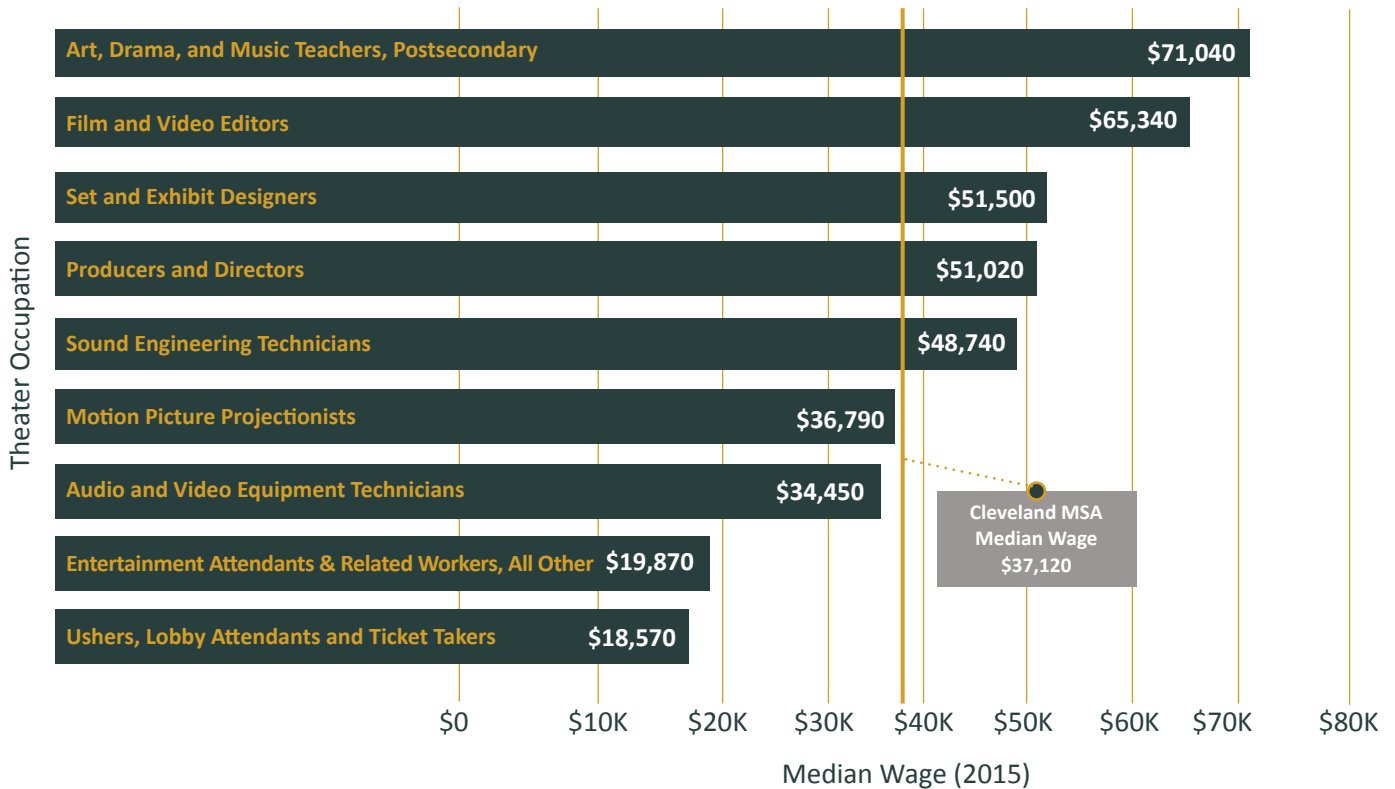


Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

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).

FIGURE 16: Theater Occupations Median Wage, Cleveland MSA, 2015



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

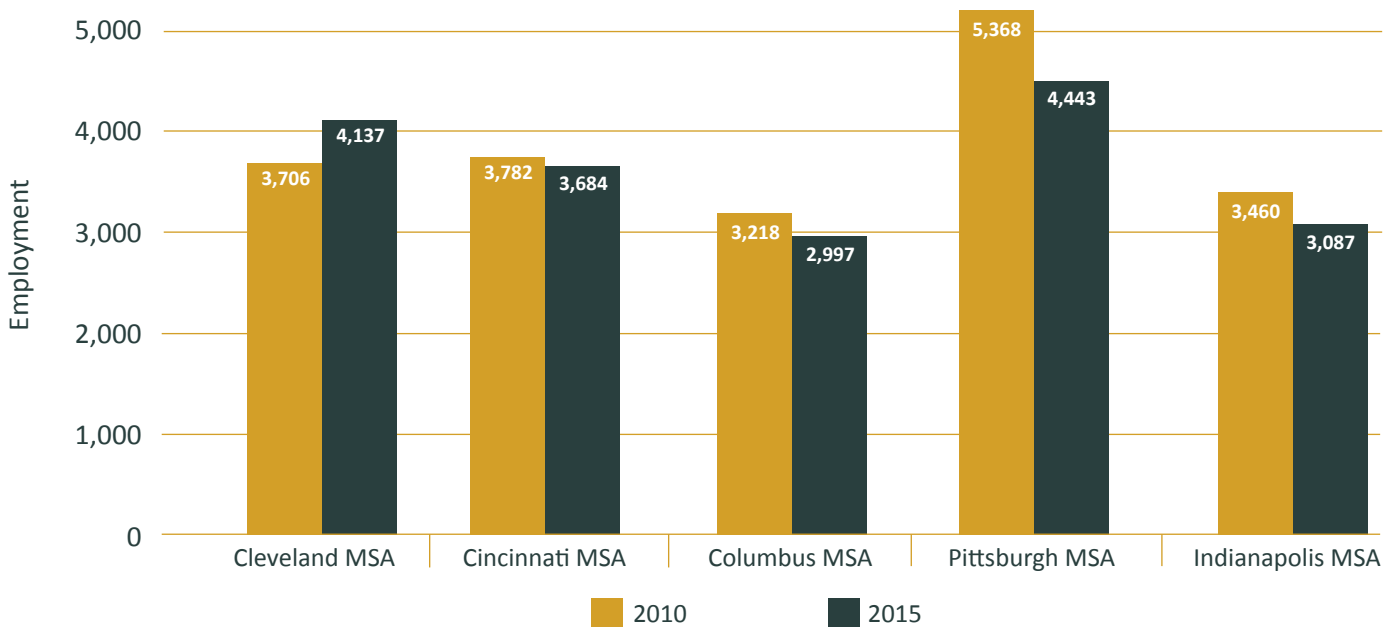
Source: Bureau of Labor Statistics, Occupational Employment Statistics; Occupational data from Quarterly Census of Employment and Wages

¹⁵ It is important to note that average wages in the trend analysis section (Chapter I) 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.

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)

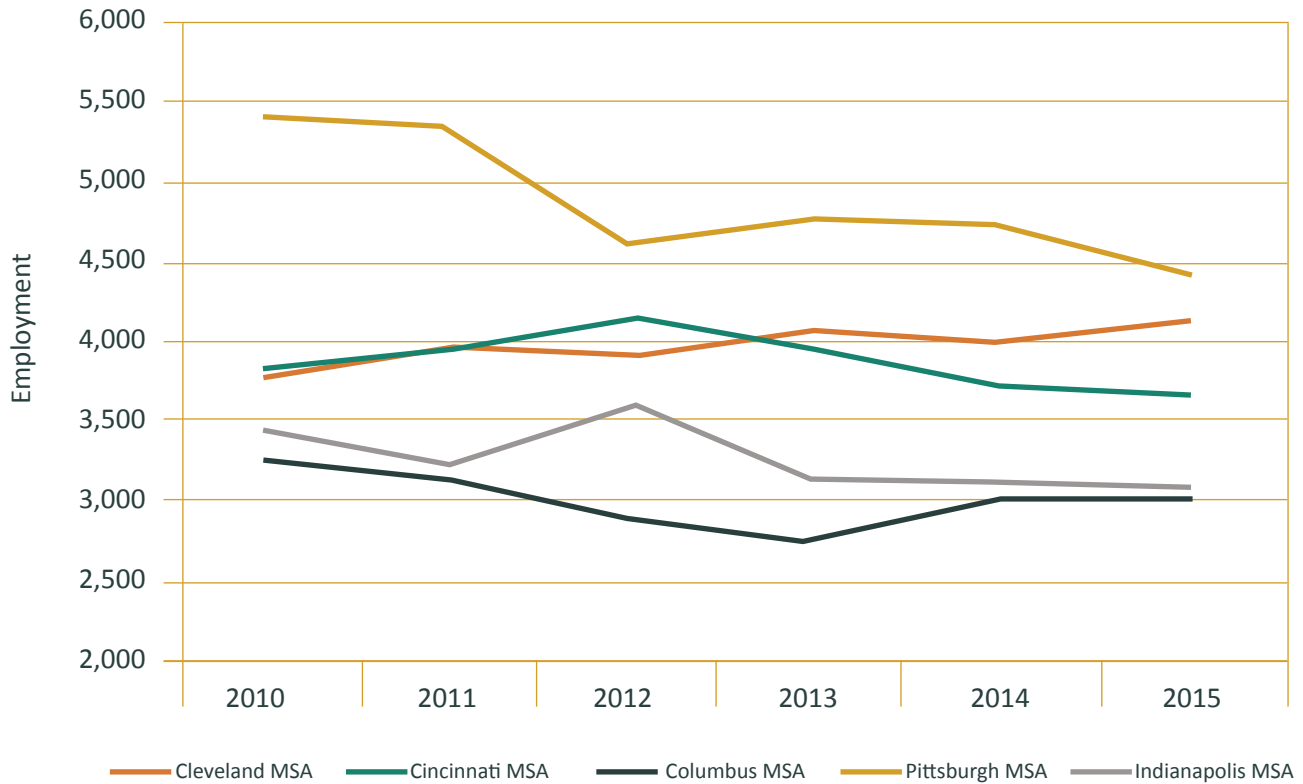
Table 7 presents the top 5 theater occupations for all MSAs in this analysis. The top four occupations with the largest employment in 2015 in Cleveland were: *Art, Drama, and Music Teachers, Postsecondary* (1,340); *Musicians and Singers* (583); *Ushers, Lobby Attendants and Ticket Takers* (414); and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

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)

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.



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 occupations¹⁶ (\$37,120). 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.

Rehearsal of Upstage Players production of *Fiddler on the Roof*. Photo by Anthony Gray

Upstage Players is dedicated to the child performer, instilling a love of theatre while building leadership and community.

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.



Incendiaries, Photo by Mark Horning

Ohio City Theatre Project is a not-for-profit performing arts organization committed to pursuing excellence and building community through creative innovation, mentoring, and neighborhood involvement.

CHAPTER THREE

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

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

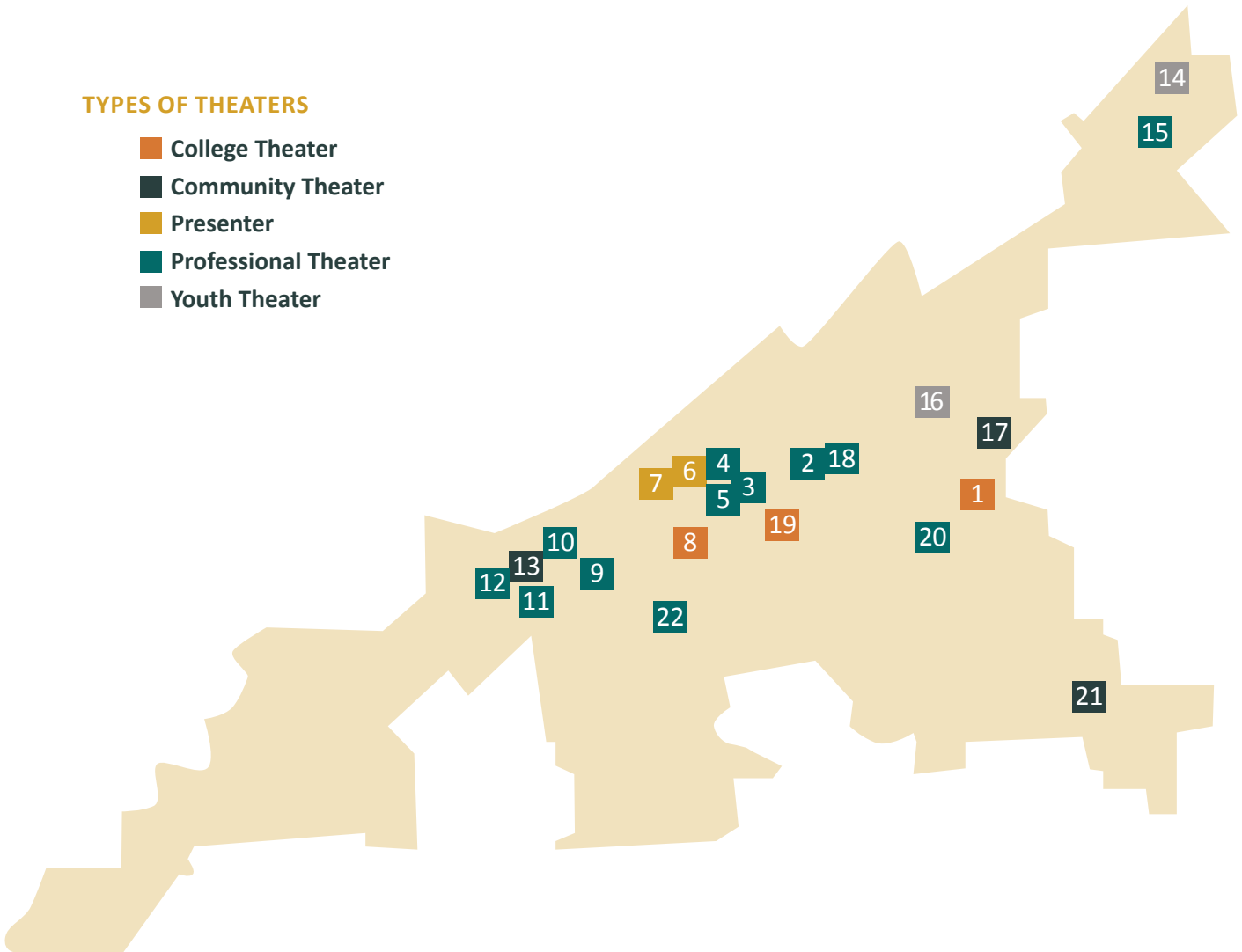
TABLE 8. Listing of Theaters in Cuyahoga County (Continued)

Organization	City
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

FIGURE 19. Theater Landscape of Cleveland

TYPES OF THEATERS

- College Theater
- Community Theater
- Presenter
- Professional Theater
- Youth Theater

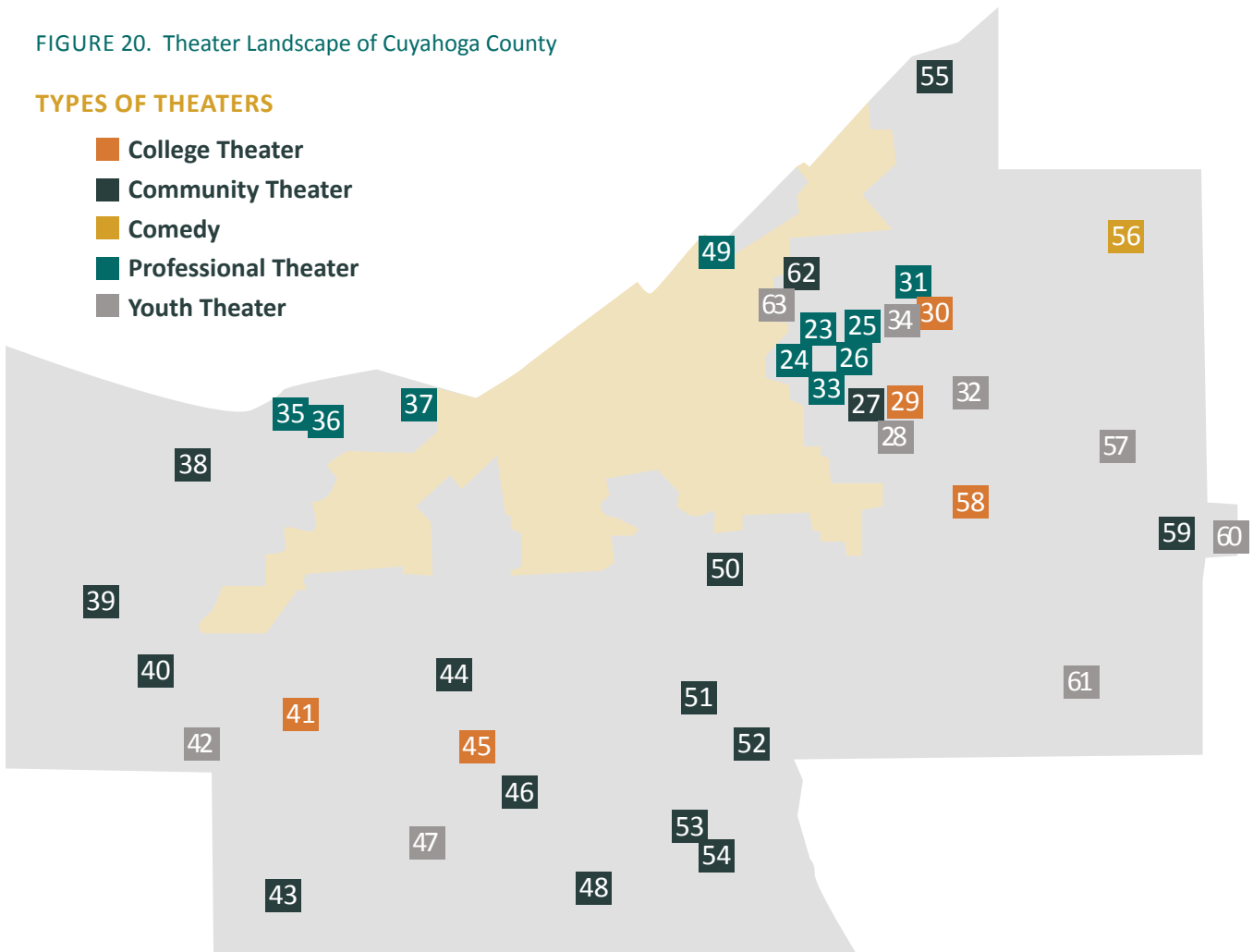


- | | |
|------------------------------------|-----------------------------------|
| 1. Eldred Theater at CWRU | 12. Blank Canvas Theatre |
| 2. Mamai Theatre Company | 13. Near West Theatre |
| 3. Cleveland Play House | 14. Upstage Players |
| 4. Caesar’s Forum | 15. Playwrights Local |
| 5. Great Lakes Theater | 16. Cleveland School of the Arts |
| 6. Playhouse Square | 17. SignStage |
| 7. Hillarities 4th Street Theatre | 18. Cleveland Opera Theater |
| 8. Allen Theater Complex at CSU | 19. Metro Campus Theater at Tri-C |
| 9. Ohio City Theatre Project | 20. Karamu House |
| 10. Talespinner Children’s Theatre | 21. Man Cry Productions |
| 11. Cleveland Public Theatre | 22. convergence-continuum |

FIGURE 20. Theater Landscape of Cuyahoga County

TYPES OF THEATERS

- College Theater
- Community Theater
- Comedy
- Professional Theater
- Youth Theater



- | | |
|---|--|
| <ul style="list-style-type: none"> 23. Ensemble Theatre 24. Cleveland Shakespeare Festival 25. Cain Park Theatre 26. Dobama Theatre 27. Happy Ending Lyric Players 28. Hathaway Brown Theatre Institute 29. Regina Hall at NDC 30. Kulas Auditorium at JCU 31. Mercury Theatre Company 32. Playmakers Youth Theatre 33. Interplay Jewish Theatre 34. Kulture Kids 35. Beck Center for the Arts 36. Something Dada 37. The Musical Theater Project 38. Clague Playhouse 39. Dover Players 40. Olmsted Performing Arts 41. Kliest Center for Art and Drama at BW University 42. Academy for Dramatic Arts 43. Strongsville Community Theatre | <ul style="list-style-type: none"> 44. Cassidy Theatre Inc. 45. Western Campus Theater at Tri-C 46. Royalton Players 47. 82nd Street Theatre 48. Broadview Heights Spotlights 49. Theatre Ninjas 50. Garfield Players 51. Independence Community Theatre 52. Lantern Theatre 53. Brecksville Little Theatre 54. Brecksville Theatre On The Square 55. Silhouette Productions 56. Comedy Project Alliance 57. Stagecrafters Yought Theatre 58. Eastern Campus at Tri-C 59. Chagrin Valley Little Theatre 60. Chagrin Academy for Performing Arts 61. Solon Center for the Arts 62. East Cleveland Theater 63. Heights Youth Theatre |
|---|--|



Kulture Kids' Artistic Director Robin Pease portrays runaway slave, Sarah Lucy Bagby, in a community performance of *The Last Fugitive Slave*, an original, anticipatory theatre piece written by Pease that recounts Bagby's journey to Cleveland on the Underground Railroad, only to be returned to the South under the provisions of the Fugitive Slave Act, amid protests and rescue attempts by abolitionists.

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 outskirts and Blank Canvas Theatre on its western outskirts.

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.

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

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 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.

Opposite Page: Connor Palace at Playhouse Square. Photo courtesy of Playhouse Square.

The largest performing arts center in the country outside of New York, the not-for-profit Playhouse Square is Northeast Ohio's destination for Broadway and more great entertainment. Playhouse Square is a champion of arts education and downtown Cleveland, and proud to be the home of Cleveland Play House, Cleveland State University Department of Theatre and Dance, DANCECleveland, Great Lakes Theater and Tri-C JazzFest.

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 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

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.

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>.



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 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

²⁴ Markusen, A. & Gadwa, A., (2010). Creative Placemaking. The Mayors' Institute on City Design. Retrieved from <https://www.arts.gov/publications/creative-placemaking>.

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

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 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.

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

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.



CAPITOL

THEATRE

W. 65 St.

GORDON SQUARE PUBLIC P PARKING

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

Exterior of the Capitol Theatre located in the Gordon Square Arts District.
Photo by Gregory Wilson

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>.

Opposite page:

Top Left: *Los Cabezudos aka The Big Heads* by Cleveland Public Theatre's (CPT's) ensemble of Latin American artists, Teatro Publico de Cleveland, performing at Pandemonium in September 2016. Photo by Steve Wagner

Top Right: Cast of *Fire on the Water/Elementary*, Talespinner Children's Theatre collaboration with CPT. Photo by Steve Wagner

Bottom Left: Exterior of the Near West Theatre located in the Gordon Square Arts District. Photo by Steve Wagner

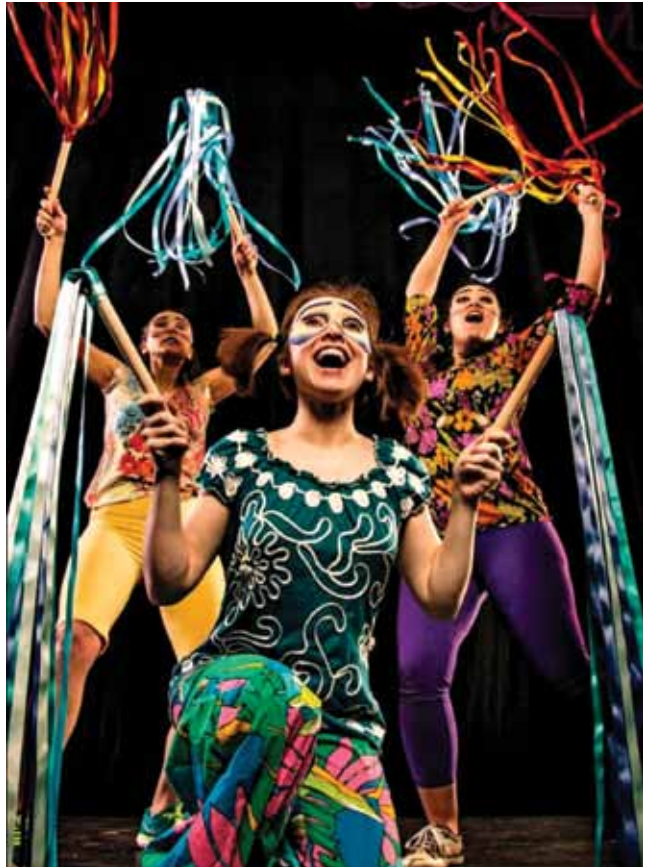
Bottom Right: Blank Canvas Theatre provides professional quality productions, placing emphasis on entertainment at affordable prices. Photo by Andy Dudik

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

³¹ 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



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 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

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



throughout the summer months. Cain Park also partners with other local theatrical organizations such as the Musical Theater Project, an area nonprofit dedicated to “foster[ing] a deeper understanding and appreciation of the American musical through programs that educate as well as entertain...”³³

Cast of *Marie Antoinette* at the Dobama Theatre. Photo by Steve Wagner

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

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>.



The cast of *Blues in the Night*, 2016. Photo by Your Influence Media

Karamu House stands tall in our nation's history as an inclusive institution that served as a common ground for Clevelanders of different races, religions, and social and economic backgrounds, as well as a trusted community resource for local families.

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 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

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

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

³⁹ Ibid.

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 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.

⁴⁰ American 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/>.

Students of the Cleveland School of the Arts in the Festival of New Works. Photo by Michael T. Thornburg

Cleveland School of the Arts is a specialty arts school in the Cleveland Municipal School District (CMSD) that incorporates all aspects of the arts into its teaching approach.



CHAPTER FOUR

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 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.

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>

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 Mamaí 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 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

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>

population of the city of Cleveland was just over 388,000 people in 2015, while boasting two residency theater companies.⁴⁵ This is 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

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

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



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 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.

Cleveland Public Theatre’s STEP program (Student Theatre Enrichment Program) performing at Herman Park in the Gordon Square Arts District in August 2016. Photo by Steve Wagner

November 2016 production photo from *West Side Story* at Baldwin Wallace University including senior Colton Ryan and first-year Nadina Hassan playing Tony and Maria. Soon after performing in *WEST SIDE STORY*, Colton was chosen to join the company of *DEAR EVAN HANSON* on Broadway completing his senior year remotely from NYC. BW's music theatre program has grown to great acclaim under the leadership of program director Victoria Bussert and is regularly ranked as one of the top ten programs in the US. The music theatre program is part of BW's Conservatory of Music. Photo by Roger Mastroianni



CHAPTER FIVE

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

⁴⁷ IMPLAN Group, LLC, copyright 2016.

⁴⁸ For more information on the methodology behind the economic impact see Appendix B. (View full appendices and methods at cultureforward.org/StagingCleveland)

Opposite Page: Teaching Artist Molly Andrews-Hinders working on *The Wizard of Oz* school residency with Kids Love Musicals! Photo by Heather Meeker

Whether on stage, in schools or on the radio, The Musical Theater Project’s programs are designed to engage and inspire current and future generations of creators, performers and audiences.

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.

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.

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.

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



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

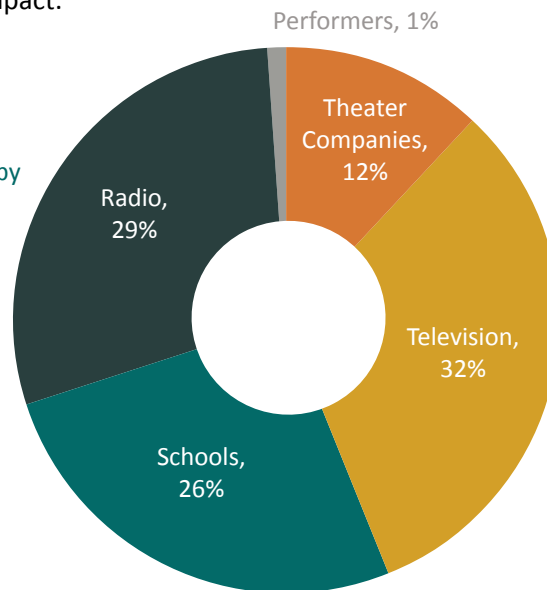


TABLE 10: Economic Impact of Cleveland Theater Sector by Subsector

Impact Type	Employment	Labor Income	Value Added	Output	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.

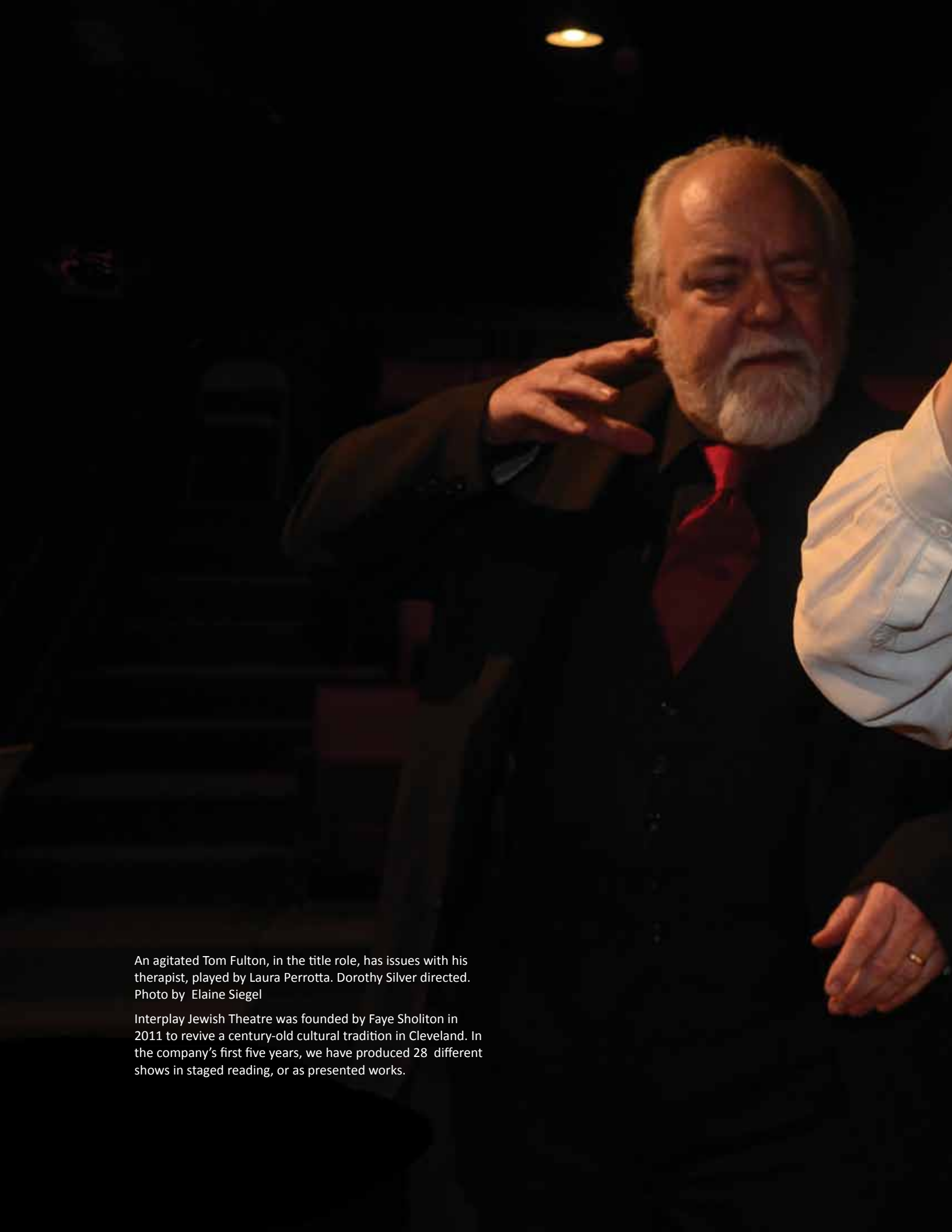
TABLE 16: Total Multipliers for Cleveland Theater Sector by Subsector⁵⁰

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

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.

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



An agitated Tom Fulton, in the title role, has issues with his therapist, played by Laura Perrotta. Dorothy Silver directed. Photo by Elaine Siegel

Interplay Jewish Theatre was founded by Faye Sholiton in 2011 to revive a century-old cultural tradition in Cleveland. In the company's first five years, we have produced 28 different shows in staged reading, or as presented works.



CHAPTER SIX

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 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 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.

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 <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.

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 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.

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.⁵⁴ 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.

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

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

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.

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.

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

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.

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 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 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

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

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.

Cast of *Forever Plaid*,
May, 2017. Photo by
Roger Mastroianni

Great Lakes Theater (GLT), northeast Ohio's professional classic theater since 1962, is one of the nation's preeminent regional theaters and the first resident company of Playhouse Square. GLT features a resident company of artists and brings the world's greatest plays to life each season in its revolutionary and intimate home at the re-imagined Hanna Theatre. GLT also presents the region's annual production of *A Christmas Carol* each year at the Ohio Theatre. On its mainstage and through its extensive educational programming, GLT positively impacts over 100,000 adults and students each season.

ABOUT THE STUDY TEAM

Iryna V. Lendel

Iryna Lendel is the Interim Director of the Center for Economic Development and a Research Associate Professor at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. Dr. Lendel was the principal investigator for this project and developed the overall framework and methodologies for research components of the project. Dr. Lendel is an economist with vast experience conducting applied economic research and analyzing regional and urban economic development. Her research portfolio includes projects on industry analyses; state and regional science and innovation policies; university products; and high-tech, emerging, and creative industries and their role in economic development. Dr. Lendel has also conducted multiple economic impact analyses. Lendel is an associate editor of *Economic Development Quarterly* and was named a Fulbright New Century Scholar for 2009-2010.

Candi Clouse

Candi Clouse was the primary researcher on the economic impact analysis. She also participated in creating the typology of the theater sector, analyzing the trends in the sector, and conducting some of the initial interviews. Ms. Clouse is a Program Manager in the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. Her areas of expertise are regional and urban economic development, economic impact analysis, industry analysis, and place image. Ms. Clouse is a Ph.D. candidate in Urban Studies and Public Affairs with a concentration in economic development.

Merissa C. Piazza

Merissa C. Piazza was involved with all elements of this report. She was the primary researcher on the design, measurement, collection, and analysis of the Survey of the Theater Sector; as well as the trend analysis, occupational analysis, and workforce sections. Ms. Piazza is a Program Manager in the Center for Economic Development at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University. She specializes in economic development, regional economic analysis, industry and occupational analysis, and survey design, methodology, and analysis. In addition to working full time for the Center, she is a Ph.D. candidate in Urban Studies and Public Affairs.

Ellen Cyran

Ms. Ellen Cyran is the Center's senior programmer and analyst; she has extensive experience in analysis of demographic and economic data and strong programming skills. Ms. Cyran manages the Quarterly Census of Employment and Wages database, which played a significant role in completing the project. Ms. Cyran participated in quantitative analysis of trends in the theater sector as well as occupational analysis of the employment and wages.



Simon Husted

Simon was a research assistant with the Center for Economic Development throughout the duration of this project. He created the directories for this study and contributed to organizing and conducting the interviews and surveys. He worked on providing background material for all components of this report, as well as maps and information for the Landscape of Theaters. Currently, he is pursuing a Master of Urban Planning and Development (MUPD) degree from the Maxine Goodman Levin College of Urban Affairs at Cleveland State University

Nichole Laird

Nichole was a research assistant with the Center for Economic Development throughout the duration of this project. She contributed to writing of the Landscapes of Theaters of this report. Currently, she is pursuing a Masters of Education at Cleveland State University. Nichole holds a Master of Urban Planning and Development (MUPD) degree from the Maxine Goodman Levin College of Urban Affairs at Cleveland State University.

Luke Seaberg

Luke was a research assistant with the Center for Economic Development throughout the duration of this project. He contributed to writing the survey analysis and discussion section of this report. Currently, he is pursuing a Master of Urban Planning and Development (MUPD) degree from the Maxine Goodman Levin College of Urban Affairs at Cleveland State University.

Jinhee Yun

Jinhee Yun participated in the industry analysis, occupational analysis, and preparation of data for the economic impact study. Yun was a research assistant in the CSU team throughout the duration of this project. She is a Ph.D. student in Urban Studies at the Maxine Goodman Levin College of Urban Affairs at Cleveland State University.



Students enjoy a performance at the Great Lakes Theater.
Photo by Roger Mastroianni

ABOUT THE COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE (CPAC)

Well-resourced, connected and united arts and culture has the power to improve lives and communities. To that end, CPAC serves and supports arts and cultural professionals and community leaders who are creating a bright future for greater Cleveland. CPAC's research and advocacy fosters informed decision-making. CPAC's training, counsel and online resources provide those we serve with the ideas, skills and connections to achieve their aims. By bringing people together both within the sector and throughout the region, CPAC ensures arts and culture is a continued force for community betterment.

VISION

Greater Cleveland's diverse arts and culture sector will be a leading partner in contributing to our community's vitality and enlivening the human experience.

MISSION

To strengthen, unify and connect greater Cleveland's arts and culture sector.

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