

An Economic Impact Study of Arts,
Cultural, and Scientific Organizations
in the Central Puget Sound Region

2014



AN ECONOMIC IMPACT STUDY OF
ARTS, CULTURAL, AND SCIENTIFIC
ORGANIZATIONS IN THE CENTRAL
PUGET SOUND REGION: 2014

PREPARED FOR:



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TABLE OF CONTENTS

Table of Contents	v	Employment in Central Puget Sound Region Cultural Organizations.	25
Table of Figures	vii	Expenditures of Patrons	28
Table of Tables	ix	Economic Impact of Cultural Organizations and their Patrons	32
Authors' Acknowledgements	xiii	Volunteers in Cultural Organizations	41
ArtsFund's Acknowledgments	xiv		
Sponsors' Remarks.	xvi	III. Cultural Organization Patronage	
Executive Summary	xix	Characteristics	43
Aggregate Impact.	xx	Number of Patrons	43
New Money.	xx	Cultural Organization Performance, Exhibition, and Attendance Statistics	48
Income.	xxi	Patron Trip Reasons	49
Expenditures	xxi	Patron Origins	49
Employment.	xxii	Patron Expenditures.	51
Attendance.	xxiii	Patron Group Sizes.	53
Patron Spending	xxiv	Attendance Frequency	54
Volunteers.	xxiv	Willingness to Travel Distance.	55
Values Regarding Cultural Activity.	xxiv	Patron Information Sources	57
Quality of Life Considerations	xxv	Attendance and Spending Change	58
I. Introduction	1	Modes of Engagement by Patrons in Cultural Activities	62
Goals and Objectives of this Study	1	Locations Sought or Wanted for Cultural Activities	63
Research Approach	3	Patron Attitudes Related to Quality of Life, Regional Identity, and Residential and Work Locations	66
Arts, Cultural, and Scientific Organization Survey.	3	Student Demographics	68
Patron Survey	5	Patron Demographic Characteristics.	72
Economic Impact Model.	6	IV. Comparisons with Other Studies	77
II. Economic Impact of Cultural Organizations in the Central Puget Sound region	7	National Overviews.	77
Income of Central Puget Sound Region Cultural Organizations.	7	Earned vs. Contributed Income.	79
Expenditures of Central Puget Sound Region Cultural Organizations.	18	Income Composition	80
		Expenditures	81
		Patron spending	82

Economic Impacts	83
Volunteers	85
Other Patron Data	86
Broader approaches	91
Summary Comments	93
V. Concluding Remarks	95
Possible Areas for Improvement in the Current Research Approach	95
Possible Bases for Expansion in the Scope of This Study	96
References	97
Appendix 1: Central Puget Sound Region Organizations Either Participating in or included in this Study	99
Appendix 2: Input-Output Model Methodology	105
Appendix 3: Survey Form for Arts, Cultural, and Scientific Organizations	109
Appendix 4: Survey Form for Patrons	115
Appendix 5: ArtsFund Economic Impact Study Measures Summarized (dollar amounts in \$2014)	119
Appendix 6: Artsfund Board of Trustees and Staff (2014-2015)	121
Index	125

TABLE OF FIGURES

Percent of Total Income by Source	xxi
Aggregate Expenditures Of Central Puget Sound Region Arts, Cultural, and Scientific Organizations	xxii
Employment Status	xxiii
Percentage Distribution Of Attendance By Category	xxiii
Patron Expenditures by Category	xxiv
Figure I-1 Number of Organizations Included in 2009 and 2014	4
Figure II-1 Percentage of Total Income by Discipline	10
Figure II-2 Percentage of Total Income by Source	10
Figure II-3 Percentage of Total Income by Discipline and Source	11
Figure II-4 Composition of Income 2009 and 2014	14
Figure II-5 Aggregate Expenditures of Central Puget Sound Region Cultural Organizations	18
Figure II-6 Employment Status	25
Figure II-7 Employment Categories Compared: 2009 and 2014	27
Figure II-8 Patron Expenditures by Category	32
Figure II-9 Aggregate Economic Impacts in Washington State	38
Figure II-10 New Money Economic Impacts of Central Puget Sound Region Cultural Organizations in 2009 and 2014	40
Figure III-1 Percentage of Patrons by Discipline	46
Figure III-2 Percentage Distribution of Attendance by Category	46
Figure III-3 Percentage Distribution of Attendance by Discipline	47
Figure III-4 Comparison of Current and Desired Locations for Participation in Cultural Activities	65

TABLE OF TABLES

Table I-1	Cultural Organizations Included in this Study	4
Table I-2	Central Puget Sound Region Cultural Organization Budget Coverage	5
Table II-1	Total Income of Central Puget Sound Region Cultural Organizations	9
Table II-2	Percentage of Total Income by Discipline and Total	9
Table II-3	Percentage Composition of Earned Income	15
Table II-4	Percentage Composition of Contributed Income by Source.	15
Table II-5	Individual Contributions to Central Puget Sound Region Cultural Organizations.	16
Table II-6	Corporate Contributions to Central Puget Sound Region Cultural Organizations.	16
Table II-7	Private Foundation Contributions to Central Puget Sound Region Cultural Organizations.	16
Table II-8	In-Kind Contributions to Central Puget Sound Region Cultural Organizations.	17
Table II-9	Government Income by Source (% of Government Income).	17
Table II-10	Aggregate Expenditures of Central Puget Sound Region Cultural Organizations.	18
Table II-11	Employee and Operating Expenses by Discipline	19
Table II-12	Composition of Employee Expenses.	20
Table II-13	Operating Expenses by Broad Category	21
Table II-14	Operating Expenses by Detailed Categories	23
Table II-15	Employment Status	25
Table II-16	Employment Mix by Discipline	26
Table II-17	Composition of Employment by Discipline	26
Table II-18	Full-Time Equivalent Employment	28
Table II-19	Per-Capita Patron Expenditures.	29
Table II-20	Number of Patrons.	29
Table II-21	Estimated Total Patron Expenditures	30
Table II-22	Summary of Washington State and Central Puget Sound Region Economic Impacts	35
Table II-23	Detailed Central Puget Sound Region Economic Impacts.	36
Table II-24	Change in Aggregate Impact Measures 2009-2014	38
Table II-25	New Money Sources	39
Table II-26	New Money Economic Impacts.	40
Table II-27	Volunteers in Cultural Organizations.	41

Table III-1	Estimated Number of Patrons by Discipline	45
Table III-2	Percentage Distribution of Attendance	45
Table III-3	Comparison of Patronage Levels and Composition	47
Table III-4	Cultural Organization Performance and Exhibition Statistics	48
Table III-5	Primary Reason for Patron Trips	49
Table III-6	Patron Origins by Discipline	50
Table III-7	Patron Origins and Percentage Making Trip Primarily to Attend a Central Puget Sound Region Cultural Organization	50
Table III-8	Origin of Sampled Patrons and Share of Total Attendance	51
Table III-9	Questionnaire Classification Into Valid and Not-Valid for Computation of Average Patron Spending	52
Table III-10	Average Spending by Region of Origin	53
Table III-11	Group Sizes Attending Cultural Organizations	54
Table III-12	Frequency of Attendance	54
Table III-13	Willingness to Travel Distance	55
Table III-14	Cross-Tabulation of Attendance Frequency and Patron Residence	56
Table III-15	Cross-Tabulation of Attendance Frequency and Willingness to Travel Distance	56
Table III-16	Cross-Tabulation of Patron Origin and Willingness to Travel Distance	56
Table III-17	Patron Information Sources	57
Table III-18	Patron Attendance Change Over The Past Three Years	58
Table III-19	Patron Spending Change Over The Past Three Years	59
Table III-20	Reasons For Change in Attendance	60
Table III-21	Reasons for Increased and Decreased Spending	61
Table III-22	How Patron In-Person Attendance Has Changed Over the Past Three Years	62
Table III-23	How Patron Hands-On Participation Has Changed Over the Past Three Years	62
Table III-24	How Patron Virtual Participation Has Changed Over the Past Three Years	63
Table III-25	Where Patrons Are Currently Most Likely To Go To Cultural Activities	63
Table III-26	Where Patrons Would Like To See More Cultural Activities	64
Table III-27	Patron Rating of the Importance of Culture To Quality of Life in This Region	66
Table III-28	Patron Rating of the Importance of Culture to the Identity of this Region	67
Table III-29	Importance of Cultural Activity To Your Decision of Where to Live or Work	67

Table III-30 Free and Discounted Student Admissions by Discipline68

Table III-31 Student Family Income Indicators—Free Admission.....69

Table III-32 Student Family Income Indicators for Discounted Student Admissions ...69

Table III-33 Ethnicity of Free Student Admissions.....70

Table III-34 Ethnicity of Discounted Student Admissions70

Table III-35 Geographic Origin of Free Student Admissions..... 71

Table III-36 Geographic Origin of Discounted Student Admissions 71

Table III-37 How Long Have You Lived In The Central Puget Sound Region72

Table III-38 Gender of Patron Questionnaire Respondents.....73

Table III-39 Age of Patron Questionnaire Respondents73

Table III-40 Educational Attainment of Patron Survey Respondents74

Table III-41 Household Income of Patron Survey Respondents.....75

Table III-42 Patron Household Size75

Table III-43 Race of Patron Survey Respondents.....76

Table IV-1 Composition of Income.....80

Table IV-2 Contributed Income Comparison.....80

Table IV-3 Composition of Expenses..... 81

Table IV-4 Patron Spending.....82

Table IV-5 Composition of Volunteer Activity (United States)86

Table IV-6 Educational Attainment of Patrons87

Table IV-7 Household Income of Patrons.....87

Table IV-8 Age Distribution of Patrons88

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We are honored to have been asked by ArtsFund to undertake this study of the economic impact of arts, cultural, and scientific organizations in the Puget Sound region again.

This was truly a collaborative effort. We could not have undertaken this study if ArtsFund had not taken leadership in data gathering from patrons and arts, cultural, and scientific organizations. Sarah Sidman, Graham Mills, and Andrew Golden were instrumental in making sure that the sampling plan for patrons was executed, and making sure that we obtained a very high level of coverage for the organization survey. They also took leadership in identifying the full scope of organizations included in this study, working closely with agencies throughout the region to obtain budget and attendance data needed for this project. It has truly been a pleasure to work with ArtsFund staff in the design, conduct, and completion of this consulting job.

The ultimate success of this project hinged on the cooperation of arts, cultural, and scientific organizations in this region. These organizations provided data of outstanding quality, yielding a database unmatched in any metropolitan region in the United States. Over 3,500 groups of patrons responded to requests for information, with a very high level of completeness. This includes an amazing set of open-ended comments about the importance of arts, cultural, and scientific organizations to these patrons and to the identity of this region. These data are far richer than gathered by several national arts advocacy support organizations, making this region a leader nationally in analyses of the type reported in this study.

ArtsFund would not have been able to undertake this study without the financial support of a dozen public and private organizations in this region. Beyond financial support, some of these organizations contributed to the data gathering needed to complete this report. Their support reinforces the contribution of arts, cultural, and scientific organizations to the quality of life and the process of economic development in this region. We hope that the report we have created meets the expectations of these funders, and contributes to the further development of arts, cultural, and scientific organizations in this region.



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ARTSFUND'S ACKNOWLEDGMENTS

Arts and creativity live at the very core of our region's identity, and the Central Puget Sound is recognized around the globe for being at the forefront of innovation, research, invention, technology, and design. The ability of the great companies rooted here to attract top talent to our region depends in no small part on the vibrant arts and cultural scene and the resulting quality of life. Our region's cultural organizations inspire and provoke us, and help us understand the world around us. They teach our children and the workforce of tomorrow about creativity, empathy, and problem solving. Our cultural assets not only enrich our lives, they are critical to a healthy society and are vital to our region's competitive advantage. They fuel the local economy, contribute to vibrant communities, and promote tourism.

Every five years, ArtsFund partners with cultural, civic, business, and public sector leaders to undertake a comprehensive scan of the economic impact of our region's cultural organizations. Arts, cultural, and scientific organizations are vital contributors to our region's economic and civic health, and the commitment of both public and private leadership is an indicator of the wide scope and value of the study. The 2014 Economic Impact Study supporters include: The Seattle Foundation, King County, 4Culture, Bank of America, Safeco Insurance, Visit Seattle, the Nesholm Family Foundation, the Seattle Office of Arts & Culture, and Amazon. We are grateful to our cross-sector funding partners for their support.

We would also like to acknowledge and thank the Paul G. Allen Family Foundation for their major funding support of previous ArtsFund studies.

As is evident in the sheer number and variety of groups taking part in this year's Economic Impact Study, the Central Puget Sound is home to a vibrant cultural ecology. As with our 2009 study, we have compiled both a King County and a four-county Regional Report. We have also generated a supplemental Eastside breakout report, with funding support from the Bellevue Arts Commission, the Redmond Arts and Culture Commission, the City of Kirkland, and the City of Issaquah Arts Commission. These three reports demonstrate the ripple effects of cultural organizations throughout the region.

This study would not be possible without Professor William Beyers, the study's main author. All ArtsFund studies dating back to 1993 have been authored by Professor Beyers, who is recognized as one of the foremost experts in the field. The depth of reporting and scope of comparative analysis the ArtsFund studies offer is only possible due to his diligent work over the past 23 years. We are honored to collaborate with such an expert.

As in all our previous studies, Professor Beyers worked with ArtsFund's long-time partner GMA Research of Bellevue, Washington, who designed the sampling plan

and tabulated data from the patron surveys. We thank Dick Anderson for his integral contribution to this study, and to all prior. And thank you to Dwight Gee for sharing the expertise and perspective garnered from overseeing all prior iterations of the study.

For helping connect ArtsFund with the nonprofit groups and organizational data needed for participation in the study, we thank our research partners: 4Culture, the Association of King County Historical Organizations, the Kitsap County Arts Board, the League of Snohomish County Heritage Organizations, the Seattle Office of Arts & Culture, the Snohomish County Arts Commission, and the Tacoma Arts Commission.

The work on this report spans well over a year and a half, and we highlight and thank three members the ArtsFund team for their invaluable contributions during various stages of the process.

Graham Mills, for outlining the launch of the process, ensuring the organizational and patron surveys were widely distributed, designing timelines and databases, and for countless hours of research and outreach. Graham oversaw six months of patron sampling, in addition to the collection of the organizational information from which this study is built.

Halle Townes, for stepping in during the final weeks of data collection and working with our cultural partners to ensure all surveys were received, tracked, and processed.

And Andrew Golden, for picking up the baton and ushering the Economic Impact Study to completion. In compiling additional research, partnering with our creative team in the production of the final documents, offering communications support, and administering the rollout and distribution plan, Andrew's voice has been key in the final stages of the project.

We also thank ArtsFund's creative partners, Dapper + Associates, for their vision in designing and formatting the reports and summary brochure.

Finally, we are deeply grateful to the 313 arts, cultural, heritage, and scientific organizations who participated in the surveying process, and to the 3,500 patrons who shared their data and perspective. It is thanks to the dedication of cultural organizations and patrons alike that this region's cultural assets play such a vital role in our lives and our communities.



Mari Horita
President & CEO
ArtsFund



Sarah Sidman
Director of Strategic Initiatives & Communications
ArtsFund

SPONSORS' REMARKS

“The Seattle Foundation is proud to partner with ArtsFund on the 2014 Economic Impact Study. Seattle is redefining what the arts mean to the health of our community. We know that supporting the arts brings creativity, vibrancy, and richness to our lives. The arts and cultural sector in our region is helping us realize that it also changes the trajectory of children’s lives, unlocks our compassion for each other, and ignites our collective vision of the world we want to live in.”

Tony Mestres

President & CEO, The Seattle Foundation

“Arts and culture enliven our community, enrich our quality of life, and make this region a more attractive place for businesses that bring with them new jobs. The ArtsFund Report will inform future decisions by elected leaders through its detailed analysis of the impact of the arts on our local economy. I look forward to the results of this study.”

Dow Constantine

King County Executive

“Not only does a vital arts ecology contribute to a better quality of life for residents, but it also serves as a robust driver of tourism. Seattle is increasingly recognized as a top cultural capital, and visitors come to experience our outstanding arts and culture. The ArtsFund Economic Impact Study helps us quantify the powerful impact of cultural tourism, and the importance of continued investment in, and promotion of, our region’s unique cultural assets. We’re proud to be a partner in this study.”

Tom Norwalk

President & CEO, Visit Seattle

“Bank of America’s support of the arts reflects our belief that the arts matter: they are a powerful tool to help economies thrive, to help individuals connect with each other across cultures. Partnering with ArtsFund and supporting the Economic Impact Study is a part of our commitment to creating economically vibrant communities, and this report showcases the measurable benefits the collective arts bring to our region.”

Anthony DiBlasi

Washington State President, Bank of America

EXECUTIVE SUMMARY

Arts, cultural, and scientific organizations make significant contributions to the quality of life of people living in the Central Puget Sound region, as well as to people living elsewhere in Washington State and from out-of-state. Patrons of these organizations eloquently expressed their opinions about the value of these organizations to them:

“Having a variety of accessible cultural venues and events is one of the integral facets that make this region such a desirable place to live, like the natural beauty of the region.”

“Arts and cultural activities allow me to learn, explore, think, dream and understand. These activities increase my quality of life, reduce stress and encourage me to engage and participate in the community.”

“Culture is the lens through which we interpret and understand our world, so developing our knowledge of culture is critical for understanding others and critically examining ourselves.”

“I consider the arts a vital part of my children’s education.”

“Cultural activity is very important to the livability and economy of the region. One of the reasons we choose to live here!”

Source: Patron Survey

Arts, cultural, and scientific organizations are also an important part of the local economy, directly creating thousands of jobs, millions of dollars in labor income, business sales, and tax revenues to governments.

This study reports on the economic impacts of 313 non-profit arts, cultural, and scientific organizations located in King, Pierce, Snohomish and Kitsap counties. It documents these economic impacts through data gathered on the expenditures that these organizations and their patrons make in the local and Washington State economies. It includes organizations with budgets of at least \$35,000 in Dance, Festival, Heritage, Theatre, Music, Science, Interdisciplinary, and the Visual Arts. It also includes public and private sector non-profit organizations supporting the delivery of services from arts, cultural, and scientific organizations. This is the second economic impact study of Central Puget Sound region arts, scientific, and cultural organizations sponsored by ArtsFund. The first study was benchmarked against the year 2009.

AGGREGATE IMPACT

The aggregate economic impact of Central Puget Sound region arts, cultural, and scientific organizations arises due to spending of patrons visiting these organizations, and by the spending that the organizations make in the process of supplying their services. In 2014 \$2.4 billion in business activity was generated in the Washington economy due to spending by Central Puget Sound region arts, cultural, and scientific organizations, and spending by their patrons. This business activity supported 35,376 jobs, \$996 million in labor income, and resulted in \$105 million in sales, business and occupation, and hotel-motel room taxes.

Spending by cultural organization patrons totaled \$694 million, with tickets and admissions accounting for \$231 million of these expenditures. Income of arts, cultural, and scientific organizations were \$513 million in 2014, while they spent \$496 million providing these services.

Economic impacts have changed modestly when compared to the 2009 ArtsFund Economic Impact Study. Business activity and jobs in Washington State supported by the spending of these organizations and their patrons rose by 5% and 4% respectively, while labor income impacts fell by 4% (as measured in \$2014).

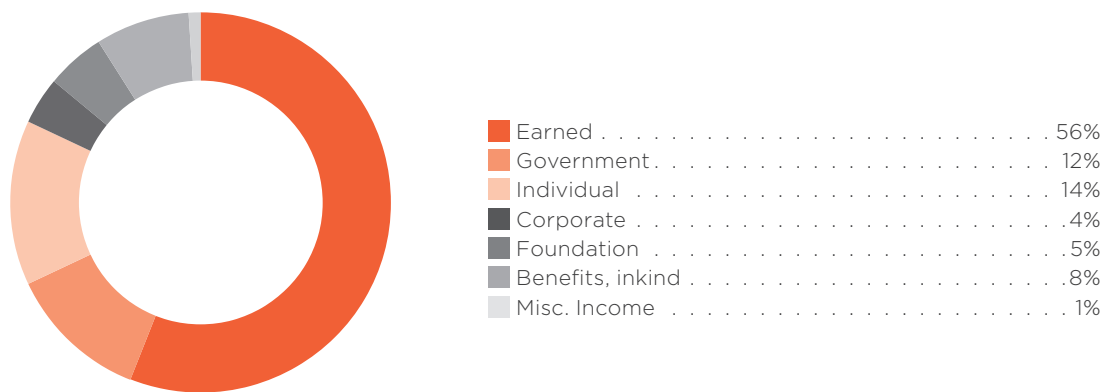
NEW MONEY

The majority of the economic impacts of arts, cultural, and scientific organizations and their patrons are related to spending by local residents, spending part of their discretionary income on visits to these local organizations. However, a significant proportion of the patrons to these organizations come from outside the local area, and their spending represents “new money,” funds that would not be spent in the local area if the organizations that are the subject of this study were not located here. In addition, arts, cultural, and scientific organizations generate a portion of their income from sources located outside of the Central Puget Sound region. New money accounts for about 17% of the revenue of arts, cultural, and scientific organizations, while 45% of patron spending is new money. New money economic impacts in the Central Puget Sound region in 2014 created 8,182 jobs, \$647 million in business activity (sales), \$257 million in labor income, and \$37 million in tax revenues.

New money economic impacts in the current study are similar when compared to those reported in the 2009 ArtsFund Economic Impact Study. Employment impacts were down 1%, while output impacts were down 9% (in constant \$) and labor income impacts were down by 6% (in constant \$). The reduction in new money economic impacts appears to be related to a reduction in outside money to Central Puget Sound arts, cultural, and scientific

organizations. In the 2009 study it was 17% of total income, while in the current study it is 13% of total income. Patron spending was about 43% outside money in the 2009 study, while in the current study it was about 45%. Changes in new money impacts are also likely related to the use of a different economic model in the two studies.

Percent of Total Income by Source



INCOME

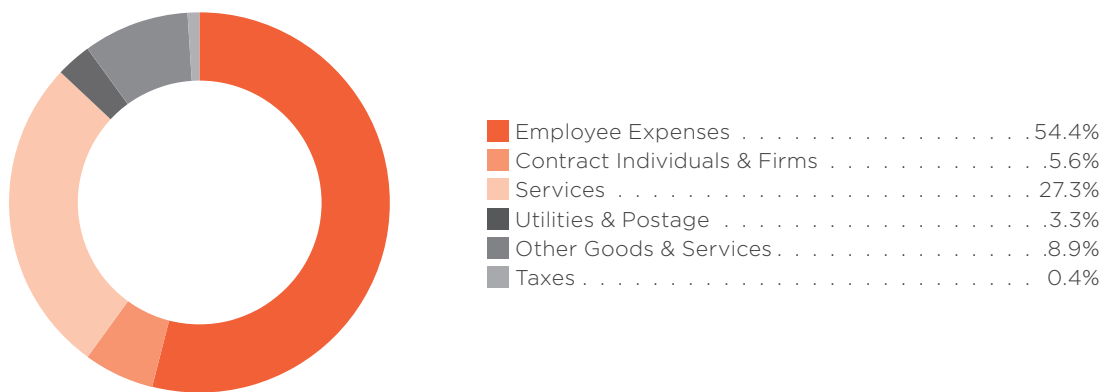
Earned income comes from tickets, admissions, tuition, retail sales, and other sources; it accounted for 56% of total income to arts, cultural, and scientific organizations in the Central Puget Sound region in 2014. The other 44% was generated through contributions, of which 14% were from individuals, 12% from governments, 8% from benefits and in-kind, 4% from corporations, 5% from foundations, and 1% was miscellaneous income. The shares of earned and contributed income were similar to those reported in the 2009 ArtsFund Economic Impact Study.

EXPENDITURES

Expenditures are divided between employee expenses (54%) and operating expenses (46%). Almost all employee expenses are related to payments to people living in the Central Puget Sound region, and they include wages and salaries, benefits, and payroll taxes. Operating expenses are more widely distributed, but 85% of operating expenses are made in the Central Puget Sound region. Payments to visiting artists and performers are referred to as “contract income,” and approximately 32% of these payments went to individuals living outside the Central Puget Sound region. Services account for the largest share of operating expenses (28%), and the majority of these are made in the Central Puget Sound region (88%). Service expenses include accounting,

legal, banking, transportation, marketing, royalties, consulting, and professional services. Other goods and services include purchases made for resale at organization venues, such as books, souvenirs, and replicas, and the purchase of materials for sets/exhibitions. These costs accounted for 9% of aggregate expenditures. Utilities and telephone costs amounted to 3%, and taxes accounted for only 0.4% of expenditures of arts, cultural, and scientific organizations. Expenditures of arts and cultural organizations in the 2009 ArtsFund Economic Impact Study had a very similar composition to expenditures reported in the current study.

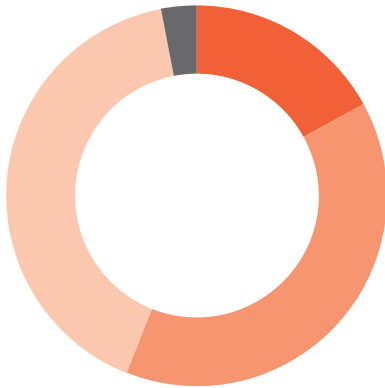
Aggregate Expenditures Of Central Puget Sound Region Arts, Cultural, and Scientific Organizations



EMPLOYMENT

An estimated 35,376 jobs in the Washington economy were related to arts, cultural, and scientific organizations in 2014. Of these 18,778 were directly tied to arts, cultural, and scientific organizations. Many of these jobs are part-time or contractual (80%), and were held by individuals working for more than one arts, cultural, or scientific organization in the region. For example, some of the musicians performing for the Seattle Symphony, Seattle Opera, and Pacific Northwest Ballet work part-time for each of these organizations. Part-time and contractual employment accounts for the majority of jobs in Dance, Festival, Heritage, Music, Theatre, and Visual Arts organizations. People working in Central Puget Sound region arts, cultural, and scientific organizations received \$270 million in labor income in 2014 while contract individuals and firms received an additional \$28 million.

Employment Status

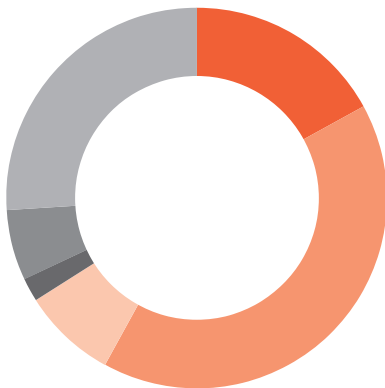


Full-Time	17.1%
Part-Time	39.1%
Contractual	40.5%
Work Study/Intern	3.3%

ATTENDANCE

There were 13.4 million admissions to arts, cultural, and scientific organizations in the Central Puget Sound region in 2014. The season ticket/membership or single ticket visits accounted for (58%) of attendance, while 26% (3.5 million) were free admissions. The balance (16%) were discounted admissions for students, seniors, and other types of discounted admissions. K-12 students accounted for over 1.2 million free or discounted admissions. About half (53%) of these students were Caucasian, and about half (47%) were other ethnicities.

Percentage Distribution Of Attendance By Category

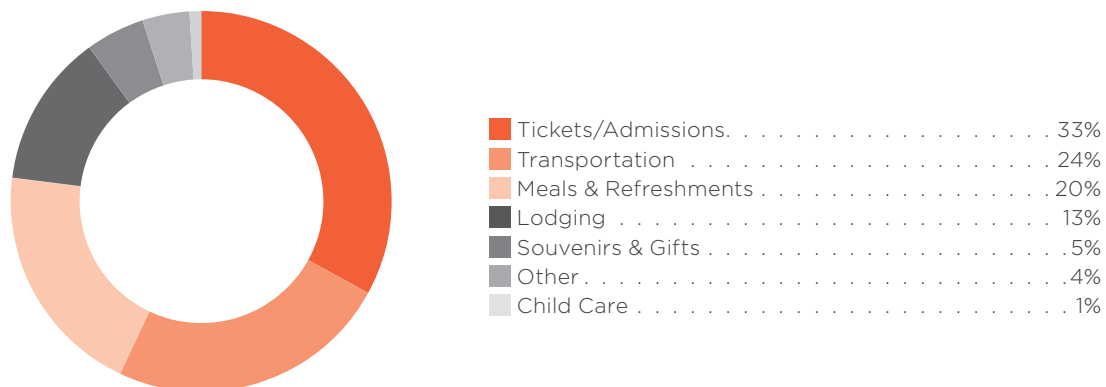


Season Ticket/Membership Visits	17%
Single Tickets/Admissions	41%
Discounted Student Tickets	.8%
Discounted Senior Tickets	.2%
Other Discounted Tickets	.6%
Free Tickets	26%

PATRON SPENDING

Patrons spent an average of \$57 on their visits to Central Puget Sound region arts, cultural, and scientific organizations in 2014. Local residents spent less (\$46) than those coming from elsewhere in Washington State (\$87) or from out-of-state (\$148). The largest share of expenditures was for tickets/admissions (33%). Significant outlays were also made for transportation (24%), meals and refreshments (20%), and lodging (13%). Smaller outlays were made for souvenirs and gifts, child-care, and other expenses. The composition of these outlays varies by region of origin. Local residents have low travel and lodging costs, while these costs are much higher for those traveling from outside the local area.

Patron Expenditures by Category



VOLUNTEERS

Volunteers are important to arts, cultural, and scientific organizations, as they provide assistance with both administrative work as well as artistic, professional, and technical work. Arts, cultural, and scientific organizations reported the use of 28,849 volunteers, providing 1.2 million hours of volunteer activity, an average of 41 hours per volunteer.

VALUES REGARDING CULTURAL ACTIVITY

Patrons regard cultural activities as a very important part of the quality of life in the Central Puget Sound region. They also consider it to be very important to the identity of the region, and to have been an important influence on their decision to live and work in this community. Most patrons report that their attendance and spending on cultural activities has been stable or increased in recent years, in increasingly diverse modes of engagement. They report a willingness to travel long distances to consume cultural activities, and have a desire to be able to attend cultural activities in more diverse locations.

QUALITY OF LIFE CONSIDERATIONS

This report contains extensive statistical information about arts, cultural, and scientific organizations in the Central Puget Sound region. It documents the economic impacts of these organizations, reporting strong impacts on jobs, business activity, and labor income. However, the community support for these organizations through contributed income and volunteer activity is not primarily because of these economic contributions to the regional economy. Rather, the organizations that are the focus of this study are vital elements in the cultural life of our region, anchors for the quality of life for which this region is so highly regarded. The following patron quotes make this contribution clear.

“Culture is a vital element of this region’s identity. Great art is a critical part of what makes this region a great place to live.”

“(Cultural activity) is a springboard for creativity and good brain development for the future problem solvers/leaders/inventors/idea builders.”

“(Cultural activity) is the reason I want to retire here in Seattle. There is such a wealth of cultural activities that are both excellent and affordable.”

“Culture expands my understanding of myself and the world I live in.”

“I feel very fortunate to be in a city that appreciates the role culture plays in society. It keeps us human and expands our perception of the world around us.”

Source: Patron Survey

I. INTRODUCTION

“The arts are extremely important to me, my family, my social life, and to the vitality of my city.”

“Cultural activities help to open one up to a bigger life. They open my eyes, my mind, and my world.”

Source: Patron Survey

GOALS AND OBJECTIVES OF THIS STUDY

ArtsFund began measuring the economic impact of arts and cultural organizations in the Puget Sound region over twenty years ago, with a first study benchmarked against King County in 1992. Since then ArtsFund has supported three additional measurements of the economic impact of these activities on the King County and Washington State economies, benchmarked against the years 1997, 2003, and 2009. In 2009 ArtsFund expanded the geographic and disciplinary scope of these economic impact studies to also include Pierce, Snohomish, and Kitsap counties, as well as non-profit scientific organizations. The regional economy has been in varying situations over the course of these studies. The period from 1992 to 1997 was one of rapid growth in the regional economy, while 2003 felt lingering effects of the recession early in that decade and the events of 9/11. The 2009 study was undertaken at a time when the local economy suffered high levels of unemployment related to the Great Recession that began in December 2007. The current study approaches the measurement of the economic impact of non-profit arts, cultural, and scientific organizations from the same methodological perspective as in the earlier ArtsFund Economic Impact Studies, allowing comparisons of selected measures over the course of these studies. The regional economy in 2014 had returned to a period of sustained growth and low unemployment.

The organizations included in this study are central to the high quality of life enjoyed by residents of the Puget Sound region. They also generate jobs, business activity, tax revenues, and labor income through the spending of the organizations and their patrons. This study documents these patterns of spending, and uses models of the state and regional economy to estimate the cumulative economic impacts related to attendance at exhibitions, performances, lectures, zoos and botanical gardens, and science-based organizations.

The current study includes the expanded definition of organizations included in the research project in 2009, which added scientific organizations and Festivals to the disciplines included in earlier ArtsFund Economic Impact Studies (GMA and Beyers, 2009). The scope of the study remains focused those organizations that are classified as by the IRS as having 501(c)3 tax status. The study includes very large organizations,

such as the Seattle Symphony, Woodland Park Zoo, Museum of Flight, Seattle Opera, Seattle Repertory Theatre, Pacific Northwest Ballet, and the Seattle Art Museum. It also includes literally hundreds of smaller organizations. We have used a budget estimate for the most recent year for which data were available to determine which organizations were included in this study, and have included all organizations with a budget of at least \$35,000. This figure was arrived at by referencing the budget basis for inclusion in the earlier ArtsFund Economic Impact Studies, and inflation since the dates of those earlier studies. The disciplines defined for purposes of the current study differ somewhat from the 2009 study. In recognition of the changing nature of presentations by arts and cultural organizations, a new disciplinary classification has been utilized—Interdisciplinary. Many organizations included in earlier ArtsFund Economic Impact studies in other disciplines were classified in this new category in the current study, making it difficult to undertake some intertemporal comparisons of disciplinary activity.

This report is organized as follows. The research approach is discussed in this section, including the two surveys that provide the basic data for this project. The economic impact model is also discussed in this section. Section II presents the data used to estimate economic impacts; this includes (1) data from arts, cultural, and scientific organizations on their revenue and expenditures, (2) data on expenditures made by patrons of these organizations, and (3) the calculation of economic impacts based on data from patrons and organizations included in this study. Section III presents detailed information from the survey of patrons of arts, cultural, and scientific organizations in the Central Puget Sound region. It also includes patronage statistics from the survey or organizations, including detailed data on student participation. Section IV reports on comparisons between the current study and similar reports undertaken in other regions in the United States. Section V presents some concluding comments. There are six appendices to this report. Appendix I identifies the arts and cultural organizations included in this study, divided between those who responded to the organizational questionnaire, and those otherwise included. Appendix II describes the input-output modeling methodology. Appendix III and IV contain the survey instruments used for this study. Appendix V is a summary of the economic impact measures. Appendix VI identifies the ArtsFund Board of Trustees and staff, who were instrumental in the execution of this study.

RESEARCH APPROACH

This study was informed in its development by decisions made in earlier ArtsFund Economic Impact Studies. The approach taken to the current study closely approximates the earlier economic impact studies undertaken by ArtsFund. The questionnaires used in the research project are quite similar to those used in previous ArtsFund Economic Impact Studies, with minor changes intended to improve the accuracy and comprehensiveness of responses. We have undertaken these surveys because data are not available from published sources on business activity in these arts, cultural, and scientific organizations, or their patrons.

ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATION SURVEY

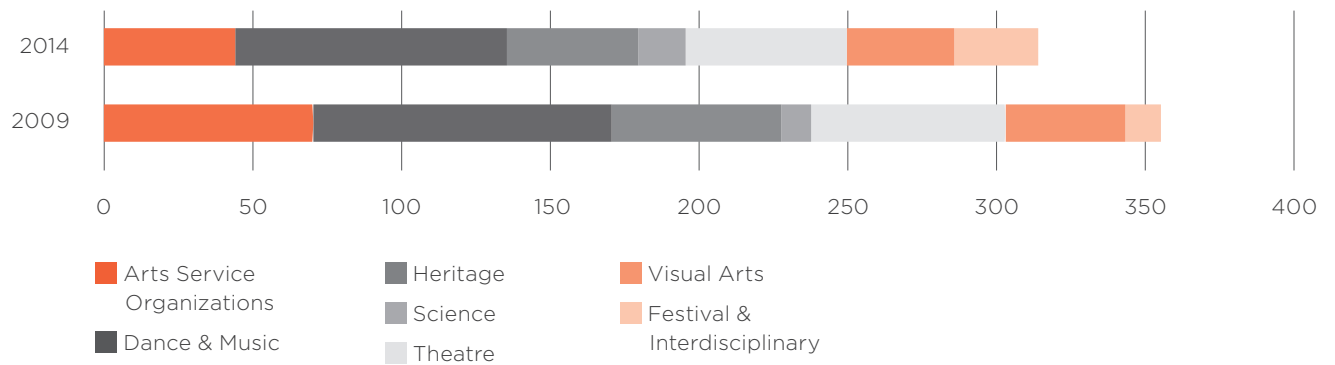
Agencies such as the Washington State Department of Employment Security or the Washington State Department of Revenue include the organizations covered in this report in their data, but they do not isolate them from broader measures of economic activity in arts, cultural, and scientific organizations. These agencies do not distinguish between 501(c)3 organizations and for-profit organizations in the industry codes covered by this study, and they do not provide data on the “disciplines” that are a major focus of this report. In this study we identify eight disciplines or types of organizations—Arts Service Organizations (hereafter referenced as ASO), Festivals and Interdisciplinary, Heritage, Dance, Music, Scientific, Theatre, and Visual Arts. The survey of organizations provides detailed information on all eight of these disciplines, while the survey of patrons provides data on seven disciplines. The survey of patrons combines data for Music and Dance due to the size of the sample of patrons in these disciplines. Government statistical agencies also fail to report data on performances by organizations in non-profit arts, cultural, and scientific organizations by their budget size. Since this study is benchmarked against those organizations in the Central Puget Sound region with a budget of at least \$35,000, we needed to develop a data-base specific to the organizations that met this budget test. ArtsFund staff worked with other local organizations to develop this data-base; Appendix I reports the names of organizations deemed to have a budget sufficient to be included in this study. There were 313 organizations that were identified as meeting this budget test, as reported below in Table I-1. Many of these organizations were asked to fill out the questionnaire found in Appendix 3. A total of 129 eligible questionnaires were returned, with a small number of additional questionnaires returned by organizations whose budgets did not meet the \$35,000 threshold for inclusion in this study.

Figure I-1 compares the number of organizations included in the 2009 and 2014 Central Puget Sound region ArtsFund Economic Impact Studies. The number of organizations was slightly smaller in 2014 than in 2009, although as reported later in this study their overall budgets have increased.

Table I-1 Cultural Organizations Included in this Study

	# OF QUESTIONNAIRES RETURNED	# OF OTHER ORGANIZATIONS INCLUDED
Arts Service Organizations	24	20
Dance	6	11
Festival & Interdisciplinary	12	16
Heritage	14	30
Music	24	50
Science	7	9
Theatre	22	32
Visual	20	16
TOTAL	129	184

Figure I-1 Number of Organizations Included in 2009 and 2014



The questionnaires sent to arts, cultural, and scientific organizations were in the form of a spreadsheet. The responding organizations sent their questionnaires to ArtsFund. ArtsFund staff worked hard to obtain as many questionnaires as possible, including returns from many organizations that do not receive funding from ArtsFund. The questionnaires were benchmarked against the most recent budget year for the organizations participating; in most cases these were based on the year 2014. Appendix III contains a copy of the survey instrument sent to arts, cultural, and scientific organizations. Each organization was asked to provide information on (1) their general activity and attendance; (2) detailed activity on their income; (3) detailed expenditures on employees including wages and salaries, benefits, types of employment; (4) detailed information on expenses other than wage and salary employees, including contract employees, and detailed purchases of goods and services; and (5) information on free or reduced admissions for K-12 students.

Excellent coverage was obtained in the organizational survey, as reported in Table I-2. This table reports in column (1) the estimated total revenue by discipline, and in column (2) the reported income of organizations responding to this survey. Column (3) contains the ratio of covered to estimated total revenue. Across the disciplines we had coverage from organizations reporting \$427 million in revenue, out of an estimated \$513 million, or 83% percent of total revenue. Excellent coverage was obtained in all disciplines except Music and Arts Service Organizations. This study has the same high level of support from arts and cultural organizations as reported in previous ArtsFund economic impact studies, and the newly defined discipline in this study also had an excellent rate of return on organizational questionnaires.

Table I-2 Central Puget Sound Region Cultural Organization Budget Coverage

	(1) ESTIMATED TOTAL INCOME OF ORGANIZATIONS INCLUDED	(2) OPERATING INCOME OF ORGANIZATIONS SURVEYED	RATIO (1)/(2)
Arts Service Organizations	\$42,344,959	\$31,159,935	1.359
Dance	\$28,452,294	\$25,277,426	1.126
Festival & Interdisciplinary	\$86,398,755	\$71,715,059	1.205
Heritage	\$33,450,861	\$22,213,219	1.506
Music	\$75,754,762	\$65,760,573	1.152
Science	\$96,083,507	\$77,748,594	1.236
Theatre	\$78,384,831	\$70,146,262	1.117
Visual	\$72,055,662	\$62,819,632	1.147
TOTAL	\$512,925,630	\$426,840,700	1.202

PATRON SURVEY

The patron survey was conducted by the intercept method in venues for each discipline. People were asked by volunteers to complete a questionnaire at 54 venues in the Central Puget Sound region from January 14, 2015 to July 20, 2015. A copy of the patron questionnaire is found in Appendix IV. A total of 3,457 questionnaires were gathered in this process. The questionnaire did not go through a pre-test, but its content was reviewed by committee established by ArtsFund to oversee development of this project. The questionnaire was quite similar to that used in the 2009 ArtsFund Economic Impact Study.

GMA Research Corporation developed the sampling plan for the patron survey. The patron questionnaires were also processed by GMA Research Corporation. The patron survey obtained data on (1) numbers of patrons in groups being interviewed, (2) their spending related to attendance at arts, cultural, and scientific organizations, (3) demographic characteristics of the respondents, (4) primary reasons for their trips, (5) attitudinal responses on a variety of questions related to their perception of the value of

arts, cultural, and scientific organizations, and (6) their frequency of attendance to these organizations. These data are presented in Sections II and III of this report.

ECONOMIC IMPACT MODEL

The data estimated from the organizational and patron surveys were drawn together to estimate the economic impact of arts, cultural, and scientific organizations in the Central Puget Sound region. These data were used with the 2007 Washington State input-output model to develop the economic impact estimates (Beyers & Lin 2012). The 2007 Washington State input-output model was based on an extensive survey of businesses across the Washington State economy; this was the eighth estimate of input-output relationships in the Washington economy (Beyers & Lin 2012). Unlike most regions in the United States, Washington State has invested repeatedly in the measurement of input-output relationships through survey research. Details about this model are reported in Appendix II. It should be noted that analyses of the multiplier structure in the Washington input-output model show considerable stability over time, while labor productivity has increased significantly over the history of these models (Beyers & Lin 2013).

The economic impact data in this report are benchmarked against Washington State and the Central Puget Sound region. The structure of the state model was changed using the location quotient approach to input-output model adjustment (Miller and Blair 2009). Data reported from the patron survey were reclassified from consumer expenditure categories to producer prices, in accordance with input-output modeling procedures. Patron expenditures on tickets and admissions were excluded from the economic impact calculations, as these are part of the income of arts, cultural, and scientific organizations. The overall expenditures of these organizations within the state or regional economy were included in this report. As documented in Section II, a large fraction of the revenue of arts, cultural, and scientific organizations are not from earned income (such as tickets/admission), but from contributed income. Thus, the accounting frame used for this study avoids “double-counting” of sources of economic impacts.

Two approaches to economic impacts are presented in this report. The first is a gross regional measure of economic impacts, based on total expenditures by patrons and arts, cultural, and scientific organizations. The second is what is referred to as a “new money” measure—economic impacts that occur due to organization income or patron spending that originates outside the local region of analysis. The new money measure is often times viewed as the contribution of economic activities to the economic-base of regions—a measure of economic impact that would not occur if the organizations included were not located here. In contrast, the difference between the gross economic impact measure and the new money measure reflects the level of discretionary spending by local residents, which could be redirected to other categories of local economic activities if the arts, cultural, and scientific organizations included in this study were not present in the local economy.

II. ECONOMIC IMPACT OF CULTURAL ORGANIZATIONS IN THE CENTRAL PUGET SOUND REGION

“Quality and variation of cultural offerings are critical drivers of the regional economy, because people have a choice where they live (often) and are attracted because of cultural diversity and excellence.”

“(Cultural activity) makes a visit here for business rich and varied. Gives reason to stay, enjoy.”

Source: Patron Survey

This chapter presents estimates of the economic impact of arts, cultural, and scientific organizations on the Washington and Central Puget Sound region economies. The chapter is divided into several parts. The first two sections document the stream of income and the pattern of expenditures of arts, cultural, and scientific organizations. Then estimated levels of employment are presented, followed by estimates of patron spending. Estimates of expenditures by patrons and arts, cultural, and scientific organizations are then used to estimate economic impacts on the Washington and Central Puget Sound region economies. The chapter also presents estimates of volunteer activity in arts, cultural, and scientific organizations in the Central Puget Sound region.

INCOME OF CENTRAL PUGET SOUND REGION CULTURAL ORGANIZATIONS

Arts, Cultural, and Scientific organizations obtain their income from a combination of earned and contributed sources. The next section of this report presents estimates of the overall structure of income. Then the structure of earned, contributed, government, and other income is reported.

(1) Total Income

Total income to arts, cultural, and scientific organizations is presented in Table II-1, while Figures II-1, II-2, and II-3 present graphic representations of the income of Central Puget Sound region arts, cultural, and scientific organizations. Total income of these organizations in 2014 is estimated to be \$512.9 million (this date represents the most recent year for budget data utilized in this analysis; it should be noted that organizations were asked to supply budget information for the most recent year for which they had data. In some cases that was calendar year 2014, in other cases it was fiscal year 2014, and in some cases it included a budget period that stretched between 2013 and 2014). Figure II-1 shows the same data as in the last row of Table II-1, the share of total income associated with the disciplines included in this study. Science, Interdisciplinary/Festival,

and Theatre account for half of the budgets of organizations included in this study, while the balance was divided between Arts Service organizations, Heritage, Visual Arts, Music, and Dance organizations. Figure II-2 presents in graphical form the composition of income, with the shares being the same as the values in the last column of Table II-1. Figure II-2 reports that earned income was 56% of total income for all arts, cultural, and scientific organizations in the Central Puget Sound region, while contributed income accounted for the balance (44%) of total income.

Figure II-3 and Table II-2 show the composition of earned and contributed income by discipline. This figure and table document the variation in the mix of earned and contributed income by discipline. Arts Service Organizations have a relatively small level of earned income, and obtain a relatively large share of their income from government sources, compared to the other disciplines. Heritage and Visual Arts organizations report a relatively large share of benefit or in-kind income.

Table II-1 Total Income of Central Puget Sound Region Cultural Organizations (\$ Millions)

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Earned	\$8.9	\$18.8	\$10.9	\$35.2	\$58.7	\$54.0	\$34.8	\$66.1	\$287.4
Government	24.2	0.4	10.3	1.3	17.0	1.3	4.3	2.2	61.0
Individual	2.7	4.6	3.5	24.1	9.3	10.2	11.6	8.2	74.3
Corporate	2.2	0.8	0.8	2.8	2.0	2.8	4.0	3.1	18.5
Foundation	1.0	1.8	3.5	8.2	2.6	2.5	4.4	2.0	26.1
Benefits, in-kind	3.2	2.0	3.4	3.9	6.5	5.0	12.8	4.8	41.5
Misc. Income	0.1	0.0	1.1	0.1	0.0	2.6	0.1	0.0	4.2
TOTAL	\$42.3	\$28.5	\$33.5	\$75.8	\$96.1	\$78.4	\$72.1	\$86.4	\$512.9
DISCIPLINE INCOME AS A % OF TOTAL INCOME	8.3%	5.5%	6.5%	14.8%	18.7%	15.3%	14.0%	16.8%	100.0%

Table II-2 Percentage of Total Income by Discipline and Total

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Earned	20.9%	66.2%	32.5%	46.5%	61.1%	68.9%	48.3%	76.5%	56.0%
Government	57.3%	1.6%	30.7%	1.8%	17.7%	1.6%	6.0%	2.5%	11.9%
Individual	6.4%	16.0%	10.6%	31.8%	9.7%	13.1%	16.1%	9.5%	14.5%
Corporate	5.3%	2.9%	2.3%	3.7%	2.1%	3.6%	5.5%	3.5%	3.6%
Foundation	2.4%	6.4%	10.4%	10.9%	2.7%	3.2%	6.1%	2.3%	5.1%
Benefits, in-kind	7.6%	6.9%	10.1%	5.1%	6.7%	6.3%	17.8%	5.6%	8.1%
Misc. Income	0.1%	0.0%	3.4%	0.2%	0.0%	3.3%	0.2%	0.1%	0.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figure II-1 Percentage of Total Income by Discipline

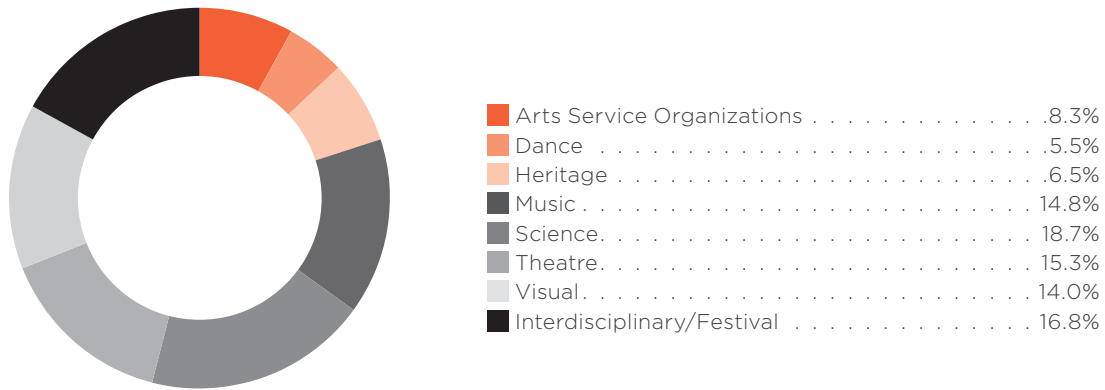


Figure II-2 Percentage of Total Income by Source

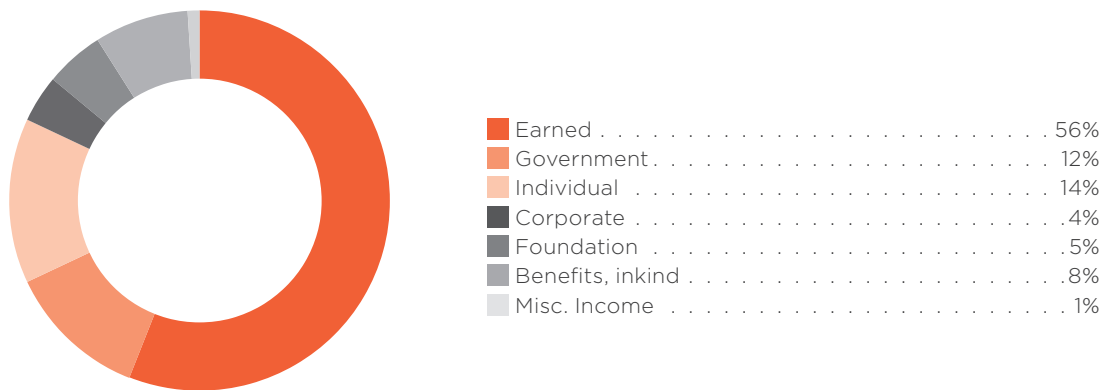
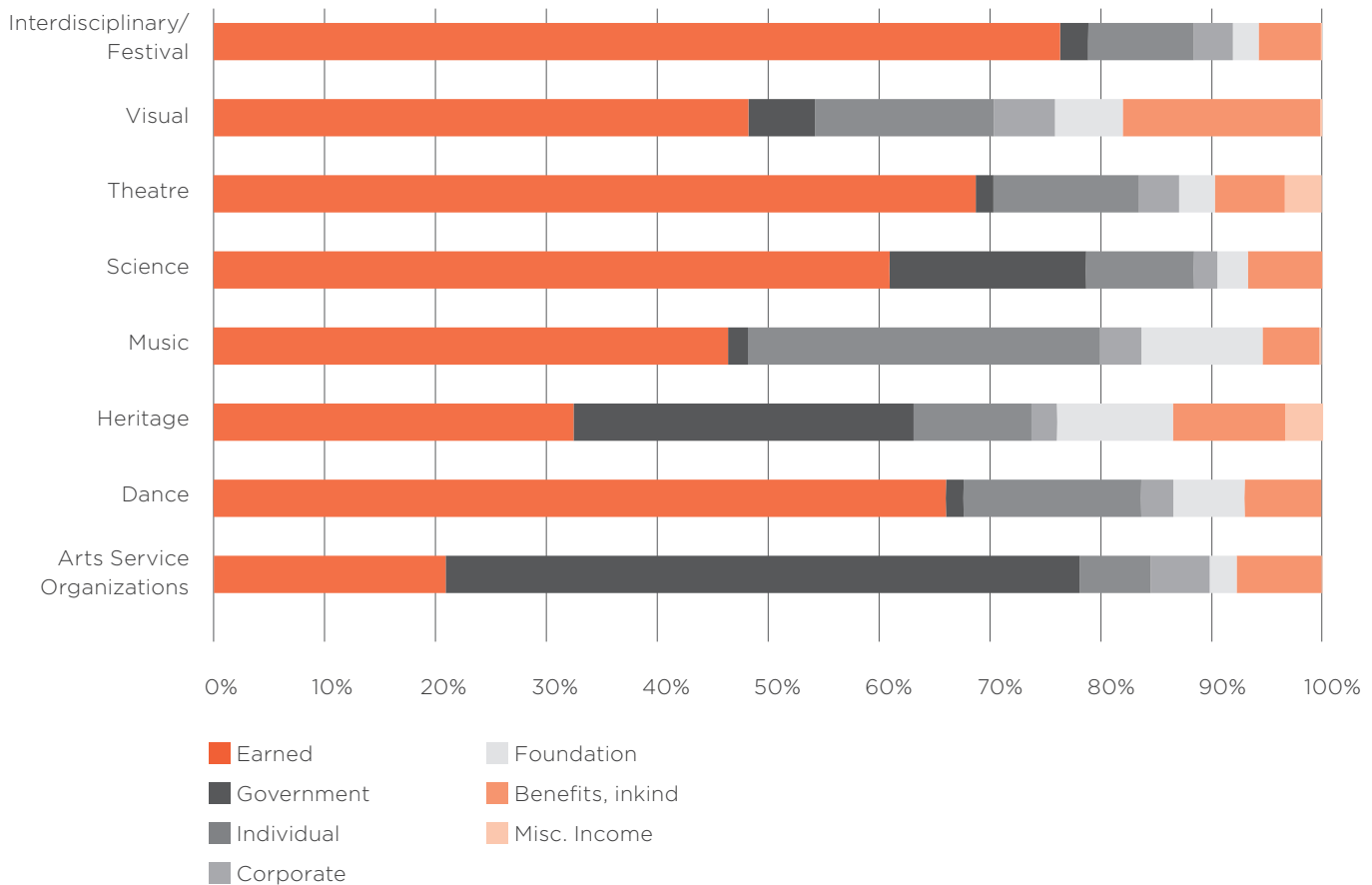


Figure II-3 Percentage of Total Income by Discipline and Source



The overall composition of income of arts, cultural and scientific organizations reported in Table II-2 and Figures II-2 and III-3 are very similar to those reported in the 2009 ArtsFund Economic Impact Study. Arts Service Organizations reported higher levels of earned income and lower levels of individual income in the current study, compared to the 2009 study. Heritage organizations reported higher levels of government support and lower levels of individual support in the current study. Visual Arts organizations reported higher levels of earned income, and lower levels of miscellaneous income in the current study.

(2) Earned Income

Table II-3 documents the detailed composition of earned income. This table clearly indicates significant variations in the composition of earned income by discipline. Box office/admissions form the largest source of earned income for all of the organizations included in this study, but Arts Service Organizations, Heritage, and Visual Arts organizations had much lower than average levels of box office/admissions. In the case

of Arts Service Organizations other earned income, interest, and tuition/workshops provided a relatively large share of earned income. Heritage organizations have a relatively large reliance on tuition/workshops, retail/wholesale sales, interest, and other sources of earned income. Visual Arts organizations reported relatively large levels of retail/wholesale sales and other earned income.

The composition of earned income in the current study is similar to that reported in the 2009 study. Box office/admissions were identical at 69% of total earned income. Interest formed a lower share of earned income (1.5% vs. 4%), undoubtedly a reflection of the historically low interest rates in the current economy.

(3) Contributed Income

The composition of contributed income (except government) is reported in Table II-4. Arts, cultural, and scientific organizations rely on a broad variety of private sources of contributed income, including individuals, corporations, foundations, and benefits/in-kind sources. There are clear differences in the mix of contributed income across the disciplines reported in Table II-4. Corporate sources of income were relatively important for Arts Service Organizations (which includes ArtsFund that receives considerable support from corporations). Interdisciplinary/Festivals, Visual Arts, and Arts Service Organizations report a large share of in-kind activity. Foundations provide support broadly across all disciplines, while miscellaneous contributions were quite important to Heritage and Theatre organizations. Individuals provided the largest share of contributed income for all disciplines.

The composition of contributed income in the current study was very similar to that reported in the 2009 study. Miscellaneous contributions dropped from 8% to 3% in the current study, with the difference spread across other categories of contributed income.

Individual Contributions

Individual contributions totaling \$74.3 million were received from almost 156 thousand contributors, as reported in Table II-5. The average individual donation was \$477; and the data in Table II-5 indicate that Dance, Arts Service Organizations, Music, and Visual Arts organizations had average individual donations above the average. On average 9.5% of these donations came from people outside the Central Puget Sound region, with Heritage, Music, and Theatre reporting relatively large donations from outside the local area. In contrast, Arts Service Organizations, Science, and Interdisciplinary/Festival organizations reported low percentages of outside donations from individuals.

The number of individual contributors to organizations in the 2014 ArtsFund study increased by 10% over the number reported in the 2009 economic impact study. Overall contributions were identical at \$74.3 (constant 2014\$) million. The average size

of a donation dropped from \$524 (constant 2014\$) to \$477. The percentage of these donations from outside the Central Puget Sound region rose from 4.7% to 9.5%.

Corporate Contributions

Corporate organizations contributed \$18.5 million to Central Puget Sound region arts, cultural, and scientific organizations in 2014, as reported in Table II-6. Over twenty-two hundred corporate donations were received, with an average value of \$8,262. Some 6.9% of these donations came from corporations located outside the Central Puget Sound region. Dance, Interdisciplinary/Festival, and Music organizations received relatively large average corporate contributions, while Interdisciplinary/Festival, Heritage, Theatre, and Music organizations received a relatively large fraction of their donations from outside the Central Puget Sound region.

Corporate contributions fell modestly from \$19.5 million (constant \$2014) to \$18.5 million. The number of corporate donors decreased from 2,404 to 2,240. The average size of a donation increased slightly (from \$8,122 in \$2014 to \$8,262). The percentage of donations from outside the Central Puget Sound region decreased significantly, from 20.6% to 6.9%.

Private Foundations

Private foundations provided \$26 million in donations in 2014 to Central Puget Sound region arts, cultural and scientific organizations. Table II-7 reports that there were 1,156 donations by private foundations, with an average value of \$22,555. Private foundation donations were large on average across all disciplines, compared to corporate or individual donations. On average, 15.5% of these donations came from outside the local area, but Dance, Interdisciplinary/Festival, and Theatre organizations had relatively large shares of foundation donations from outside the local area.

Private foundation contributions increased modestly from the 2009 ArtsFund study, from \$25 million (constant \$2014) to \$26 million. The number of donors increased from 1,048 to 1,156, and the average donation decreased from \$23,935 (constant \$2014) to \$22,555. The percentage of funds donated by private foundations outside the Central Puget Sound region was unchanged (15.2% in 2009 and 15.5% in 2014).

In-kind Contributions

The level of in-kind contributions received by Central Puget Sound region arts, cultural and scientific organizations was \$17.7 million in 2014, as reported in Table II-8. A total of 2,182 in-kind contributions were reported, with an average value of \$8,132. In-kind donations were relatively important for Arts Service, Dance, Visual Arts, and Interdisciplinary/Festival organizations. A relatively small fraction of in-kind donations came from outside the local area (3.7%).

In-kind contributions declined from \$25.4 million (constant \$2014) reported in the 2009 ArtsFund Economic Impact Study to \$17.7 million. The number of contributors declined from 6,794 to 2,182 while the average donation increased from \$3,739 (in constant \$2014) to \$8,132. The percentage of these donations from outside the Central Puget Sound region declined modestly, from 4% to 3.7%.

(4) Government Income

Government income was almost \$61 million in 2014, accounting for 12% of total income to arts, cultural, and scientific organizations, as reported in Tables II-1 and II-2. Government income was relatively important for Arts Service, Heritage, and Science organizations. Table II-9 reports the composition of government income by discipline. Local governments were the source of most of this government income, followed by state government. Heritage and Visual Arts organizations were relatively dependent on state government income sources, and Heritage, Theatre, and Interdisciplinary/Festival organizations were relatively dependent on federal government sources.

Government income also accounted for 12% of total income to arts, cultural, and scientific organizations in 2009. Federal support was the same share of government income in 2009 and in the current study: 8%. State support declined from 25% to 21%, and support from county governments declined from 30% to 22%. In contrast, support from cities increased from 37% to 48% of government support.

(5) Comparison of Income 2009 and 2014

The composition of income of Central Puget Sound region arts, cultural, and scientific organizations was almost identical in 2009 and 2014, as reported in Figure II-4. Earned income increased from 55% to 56%, while miscellaneous income dropped from 3% to 1%. Other components of contributed income were very similar in 2009 and 2014.

Figure II-4 Composition of Income 2009 and 2014

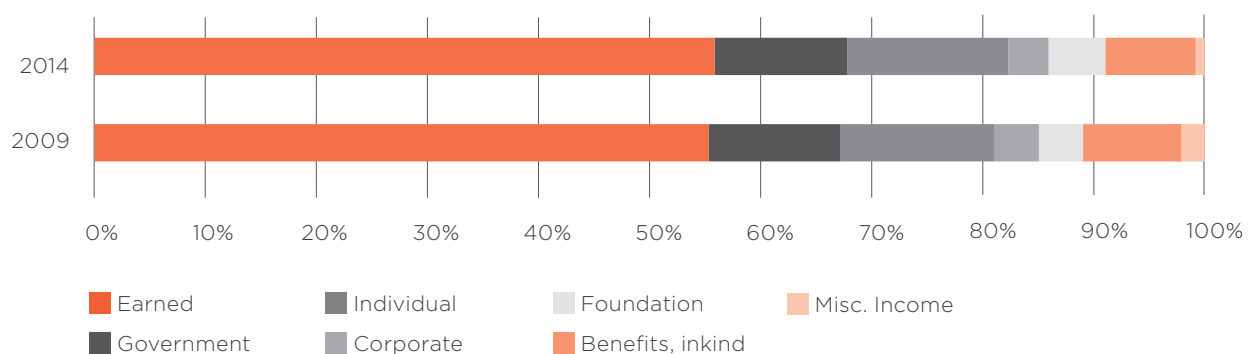


Table II-3 Percentage Composition of Earned Income

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Box Office/ Admissions	13.8%	67.7%	33.7%	83.6%	72.3%	76.0%	41.3%	81.7%	69.2%
Tuition/Workshops	46.2%	27.1%	11.4%	7.6%	11.4%	8.1%	13.2%	0.8%	10.2%
Retail/Wholesale Sales	9.3%	1.7%	12.2%	2.0%	5.3%	2.6%	15.6%	4.2%	5.5%
Other Earned Income	23.0%	3.5%	30.3%	5.0%	10.7%	13.2%	26.5%	13.3%	13.6%
Interest	7.7%	0.0%	12.5%	1.8%	0.4%	0.1%	3.3%	0.2%	1.5%
TOTAL EARNED INCOME	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table II-4 Percentage Composition of Contributed Income by Source (Except Government)

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Corporations	24.1%	9.0%	6.3%	7.2%	9.7%	12.2%	12.1%	16.9%	11.2%
Foundations	11.1%	19.8%	28.3%	21.0%	12.8%	10.9%	13.4%	10.8%	15.8%
Individuals	29.5%	49.7%	28.7%	61.5%	45.6%	44.2%	35.2%	45.4%	45.2%
Benefits/Galas/ Guilds	19.0%	9.7%	22.5%	6.7%	24.7%	15.6%	16.0%	9.6%	14.4%
In-Kind	15.6%	11.7%	4.9%	3.2%	7.0%	5.8%	22.8%	17.0%	10.8%
Misc. Contributions	0.7%	0.1%	9.2%	0.4%	0.1%	11.3%	0.4%	0.2%	2.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table II-5 Individual Contributions to Central Puget Sound Region Cultural Organizations

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Individual Contributions (\$ Millions)	\$2.7	\$4.6	\$3.5	\$24.1	\$9.3	\$10.2	\$11.6	\$8.2	\$74.3
Number of Contributors	4,491	6,079	8,953	20,665	34,230	30,028	22,074	29,313	155,834
\$/Contributor	\$606	\$749	\$394	\$1,166	\$272	\$341	\$527	\$280	\$477
% Outside Region	2.2%	9.4%	15.0%	11.4%	4.4%	15.2%	9.1%	3.5%	9.5%

Table II-6 Corporate Contributions to Central Puget Sound Region Cultural Organizations

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Corporate Contributions (\$ Millions)	\$2.2	\$0.8	\$0.8	\$2.8	\$2.0	\$2.8	\$4.0	\$3.1	\$18.5
Number of Contributors	317	70	185	215	214	537	439	263	2240
\$/Contributor	\$7,024	\$11,819	\$4,212	\$13,041	\$9,304	\$5,268	\$9,076	\$11,661	\$8,262
% Outside Region	5.2%	5.2%	8.7%	10.5%	3.8%	8.5%	4.5%	8.4%	6.9%

Table II-7 Private Foundation Contributions to Central Puget Sound Region Cultural Organizations

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Private Foundation Contributions (\$ Millions)	\$1.0	\$1.8	\$3.5	\$8.2	\$2.6	\$2.5	\$4.4	\$2.0	\$26.1
Number of Contributors	91	53	133	183	100	211	274	111	1,156
\$/Contributor	\$11,281	\$34,206	\$26,292	\$45,019	\$26,083	\$11,933	\$16,133	\$17,605	\$22,555
% Outside Region	16.2%	42.9%	14.3%	6.9%	3.6%	26.2%	14.0%	33.8%	15.5%

Table II-8 In-Kind Contributions to Central Puget Sound Region Cultural Organizations

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
In-Kind Contributions (\$ Millions)	\$1.4	\$1.1	\$0.6	\$1.3	\$1.4	\$1.3	\$7.5	\$3.1	\$17.7
Number of Contributors	175	57	77	247	167	568	692	200	2,182
\$/Contributor	\$8,242	\$18,633	\$7,827	\$5,147	\$8,559	\$2,357	\$10,875	\$15,366	\$8,132
% Outside King County	1.4%	0.3%	7.0%	1.9%	0.0%	7.7%	3.0%	7.7%	3.7%

Table II-9 Government Income by Source (% of Government Income)

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Federal	4%	19%	16%	12%	8%	21%	6%	18%	8%
State	1%	10%	77%	7%	8%	7%	65%	25%	21%
Counties	26%	25%	4%	22%	33%	20%	7%	9%	22%
Cities	70%	45%	3%	58%	50%	52%	23%	48%	48%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

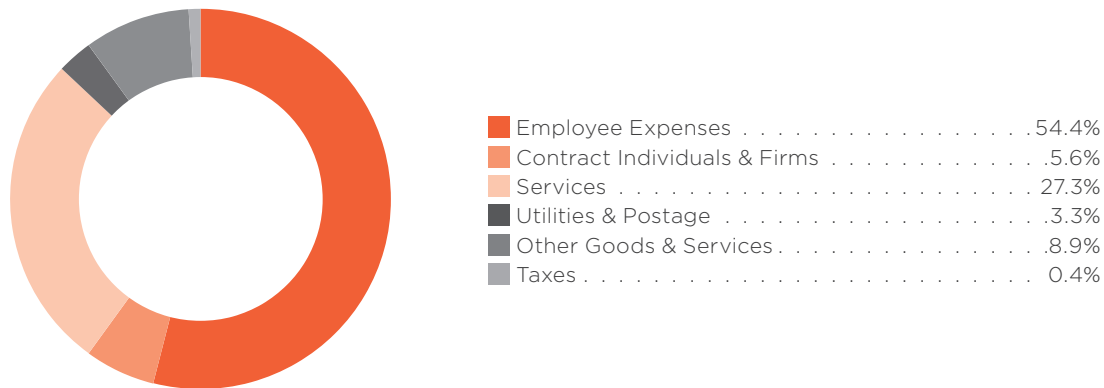
EXPENDITURES OF CENTRAL PUGET SOUND REGION CULTURAL ORGANIZATIONS

Table II-1 reported that Central Puget Sound arts, cultural, and scientific organizations had income of \$512.9 million in 2014. Table II-10 reports that their expenditures in this same time period were just slightly less than their total income, an estimated \$496.4 million. Expenses in Table II-10 are divided into two broad categories, employee expenses (54%) and operating expenses (46%). Figure II-5 provides more detail on the composition of operating expenses. Table II-10 indicates that almost all of the employee expenses were incurred within the Central Puget Sound region (99%), while 85% of operating expenses were made within the Central Puget Sound region. In the aggregate, 93% of total expenditures were made in the local economy.

Table II-10 Aggregate Expenditures of Central Puget Sound Region Cultural Organizations

	TOTAL EXPENDITURES	REGIONAL EXPENDITURES	% REGION
Employee Expenses	\$270,235,082	\$267,198,114	99%
Operating Expenses	\$226,142,129	\$192,707,348	85%
TOTAL	\$496,377,211	\$459,905,461	93%

Figure II-5 Aggregate Expenditures of Central Puget Sound Region Cultural Organizations



The composition of employee and operating expenses varies across the disciplines, as reported in Table II-11. Interdisciplinary/Festivals report a much lower share of their expenses for employees than the other disciplines. However, the Theatre percentage is lowered because of the relatively strong use by Theatres of contract employees, which are counted as part of operating expenses. Arts Service Organizations, Dance, Science, Heritage, and Music report somewhat higher employee expenses than the regional average.

Table II-11 Employee and Operating Expenses by Discipline

	EMPLOYEE EXPENSES (%)	OPERATING EXPENSES (%)	TOTAL
Arts Service Organizations	62%	38%	100%
Dance	62%	38%	100%
Heritage	66%	34%	100%
Music	59%	41%	100%
Science	62%	38%	100%
Theatre	57%	43%	100%
Visual	50%	50%	100%
Interdisciplinary/Festival	34%	66%	100%
TOTAL	54%	46%	100%

The shares of employee expenses and operating expenses reported in Table II-11 are similar to those reported in the 2009 ArtsFund Economic Impact Study. The 2009 study found employee expenses to be 52% of total expenses, and operating expenses to be 48% of total expenses. The 2009 study reported a somewhat lower percentage of operating expenses made the Central Puget Sound region (75%) than reported in the current study (85%).

(1) Composition of Employee Expenses

Employee expenses are divided into two broad categories: administrative and other categories of employee expenses. For arts and cultural organizations, the other employees include artistic/technical/and professional occupations. Table II-12 reports the share of these two categories across the disciplines included in this study. On balance, slightly more than one-third of employee expenses are administrative, and approximately two-thirds are for other employees. Dance and Heritage organizations report shares of administrative employee expenses well below the average, while Arts Service Organizations, Interdisciplinary/Festivals, and Visual Arts report shares of administrative employment expenditures above the regional average. These percentages are inclusive of wages and salaries, as well as estimated benefits and payroll taxes incurred by arts, cultural, and scientific organizations in the Central Puget Sound region.

The overall split between administrative and artistic/professional/technical wages, salaries, and benefits in the 2009 ArtsFund economic impact study has not changed significantly (34% for administrative in the 2009 study vs. 36% in the current study). However, there have been some more significant changes at the discipline level. Arts Service Organizations' administrative salaries, wages, and benefits fell from 60% to 50%, in Dance they rose from 17% to 23%, while in Heritage they decreased from 56% to 22%. Music reported a rise in administrative salaries, wages, and benefits from 25% to 30%, while in Theatre these expenses decreased from 43% to 36%. These changes up or down in administrative expenses are offset by corresponding changes in artistic/professional/technical wages, salaries, and benefits.

Table II-12 Composition of Employee Expenses

	ADMINISTRATIVE WAGES AND SALARIES & BENEFITS	OTHER WAGES AND SALARIES & BENEFITS	TOTAL
Arts Service Organizations	50%	50%	100%
Dance	23%	77%	100%
Heritage	22%	78%	100%
Music	30%	70%	100%
Science	35%	65%	100%
Theatre	36%	64%	100%
Visual	50%	50%	100%
Interdisciplinary/Festival	42%	58%	100%
TOTAL	36%	64%	100%

(2) Operating Expenses

Operating expenses were divided into five broad categories, as reported in Table II-13 and Table II-14. The largest share of operating expenses was for services (60%), followed by “other goods and services (19.6%),” contract individuals (12.4%), utilities and postage (7.2%), and taxes (0.9%). There are significant differences in the composition of operating expenses across disciplines; these broad differences are reported in Table II-13, while Table II-14 provides much greater detail on these operating expenses. Interdisciplinary/Festivals report significantly higher than average services expenses, while these costs are relatively low for Heritage, Music, and Arts Service Organizations. Contract individuals represent relatively high shares of operating cost expenses for Arts Service Organizations and Music organizations, and a small share for Science, Interdisciplinary/Festival, and Visual Arts organizations. Utilities and postage are higher than average for Visual Arts, Science, and Heritage organizations. Other goods and services (which includes exhibit/set materials and production materials) is relatively high for Heritage and Visual Arts organizations. Taxes represent a small share of operating expenses for all disciplines except Heritage.

Table II-13 Operating Expenses by Broad Category

	CONTRACT INDIVIDUALS & FIRMS	SERVICES	UTILITIES	OTHER GOODS & SERVICES	TAXES	TOTAL
Arts Service Organizations	23.6%	48.8%	5.7%	20.0%	2.0%	100.0%
Dance	13.5%	62.0%	3.8%	20.5%	0.2%	100.0%
Heritage	9.1%	38.4%	10.5%	37.9%	4.0%	100.0%
Music	39.1%	45.9%	3.7%	10.9%	0.3%	100.0%
Science	8.7%	58.1%	13.3%	17.9%	1.9%	100.0%
Theatre	11.5%	59.9%	6.5%	21.8%	0.3%	100.0%
Visual	6.0%	55.5%	10.8%	27.1%	0.7%	100.0%
Interdisciplinary/ Festival	3.0%	79.2%	3.4%	14.3%	0.2%	100.0%
TOTAL	12.4%	60.0%	7.2%	19.6%	0.9%	100.0%

The shares of operating expenses reported in Table II-13 did not change very much from shares reported in the 2009 ArtsFund Economic Impact Study. The cost of contract individuals and firms rose from 9% to 12.4%, service purchases fell from 62% to 60%, and other goods and services purchases fell from 21% to 19.6%. Utilities and postage expenses increased from 6% to 7.2%. Taxes remained unchanged at about 1%. At the discipline level there was also relative stability in operating expenses. Dance organizations reported higher expenditures for contract individuals & firms (13.5% vs. 8% in the 2009 study) and services (62% vs. 58% in the 2009 study), but lower outlays for other goods and services (20.5% vs. 29% in the 2009 study). Heritage organizations reported lower services purchases (38.4% vs. 47% in the 2009 study), but higher other goods and services purchases (37.9% vs. 30% in the 2009 study). Music reported a sharp increase in contract individuals and firms (39.1% vs. 23% in the 2009 study), and lower expenditures on all other categories of costs. Science organizations also reported an increase in contract individuals & firms (8.7% vs. 1% in the 2009 study), and lower expenditures on all other categories of costs.

The detailed estimates of operating expenses in Table II-14 report variations in the level and composition of these expenses across disciplines more sharply than the broad operating expenses reported in Table II-13. Marketing expenses are much larger than average for Dance and Science organizations. Press and public relations costs are relatively high for Science organizations, while photographic services were relatively high for Arts Service Organizations and Visual Arts organizations. Banking was a relatively high cost for Dance organizations, while insurance was reported as a relatively high cost for Heritage, Science, and Visual Arts organizations. Arts Service Organizations incurred relatively high accounting costs. Set or costume rental was reported as a relatively high cost by Visual Arts organizations, while Interdisciplinary/Festivals reported relatively

high costs for “other services.” Hall rental costs were reported to be relatively high by Music and Dance organizations. Office space rental was reported to be relatively high in cost by Dance, Visual Arts, and Arts Service Organizations. Royalties were a relatively high cost for Theatres. Other utilities were reported as a relatively high cost by Science organizations. Exhibit materials were reported as a relatively high cost by Heritage, Theatre, and Visual Arts organizations. Production materials were reported as a relatively high cost by Heritage and Visual Arts organizations, while supplies were a relatively high cost for Heritage organizations.

Table II-14 Operating Expenses by Detailed Categories (% of Total Operating Expenses)

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Contract Individuals & Firms	23.6%	13.5%	9.1%	39.1%	8.7%	11.5%	6.0%	3.0%	12.4%
Services									
Marketing	6.2%	20.7%	7.6%	10.2%	14.9%	14.2%	9.9%	11.8%	12.0%
Press and Public Relations	0.3%	0.3%	0.6%	0.8%	3.9%	0.9%	1.1%	0.6%	1.2%
Photographic/Art Services	2.5%	0.5%	0.3%	0.4%	0.0%	0.6%	3.0%	1.0%	1.1%
Banking	1.4%	4.3%	2.2%	2.2%	3.0%	1.3%	2.3%	1.5%	2.1%
Insurance	1.7%	1.0%	2.8%	0.9%	2.9%	1.6%	4.3%	1.3%	2.2%
Accounting/Audit	2.2%	0.7%	2.4%	0.7%	1.5%	0.8%	1.8%	0.4%	1.1%
Transportation	1.8%	2.3%	1.0%	4.1%	1.0%	1.2%	2.1%	0.8%	1.7%
Lodging	0.4%	0.9%	1.6%	1.8%	1.1%	1.0%	0.7%	0.7%	1.0%
Food & Beverages	2.0%	2.8%	2.4%	3.2%	4.2%	3.1%	3.2%	1.4%	2.8%
Set/Costume Rental	0.2%	0.5%	3.4%	0.6%	0.8%	3.1%	5.6%	0.5%	2.0%
Equipment Rental	4.5%	0.4%	1.5%	1.2%	0.9%	0.7%	1.5%	1.6%	1.4%
Hall Rental	1.4%	7.1%	2.2%	7.0%	0.0%	4.0%	1.4%	2.6%	2.9%
Office Space Rental	7.8%	11.8%	1.9%	4.4%	1.1%	3.0%	7.5%	1.2%	3.8%
Royalties	1.8%	3.1%	0.1%	1.1%	6.0%	17.5%	0.2%	0.4%	4.1%
Other Services	14.6%	5.7%	8.3%	7.1%	16.9%	6.8%	10.8%	53.3%	20.6%
Subtotal Services	48.8%	62.0%	38.4%	45.9%	58.1%	59.9%	55.5%	79.2%	60.0%
Utilities & Phone									
Telephone	1.2%	0.4%	2.0%	0.7%	1.0%	0.7%	0.8%	0.6%	0.8%
Postage	1.6%	2.2%	1.9%	2.0%	0.6%	2.3%	2.6%	0.4%	1.5%
Other Utilities	2.9%	1.3%	6.7%	1.0%	11.7%	3.5%	7.4%	2.4%	4.9%
Subtotal Utilities	5.7%	3.8%	10.5%	3.7%	13.3%	6.5%	10.8%	3.4%	7.2%

EMPLOYMENT IN CENTRAL PUGET SOUND REGION CULTURAL ORGANIZATIONS

Central Puget Sound region arts, cultural, and scientific organizations employ a mixture of full-time and part-time employees, contractual employees, and work-study or interns. Table II-15 reports estimated levels of employment by discipline, while Figure II-6 reports the total level of employment by employment category. The number of employees under a union contract is relatively high in Music and Theatre, but also of importance in Dance, Visual Arts, and Interdisciplinary/Festival organizations.

Table II-15 Employment Status

	FULL-TIME	PART-TIME	CONTRACTUAL	WORK STUDY/ INTERN	TOTAL	# PERSONNEL UNDER UNION CONTRACTS
Arts Service Organizations	167	291	2,294	22	2,774	7
Dance	160	514	201	36	912	370
Heritage	354	367	185	39	946	84
Music	321	1,251	1,859	38	3,470	1,058
Science	879	787	43	30	1,739	0
Theatre	425	2,170	1,699	251	4,545	714
Visual	609	869	688	177	2,343	314
Interdisciplinary/ Festival	290	1,094	631	35	2,050	637
TOTAL	3,205	7,344	7,601	628	18,778	3,185

Figure II-6 Employment Status

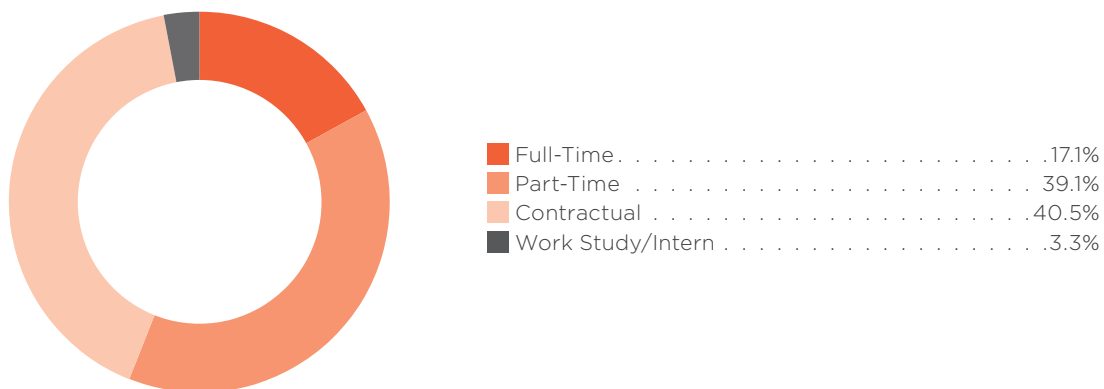


Table II-16 reports the composition of employment by discipline, and there are significant differences in the mix of employment. Arts Service Organizations have high levels of contractual employees, a reflection of public art programs hiring artists to do particular projects, often on a short-term basis. Science organizations report few contract workers. Science, Heritage, and Visual Arts programs have much larger proportions of full-time employees than on average. Dance, Interdisciplinary/Festival, Science, and Theatre organizations report higher than average proportions of part-time employees.

Table II-16 Employment Mix by Discipline

	FULL-TIME	PART-TIME	CONTRACTUAL	WORK STUDY/ INTERN	TOTAL
Arts Service Organizations	6.0%	10.5%	82.7%	0.8%	100.0%
Dance	17.5%	56.4%	22.1%	4.0%	100.0%
Heritage	37.4%	38.9%	19.6%	4.1%	100.0%
Music	9.3%	36.1%	53.6%	1.1%	100.0%
Science	50.5%	45.3%	2.5%	1.7%	100.0%
Theatre	9.3%	47.8%	37.4%	5.5%	100.0%
Visual	26.0%	37.1%	29.4%	7.5%	100.0%
Interdisciplinary/ Festival	14.2%	53.3%	30.8%	1.7%	100.0%
TOTAL	17.1%	39.1%	40.5%	3.3%	100.0%

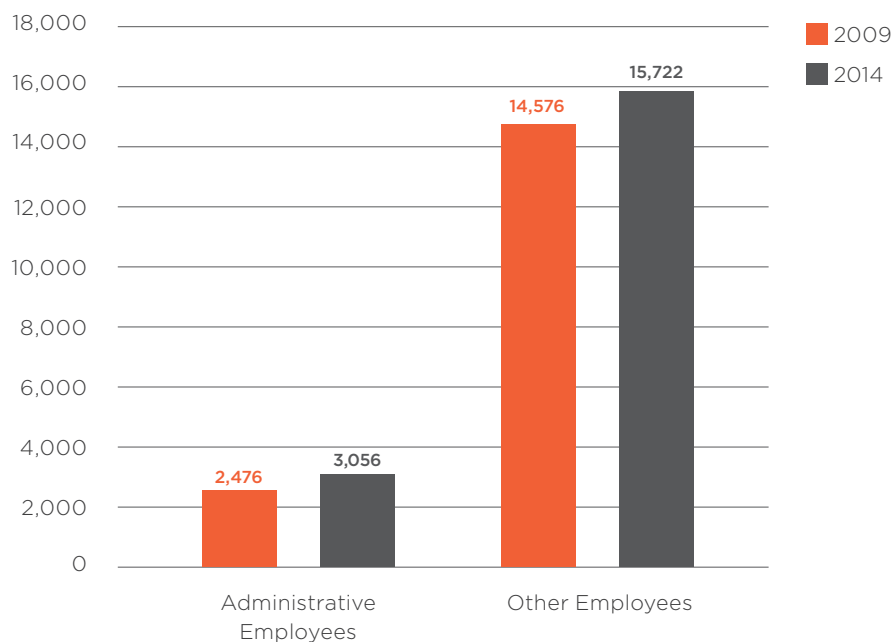
Table II-17 reports the number and percentage of employees working in administrative versus other types of employment for arts, cultural, and scientific organizations. Employment in every discipline is largely non-administrative. This table excludes contract workers, as their status as to administrative or other cannot be defined.

Table II-17 Composition of Employment by Discipline

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTER- DISCIPLINARY/ FESTIVAL	TOTAL
Administrative	202	111	122	346	702	626	728	218	3,056
Other	277	599	639	1,265	994	2,220	927	1,201	8,121
TOTAL	480	710	760	1,610	1,696	2,846	1,655	1,419	11,177
% Administrative	42%	16%	16%	21%	41%	22%	44%	15%	27%
% Other	58%	84%	84%	79%	59%	78%	56%	85%	73%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure II-7 presents estimates of administrative and artistic/professional/technical employment for the years 2009 and 2014. This figure reports modest increases in both categories. Full-time employment was almost identical in the two years—3,183 versus 3,205. Part-time and contractual employment each increased by about 1,000, while work study/intern employment declined from 1,076 to 628. The number of personnel under union contracts increased from 2,636 to 3,185.

Figure II-7 Employment Categories Compared: 2009 and 2014



The full-time number of part-time and contractual workers was estimated from the survey of arts, cultural, and scientific organizations using the following methodology. Organizations reported the number of hours worked by these employees. It was assumed that a full-time worker would work 1,920 hours per year (48 weeks at 40 hours per week). Table II-18 reports the full-time equivalent of the part-time employee numbers reported in Table II-15. When this conversion is made, the number of full-time employees within Central Puget Sound region arts, cultural, and scientific organizations outnumbers the full-time equivalent number of part-time workers. Data were not gathered on the number of hours worked by work-study students or interns.

The level of full-time equivalent employment in the 2009 ArtsFund Economic Impact Study was 2,031 persons, somewhat higher than the 1,650 persons reported in the current study. The major difference between the current study and the 2009 study is in the number of part-time full-time equivalent, which declined to 1,052 from 1,535.

Table II-18 Full-Time Equivalent Employment

	FTE ADMINISTRATIVE PART-TIME	FTE OTHER EMPLOYEES PART-TIME	FTE CONTRACT	TOTAL
Arts Service Organizations	26	44	18	88
Dance	12	66	32	110
Heritage	13	155	14	182
Music	65	126	63	253
Science	24	132	30	186
Theatre	66	263	109	438
Visual	67	147	34	248
Interdisciplinary/ Festival	20	119	6	146
TOTAL	293	1,052	305	1,650

EXPENDITURES OF PATRONS

People travelling to arts, cultural, or scientific organizations have expenses beyond the cost of admission to these organizations. They incur travel costs, frequently they have food costs attributable to their trip, and if they come from long distances they frequently have overnight accommodation costs. Table II-19 documents estimated per capita expenses by discipline. The survey of patrons did not estimate a separate statistically valid sample for Music and Dance; rather data for these two disciplines is combined in tables based on the survey of patrons. There are significant differences in per capita spending across disciplines. Ticket costs are relatively high for Music & Dance and for Theatre. There are differences in the geographic origins of patrons across disciplines; these differences are reported in Section III of this report. In the case of disciplines with large proportions of patrons coming from out of state or outside the region, air travel and lodging costs are relatively high. Arts Service Organization events tend to draw local residents to community-based events, with relatively low reported per capita expenditures.

Table II-19 Per-Capita Patron Expenditures

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	WEIGHTED AVERAGE
Tickets/ Admission	\$11.69	\$10.13	\$45.01	\$13.39	\$33.12	\$8.22	\$26.37	\$18.96
Souvenirs	3.06	2.56	1.53	3.52	0.62	1.88	4.05	2.72
Parking	0.51	1.40	4.47	1.42	1.83	1.55	3.01	1.96
Bus/Ferry/ Light Rail	0.37	0.35	1.88	1.18	0.50	1.05	1.20	1.08
Auto Travel	1.30	2.14	3.88	5.25	2.70	2.27	4.09	3.74
Food Before or After Event	7.21	6.28	14.26	6.17	16.45	8.21	9.85	9.01
Food At Event	1.05	1.24	4.39	2.61	2.33	1.03	2.64	2.28
Entertainment	0.36	2.91	1.23	2.09	0.80	0.96	1.40	1.47
Lodging	1.31	8.81	2.69	11.77	3.03	5.22	7.86	7.41
Air Travel	0.58	2.51	0.65	10.97	3.27	6.47	8.60	7.09
Child care	0.61	0.11	0.42	0.07	0.32	0.55	0.40	0.31
Other	0.83	0.84	0.45	1.30	0.05	1.59	1.03	1.07
TOTAL	\$28.87	\$39.27	\$80.87	\$59.73	\$65.02	\$39.00	\$70.50	\$57.10
N = 3,086								

Table II-20 Number of Patrons

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Total Attendance	751,516	269,138	756,369	966,854	4,428,671	1,458,042	2,679,665	2,100,781	13,411,037
Discounted Student Tickets	25,203	15,273	82,477	46,706	117,366	192,000	36,144	168,024	683,193
Free Student Tickets	89,244	6,610	253,459	54,516	8,116	31,864	49,901	78,773	572,480
NET ATTENDANCE	637,069	247,255	420,433	865,632	4,303,189	1,234,178	2,593,620	1,853,985	12,155,364

Table II-21 Estimated Total Patron Expenditures (\$ Millions)

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Tickets/Admission	\$7.4	\$4.3	\$50.1	\$57.6	\$40.9	\$21.3	\$48.9	\$230.5
Souvenirs	1.9	1.1	1.7	15.1	0.8	4.9	7.5	33.0
Parking	0.3	0.6	5.0	6.1	2.3	4.0	5.6	23.9
Bus/Ferry/Light Rail	0.2	0.1	2.1	5.1	0.6	2.7	2.2	13.1
Auto Travel	0.8	0.9	4.3	22.6	3.3	5.9	7.6	45.4
Food Before & After Event	4.6	2.6	15.9	26.5	20.3	21.3	18.3	109.5
Food at Event	0.7	0.5	4.9	11.2	2.9	2.7	4.9	27.7
Entertainment	0.2	1.2	1.4	9.0	1.0	2.5	2.6	17.9
Lodging	0.8	3.7	3.0	50.6	3.7	13.5	14.6	90.0
Air Travel	0.4	1.1	0.7	47.2	4.0	16.8	15.9	86.1
Child Care	0.4	0.0	0.5	0.3	0.4	1.4	0.7	3.8
Other	0.5	0.4	0.5	5.6	0.1	4.1	1.9	13.1
TOTAL	\$18.4	\$16.5	\$90.0	\$257.0	\$80.2	\$101.1	\$130.7	\$694.0

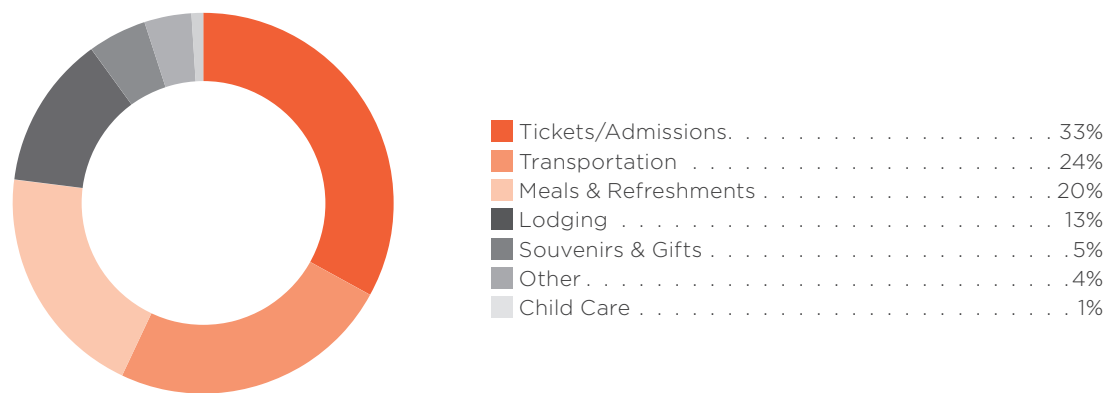
Average patron spending in the current ArtsFund Economic Impact Study is lower than reported in the 2009 study (\$57.10 vs. \$68.82 [\$2014]). A major factor explaining this difference is differences in the origins of patrons measured in the 2009 study versus the current study. The geographic origin of patrons and their spending patterns is discussed in more detail in section III of this report, and average patron spending is directly proportional to distance travelled. The current study reports patrons from the Central Puget Sound region were 77.4% of total patrons, vs. 80.7% in the 2009 study. The percent of out-of-state patrons was estimated to be 14.6% in the 2009 study, and 14.9% in the current study. The percentage of patrons from Washington State outside the Central Puget Sound region was larger in the current study than in the 2009 study (7.6% and 4.7%).

An estimate of the number of patrons by discipline was developed from the survey of organizations. Greater detail about this survey is provided in Section III of this report. Table II-20 reports estimated numbers of patrons, and the estimated number of discounted student tickets or free student tickets. It was presumed that students did not incur expenditures similar to regular visitors. Section III of this report documents characteristics of student visitors. Arts, cultural, and scientific organizations were asked to estimate the number of discounted student tickets as a part of their overall estimated attendance, and to also estimate their free ticket numbers. The number of those free tickets estimated to go to students was derived from a part of the organizational questionnaire that specifically asked how many free student tickets were supplied. The last line in Table II-20 reports the estimated attendance net of free and discounted student tickets. The number of patrons reported in the last line of Table II-20 was multiplied by the average spending reported in Table II-19 to obtain estimated total patron spending. These estimates are reported in Table II-21.

The net attendance to arts and cultural organizations in the current study rose 5% over the level reported in the 2009 ArtsFund Economic Impact Study. Total attendance to these organizations increased from 13.2 million to 13.4 million (a gain of 1.3%); the number of discounted student tickets decreased from 1.096 million to 683 thousand, while the number of free student tickets increased from 556 thousand to 572 thousand. Changes in the net attendance at the disciplinary level are not possible to estimate for some disciplines due to shifting organizations into the Interdisciplinary/Festival discipline in the current study. Arts Service Organizations reported much higher net attendance in the current study (637 thousand vs. 477 thousand). Heritage organizations report a decline in net attendance from 609 thousand to 420 thousand. Science organizations report a slight decrease in net attendance, from 4.85 million to 4.303 million. Visual Arts organizations report a strong increase in net attendance, from 1.644 million to 2.593 million.

The estimated 12.155 million patrons of arts, cultural, and scientific organizations in the Central Puget Sound region are estimated to have spent \$694 million on their visits to these organizations, as reported in Table II-21. Patrons reported spending \$231 million on tickets; the organizational survey yields an estimate of income from tickets/admissions of \$199 million; this difference is likely related to some patrons reporting annual costs for memberships or donations that were not considered tickets or admissions in the organizational survey. Figure II-8 graphically depicts the distribution of patron expenditures. After tickets/admissions, travel costs are the largest reported expenditure, followed by meals and refreshments, and lodging. Smaller shares are spent on entertainment, other goods and services, and child care.

Figure II-8 Patron Expenditures by Category



The composition of average patron spending changed moderately, reflecting the change in the origin of patrons (discussed in more detail in Section III of this report). Ticket/admission expenditures rose from 31% to 33% of total outlays, while transportation costs fell from 28% to 24%, and lodging costs rose from 12% to 13%. Meal and refreshment costs were reported to have risen from 16% to 20%, while souvenir and gift, other, and child care expenses remained similar to the 2009 study levels.

ECONOMIC IMPACT OF CULTURAL ORGANIZATIONS AND THEIR PATRONS

The expenditures of arts, cultural, and scientific organizations were combined with the expenditures of patrons to estimate economic impacts. A brief description of this process was presented in Section I, and a more detailed description of the mathematics involved is presented in Appendix II. Direct, indirect, and induced economic impacts

were estimated for the Central Puget Sound region and for Washington State. The classification of expenditures used in the patron survey and in the organizational survey required reclassification into the categories and principles used in the input-output model utilized to calculate economic impacts. The input-output model requires data to be expressed in producer prices. For example, the purchase of gasoline at a service station is composed of the margins earned by the retailer of the gasoline, the transport costs incurred to move the gasoline from a petroleum refinery to the gas station, and the value of the gasoline at the petroleum refinery. Both organizational and patron purchases were re-expressed in producers prices, utilizing data from the 2007 U.S. benchmark input-output tables that describe this conversion from consumer expenditure categories to producers prices.

Two versions of the Washington State input-output model were used to estimate economic impacts. The state model was used to estimate statewide impacts, while an adjusted version of the multiplier structure was estimated for the Central Puget Sound region. This model used location quotients estimated for the sectors contained in the Washington input-output model to adjust the direct requirements coefficients in the state model. This technique assumes that when the location quotient is less than 1.0, that regions cannot supply all of the inputs needed by particular sectors. In these cases the direct requirements coefficients are reduced, by multiplying them by the values of the location quotient. After this procedure has been undertaken across all sectors, then an adjusted matrix of multipliers is calculated and is used to calculate local economic impacts. An example of an industry that is important at the state level, but that is modest in the Central Puget Sound region is agriculture. This industry is very important in Eastern Washington, and in some rural parts of Western Washington, but it has a small presence in the Central Puget Sound region. The result of these adjustments is that the economic impact estimates for the Central Puget Sound region are lower than the statewide estimates.

Two estimates of economic impacts were calculated. The first is based on total spending by the patrons of arts, cultural, and scientific organizations, and on the total spending of arts, cultural, and scientific organizations. The second is an estimate of “new money,” which is the estimate of funds flowing into the Central Puget Sound region from outside it. These are the earned and contributed funds that arts, cultural, and scientific organizations obtain from sources outside the local area, and the spending locally by patrons who come from outside the local area. The second estimate can be regarded as the contribution of arts, cultural, and scientific organizations to the economic base of the Central Puget Sound region.

(1) Aggregate Impacts

Aggregate economic impacts of Central Puget Sound region economic, cultural, and scientific organizations are reported in Table II-22. This table provides estimates of business activity (sales or output), employment, labor income, and selected taxes generated. Output or sales in the Washington economy are estimated to be \$2.38 billion, while Central Puget Sound region impacts are estimated to be \$2.14 billion. An estimated 35,376 jobs are supported in the Washington State economy by Central Puget Sound region arts, scientific, and cultural organizations and their patrons, while 33,724 of these jobs are estimated to be created in the Central Puget Sound region. Labor income in the state is estimated to be \$996 million, while in the Central Puget Sound region it is estimated to be \$925 million.

Arts, cultural, and scientific organizations pay only modest taxes to federal, state, and local governments. Their tax status largely explains these modest tax payments, their tax liability is largely related to employee-related taxes (\$22.1 million). Patron spending and the other expenditures of arts, cultural, and scientific organizations leads to much larger tax revenues. Most businesses beyond a certain threshold of sales in Washington State pay business and occupations (B&O) taxes. The input-output model provides estimates of total sales by sector or industry, and data from the Washington State Department of Revenue also reports total tax collections by these same industries. A ratio was calculated of total B&O tax collections to total sales, to estimate B&O tax revenues. Sales taxes are paid on souvenirs and gifts, retail sales, and food and beverages reported by patrons, but they are also paid on labor income earned as a function of economic activity generated as measured through the input-output model. Hotel or motel stays are subject to the hotel-motel room tax. Table II-22 provides estimates of these tax revenues sources. Other sources of tax revenue accrue as a result of income and expenditures of organizations and patrons included in this study, including property taxes and car rental taxes. Data were not available to estimate these additional sources of tax revenue. Therefore, the estimates of tax revenue reported in this study bound on the low side their total revenue to state and local governments. It is estimated that Central Puget Sound region arts, cultural, and scientific organizations and their patrons generated \$105 million in taxes statewide, while business activity in the Central Puget Sound region generated \$100 million in the types of taxes reported in Table II-22.

Table II-22 Summary of Washington State and Central Puget Sound Region
Economic Impacts

	WASHINGTON	REGION
Output (\$ Millions)		
Natural Resources and Utilities	\$77.230	\$64.651
Construction and Manufacturing	276.288	167.175
Retail and Wholesale Trade	236.735	209.060
Producer and Transport Services	589.823	548.507
Consumer Services & S&L Govt.	1,195.185	\$1,155.118
TOTAL	\$2,375.261	\$2,144.511
Employment		
Natural Resources and Utilities	164	106
Construction and Manufacturing	592	469
Retail and Wholesale Trade	1,833	1,610
Producer and Transport Services	3,461	3,224
Consumer Services & S&L Govt.	29,327	28,315
TOTAL	35,376	33,724
Labor Income (\$ Millions)		
Natural Resources and Utilities	\$19.625	\$16.402
Construction and Manufacturing	38.716	30.215
Retail and Wholesale Trade	82.075	72.333
Producer and Transport Services	209.392	194.845
Consumer Services & S&L Govt.	646.451	610.845
TOTAL	\$996.260	\$924.640
Tax Impacts (\$ Millions)		
State Sales on Direct Sales	\$12.513	\$12.513
Local Sales on Direct Sales	7.447	7.447
State sales as a share of labor income	29.751	27.612
Local Sales as a share of labor income	13.731	12.744
Hotel-Motel Tax (Direct sales)	14.854	14.854
State B&O Tax	17.507	16.127
Local B&O Tax	8.905	8.208
TOTAL	\$104.709	\$99.506

Table II-23 Detailed Central Puget Sound Region Economic Impacts

	OUTPUT (MILS. \$2014)	EMPLOYMENT	LABOR INCOME (MILS. \$2014)
1. Crop Production	\$0.138	1	\$0.045
2. Animal Production	0.216	1	0.053
3. Forestry and Logging	0.097	0	0.018
4. Fishing, Hunting, and Trapping	5.084	12	1.454
5. Mining	2.063	8	0.397
6. Electric Utilities	40.154	53	11.959
7. Gas Utilities	10.181	6	0.671
8. Other Utilities	6.720	24	1.805
9. Highway, Street, and Bridge Construction	10.788	30	2.516
10. Other Construction	84.311	301	19.419
11. Food, Beverage and Tobacco Manufacturing	26.869	40	2.216
12. Textiles and Apparel Mills	0.671	3	0.127
13. Wood Product Manufacturing	1.239	3	0.192
14. Paper Manufacturing	1.967	3	0.256
15. Printing and Related Activities	8.036	48	2.648
16. Petroleum and Coal Products Manufacturing	19.071	1	0.238
17. Chemical Manufacturing	0.470	1	0.088
18. Nonmetallic Mineral Products Manufacturing	4.793	11	0.689
19. Primary Metal Manufacturing	0.080	0	0.015
20. Fabricated Metals Manufacturing	2.299	8	0.480
21. Machinery Manufacturing	1.346	3	0.198
22. Computer and Electronic Product Manufacturing	0.665	2	0.217
23. Electrical Equipment Manufacturing	0.199	0	0.032
24. Aircraft and Parts Manufacturing	0.124	0	0.025
25. Ship and Boat Building	0.576	2	0.160
26. Other Transportation Equipment Manufacturing	1.102	2	0.127
27. Furniture Product Manufacturing	1.035	5	0.266
28. Other Manufacturing	1.534	5	0.306
29. Wholesale	74.834	264	21.048
30. Non-Store Retail	3.064	22	0.758
31 Other Retail	131.162	1324	50.527
32. Air Transportation	55.551	92	7.973
33. Water Transportation	7.406	16	1.504
34. Truck Transportation	13.152	71	4.073
35. Other Transportation/Postal Offices	32.592	143	10.712
36. Support Activities for Storage, Transportation and Warehousing	9.971	49	3.602
37. Software Publishers & Data Processing & related services	10.978	21	3.814
38. Telecommunications	46.831	88	8.119
39. Other Information	18.703	85	7.918
40. Credit Intermediation and Related Activities	74.738	167	16.708
41. Other Finance and Insurance	76.658	376	24.890
42. Real Estate and Rental and Leasing	75.374	736	15.120

	OUTPUT (MILS. \$2014)	EMPLOYMENT	LABOR INCOME (MILS. \$2014)
43. Legal/Accounting and Bookkeeping/ Management Services	69.130	664	54.652
44. Architectural, Engineering, and Computing Services	28.275	178	15.308
45. Educational Services	13.595	173	4.801
46. Ambulatory Health Care Services	64.856	473	34.101
47. Hospitals	51.581	249	18.953
48. Nursing and Residential Care Facilities, Social Assistance	25.289	354	10.831
49. Arts, Recreation, and Accommodation	642.469	20,285	338.119
50. Food Services and Drinking Places	216.919	3,078	70.885
51. Administrative/Employment Support Services	29.150	539	20.453
52. Waste Management/Other, and Agriculture Services	140.409	1,065	44.400
State & Local Government		2,638	88.753
TOTAL	\$2,144.511	33,724	\$924.640

Table II-23 presents a more detailed portrait of regional economic impacts than contained in Table II-22. This table shows the output (sales), employment, and labor income created in each sector included in the input-output model. These impacts are largely driven by the spending of labor income by consumers. Arts, cultural, and scientific organization costs are dominated by their labor payments, and the expenditures by patrons lead to other large levels of direct earnings of labor income (in places such as restaurants or hotels). The economic impact model calculates the indirect and induced effects of these measures, and Table II-23 documents the magnitude of these effects for the sectors in the input-output model. Every industry has some economic impact, but the total impacts are concentrated in service industries for arts, cultural, and scientific organizations.

The economic impact of spending by arts, cultural, and scientific organizations in the Central Puget Sound region, and by their patrons, have increased, as reported in Table II-24 and Figure II-9. These increases were recorded for sales (output), employment, and tax revenues. Labor income impacts have a reported modest decline. Compared to background measures for Washington State population and employment, economic impacts of arts, cultural, and scientific organizations in the Central Puget Sound region have mirrored these background measures. Labor income impacts may well be related to changes in the economic impact models used in the 2009 and 2014 ArtsFund Economic Impact Studies. The 2009 study used an economic impact model benchmarked against the year 2002, while the current study uses an economic impact model benchmarked against the year 2007. Labor income as a share of output has declined over the years in the Washington state input-output models used to calculate economic impacts in this study. The reduced economic impact as measured by labor income is likely related to this trend in economic structure in the Washington economy.

Table II-24 Change in Aggregate Impact Measures 2009-2014

	WASHINGTON STATE	CENTRAL PUGET SOUND REGION
Output (constant \$)	5.3%	2.5%
Labor Income (constant \$)	-3.7%	-5.0%
Tax Revenue Impacts (constant \$)	8.9%	8.4%
Employment	4.3%	3.7%
Background Measures		
Population	4.5%	4.4%
Employment	7.3%	8.6%

Figure II-9 Aggregate Economic Impacts in Washington State



(2) New Money Impacts

The second perspective on economic impacts included in this study is from the perspective of “new money.” This concept benchmarks economic impacts against spending that comes from outside the Central Puget Sound region by patrons, and income that is earned by organizations from outside this region. Table II-25 reports that an estimated 12.7% of overall organization income came from outside the four-county Central Puget Sound region based on the organization survey. When data from the patron survey are used to adjust earned income, this figure rises to 16.6%. Significant differences in the share of patrons who come from outside the region are evident across disciplines. Science, Visual Arts, and

Interdisciplinary/Festival organizations attract a relatively large share of patrons from outside the local area, while Arts Service Organizations, Music & Dance, Theatre, and Heritage organizations draw most of their patrons from the local area. A large share of patron spending comes from outside the local area, because expenditures by non-local patrons spend more per trip than local patrons. Table II-25 estimates that non-local patron outlays were \$312 million, of which \$254 million were made on expenses other than tickets.

Table II-25 New Money Sources

SHARE OF ATTENDANCE	OTHER WASHINGTON	OUT OF STATE
Arts Service Organizations	3.9%	2.0%
Heritage	6.0%	7.2%
Music & Dance	7.7%	1.4%
Science	10.0%	18.8%
Theatre	5.5%	2.2%
Visual	5.1%	16.7%
Interdisciplinary/Festival	8.5%	13.2%
Weighted Total	7.6%	12.9%

ORGANIZATION INCOME SOURCES (\$ MILLIONS)	BASELINE	ADJUSTED
Earned	\$38.626	\$58.306
Government	12.996	12.996
Individuals	7.080	7.080
Corporate	1.271	1.271
Foundation	4.035	4.035
Other	1.290	1.290
TOTAL	\$65.299	\$84.979
Patron Expenditures (Total - \$ Millions)		\$312.112
Except Tickets (\$ Millions)		\$253.806
TOTAL GROSS NEW MONEY (\$ MILLIONS)		\$338.785

Table II-26 contains estimates of new money economic impacts for Central Puget Sound region arts, cultural, and scientific organizations and their patrons. These impacts are approximately 30% of the gross value of sales impacts, 24% of the overall job impact, and 28% of total labor income impacts. Tax impacts are well above these values, they are about 37% of the total tax impacts reported in Table II-23. The tax impact percentage is relatively high because the majority of the hotel-motel room taxes are paid by visitors coming from outside the local area.

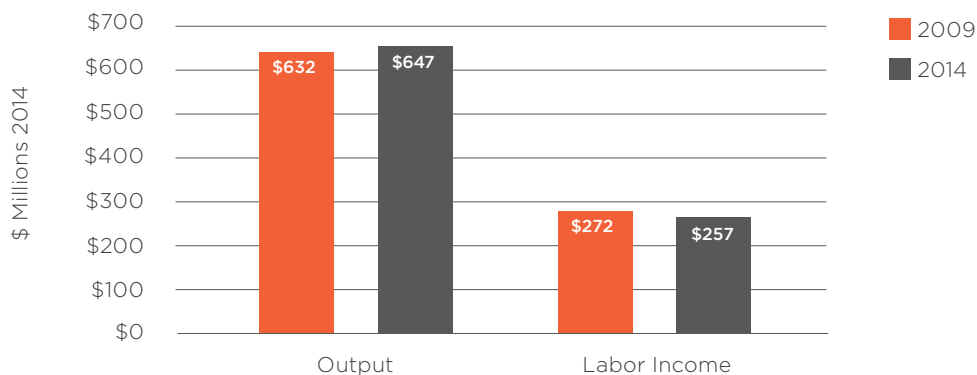
Table II-26 New Money Economic Impacts

	OUTPUT (\$ MILLIONS)	EMPLOYMENT	LABOR INCOME (\$ MILLIONS)
Natural Resources and Utilities	\$18.406	30	\$4.681
Construction and Manufacturing	\$55.204	152	\$9.823
Retail and Wholesale Trade	\$62.679	484	\$21.714
Producer and Transport Services	\$179.790	933	\$57.434
Consumer Services & S&L Govt.	\$331.405	6,582	\$163.358
TOTAL	\$647.484	8,182	\$257.010

TAX IMPACTS	\$ MILLIONS
State Sales on Direct Sales	\$4.400
Local Sales on Direct Sales	\$2.031
State sales as a share of labor income	\$7.675
Local Sales as a share of labor income	\$3.542
Hotel-Motel Tax (Direct sales)	\$12.104
State B&O Tax	\$4.886
Seattle Business Tax	\$2.478
TOTAL	\$37.117

New money economic impacts in the current study are similar to those reported in the 2009 ArtsFund Economic Impact Study, as reported in Figure II-10. In the 2009 study an estimated 43% of patron spending came from outside the Central Puget Sound region, while in the current study this percentage is estimated to be 45%. Organizations' direct spending was estimated to be 12.7% from new money sources (based on the organization survey; 16.6% using adjusted data from the patron survey). This compares with 16.7% in the 2009 study. In contrast to overall employment impacts reported in Table II-24, which found modest gains in output, tax, and job impacts, these measures were stable for new money. While the share of attendance from outside the Central Puget Sound region increased from 16.7% to 20.5%, organizational new money levels decreased.

Figure II-10 New Money Economic Impacts of Central Puget Sound Region Cultural Organizations in 2009 and 2014



VOLUNTEERS IN CULTURAL ORGANIZATIONS

Table II-27 reports data from the organization survey with regard to volunteers. This survey finds 28,849 volunteers, working almost 1.2 million volunteer hours, or an average of 41 hours per volunteer. There are striking differences in the number of hours that organizations report per capita for volunteer activity. Arts Service Organizations have very large numbers of volunteers, but the average time spent per volunteer is relatively short. In contrast, Science and Music volunteers spend many hours on average in their volunteer work.

Table II-27 Volunteers in Cultural Organizations

	NUMBER OF ADMINISTRATIVE VOLUNTEERS	NUMBER OF OTHER VOLUNTEERS	TOTAL HOURS	HOURS/VOLUNTEER
Arts Service Organizations	1,218	3,450	53,679	11
Dance	466	618	48,497	45
Heritage	729	3,046	168,885	45
Music	1,514	2,233	195,692	52
Science	219	3,331	339,233	96
Theatre	2,351	3,419	110,402	19
Visual	1,620	3,270	218,002	45
Interdisciplinary/ Festival	593	773	49,061	36
TOTAL	8,708	20,141	1,183,451	41

The number of volunteers and the number of volunteer-hours estimated in the 2009 ArtsFund Economic Impact Study were larger than estimated in the current study. The estimated number of administrative and other volunteers declined in total, but there are significant variations in these changes across disciplines. Declines were recorded in Arts Service and Heritage organizations. Increases were recorded in Dance, Music, and Visual Arts organizations. The creation of the Interdisciplinary/Festival discipline in the current study makes these disciplinary comparisons less robust, as organizations in the interdisciplinary category were largely included in other disciplines in the 2009 study. Average volunteer hours were up across all disciplines (rising from 27 hours to 41 hours).

III. CULTURAL ORGANIZATION PATRONAGE CHARACTERISTICS

“Cultural activities keep me well rounded. They inspire, they educate, they touch a deep inner spiritual need in me.”

“(Cultural activities) enrich and expand on my understanding of what binds us together as a community, where we have come from and perhaps where we are going.”

“I feel it is important to expose myself and my son to different cultural opportunities to broaden our horizons and know that the world is more than what is just in our back yard.”

Source: Patron Survey

This section presents information about patrons attending arts, cultural, and scientific organizations in the Central Puget Sound region. It reports responses from many questions in the patron survey, but also includes data from the survey of organizations on the numbers of patrons, and on students.

NUMBER OF PATRONS

Arts, cultural, and scientific organizations reported information on the number of patrons and other characteristics of patrons on their survey forms. These data are summarized by discipline in Table III-1, and were used to calculate the percentages of attendance by type in Table III-2 and presented graphically in Figure III-1. Line (1) in Table III-1 reports the number of season tickets sold or the number of visits made by people who were members of a particular organization. This is not a measure of the number of season ticket holders or members, but rather an estimate of their total number of times attending these organizations. The number of season tickets/memberships is reported in Table III-3. Line (2) reports the number of single tickets/admissions purchased; lines (1) and (2) represent the majority of the attendance at these organizations, as depicted in Figure III-2. Discounted student, senior, and other discounted tickets/admissions are reported in lines (3), (4) and (5). Free admissions/tickets are reported on line (6), while total admission/tickets are reported on line (7). Table III-2 reports considerable differences in the composition of tickets/admissions across disciplines. Arts Service Organizations report large levels of free admissions. The large level of free admissions at Visual Arts organizations is related to the Olympic Sculpture Park of the Seattle Art Museum. Line (8) reports the number of tickets/admissions used to calculate

total patron spending, as reported in Section II of this report. These numbers exclude discounted student admissions (line 3), and estimated free student admissions reported by organizations (See Table II-20 for further adjustments to these numbers, to also exclude free student admissions reported in Table III-27).

Figure III-1 reports the composition of patrons by discipline, while Figure III-2 documents attendance by category (as shown in Table III-1). Figure III-3 reports the percentage distribution by discipline; slightly more than one-third of the attendance/tickets comes from Interdisciplinary/Festival and Science organizations. Music accounts for 14.8% of attendance/tickets; Theatre accounts for 15.3% of attendance/tickets; while Visual Arts accounts for 14.0% of attendance/tickets. Smaller shares are related to Arts Service Organizations, Heritage, and Dance organizations.

Table III-1 Estimated Number of Patrons by Discipline

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
(1) Season Ticket/ Membership Visits	89,240	40,151	96,500	220,144	661,447	439,758	574,459	178,456	2,300,155
(2) Single Tickets/ Admissions	86,480	124,342	248,880	243,983	2,274,417	471,635	753,584	1,270,637	5,473,958
(3) Discounted Student Tickets	2,912	32,869	150,372	35,944	216,086	232,434	163,702	205,376	1,039,695
(4) Discounted Senior Tickets	6,459	1,567	54,446	15,451	36,360	43,099	91,276	23,405	272,063
(5) Other Discounted Tickets	272	46,587	35,687	99,936	266,979	149,696	138,195	120,516	857,867
(6) Free Tickets	566,153	23,622	170,486	351,395	973,381	121,421	958,450	302,391	3,467,299
(7) Total Attendance	751,516	269,138	756,369	966,854	4,428,671	1,458,042	2,679,665	2,100,781	13,411,037
(8) Net Of Free Tickets and Discounted Students	182,451	212,647	435,512	579,515	3,239,204	1,104,188	1,557,513	1,593,014	8,904,043

Table III-2 Percentage Distribution of Attendance

	ARTS SERVICE ORGANIZATIONS	DANCE	HERITAGE	MUSIC	SCIENCE	THEATRE	VISUAL	INTERDISCIPLINARY/FESTIVAL	TOTAL
Season Ticket/ Membership Visits	12%	15%	13%	23%	15%	30%	21%	8%	17%
Single Tickets/ Admissions	12%	46%	33%	25%	51%	32%	28%	60%	41%
Discounted Student Tickets	0%	12%	20%	4%	5%	16%	6%	10%	8%
Discounted Senior Tickets	1%	1%	7%	2%	1%	3%	3%	1%	2%
Other Discounted Tickets	0%	17%	5%	10%	6%	10%	5%	6%	6%
Free Tickets	75%	9%	23%	36%	22%	8%	36%	14%	26%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%

Figure III-1 Percentage of Patrons by Discipline

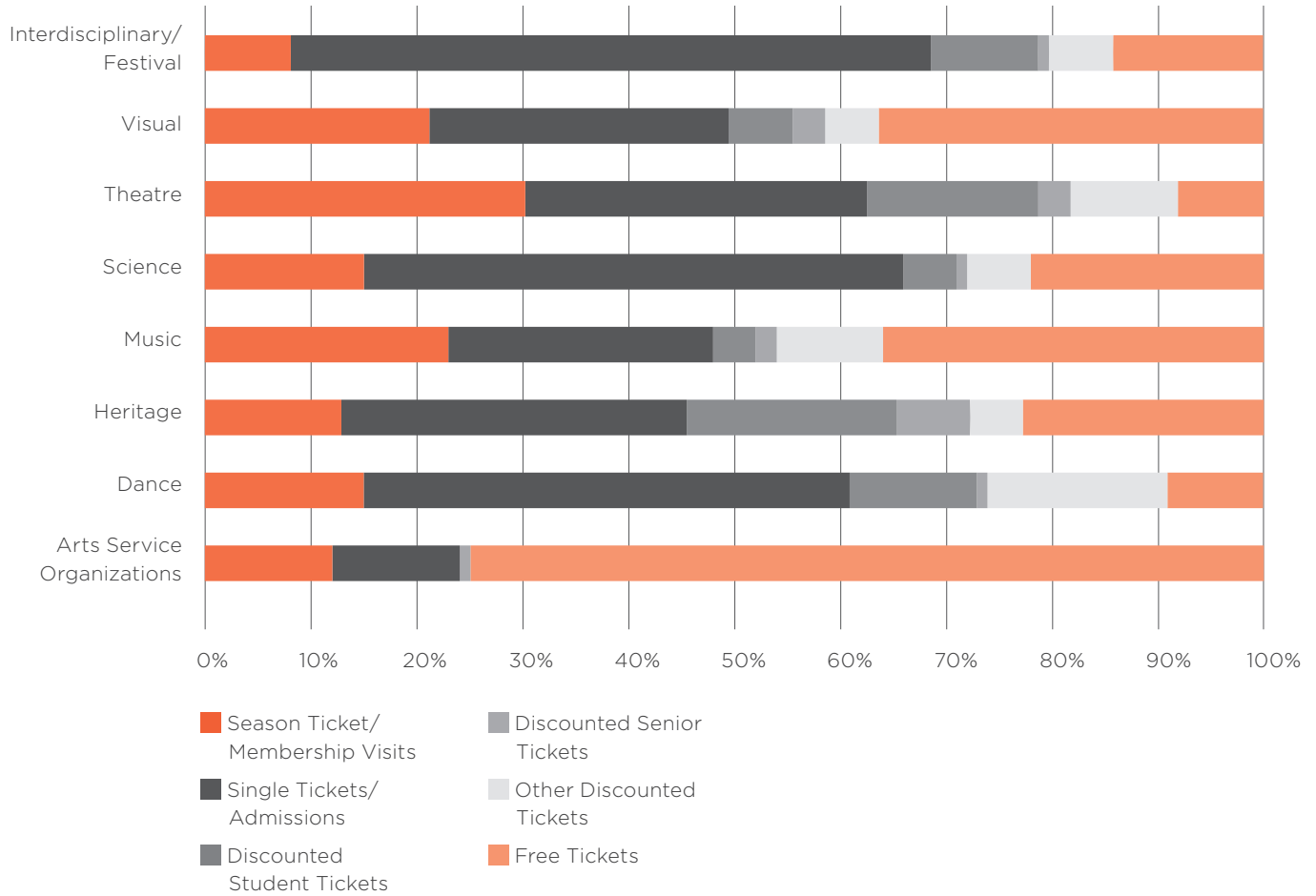


Figure III-2 Percentage Distribution of Attendance by Category

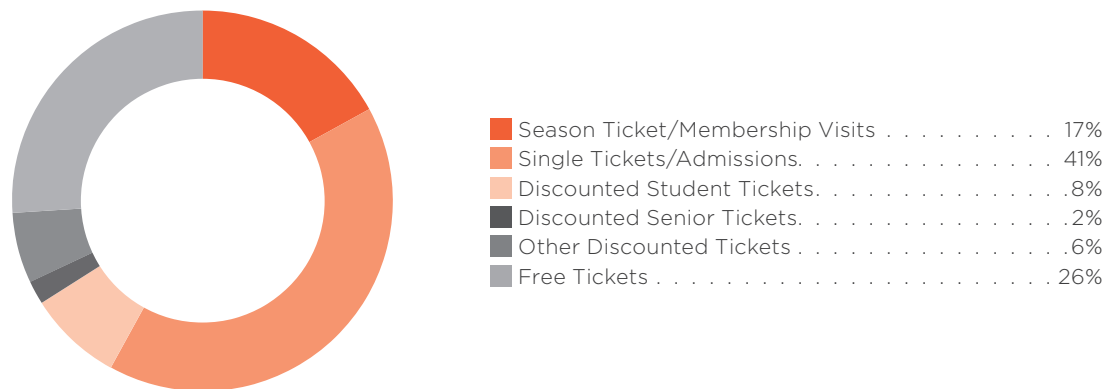


Figure III-3 Percentage Distribution of Attendance by Discipline

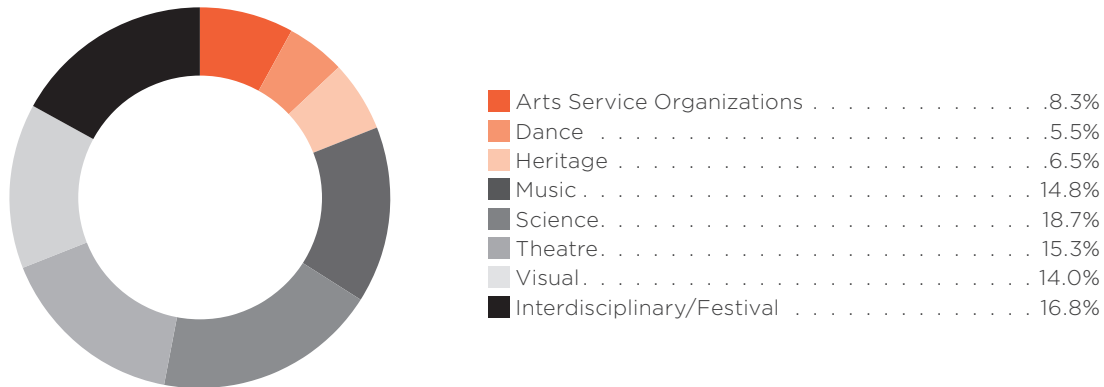


Table III-3 provides comparisons of selected patronage statistics for the 2009 and 2014 ArtsFund Economic Impact Studies. This table reports an increase in overall attendance (1.3%), and a drop in season ticket/membership, single ticket/admission, discounted student and senior, and other discounted attendance levels. In contrast, free tickets had strong percentage gains. The composition of admissions reflects the percentage changes by attendance category. The share of overall admissions rose for free tickets, and declined for the other categories in Table III-3. Attendance shares by discipline between the 2009 and 2014 ArtsFund Economic Impact studies are not possible to calculate for some disciplines, due to their redefinition. Arts Service Organizations share of patronage increased from 7% to 8%, while Science had a sharp decrease from 24% to 18.7%. Visual Arts patronage rose from 12% to 14%. Heritage organization patronage was stable, accounting for 6% in the 2009 study and 6.5% in the current study.

Table III-3 Comparison of Patronage Levels and Composition

	2009 PATRON #	2014 PATRON #	% CHANGE	2009 % OF TOTAL	2014 % OF TOTAL
Season Ticket/ Membership Visits	2,604,098	2,300,155	-11.7%	19.7%	17.2%
Single Tickets	5,885,462	5,473,958	-7.0%	44.4%	40.8%
Discounted Student	1,096,112	1,039,695	-5.1%	8.3%	7.8%
Discounted Senior	291,831	272,063	-6.8%	2.2%	2.0%
Other Discounted	914,850	857,867	-6.2%	6.9%	6.4%
Free	2,450,677	3,467,299	41.5%	18.5%	25.9%
TOTAL	13,243,030	13,411,037	1.3%	100.0%	100.0%

**CULTURAL ORGANIZATION PERFORMANCE, EXHIBITION,
AND ATTENDANCE STATISTICS**

The survey of arts, cultural, and scientific organizations documented the number of productions or exhibits, memberships sold, subscriptions sold, average percentage of capacity, and the number of patrons served with disabilities. Table III-4 provides summaries of these data. Over 10,000 unique productions or exhibits were mounted by Central Puget Sound region arts, cultural, and scientific organizations. They sold almost 207,000 memberships, and 153,000 full or partial subscriptions to performances or exhibitions. These memberships and subscriptions generated 2.3 million season ticket or memberships visits, as reported in Table III-1. The average percentage of capacity measure is only meaningful for some of the disciplines included in Table III-4. It is estimated that Dance organizations played to 71% of capacity, Music organizations to 75% of capacity, and Theatre organizations to 71% of capacity. Almost 55,000 patrons were served with disabilities; a relatively large fraction of these were reported from Theatre and Visual Arts organizations.

Performance, exhibition, and attendance statistics in the 2009 ArtsFund Economic Impact Study show significant differences for most of the measures reported in Table III-4. The number of productions/exhibits shows a sharp rise—from 6,822 to 10,134. This increase was sharpest in Theatre and Visual Arts organizations. The number of memberships sold was similar to that reported in the 2009 study, while full and partial subscriptions sold, and numbers of patrons served with disabilities were lower than numbers reported in the 2009 study. The average percentage of capacity was stable for Theatres (72% vs. 71%), while it increased for Dance (from 61% to 71%) and Music organizations (from 66% to 75%).

Table III-4 Cultural Organization Performance and Exhibition Statistics

	# OF PRODUCTIONS/ EXHIBITS	# OF MEMBERSHIPS SOLD	# OF FULL OR PARTIAL SUBSCRIPTIONS	AVG % OF CAPACITY	# OF PATRONS SERVED WITH DISABILITIES
Arts Service Organizations	1,434	2,988	41	NA	4,043
Dance	239	0	7,149	70.7%	419
Heritage	780	20,266	0	NA	4,322
Music	1,365	70	45,593	75.3%	2,902
Science	115	90,891	0	NA	6,775
Theatre	2,739	156	85,124	70.7%	17,713
Visual	1,805	75,708	0	NA	16,959
Interdisciplinary / Festival	1,658	16,515	14,853	74.1%	1,867
TOTAL	10,134	206,595	152,760	NA	54,999

PATRON TRIP REASONS

Patrons were asked whether the primary reason for their trip was to attend the arts, cultural, or scientific organization at which they were interviewed. Table III-5 reports responses to this question. Overall, about three-quarters of patrons were primarily on trips to go to the organization at which they were interviewed. These percentages were particularly high for Arts Service Organizations, Interdisciplinary/Festivals, Music & Dance, and Theatres. Patrons who said that their primary trip reason was other than visiting the venue in which they were interviewed were asked what the primary reason for their trip was. These responses were quite diverse. Here are a few of them: *Birth day party. UW assignment for concert attendance. Bring grandchildren to see history. Visiting aquarium for my 9 year olds birthday. City pass. Yo-yo competition upstairs on armory stage. We were going to go scuba diving, but the weather did not meet our expectations.* Relatively few of these open-ended comments mentioned business reasons for trips; most had to do with family or personal activities.

Table III-5 Primary Reason for Patron Trips

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY	WEIGHTED TOTAL
Yes	89.8%	71.9%	98.6%	51.8%	98.3%	69.6%	88.0%	72.8%
No	10.2%	28.1%	1.4%	48.2%	1.7%	30.4%	12.0%	27.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N = 3,037								

Primary trip reasons for patrons interviewed in the 2009 ArtsFund Economic Impact Study have changed modestly. In the 2009 study 76% of the patrons said that their primary trip reason was to attend the event at which they were interviewed. This response declined to 72.8% in the current study. Theatre patrons reported very similar answers to this question—the overwhelming percentage coming primarily to attend the event at which they were interviewed. Other disciplines report varying differences in the percentages of patrons primarily coming to the venue in which they were interviewed. Music and Dance patrons increased their “yes” answers from 86% to 98.6%, while Science patron answers dropped from 60% to 51.8% “yes.”

PATRON ORIGINS

Most patrons coming to Central Puget Sound region arts, cultural, and scientific organizations live in the local area, as reported in Table III-6. Approximately 77% of the patrons are from the local area. However, there are important differences in the origin of patrons by discipline. Arts Service Organization patrons are overwhelming local, reflecting the community nature of presentations by most of these organizations.

In contrast, Visual Arts, Interdisciplinary/Festival, and Science organization patrons are more frequently from outside the local area. The weighted average is calculated based on the levels of attendance reported for each discipline, as reported in Table III-1, and using estimates of the number of patrons by discipline from each region of origin.

Table III-6 Patron Origins by Discipline
(This table is from the entire sample, not just those marked as valid)

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY	WEIGHTED TOTAL
Central Puget Sound	93.2%	86.3%	91.0%	66.9%	92.7%	76.6%	77.2%	77.4%
Other Washington	4.0%	6.1%	7.4%	10.3%	5.2%	5.1%	8.5%	7.6%
Out of State	2.8%	7.5%	1.6%	22.8%	2.1%	18.3%	14.4%	14.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,143; 9.1% did not respond to this question

A cross-tabulation of the shares of patrons primarily making their trip to go to the organization at which they were interviewed by geographic origin and discipline is presented in Table III-7. This table indicates data similar to that in Table III-5. The respondents included in Table III-5 who said that they made their trip primarily to attend the event that they were interviewed at are then shown by region of origin as to their primary reason for their trips. For example, all of those interviewed going to Theatre from Washington State outside the Central Puget Sound region and saying that they primarily made their trips to go to a Theatre presentation answered “yes.” Overall the percentages are generally lower for people travelling longer distances.

Table III-7 Patron Origins and Percentage Making Trip Primarily to Attend a Central Puget Sound Region Cultural Organization

	CENTRAL PUGET SOUND	OTHER WA	OUT OF STATE
Arts Service Organizations	90.8%	66.7%	60.0%
Heritage	72.6%	71.4%	51.9%
Music & Dance	98.7%	97.7%	100.0%
Science	48.1%	47.5%	43.7%
Theatre	98.4%	100.0%	90.0%
Visual	73.7%	61.1%	45.5%
Interdisciplinary/Festival	92.7%	76.2%	61.5%
SIMPLE TOTAL	86.3%	76.1%	54.2%

N = 3,060; 11.5% did not provide data for this question

Another perspective on the origin of patrons is presented in Table III-8. This table reports on the share of patrons interviewed by discipline, and in total. The last column indicates the share of patrons interviewed by discipline, while the first three data columns indicate the share of patrons interviewed by geographic region. For example, Heritage organizations had 3.5% of total attendance, but 8.5% of those interviewed were from out-of-state. Arts Service Organization and Theatre patrons tend to be from the Central Puget Sound region, Interdisciplinary/Festival patrons from other Washington, and Heritage and Visual Arts patrons from out of state.

Table III-8 Origin of Sampled Patrons and Share of Total Attendance

	LOCAL	OTHER WA	OUT OF STATE	SHARE OF TOTAL ATTENDANCE
Arts Service Organizations	6.3%	3.2%	1.6%	5.2%
Heritage	11.9%	10.0%	8.5%	3.5%
Music & Dance	20.2%	19.5%	2.8%	9.2%
Science	10.0%	18.1%	28.2%	35.4%
Theatre	18.6%	12.2%	3.5%	10.2%
Visual	10.9%	8.6%	21.5%	21.3%
Interdisciplinary/Festival	22.1%	28.5%	33.9%	15.3%
TOTAL	100.0%	100.0%	100.0%	100.0%

The current economic impact study documents a slightly larger share of patrons from outside the Central Puget Sound region than found in the 2009 ArtsFund Economic Impact Study. The 2009 study found that 80.7% of the patrons came from the Central Puget Sound region, while the current study finds that 77.4% of the patrons came from the Central Puget Sound region. The percentage of nonlocal patrons was lower for all disciplines except Science. The share of out of state patrons increased slightly, from 14.6% to 14.9%, while the share of patrons from Washington State outside the Central Puget Sound region increased from 4.7% to 7.6%.

PATRON EXPENDITURES

The sample of 3,457 patron groups was classified into those questionnaires considered to have reasonable spending and patron counts; Table III-9 reports results of this analysis. Approximately 86% of the questionnaires were considered to be “valid,” and this percentage was relatively consistent across disciplines.

Table III-9 Questionnaire Classification Into Valid and Not-Valid for Computation of Average Patron Spending

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY	WEIGHTED TOTAL
Yes	84.4%	88.6%	96.6%	82.0%	92.8%	82.5%	90.2%	86.1%
No	15.6%	11.4%	3.4%	18.0%	7.2%	17.5%	9.8%	13.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N = 3,457								

Average spending per patron by discipline was reported in Section II. The average spending reported in that section was based on the weighted average of the number of patrons by discipline. Table III-10 reports average spending per capita by region of origin. The sample size was too small by discipline for the calculation of a weighted average value based on attendance at individual disciplines for patrons from Washington State outside the Central Puget Sound region. Therefore, the values reported in Table III-10 are averages for valid questionnaires from each region of origin. Total travel costs clearly increase with distance travelled. The travel costs reported in Table III-10 represent costs attributable to visits to Central Puget Sound region arts, cultural, and scientific organizations. Responses to each questionnaire in which the patron said that their trip was not primarily to visit the arts, cultural, or scientific organization at which they were interviewed were evaluated to make sure that costs attributed to attendance were reasonable. Respondents who said that they had another primary trip reason were asked to describe that primary trip reason. Some of those surveyed did not provide a reply to this question, and their responses were then deleted from the calculation of the values in Table III-10. Many of those who did describe their primary trip reason had their reported expenditures attributable to the visit at which they were interviewed reduced, when it was evident they were reporting their entire trip cost (especially air fare) as attributable to their visit to an arts, cultural, or scientific organization. The primary bases for higher total trip cost for those coming from outside the local area were travel, food/beverages, and lodging costs.

Table III-10 Average Spending by Region of Origin

	CENTRAL PUGET SOUND	OTHER WA	OUT OF STATE
Tickets/Admission	\$24.05	\$25.95	\$21.87
Souvenirs	1.74	3.44	6.14
Parking	2.35	3.27	1.80
Bus/Ferry/Light Rail	0.79	1.94	2.13
Auto Travel	2.13	7.04	8.47
Food Before or After Event	9.43	14.93	14.17
Food at Event	2.40	3.35	2.06
Entertainment	0.80	5.87	3.16
Lodging	0.89	18.28	38.00
Air Travel	0.38	0.00	46.73
Child Care	0.29	0.18	0.60
Other	0.55	2.80	2.47
TOTAL	\$45.80	\$87.04	\$147.59
N = 2,838			

Average spending by patrons in the 2009 ArtsFund Economic Impact study decreased for Washington patrons, and increased for those from out of state. Average local patron spending decreased from \$48.18 (\$2014) to \$45.80; average spending of patrons coming from elsewhere in Washington State decreased from \$102.60 (\$2014) to \$87.04. Out of state patron spending increased slightly, from \$145.57 (\$2014) to \$147.59. Local and out of state patron spending changes were quite modest. The drop in spending by patrons from Washington State outside the Central Puget Sound region was broad-based, including lower outlays for souvenirs, auto travel, lodging, and other expenditures.

PATRON GROUP SIZES

The mean size of patron groups is presented in Table III-11, and it is 2.8 persons across all disciplines. The median group size was two persons for all disciplines except Science (where the median group size was three persons). The mean is larger than the median because there are more groups with more than 2 persons than groups with a single person. Group sizes vary somewhat across the disciplines, with Science organizations clearly attracting a significantly larger cohort of large size groups.

Table III-11 Group Sizes Attending Cultural Organizations (% of Total)

# OF PERSONS	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
1	25.5%	21.3%	17.6%	8.0%	9.5%	14.8%	13.1%	14.4%
2	49.7%	42.6%	64.6%	33.4%	64.1%	42.9%	43.5%	49.9%
3	12.7%	15.3%	8.1%	21.8%	10.6%	19.0%	15.5%	14.3%
4	8.3%	11.7%	6.3%	19.4%	12.0%	13.3%	16.0%	12.7%
5	1.9%	3.6%	1.5%	10.1%	1.2%	5.1%	6.8%	4.5%
6 or more	1.9%	5.4%	1.9%	7.4%	2.7%	4.8%	5.1%	4.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
MEAN	2.19	2.61	2.18	3.21	2.42	2.76	2.79	2.80
MEDIAN	2	2	2	3	2	2	2	2

N = 3,086

The composition of group sizes in the 2009 ArtsFund Economic Impact Study was very similar to that reported in the current study. However, the average group size was somewhat smaller, at 2.8 persons, while in the 2009 study it was 3.0 persons. The median group size was the same across the two studies—2 persons.

ATTENDANCE FREQUENCY

Patrons were asked how frequently they attended an arts, cultural, or scientific organization's activity. Table III-12 reports the pattern of responses to this question. It is clear across almost all of the disciplines patrons indicate attendance about once a month, with patrons of Science organizations reporting a somewhat lower frequency of attendance. About 60% of those interviewed indicate that they went monthly or once or twice per year, while about 9% had weekly attendance, and about 28% indicated attendance of more than once or twice per year. More detailed data on participation is reported in Table III-12 below.

Table III-12 Frequency of Attendance

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
Weekly	17.9%	12.7%	13.3%	4.9%	13.1%	11.5%	9.7%	9.6%
Once a Month	44.0%	36.8%	40.9%	26.8%	40.6%	33.2%	29.9%	32.6%
Once or Twice a Year	16.8%	25.9%	11.5%	42.3%	14.5%	30.9%	31.4%	30.7%
More than Twice a Year	21.2%	24.6%	34.3%	26.0%	31.8%	24.3%	29.0%	27.1%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,390; 1.9% chose to not answer this question.

This question was worded in a somewhat different manner in the 2009 ArtsFund Economic Impact study. That study found weekly attendance to be by 13% of patrons, compared to 9.6% in the current study. The other categories of attendance frequency were not worded in a way that allows comparisons.

WILLINGNESS TO TRAVEL DISTANCE

Patrons were asked how far they were willing to travel to attend a cultural event. Table III-13 presents percentage responses by patrons to this question. This question has not been asked in previous ArtsFund Economic Impact Studies. The answers here are quite clear: patrons in all disciplines are willing to travel long distances to attend cultural events.

Table III-13 Willingness to Travel Distance

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
Less than 5 miles	2.7%	3.5%	4.5%	3.8%	3.1%	3.3%	2.7%	3.4%
5-10 miles	15.4%	14.9%	13.4%	12.1%	11.9%	16.2%	13.5%	13.5%
11-19 miles	17.0%	14.1%	18.1%	16.5%	23.9%	16.9%	14.7%	17.2%
20-29 miles	23.1%	22.7%	22.4%	18.5%	23.5%	20.7%	18.8%	20.3%
More than 30 miles	41.8%	44.8%	41.6%	49.1%	37.6%	42.9%	50.3%	45.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,412; 1.3% chose to not answer this question.

Several cross-tabulations were undertaken exploring the relationship between a patron’s willingness to travel various distances and their participation in cultural activities. The tables reported below were all statistically significant, as measured by Chi-square values. Table III-14 reports on the frequency of attendance with regard to the location of the patron’s residence. Local patrons (those from King County) clearly participate more frequently than those who travel longer distances. In contrast, those from out of state report the lowest frequency of participation.

Table III-14 Cross-Tabulation of Attendance Frequency and Patron Residence

	KING	OTHER CENTRAL PUGET SOUND	OTHER WA	OUT OF STATE	ALL
Weekly	14%	9%	5%	5%	12%
Once a month	39%	29%	30%	24%	35%
Once or twice a year	19%	31%	33%	43%	25%
More than twice a year	27%	31%	32%	28%	28%
TOTAL	100%	100%	100%	100%	100%

N = 3,091

Table III-15 reports on the frequency of attendance and a patron’s willingness to travel various distances to cultural activities. There is a clear decrease in frequency of attendance on a weekly basis as a patron’s willingness to travel distance increases. In contrast, those who attend the least frequently (once or twice a year) are the most willing to travel long distances.

Table III-15 Cross-Tabulation of Attendance Frequency and Willingness to Travel Distance

	LESS THAN 5 MILES	5-10 MILES	11-19 MILES	20-29 MILES	MORE THAN 30 MILES
Weekly	22.9%	18.3%	10.9%	8.2%	9.3%
Once a month	34.9%	39.9%	36.6%	36.8%	32.6%
Once or twice a year	22.9%	21.8%	25.1%	25.4%	26.1%
More than twice a year	19.3%	20.0%	27.4%	29.6%	31.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,362

Table III-16 reports a clear increase in the willingness to travel long distances as the patron’s region of origin increases from King County. Only 32% of patrons residing in King County said they would be willing to travel more than 30 miles to a cultural event, while over 63% of those residing outside King County said that they were willing to travel more than 30 miles to attend a cultural event.

Table III-16 Cross-Tabulation of Patron Origin and Willingness to Travel Distance

	LESS THAN 5 MILES	5-10 MILES	11-19 MILES	20-29 MILES	MORE THAN 30 MILES	TOTAL
King County Residents	4%	18%	22%	24%	32%	100%
Other Central Puget Sound Region Residents	2%	5%	8%	19%	66%	100%
Other Washington Residents	2%	3%	3%	8%	83%	100%
Out Of State Residents	3%	7%	11%	16%	63%	100%

N = 3,412

PATRON INFORMATION SOURCES

Information was gathered from patrons on the primary information source that they relied upon when making their trip. Table III-17 reports results of this question. It was assumed when this question was composed that new media sources such as Blogs, Facebook, YouTube, and Twitter would have a strong showing, but the data in Table III-17 do not show that these sources of information were nearly as important as traditional sources, such as friends and family, newspapers, or websites. The strong response to the category “other” was followed up by a request to state in writing what the other reason was for attendance. A sample of these responses follows: *ad on billboard, accident, bus ad, direct contact from the organization, e-mail, Google, long-term subscriber, school, season ticket holder, subscriber, volunteer*. These responses suggest that some may have misinterpreted this question, as they held season tickets or memberships. However, the majority of these respondents identify categories that were not predefined in this question, rather than being a misinterpretation of the question. While the categories included in this question are somewhat different than in the 2009 ArtsFund Economic Impact Study, there are broad similarities to answers in that study. Family/Friend increased—50.5% in the current study vs. 40.8% in the 2009 study. Website citations increased from 17.1% to 26.6%. Other citations were similar—24.2% vs. 22.3%. Newspapers had reduced citations—from 11.6% to 8.7%. Social media (in the 2009 study defined as Facebook, YouTube, and Twitter) rose from 1.1% to 10.5% of citations.

Table III-17 Patron Information Sources

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
Friend/family	49.7%	44.2%	31.3%	57.6%	44.7%	53.4%	46.7%	50.5%
Newspaper	10.6%	12.8%	9.1%	4.7%	10.7%	11.3%	11.3%	8.7%
TV	0.7%	6.1%	2.8%	8.8%	2.0%	3.7%	5.1%	5.4%
Radio	1.3%	2.1%	4.3%	2.6%	2.0%	2.1%	4.6%	2.8%
Website	23.8%	30.2%	23.8%	30.0%	15.2%	27.0%	27.7%	26.6%
Blog	1.3%	0.9%	0.3%	1.2%	0.8%	2.8%	1.6%	1.5%
Social Media	10.6%	14.0%	6.2%	10.9%	6.3%	10.7%	14.0%	10.5%
Mail	7.9%	4.9%	14.3%	2.1%	12.7%	6.1%	4.3%	5.9%
Tourism Organization	2.0%	4.9%	0.5%	7.4%	0.2%	2.1%	3.5%	3.9%
Other	24.5%	19.5%	27.4%	23.2%	26.4%	20.6%	16.5%	22.3%
# of citations/patron	1,325	1,396	1,200	1,485	1,209	1,399	1,354	1,381

N = 3,371; 2.5% chose to not answer this question.

Patron Origins and Sources of Information

There was not a statistically significant relationship between these sources of information and patron origin: Friends/family, radio, blog, social media, and other. The following are cases where there are statistically significant differences by region of origin. Newspapers are much more important for local patrons than for those from out of state. TV is much more important for people outside King County than for local King County patrons. Websites were much more important for those from Other Washington and Out of State. Mail was relatively important for local King County & other Central Puget Sound region patrons, but not important for those from other WA or Out of state. Tourism organizations were very important for those from out-of-state.

ATTENDANCE AND SPENDING CHANGE

Two questions were asked of patrons regarding changes in their frequency of attendance and spending with regard to arts and cultural organizations over the past three years. Tables III-18 and III-19 report responses to these questions. Few respondents reported decreases in attendance and spending, and this result was consistent across disciplines. About half of respondents indicated that their attendance and spending had not changed, while about 41% indicated that it had increased. Patrons that reported a change in attendance or spending were invited to explain why they experienced a change. Tables III-20 and III-21 contain a sampling of these comments.

Table III-18 Patron Attendance Change Over The Past Three Years

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
Increased	41.2%	46.5%	41.6%	36.2%	44.1%	41.6%	46.6%	40.9%
Stayed the same	51.1%	44.1%	53.1%	55.9%	49.6%	49.4%	46.9%	51.6%
Decreased	7.7%	9.4%	5.3%	7.8%	6.3%	9.0%	6.5%	7.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,349; 3.1% chose to not answer this question.

Table III-19 Patron Spending Change Over The Past Three Years

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY/FESTIVAL	WEIGHTED TOTAL
Increased	42.8%	44.1%	48.4%	33.0%	46.2%	37.6%	45.3%	39.5%
Stayed the same	50.0%	47.4%	45.3%	59.3%	48.0%	53.2%	47.3%	52.8%
Decreased	7.2%	8.4%	6.3%	7.8%	5.9%	9.2%	7.4%	7.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,273; 5.3% chose to not answer this question.

A sample of answers to the question about reasons for changes in attendance are reported in Table III-20. A variety of responses are evident for both increases and decreases in attendance. Monetary concerns, changes in family status, health, changes in residential location, and changes in educational status dominate the answers. Decreased attendance responses also mentioned traffic congestion frequently, as well as changes in geographic location of residence.

Table III-21 contains a sampling of answers regarding increased or decreased spending. As with responses to the question about changes in attendance, a variety of reasons are evident in these open-ended answers. Increased spending is related to rising income, rising costs associated with attendance, and changes in family status. Decreased spending is related to reduced income and changes in family status (such as retirement or death of a spouse). Relocation to a more distant residential location was cited by some as a reason for reduced spending, as well as traffic and travel costs.

Table III-20 Reasons For Change in Attendance

INCREASED ATTENDANCE	DECREASED ATTENDANCE
Increased funds available (family grown)	Cost too expensive
New events are less expensive so more of them.	Don't want to attend as much in evening, are in our 70's now.
Moving from the east side to Seattle has made more activities accessible.	Costly, crowded, nowhere to park!
Working more with more disposable income.	Been involved in educational pursuits
I now work at a museum	Lack of income due to change of career
More plugged in, get regular email blasts.	Children have grown up and left home.
More time in my life.	Increased work demands.
Retired	Traffic
Came for classes and found more events to attend.	Increased costs of living in region.
Children are getting older and more involved.	Post-graduate young professional with no money
Found someone to go with me on a regular basis.	Time limitation
I bought a season ticket to join my friends	We had our first child
More awareness of what is available	I travel more for work
Dating someone who works in the arts.	Went back to school, no time
Attend more concerts and dance than in the past, expose children to the power of the arts.	Too expensive to attend with the whole family.
Moved back to the west coast from a cultural wasteland where I was stuck 7 years.	New kids makes going out difficult.
I enjoy the opera and now my spouse is joining me.	More busy with school activities
Kids are older so easier to get out and about.	Time and health concerns
Just more interested in the topics	Family medical issues
I think there are more offers of cultural activities	Too much traffic, so we have fewer subscriptions, but go to more occasional performances.
I've gotten older and gained appreciation.	Death in family
Living in downtown Seattle, close by	Physical Limitations/illness
We are retired and have more time.	Moved from the city to the island.
My children are interested in performing.	Fewer exhibitions of interest available.
Kids are older and easier to go places with them.	Retired, less income
I had health that restricted what I could do. Now I'm better.	Less time, difficult work schedule.
Son is actor-in-training so we've got more exposure to theatre	Traffic
Finished Grad School, had free time.	Not enough time
Like selection of offerings	Pain and mobility issues.
I have decided to pursue a career in arts. I want to learn by watching others and I want to support other artists.	I travel more for work

Table III-21 Reasons for Increased and Decreased Spending

INCREASED SPENDING	DECREASED SPENDING
Added different theatre subscription	Being more aware of our monthly budget
Attending more performances	Reduced income due to retirement
Increased funds available/family grown	Widowed, so loss of transportation.
More free spending money	Lack of income due to change of career.
We're trying to do more socializing, also more disposable income.	Having a baby
As our income increased (rebounded) after the recession.	Senior citizens; night driving is difficult.
Increase in salary	New baby
Ticket prices increasing, cost of parking increasing around Seattle Center	Saving for a house.
More interest, more time	Went back to school
New friends have introduced me to different shows, and I have more time	Fixed income, less money
Received a raise/have more spending money	Gasoline, traffic
Decided it was important in my life and kids are getting older.	Seattle opera is now paying for parking.
The arts are valuable and to keep them vibrant, we must prioritize where our money goes	Stopped driving to symphony, take the bus with senior card.
I give more support for organizations I care about.	Husband retired, less income.
Retirement	New kids makes going out difficult.
Kids are older and we cannot get kid prices anymore.	We now need tickets and childcare so it costs more
Increased income	Changes of income.
More disposable income.	Changing living costs, high price of activities.
Moved to area with more cultural events.	Going out less since I had a baby
Our son with autism tolerates public better, Yay!	Too much traffic, so we have fewer subscriptions, but go to more occasional performances.
Son is now performing regularly and our children are old enough to attend with us.	Now get senior discount
Now have a job and more money	Young child added to family
We have more discretionary money to use.	Moved to Olympia
Since we have kids, we want to get out more and expose them to art. We value these things more than we used to.	Economizing
Kids can do more as they've gotten older. We can afford to spend more\out with less need to spend on babysitter.	
Found someone to go with me on a regular basis, increased attendance = increased cost.	
Spending more money on pre/post event food and shopping.	
We go more often, dissatisfaction with the movie industry brings us into live productions.	
I am wanting to expose my kids to all the arts and we also go into Seattle for shows.	

MODES OF ENGAGEMENT BY PATRONS IN CULTURAL ACTIVITIES

Patrons were asked how their modes of engagement in cultural activity had changed over the past three years, with three ways identified for this engagement: in-person attendance, hands-on participation (e.g. art classes, art making), and virtual participation (e.g. videos, streaming, downloads). Tables III-22, III-23, and III-24 report answers to these questions. The level of non-response was higher with regard to hands-on and virtual modes of engagement than was the case for in-person modes of engagement. The answers to these questions were quite consistent across disciplines as well as with regard to the questions themselves. Most patrons reported their engagement was about the same. However, in-person modes of engagement were reported to increase by about 40% of respondents, while only 7% reported less frequent in-person modes of engagement. About an equal number of patrons reported more frequent (20%) or less frequent (16%) hands-on modes of engagement. Virtual modes of engagement were reported to increase about three times as often (31%) as they were reported to have decreased (10%). The broad message from responses to this question is that patrons report that they are more frequently engaged with cultural activities, and this result is consistent with the responses to questions regarding attendance and spending on cultural activities. This question was not asked in earlier ArtsFund Economic Impact Studies.

Table III-22 How Patron In-Person Attendance Has Changed Over the Past Three Years

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
More Often	44.4%	43.8%	40.3%	33.9%	41.1%	43.0%	45.1%	39.8%
About the Same	48.9%	48.6%	55.3%	58.5%	53.5%	48.6%	48.8%	53.3%
Less Often	6.7%	7.6%	4.3%	7.6%	5.5%	8.4%	6.1%	7.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,291; 4.8% chose to not answer this question.

Table III-23 How Patron Hands-On Participation Has Changed Over the Past Three Years

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
More Often	34.3%	21.7%	11.9%	18.6%	10.9%	25.1%	19.4%	19.7%
About the Same	51.8%	63.5%	67.8%	66.3%	71.6%	60.1%	62.0%	64.2%
Less Often	13.9%	14.8%	20.3%	15.0%	17.5%	14.8%	18.6%	16.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 2,982; 13.7% chose to not answer this question.

Table III-24 How Patron Virtual Participation Has Changed Over the Past Three Years

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
More Often	24.2%	36.8%	26.9%	29.7%	23.1%	35.1%	34.3%	30.6%
About the Same	58.0%	53.5%	62.0%	62.4%	64.2%	54.0%	55.3%	59.1%
Less Often	17.8%	9.6%	11.1%	7.9%	12.7%	10.9%	10.4%	10.3%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 2,973; 14% chose to not answer this question.

LOCATIONS SOUGHT OR WANTED FOR CULTURAL ACTIVITIES

Two questions were posed to patrons regarding the locations where they are most likely to go to cultural activities, and where they would most like to see more cultural activities taking place. Tables III-25 and III-26 report responses to these two questions. Patrons were able to identify more than one location, and on average they identified about three locations where they currently go to cultural activities, and they identified on average more than two locations where they would like to see more cultural activities. Regarding where patrons are currently likely to go for cultural activities, Table III-25 reports that formal venues, museums or galleries, open-air venues or parks, and community facilities are the most frequently utilized. There is a fair degree of consistency in these responses across disciplines. Informal areas and art schools had much more modest citations. Patrons were invited to describe their “other” locations, and these responses are most frequently churches, colleges, schools, the UW and other universities, as well as online and theatres.

Table III-25 Where Patrons Are Currently Most Likely To Go To Cultural Activities

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
Formal Venues	55%	47%	85%	35%	82%	41%	64%	51%
Museums or Galleries	77%	92%	80%	80%	75%	92%	78%	82%
Open-Air Venues or Parks	75%	68%	55%	74%	58%	71%	70%	69%
Informal Areas	36%	32%	22%	28%	21%	30%	30%	28%
Community Facilities	61%	48%	41%	39%	46%	43%	41%	43%
Art Schools	19%	23%	17%	15%	18%	23%	16%	18%
Not Sure	2%	1%	2%	4%	1%	2%	2%	3%
Other	5%	7%	10%	2%	7%	5%	3%	5%
CUMULATIVE PERCENTAGE	330%	317%	312%	277%	308%	307%	305%	298%

N = 3,321; 3.9% chose to not answer this question.

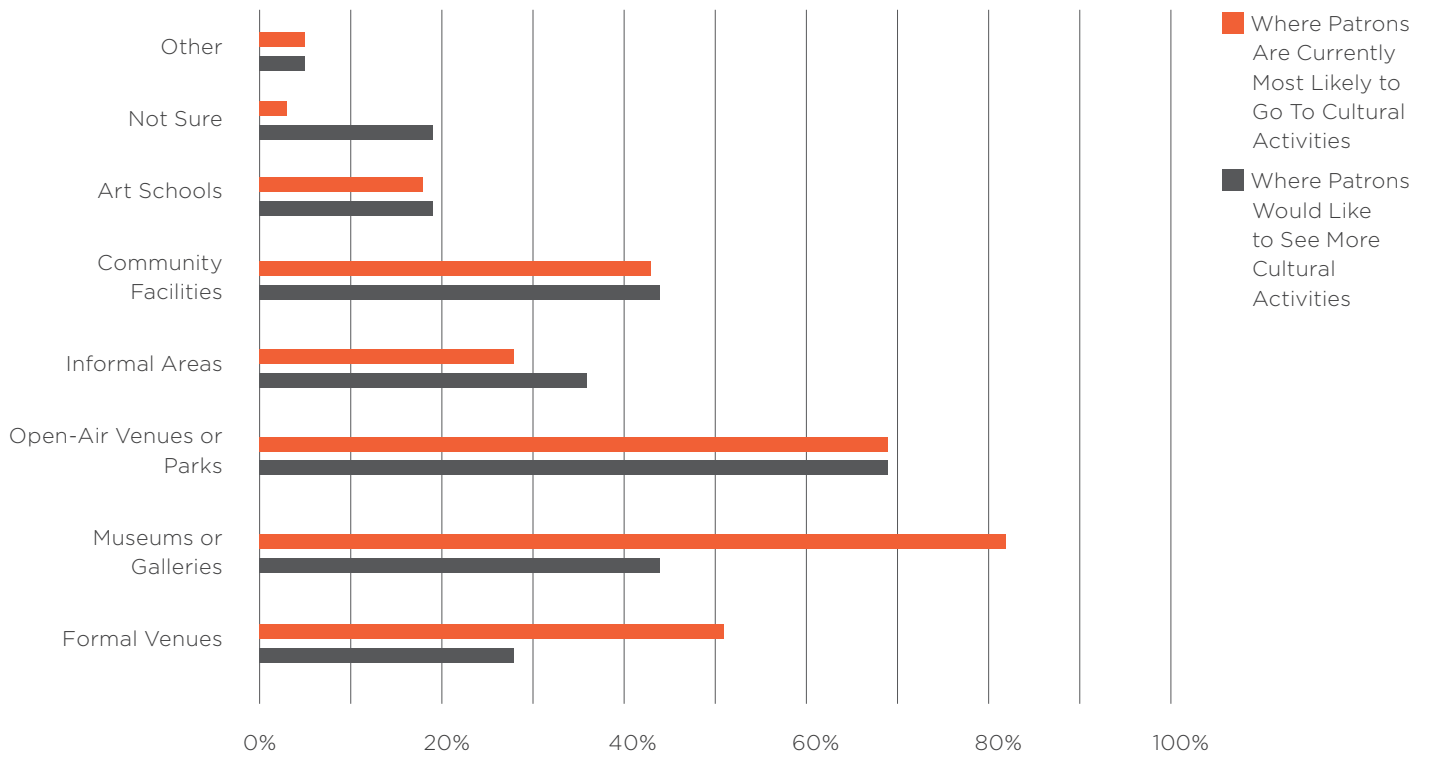
Table III-26 reports the pattern of responses regarding where patrons would like to see more cultural activities, compared to their current participation locations. Figure III-4 presents a comparison of responses reported in Tables III-25 and III-26. The strength of responses regarding open-air venues or parks, and informal areas is greater with respect to places where patrons would like to see more cultural activities compared to where they currently participate. The pattern of responses is again relatively consistent across disciplines. Patrons were also asked to describe the “other” locations where they would like to see more cultural activities. Answers to this question are quite diverse, although public schools were mentioned relatively frequently. A sampling of other answers follows: *ball park, coffee shops, historical buildings, libraries, would love more events in parks/venues in the neighborhoods as well as downtown, smaller community based venues, retirement homes, more online lectures and museum explorations.* The “other” responses to this question are certainly much broader than reported above regarding current locations where patrons go for cultural activities.

Table III-26 Where Patrons Would Like To See More Cultural Activities

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
Formal Venues	35.0%	23.5%	35.7%	23.3%	34.0%	23.8%	33.4%	27.8%
Museums or galleries	45.3%	56.0%	37.2%	46.3%	33.3%	45.7%	42.0%	43.6%
Open-air venues or parks	67.9%	70.8%	48.3%	79.1%	54.4%	71.4%	66.1%	69.3%
Informal Areas	46.0%	40.3%	29.0%	35.1%	21.9%	43.7%	36.3%	36.0%
Community facilities	62.8%	52.3%	37.4%	39.2%	43.0%	50.8%	44.2%	44.4%
Art Schools	29.2%	20.8%	16.0%	18.6%	12.9%	22.5%	15.6%	18.8%
Not Sure	17.5%	17.8%	18.2%	20.6%	21.3%	15.1%	16.9%	18.5%
Other	6.6%	6.4%	7.6%	3.8%	4.9%	6.4%	3.8%	5.1%
CUMULATIVE PERCENTAGE	310.2%	287.9%	229.4%	266.1%	225.8%	279.4%	258.3%	263.4%

N = 3,094; 10.4% chose to not answer this question.

Figure III-4 Comparison of Current and Desired Locations for Participation in Cultural Activities



PATRON ATTITUDES RELATED TO QUALITY OF LIFE, REGIONAL IDENTITY, AND RESIDENTIAL AND WORK LOCATIONS

“Art and culture give this region class, inspiration, and vital love for beauty, as well as a passion for exploring cultures beyond or own.”

“The arts are what bring people to this region, what inspires them on a daily basis.”

“(Cultural activity is) essential for providing a sense of place or community”

“(Cultural activity) helps us to understand who we are in a time of change”

Source: Patron Survey

The patron survey asked three questions related to the relationship between cultural activities and quality of life, regional identity, and the decision of patrons as to where they live and work. Tables III-27, III-28, and III-29 report the results of these questions. Respondents were asked to evaluate these questions on a seven point Likert-scale, with a value of 1 being not at all important, and value of 7 being very important. Answers were skewed towards being very important for the data reported in Table III-27 (quality of life and culture), and in Table III-28 (regional identity and culture), and consistent across disciplines.

Table III-27 Patron Rating Of The Importance Of Culture To Quality Of Life In This Region

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
1 (Not at all Important)	0.0%	0.8%	0.5%	0.2%	1.1%	0.5%	0.5%	0.5%
2	2.8%	0.8%	0.7%	0.2%	0.7%	1.0%	0.5%	0.7%
3	0.6%	0.8%	0.7%	1.4%	0.5%	1.0%	1.3%	1.1%
4	6.2%	3.8%	4.2%	10.2%	3.5%	6.4%	4.5%	6.9%
5	12.4%	11.1%	10.6%	20.1%	16.5%	13.9%	14.6%	16.0%
6	10.7%	26.2%	20.3%	22.9%	21.9%	22.1%	22.5%	21.8%
7 (Very Important)	67.4%	56.5%	63.1%	45.0%	55.8%	55.0%	56.2%	53.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,318; 4.0% chose to not answer this question.

Table III-28 Patron Rating Of The Importance Of Culture To The Identity Of This Region

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
1 (Not at all Important)	0.0%	0.8%	1.2%	0.2%	0.7%	0.8%	0.4%	0.5%
2	1.1%	1.1%	0.7%	0.5%	0.6%	1.0%	0.5%	0.7%
3	0.6%	1.6%	1.7%	2.0%	1.5%	1.0%	1.0%	1.5%
4	9.0%	5.1%	6.2%	11.8%	6.5%	9.1%	5.3%	8.8%
5	11.2%	14.4%	12.9%	16.1%	18.6%	13.2%	15.6%	15.0%
6	13.5%	22.2%	19.7%	20.4%	21.7%	20.8%	22.4%	20.5%
7 (Very Important)	64.6%	54.7%	57.6%	49.1%	50.5%	54.0%	54.8%	52.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,302; 4.5% chose to not answer this question.

Answers to the question as to the importance of cultural life in the region to the decision as to where to work or live has a somewhat different pattern of answers than to the two previous questions, as reported in Table III-29. Patrons were not so extreme in their answers towards the “Very Important” end of the Likert scale. This pattern of response suggests that other factors were also important to patrons answering this question, but they were not asked to identify other factors that they considered to be competing with or also very important in their decision as to where to live or work. Future ArtsFund studies that ask this question could consider asking patrons to describe other factors in their decision as to where to live or work beyond the importance of cultural activity. There was no difference in the pattern of responses to the questions about quality of life and the importance of cultural activity in the patron’s decision of where to live or work, and the length of time that the patron had lived in the region.

Table III-29 Importance of Cultural Activity To Your Decision of Where To Live or Work (restricted to those who reported a zip-code in King, Pierce, Snohomish or Kitsap counties)

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
1 (Not at all Important)	5.6%	7.6%	7.6%	5.9%	6.9%	7.0%	3.7%	6.1%
2	4.9%	1.3%	4.1%	2.4%	6.3%	2.9%	3.3%	3.3%
3	9.3%	5.6%	6.0%	5.9%	7.1%	7.0%	4.9%	6.3%
4	10.5%	8.3%	9.7%	13.8%	12.8%	13.2%	11.2%	12.4%
5	16.7%	19.9%	18.0%	16.6%	15.3%	18.0%	16.7%	17.0%
6	13.0%	16.2%	15.7%	18.6%	14.4%	18.4%	19.4%	17.6%
7 (Very Important)	40.1%	41.1%	39.0%	36.8%	37.2%	33.5%	40.8%	37.3%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 2,529; 3.0% chose to not answer this question.

STUDENT DEMOGRAPHICS

Arts, cultural, and scientific organizations were asked to provide information on the number of free or discounted admissions of K-12 students that their organizations served at their facilities, or at programs that their organization took to schools or other spaces. The next section of this report presents results from this survey. Most organizations completed this part of the questionnaire, but some left this section blank. It cannot be determined if those who left this section blank had no student attendance, or if they were unable to provide this type of information. As is evident in the tables below, a substantial proportion of those responding to these questions did not have data that allowed them to provide information in the categories requested.

Table III-30 contains estimates of the number of free and discounted student admissions by discipline. About 46% of these student tickets were free, while about 54% were discounted. The number of discounted student admissions in Table III-27 is well below that reported in Table III-1 (that table reported 1.04 million discounted student admissions). This difference may be accounted for by discounted student admissions to those outside the K-12 system (preschool and college students). There are significant differences in the mix of free versus discounted tickets by discipline. Arts Service Organizations and Festivals student tickets are predominately free. In contrast, Science, Festival/Interdisciplinary, and Theatre student tickets are largely discounted.

Table III-30 Free and Discounted Student Admissions by Discipline

	FREE K-12 ADMISSIONS	DISCOUNTED STUDENT ADMISSIONS
Arts Service Organizations	89,244	25,203
Dance	6,607	15,273
Heritage	253,459	82,477
Music	54,516	46,706
Science	8,116	117,366
Theatre	31,864	192,000
Visual	49,901	36,144
Interdisciplinary/Festival	78,773	168,024
TOTAL	572,480	683,193

Three measures were sought for both free and discounted student admissions. The first of these was a family income indicator—the share of students on free lunch, reduced cost lunches, or not on a free or reduced cost lunch program. The second measure sought data on student ethnicity, while the third measure requested information on the geographic origin of students.

Income Indicators of K-12 Students

Tables III-31 and III-32 present information on income characteristics of students. Low income students are either provided a free lunch, or a reduced cost lunch. With regard to those providing free admission to K-12 students, over half of the organizations responding to this question did not know if students were on a lunch program. Of those that did know, 66% of the students were on a free or reduced cost lunch program. Of the students granted reduced admissions, organizations could not identify the income status of more than half of these students. Of those that could have their income status identified, about 54% were on a free or reduced cost lunch. Responses to this question indicate that arts, cultural, and scientific organizations that provided free or reduced admissions were doing this to a large cohort of low-income students.

Table III-31 Student Family Income Indicators—Free Admission

	FREE LUNCH	REDUCED COST LUNCH	NOT ON LUNCH PROGRAM	DON'T KNOW	TOTAL
Arts Service Organizations	6.9%	7.3%	3.2%	82.6%	100.0%
Dance	36.5%	36.5%	0.3%	26.8%	100.0%
Heritage	0.3%	0.3%	0.0%	99.4%	100.0%
Music	20.8%	10.3%	40.9%	28.0%	100.0%
Science	80.4%	0.0%	0.0%	19.6%	100.0%
Theatre	57.6%	19.1%	4.8%	18.4%	100.0%
Visual	16.2%	4.5%	25.4%	54.0%	100.0%
Interdisciplinary/Festival	7.7%	9.9%	12.6%	69.8%	100.0%
TOTAL	10.6%	5.1%	8.2%	76.1%	100.0%

Table III-32 Student Family Income Indicators for Discounted Student Admissions

	FREE LUNCH	REDUCED COST LUNCH	NOT ON LUNCH PROGRAM	DON'T KNOW	TOTAL
Arts Service Organizations	3.5%	5.7%	0.1%	90.7%	100.0%
Dance	10.0%	10.0%	12.0%	68.0%	100.0%
Heritage	10.0%	32.5%	7.2%	50.4%	100.0%
Music	7.4%	14.0%	18.9%	59.7%	100.0%
Science	0.0%	16.0%	66.5%	17.5%	100.0%
Theatre	16.9%	23.5%	32.5%	27.1%	100.0%
Visual	26.1%	3.5%	17.2%	53.2%	100.0%
Interdisciplinary/Festival	1.8%	1.7%	4.5%	92.0%	100.0%
TOTAL	9.4%	15.2%	21.3%	54.1%	100.0%

Ethnicity of K-12 Students

Over two-thirds of the organizations responding to the question about ethnicity and providing free admissions did not know the ethnicity of their free student admissions (Table III-33). Of those that responded with regard to ethnicity, 49% indicated that these students were Caucasian. As reported in Table III-34, about half of the students granted discounted admissions were Caucasian. Over 60% of the respondents reporting on the ethnicity of students granted reduced admissions could not identify their ethnicity. The data in these two tables indicate that arts, cultural, and scientific organizations provide free or discounted admissions to a large cohort of minority students.

Table III-33 Ethnicity of Free Student Admissions

	CAUCASIAN	AFRICAN AMERICAN	ASIAN/PACIFIC ISLANDER	HISPANIC /LATIN	NATIVE AMERICAN	OTHER	DON'T KNOW	TOTAL
Arts Service Organizations	23.4%	3.6%	4.2%	5.1%	0.6%	2.8%	60.3%	100.0%
Dance	37.6%	13.1%	16.8%	18.6%	1.0%	12.8%	0.0%	100.0%
Heritage	3.1%	0.2%	0.1%	0.4%	0.1%	0.0%	96.1%	100.0%
Music	37.8%	13.5%	16.0%	10.7%	1.9%	6.0%	14.1%	100.0%
Science	61.2%	12.7%	13.0%	9.1%	0.3%	0.6%	3.0%	100.0%
Theatre	22.8%	12.2%	13.9%	10.4%	2.9%	0.5%	37.3%	100.0%
Visual	24.2%	3.4%	9.6%	4.8%	0.5%	2.5%	55.0%	100.0%
Interdisciplinary/Festival	24.5%	13.5%	12.9%	6.9%	0.7%	3.1%	38.4%	100.0%
TOTAL	16.0%	4.6%	5.6%	4.1%	0.6%	1.7%	67.3%	100.0%

Table III-34 Ethnicity of Discounted Student Admissions

	CAUCASIAN	AFRICAN AMERICAN	ASIAN/PACIFIC ISLANDER	HISPANIC /LATIN	NATIVE AMERICAN	OTHER	DON'T KNOW	TOTAL
Arts Service Organizations	17.8%	1.4%	2.4%	3.0%	0.4%	1.7%	73.3%	100.0%
Dance	40.0%	19.0%	17.0%	15.0%	1.1%	8.0%	0.0%	100.0%
Heritage	7.6%	3.7%	5.1%	5.1%	0.9%	1.4%	76.2%	100.0%
Music	22.3%	3.0%	5.1%	3.1%	0.8%	2.1%	63.5%	100.0%
Science	32.3%	2.8%	3.6%	0.3%	0.4%	0.4%	60.2%	100.0%
Theatre	33.6%	5.7%	9.2%	11.5%	0.7%	4.6%	34.7%	100.0%
Visual	22.8%	3.8%	9.7%	6.8%	1.2%	1.7%	54.1%	100.0%
Interdisciplinary/Festival	4.7%	0.6%	0.7%	1.1%	0.1%	0.1%	92.7%	100.0%
TOTAL	21.2%	3.6%	5.3%	5.1%	0.5%	2.0%	62.2%	100.0%

Geographic Origin of Free and Discounted Student Admissions

Arts, cultural, and scientific organizations reported stronger knowledge about where these students came from, than regarding their income characteristics or ethnicity, as reported in Table III-35 and Table III-36. They reported not knowing the geographic origin for only about 20% of the discounted students, but did not know the origin of over 60% of the free admissions. Free student admissions are clearly much more local (in the city from which the students came) than is the case for discounted student admissions. A much larger share of students granted discounted admission come from counties outside the location of the arts, cultural, or scientific organization. This result should not be interpreted as students coming from outside King County, as the question in the organization survey did not ask for a specific geographic origin for students from outside the county of the organization being surveyed.

Table III-35 Geographic Origin of Free Student Admissions

	YOUR CITY	YOUR COUNTY OUTSIDE YOUR CITY	WA OUTSIDE YOUR COUNTY	OUTSIDE WA	DON'T KNOW	TOTAL
Arts Service Organizations	36.8%	19.2%	0.6%	0.0%	43.3%	100.0%
Dance	37.6%	61.1%	1.4%	0.0%	0.0%	100.0%
Heritage	4.3%	1.4%	1.0%	0.1%	93.1%	100.0%
Music	69.2%	12.4%	6.6%	0.0%	11.8%	100.0%
Science	51.5%	38.2%	7.3%	0.0%	3.0%	100.0%
Theatre	42.3%	31.0%	14.2%	0.0%	12.6%	100.0%
Visual	40.4%	19.1%	8.1%	1.2%	31.2%	100.0%
Interdisciplinary/Festival	25.8%	8.4%	2.0%	1.1%	62.6%	100.0%
TOTAL	24.5%	10.6%	3.2%	0.3%	61.5%	100.0%

Table III-36 Geographic Origin of Discounted Student Admissions

	YOUR CITY	YOUR COUNTY OUTSIDE YOUR CITY	WA OUTSIDE YOUR COUNTY	OUTSIDE WA	DON'T KNOW	TOTAL
Arts Service Organizations	26.6%	17.9%	0.7%	0.0%	54.7%	100.0%
Dance	59.0%	33.0%	8.0%	0.0%	0.0%	100.0%
Heritage	15.7%	13.5%	36.2%	0.0%	34.6%	100.0%
Music	48.0%	22.3%	10.3%	0.0%	19.5%	100.0%
Science	30.2%	9.5%	2.7%	0.0%	57.6%	100.0%
Theatre	36.0%	26.9%	30.6%	0.0%	6.5%	100.0%
Visual	27.8%	27.3%	20.4%	1.4%	23.2%	100.0%
Interdisciplinary/Festival	14.3%	21.2%	33.3%	28.4%	2.9%	100.0%
TOTAL	27.7%	20.4%	23.7%	7.1%	21.2%	100.0%

PATRON DEMOGRAPHIC CHARACTERISTICS

A set of questions were asked of patrons regarding themselves on a set of measures referred to here as demographic characteristics. It should be emphasized that these questions were addressing these characteristics of the individual filling out the patron questionnaire, rather than for their entire party. It should be noted that these responses are not presumed to be representative of characteristics of the population of the Central Puget Sound region.

Table III-37 presents results from a question the patron answering the questionnaire how long they have lived in the Central Puget Sound region. (The data in this question are restricted to those whose zip-code was in the Central Puget Sound region.) There is a wide distribution of length of residence reported in these responses. The median length of residence reported is underlined by discipline, and for the entire sample. The median overall was 20-29 years, while the median age of the patron responding to the patron questionnaire was 35-44 years, implying a strong share of patrons moving to this region over their life-course. There are differences in the median age of patron respondents by discipline, with Science patrons tending to be younger, while those answering the questionnaire at Music & Dance and Theatre venues tended to older than average.

Table III-37 How Long Have You Lived In The Central Puget Sound Region (restricted to those who reported a zip-code in King, Pierce, Snohomish or Kitsap counties) (Mean is in the underlined age cohort)

# OF YEARS	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
N/A	0.0%	1.3%	0.4%	2.3%	0.6%	1.4%	1.1%	1.4%
<1	1.9%	4.3%	0.8%	8.2%	1.7%	7.8%	2.8%	5.5%
1-3	8.2%	6.6%	3.9%	7.8%	4.6%	8.9%	6.2%	7.1%
4-6	3.8%	5.3%	3.9%	9.0%	3.3%	4.3%	6.0%	6.1%
7-9	3.8%	5.3%	4.3%	7.4%	4.8%	5.3%	7.6%	6.2%
10-19	19.0%	17.8%	13.2%	<u>17.6%</u>	11.6%	18.4%	16.7%	16.7%
20-29	<u>14.6%</u>	<u>17.8%</u>	20.3%	19.9%	18.1%	<u>18.4%</u>	<u>19.2%</u>	19.0%
30-39	20.9%	12.8%	<u>15.9%</u>	14.8%	<u>15.4%</u>	17.0%	15.1%	15.7%
40-49	10.1%	12.5%	13.0%	9.4%	15.4%	11.0%	11.6%	11.1%
50-59	11.4%	7.6%	10.6%	2.3%	11.6%	2.8%	8.1%	5.7%
>59	6.3%	8.9%	13.9%	1.2%	12.9%	4.6%	5.8%	5.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 2,570; 1.4% chose to not answer this question.

The gender of those answering the patron questionnaire is reported in Table III-38. Females were the largest cohort of respondents in every discipline. This question did not ask the gender of persons in the party being interviewed. Table III-11 reported that the median group size was two persons, and the average nearly three persons. The way this question was worded does not allow determination of the gender of overall party-sizes.

Table III-38 Gender of Patron Questionnaire Respondents

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
Male	24.6%	33.6%	35.2%	40.0%	36.2%	31.7%	38.5%	36.2%
Female	75.4%	66.4%	64.8%	60.0%	63.8%	68.3%	61.5%	63.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,200; 7.4% chose to not answer this question.

Patrons were asked to identify their age in the categories reported in Table III-39. The age category that contains the median is underlined, with the overall age group being 35-44 years of age. The shares of patrons by age is relatively evenly distributed between the 25-34 and 65-74 year age groups; relatively few patrons were respondents younger than 25 or older than 75. There are modest difference in the median age by discipline. Science, Visual Arts, and Interdisciplinary/Festival patrons tended to be younger, while Theatre patrons tended to be older than patrons as a whole.

Table III-39 Age of Patron Questionnaire Respondents

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
19 or younger	1.2%	3.8%	1.2%	3.2%	1.7%	2.6%	4.7%	2.9%
20-24	2.9%	4.9%	4.7%	11.7%	2.4%	10.0%	7.7%	8.4%
25-34	6.9%	17.3%	7.6%	28.7%	6.6%	18.7%	20.5%	19.6%
35-44	15.6%	17.6%	10.4%	<u>27.3%</u>	9.0%	<u>19.2%</u>	<u>16.7%</u>	19.6%
45-54	<u>20.2%</u>	<u>16.8%</u>	<u>16.5%</u>	14.4%	18.3%	11.3%	20.4%	15.6%
55-64	29.5%	17.9%	21.0%	10.8%	<u>27.1%</u>	15.6%	17.9%	16.7%
64-74	18.5%	18.2%	24.6%	3.4%	23.4%	16.2%	10.0%	12.4%
75 or Older	5.2%	3.5%	14.0%	0.5%	11.4%	6.4%	2.2%	4.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,314; 4.1% chose to not answer this question.

Table III-40 presents a profile of the educational attainment of the patron answering the patron questionnaire. Most patrons had a four year college degree, with one-third holding a graduate or post-graduate degree. This educational profile varies only modestly across discipline.

Table III-40 Educational Attainment of Patron Survey Respondents

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY / FESTIVAL	WEIGHTED TOTAL
High school diploma or equivalency	9.1%	11.7%	7.3%	13.6%	9.1%	9.5%	12.6%	11.3%
College or vocational/technical degree	21.7%	19.4%	14.7%	24.7%	17.6%	20.4%	21.6%	21.3%
Four-year college / university degree	29.1%	33.6%	33.5%	33.3%	35.0%	37.4%	34.9%	34.4%
Graduate degree	26.3%	24.9%	25.2%	15.9%	22.8%	20.9%	15.5%	19.3%
Post-graduate degree	13.7%	10.4%	19.3%	12.5%	15.6%	11.9%	15.5%	13.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,295; 4.7% chose to not answer this question.

The patron survey asked about the level of household income, using the income range's reported in Table III-41. Across all disciplines the median income range was \$75,000 to \$99,999. This value was similar for patrons interviewed in all disciplines except Visual Arts and Theatre. Patrons interviewed at Visual Arts organizations reported a somewhat lower income distribution, while those interviewed at Theatres reported a somewhat higher income distribution than the overall sample. There was a somewhat lower percentage response rate to this question than for most questions in the patron survey, possibly because patrons were unwilling to reveal their income level.

Table III-41 Household Income of Patron Survey Respondents
(Underline represents the median)

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
Under \$20,000	5.1%	5.6%	2.7%	7.7%	1.9%	13.1%	7.7%	7.6%
\$20,000 to \$39,999	12.7%	12.2%	10.7%	12.5%	7.4%	14.0%	13.7%	12.3%
\$40,000 to \$59,999	13.9%	15.4%	11.7%	13.0%	10.5%	14.5%	13.3%	13.1%
\$60,000 to \$74,999	12.0%	13.1%	11.5%	13.7%	11.4%	<u>8.7%</u>	11.7%	11.8%
\$75,000 to \$99,999	<u>14.6%</u>	<u>11.6%</u>	<u>19.0%</u>	<u>13.0%</u>	16.0%	15.6%	<u>16.0%</u>	<u>14.9%</u>
\$100,000 to \$124,999	11.4%	14.2%	15.2%	13.9%	<u>17.9%</u>	14.2%	14.6%	14.5%
\$125,000 to \$249,999	24.1%	18.4%	21.5%	19.2%	23.4%	12.0%	16.7%	18.2%
Over \$250,000	6.3%	9.5%	7.7%	7.0%	11.4%	7.8%	6.4%	7.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 2,996; 13.3% chose to not answer this question.

Patrons were also asked to indicate their household size, and these results are reported in Table III-42. For the sample as a whole this number was two persons, the same as the patron group size reported in Table III-11. Only those interviewed at Science organizations reported a larger household size, and their median group sizes were also larger (as reported in Table III-11).

Table III-42 Patron Household Size (Underline represents the median)

# OF PERSONS	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
1	18.5%	18.6%	23.5%	7.4%	17.0%	24.0%	19.8%	16.2%
2	<u>44.9%</u>	<u>40.7%</u>	<u>52.5%</u>	27.6%	<u>53.7%</u>	<u>35.5%</u>	<u>39.7%</u>	<u>37.4%</u>
3	16.9%	18.9%	11.1%	<u>25.3%</u>	12.7%	16.4%	17.1%	18.9%
4	13.5%	13.1%	8.2%	24.1%	10.5%	14.6%	14.6%	16.9%
5	2.8%	4.4%	3.6%	9.9%	3.7%	6.0%	6.1%	6.7%
6 or more	3.4%	4.4%	1.2%	5.7%	2.2%	3.4%	2.7%	3.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

N = 3,271; 5.4% chose to not answer this question.

The last question in the patron questionnaire asked the person interviewed to identify their race, as reported in Table III-43. Caucasian/white was identified by the majority of patrons in all disciplines. Approximately one quarter of the overall sample identified a category other than Caucasian/white, with Asian/Asian American being the most common other racial category identified. However, it should be noted that patrons were allowed to check more than one racial category, and Table III-43 indicates that about 10% of respondents did select at least one other category.

Table III-43 Race of Patron Survey Respondents (The totals are greater than 100% because individual respondents could cite more than one racial category)

	ARTS SERVICE ORGANIZATIONS	HERITAGE	MUSIC & DANCE	SCIENCE	THEATRE	VISUAL	INTER-DISCIPLINARY /FESTIVAL	WEIGHTED TOTAL
African American/Black	2.8%	2.2%	3.1%	3.7%	2.6%	5.9%	5.1%	4.1%
Asian/Asian American	5.6%	13.9%	7.9%	13.5%	5.4%	10.1%	10.9%	10.6%
Hispanic Origin	2.8%	4.1%	2.7%	8.7%	2.8%	6.7%	5.3%	6.1%
Native American/Inuit/Aleut	0.6%	3.3%	2.4%	2.3%	0.9%	3.4%	2.1%	2.3%
Caucasian/White	85.3%	79.6%	86.8%	76.7%	92.0%	79.6%	79.7%	80.8%
Other	1.1%	3.0%	1.4%	1.6%	0.6%	1.8%	1.8%	1.6%
Prefer not to Answer	4.5%	2.7%	3.8%	4.6%	3.2%	4.1%	3.5%	4.0%
TOTAL	102.8%	108.7%	108.0%	111.0%	107.5%	111.6%	108.4%	109.6%

N = 3,288; 4.9% chose to not answer this question.

IV. COMPARISONS WITH OTHER STUDIES

“(Cultural activities) keep me asking and learning. They keep our community economically vital. They are exciting and fun!”

“As a tourist, I feel I want to gain a good sense of the history of the region and its contemporary culture.”

Source: Patron Survey

This ArtsFund Economic Impact study presents information similar to that gathered in other studies undertaken by regional arts and cultural organizations, as well as by national arts and cultural advocacy organizations. This section of this report presents selected results gathered in these other studies; it is not intended to be exhaustive, but rather to present some comparisons that provide a context for results presented in this study. This section first addresses sources of data similar to those measured in the current study, and then turns briefly to Washington State and local government efforts focused on programs aimed at enhancing support for arts and cultural activities.

NATIONAL OVERVIEWS

Several organizations have developed a significant presence nationally in the measurement of arts and cultural activity, including Americans for the Arts and the Cultural Data Project. These organizations have developed many regional reports, in addition to providing national-level measures of arts and cultural activity. Their work complements research presented by the National Endowment for the Arts (NEA).

A baseline report on public participation in the arts comes from the NEA, through its surveys of public participation in the arts. The latest of these surveys was benchmarked against 2012, as a part of the Current Population Survey conducted by the U.S. Census Bureau. A few highlights from this report are presented here, with an emphasis on trends in participation. NEA reported a slight decrease in national rates of attendance at visual and performing arts activities, with levels remaining below those documented in 2002. Peak participation (41% of the adult population) was recorded in 1992; in 2002 it fell to 39.4%, while in 2012 it was 33.4%. The 2012 survey found strong levels of consumption of art through electronic media, with 71% of adults utilizing television or radio, hand-held or mobile devices, the internet, and DVD/CD/tape/or record players. Comparisons with earlier surveys of consumption by electronic media were not available. The NEA survey found that: “nearly half of the nation’s adults attended at least one type of visual or performing arts activity.” “...half of the nation’s adults created, performed, or shared arts art of various types, and more than two-thirds accessed art via electronic media” (NEA

2013b, p. 42). The current ArtsFund Economic Impact Study is not benchmarked against the overall population. Rather, data were gathered from patrons interviewed at arts, cultural, and scientific organizations in the region. Thus, these two sources of data are not entirely comparable.

Americans for the Arts reports similar data. “Arts attendance remains fluid: In 2012, 32 percent of the adult population attended a live performing arts event, the same as in 2010, but much less than the 40 percent of 2003. Art museums attendance also held steady with 13 percent of the population attending at least once (down from 15.5 percent in 2003). Overall, attendance at theatre, opera, and movies increased in 2012 over 2011, while audiences for symphony got smaller. Almost certainly related is the decreasing share of households making contributions to the arts—a figure that has dropped annually since 2007, from 9.3 percent to 8.6 percent.” (Americans for the Arts 2014). The current Central Puget Sound region ArtsFund study finds overall attendance increasing slightly. Its results are based on the survey of patrons intercepted at arts, cultural and scientific organizations, rather than being a general survey of the overall population.

Americans for the Arts compiles a composite index that attempts to convey trends in the health of the non-profit arts sector. The 2014 index contains a value for 2012 of 97.3, up from 96.1 in 2011, but below the baseline 100 from 2003. This index is based on a set of 81 indicators. The analysis indicates that the nonprofit arts community did not start to recover from the Great Recession until 2012, 3 years after the economy as a whole began to improve. Many arts nonprofits operate at a deficit—44% in 2012—“a figure that raises concerns about the long-term sustainability of arts organizations that are unable to achieve a break-even budget” (Americans for the Arts 2014). In the current ArtsFund study 18% of the respondents completing the organizational survey reported lower operating income than operating expenses, a much lower percentage than cited by Americans for the Arts.

Americans for the Arts also reports on charitable giving to the arts, referred to as contributed income earlier in this report. “Total charitable giving and overall employment help explain the health of the arts sector: For the 10-year period between 2002 and 2011, two economic forces were strongly correlated to the overall National Arts Index: (1) total private giving to all charities, and (2) the overall number of workers in all occupations. This combination of factors explained a robust 75% of the change in the Index value from 2003-2012. The significance of this finding is that it points to two bellwethers for the arts over the long term. People who are working, especially within the confidence of a growing job market, have more discretionary income to engage in the arts

both personally and as consumers, and are financially more able to make charitable contributions. At the same time, an environment where charitable giving rises is also healthy for the arts. Thus, the increases in employment and in overall levels of charitable giving in 2013 and 2014 are promising signs for the arts.” (Americans for the Arts 2014).

EARNED VS. CONTRIBUTED INCOME

ArtsFund has carefully measured the composition of income to non-profit arts, cultural, and scientific organizations. One of the statistical initiatives that has emerged for the non-profit arts and cultural organization sector is the Cultural Data Project (CDP), which allows development of data on the composition of income and other metrics. Started in 2004 by the Pew Charitable Trusts, the CDP offers an online system that allows arts and cultural organizations to enter statistical information in a standardized form. Users can then access these data and can aggregate them into reports organized by discipline or by geography. Currently twelve states and the District of Columbia participate in the CDP, and the CDP has become an independent nonprofit with a national board of directors and governance structure (Cultural Data Project 2015a). Recently, it was announced that the CDP will provide the organizational data collection platform for the next Arts & Economic Prosperity economic impact study conducted by Americans for the Arts (Cultural Data Project 2015b).

The state of Minnesota is a participant in the Cultural Data Project, and has recently issued a detailed report on the impact and health of the nonprofit arts and culture sector in that state (Minnesota Citizens for the Arts 2015). This report contains data that parallel the ArtsFund Economic Impact Studies on a number of dimensions. It reports statewide impacts, as well as a set of regional profiles. Table IV-1 below provides an example of data contained in this report that can be compared to data gathered by ArtsFund. Central Puget Sound region arts, cultural, and scientific organizations have a level of earned income somewhat above organizations in Minnesota (note that science organizations are not included in the Cultural Data Project). Individual contributions are quite similar, while government and corporate & foundation contributions are higher in Minnesota than in the Central Puget Sound region. In-kind contributions are considerably higher in the Central Puget Sound region than in Minnesota. Similar comparisons could be made from reports generated in other regions participating in the Cultural Data Project.

Table IV-1 Composition of Income

	MINNESOTA	CENTRAL PUGET SOUND REGION
Earned Income	43.65%	56.0%
Individual Contributions	16.70%	14.0%
Corporate & Foundations	14.50%	9.0%
Government	21.98%	12.0%
Special Event/Other	1.65%	1.0%
In Kind	1.54%	8.0%
TOTAL	100.02%	100.00%

INCOME COMPOSITION

Another example of a study that details the composition of income comes from the Denver area, where a cultural taxing district has been in existence since 1989. (See a discussion of a proposal for a similar taxing district in this region later in this section). The Colorado Business Committee for the Arts has developed reports on the income and economic impact of arts and cultural organizations in the Denver region for twenty years, using data self-reported by those receiving funds from this taxing district. Table IV-2 reports that this taxing district provides about 28% of total contributed income to these Colorado organizations. Central Puget Sound region arts, cultural, and scientific organizations rely on larger shares of individual, government and in-kind income than reported by Denver organizations. Attendance at the Denver organizations (14.2 million) is somewhat above Central Puget Sound region attendance (13.4 million). Total contributed income in the Central Puget Sound region was somewhat above that reported for the Denver region (\$225 million vs. \$167 million), a testament to the strong support for non-profit arts, cultural, and scientific organizations in the Central Puget Sound region. It should be noted that the Denver region scientific and cultural facilities district tax rate is 1 cent per \$10 sales.

Table IV-2 Contributed Income Comparison

	DENVER \$ MILLIONS	DENVER %	% CENTRAL PUGET SOUND
Individual	\$23.9	14.3%	32.9%
Government	24.8	14.8%	27.0%
Foundations	29.2	17.5%	11.6%
Scientific and Cultural Facilities District	46.6	27.9%	Not present
Corporate	10.4	6.2%	8.2%
Other	16.8	10.0%	1.9%
In Kind	15.6	9.3%	18.4%
TOTAL	\$167.3	100.0%	100.0%

Motivations for giving were reported in a survey of individuals by LaPlaca Cohen. This survey finds that 61% of patrons support organizations that benefit the community, 59% support organizations they enjoy, 48% give to support the arts, 46% give to help with funding challenges, 35% give because of tax deductibility, 34% give to help organizations achieve their potential, and 22% give because of benefits received (LaPlaca Cohen 2014, p. 88).

Regarding government support, the Americans for the Arts 2014 National Arts Index wrote: “Government arts funding struggles continued in 2012. Funding of the whole suite of federal arts-related agencies stayed very close to historic highs of previous years at \$1.86 billion. Funding of the National Endowment for the Arts decreased to \$155 million in 2011, and total arts funding dropped from 0.40 percent of federal domestic discretionary spending to 0.30 percent between 2002 and 2012. Not included in these totals are arts programs embedded in the budgets of other federal departments and agencies such as Health and Human Services, GSA, Transportation, and Defense (which boasts vigorous music programs throughout the armed services). State arts funding dropped to historic lows in 2012 dollars, in share of total expenditures, and per capita, while municipal arts funding in 60 of the largest US cities grew” (Americans for the Arts 2014).

EXPENDITURES

Americans for the Arts provides limited information on the composition of expenditures of arts and cultural organizations. Table IV-3 presents a comparison of these data. Americans for the Arts includes full time contract employees in employee expenses, while all contract employment is reported separately in the ArtsFund Economic Impact Study. The data in Table IV-3 from Americans for the Arts are for regions with more than one million population. These data suggest a somewhat lower share of employee expenses in the Americans for the Arts surveys than documented in the current study.

Table IV-3 Composition of Expenses

	AMERICANS FOR THE ARTS	CENTRAL PUGET SOUND REGION
Employee Expenses	42.3%	54.4%
Contract Labor/Artists	7.9%	5.6%
Other Operating Expenses	49.8%	39.9%
TOTAL	100.0%	100.0%

PATRON SPENDING

Data on patron spending was documented in the Americans for the Arts' Arts & Economic Prosperity IV initiative. An example of data from this initiative is reported in Table IV-4. It should be noted that surveys of this type were conducted in 182 communities around the United States. In Table IV-4 patron spending other than for tickets/admissions is reported for Miami, along with the median spending for study regions with more than a population of one million, and the average spending in the ArtsFund Central Puget Sound region study. The overall levels of spending are similar, with relatively close figures for refreshments & snacks, meals before or after event, and for child care. The Americans for the Arts questionnaire identifies clothing and accessories as a specific category, while ArtsFund did not identify this category. ArtsFund data report considerably higher average spending for overnight lodging, ground transportation, and the other category folds together several categories identified by ArtsFund, including air transportation spending. However, the broad outlines of spending measured by the Americans for the Arts surveys appear similar to those reported from the ArtsFund surveys.

Table IV-4 Patron Spending (Excluding Tickets/Admission)

	MIAMI-DADE COUNTY	MEDIAN OF SIMILAR STUDY REGIONS (POP. 1,000,000 OR MORE)	ARTSFUND CENTRAL PUGET SOUND REGION
Refreshments/Snacks During Event	\$3.89	\$3.57	\$2.28
Meals Before/After Event	\$13.73	\$11.11	\$9.01
Souvenirs & Gifts	\$1.27	\$2.32	\$2.72
Clothing & Accessories	\$2.57	\$1.46	Not defined (part of Other)
Ground Transportation	\$4.06	\$2.97	\$6.78
Event-Related Child Care	\$0.49	\$0.35	\$0.31
Overnight Lodging	\$2.53	\$2.12	\$7.41
Other	\$1.07	\$0.62	\$11.59
TOTAL PER PERSON SPENDING	\$29.61	\$25.64	\$38.14

Spending by Local vs. Non-Residents.

The Americans for the Arts studies differentiate between local resident spending and non-resident spending. In the Miami study this was \$25.21 vs. \$46.89 for non-residents; this survey estimates 79.7% of patrons were local, vs. 20.3% non-residents. Americans for the Arts reports an average of 73.5% local patrons and 26.5% non-local patrons in its survey of metropolitan areas of more than one-million population (Americans for the Arts 2012b, Table 14). The Central Puget Sound region report finds local patrons to be 77.4%, versus 22.6% non-local, a higher percentage of non-local patrons than documented in Miami. Local spending was \$20.34 for non-ticket/admission spending in the Central Puget Sound region; versus \$103.89 average non-ticket spending patrons from outside Central Puget Sound region, a figure considerably higher than measured in Miami. Americans for the Arts reports average local spending of \$21.89 and non-local patrons spending of \$40.59 for all metropolitan areas included in its survey with more than one million population (Americans for the Arts 2012b, Table 15).

The Minnesota study included an audience survey, in addition to using data from the Cultural Data Project. This survey found 84.2% of the audiences were local, 15.8% nonlocal. Average spending by local patrons (excluding tickets) was \$17.83, while non-local spending was \$32 (Minnesota Citizens for the Arts 2015). As with the Americans for the Arts data, these figures are below measurements made in the current ArtsFund study.

ECONOMIC IMPACTS

Many regions have undertaken economic impact studies similar to those sponsored by ArtsFund. Nationally, Americans for the Arts has become a major source of these studies, undertaken in partnerships with local governments and arts advocacy organizations. As with the ArtsFund studies, these economic impact studies are based on measures of patron spending and non-profit arts organization spending, and utilize input-output models to calculate indirect economic impacts.

One major difference between the approach taken by ArtsFund to economic impacts and that taken by Americans for the Arts has to do with organizations considered “eligible” for inclusion in these studies. In the case of ArtsFund, that was organizations with budgets over \$35,000 for their most recent fiscal year, and as reported in Table I-2, data from organizations completing the ArtsFund organizational questionnaire was supplemented with budget data for other organizations. In contrast, Americans for the Arts excludes data for non-respondents: “It is important to note that each study region’s results are based solely on the actual survey data collected.

No estimates have been made to account for non-respondents. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings in most of the individual study regions.” (Americans for the Arts Los Angeles fact sheet page 2). Americans for the Arts reports response rates averaged 40.6% from the population of possible respondents in metropolitan areas with more than one million population (Americans for the Arts 2012b, Table 5). Americans for the Arts does not provide estimates of budgetary coverage comparable to those reported in Table I-2 in this report, which indicates ArtsFund had survey data results from organizations accounting for about 80% of total estimated budgets. The ArtsFund Study is inclusive of scientific organizations, whereas the studies from Americans for the Arts do not include this discipline.

Americans for the Arts’ description of their input-output modelling approach appears to be similar to that used in the current study. They have brought data from patron and organization spending together, and have created a system for estimating local economic impacts for each region included in their studies. This modelling system includes induced effects related to household spending, and direct as well as indirect income impacts on state and local governments. It is not possible to compare directly multipliers used in the Americans for the Arts impact models with the models used in this study. One point of comparison can be made, as to the relative importance to patron versus organizational spending. Americans for the Arts reports an average expenditure of \$263.5 million by arts and cultural organizations in communities with over one million population, and average spending by patrons of \$226 million in these same communities, a total about 86% of total organizational spending (Americans for the Arts 2012b, Table 2). In the current report, we find a higher level of patron spending, with a total 40% higher than total organizational spending.

While Americans for the Arts distinguishes between resident and non-resident attendees and spending, it does not calculate the new money economic impact estimates found in this report.

The Colorado Business Committee for the Arts produced an Economic Activity Study of Metro Denver Culture (2014). Using data (2013) from nearly 300 organizations that received distributions from the Scientific and Cultural Facilities District in 7 metro counties, they calculated economic impacts using the BEA RIMS models. They documented attendance of 14.2 million, 10,205 direct jobs, and economic impacts of \$1.85 billion. Operating expenditures were estimated to be \$820 million, and audience spending to be \$926 million, figures above those for the current study.

A particularly rich example of an economic impact study utilizing data from the Cultural Data Project and Americans for the Arts economic impact modelling comes from Philadelphia. This report presents the results common to the Americans for the Arts economic impact studies—direct spending by audiences and organizations, and economic impacts as measured by jobs, labor income, and sales or output (Greater Philadelphia Cultural Alliance 2012). However, it goes beyond these metrics to place Philadelphia in context. The authors calculate per capita direct spending, jobs generated per 1,000 population, and total FTE jobs generated for Philadelphia and other regions in the Americans for the Arts economic impact study with populations over one million. They also supplement the normal Americans for the Arts patron survey with data similar to that gathered in this study (89% said that attending cultural events were important to them, 12 % went once a week (vs. 9% in this report), 48% went at least once a month, and 36% went at least once a year (vs. 32% once a month, 31% once or twice a year, and 28% more than once or twice a year in this study).

VOLUNTEERS

Considerable information was reported on volunteers in various studies across the United States. For reference, in the Central Puget Sound region about 29,000 volunteers gave about 1.18 million hours or 41 hours per volunteer. The Colorado study reported 44,438 volunteers giving 1.77 million hours, or an average of 40 hours per volunteer, very close to the King County average. The Minnesota Cultural Data Project database for Minneapolis reported 42,705 volunteers and 1,958,967 volunteer hours, or 46 hours per volunteer. Americans for the Arts reported an average of 43.2 hours per volunteer in the metropolitan areas with a population greater than one million included in its 2010 economic impact study (Americans for the Arts 2012b, Table 13).

Americans for the Arts' 2014 National Arts Index reported the following about volunteers: "Millions of Americans spend their time in the arts. Three Index measures show the range of volunteer engagement in the arts. Volunteering at an arts organization was the choice of service for 2.1 million people in 2011, up 15 percent from 1.8 million in 2010. This amounts to 24 volunteers for every nonprofit arts organization in the country! In another federal study of volunteerism, 6.2 million Americans say that arts activities (such as playing music) are their main volunteering activities, regardless of type of organization they volunteered for (a school or church, for example). Consistently, about three percent of Americans spend time engaged in the arts every day, and those who do spend about 2.85 hours a day" (Americans for the Arts 2014).

The new BEA Arts and Cultural Satellite Accounts present estimates of volunteer activity, based on the Census Bureau Current Population Survey. This survey documents 210 million hours of volunteer activity by 2.2 million people, or 95.5 hours per volunteer.

This survey breaks down the type of volunteer effort, as reported in Table IV-5. Other volunteer activity includes general labor and transportation, mentoring youth, and other services not specified in the volunteer supplement.

Table IV-5 Composition of Volunteer Activity (United States)

CATEGORY	
Management	21.3%
Music and Performance	13.0%
General Office Work	12.8%
Teach	7.7%
Usher or greeter	5.8%
Fundraise	4.8%
Distribute goods	2.1%
Serve food	0.7%
All Others	31.9%

Source: National Endowment for the Arts 2013, p. 35

OTHER PATRON DATA

This section reports other data about patrons gathered in the process of conducting economic impact studies and from other patron surveys. These data parallel some of the questions contained in the patron questionnaire used in this study.

In the Minnesota study, 60% of non-residents said the primary reason for their trip was “specifically to attend this arts/cultural event” (Minneapolis Citizens for the Arts 2015). Americans for the Arts reports that 59.7% of non-residents interviewed in communities with a population greater than one million said they were making their trip primarily to attend the arts event at which they were interviewed. This same study indicates that 24.3% said their primary trip reason was a vacation or holiday, 7.2% said their primary trip reason was to visit friends or relatives, and 8.6% had other trip reasons (Americans for the Arts 2012b, Table 25). In this ArtsFund study, 54% of out of state patrons said they made their trip primarily to attend the event at which they were interviewed, while 76% of those from Washington State outside the Central Puget Sound region said they made their trip primarily to attend the event at which they were interviewed.

The Minnesota study also reported on the education of attendees: It reported high-school or less for 8.3%, a 2 or 4 year college degree for 51.7%, and a Masters or doctoral degree for 40%. Americans for the Arts also reported educational attainment of arts and cultural organization patrons, with more detail than reported in the Minnesota study, as reported in Table IV-6. The Americans for the Arts data are for metropolitan

regions with more than one million population (Americans for the Arts 2012b, Table 26). The Americans for the Arts data report a somewhat higher educational attainment profile than the Minnesota data. This compares to 11% high school diploma or equivalency in the current ArtsFund report, 56% with a 2 or 4 year degree, and 33% with a graduate degree.

Table IV-6 Educational Attainment of Patrons

	AMERICANS FOR THE ARTS	CENTRAL PUGET SOUND REGION
High School or Less	11.0%	10.4%
2 year degree/college or vocational/technical degree	18.5%	20.9%
Four-year college/university degree	36.6%	34.3%
Graduate/MA Degree	24.8%	20.0%
Post-Graduate/Doctoral Degree	9.0%	14.0%
TOTAL	100.0%	100.0%

Household income in the Minnesota study was reported to be less than \$60,000 for 36.1% of respondents; \$60,000 to \$99,999 for 30.7% of respondents; and over \$100,000 for 33.2% of respondents (Minnesota Citizens for the Arts 2015). The Americans for the Arts Economic Impact Study also reports household income; Table IV-7 contains these data for metropolitan areas with populations greater than one million participating in that study (Americans for the Arts 2012b, Table 26). The Americans for the Arts data have a distribution similar to that reported for Minnesota. In contrast, in the current ArtsFund study finds 33% with income less than \$60,000, 28% with incomes between \$60K and \$100K, and over \$100K for 30%. Thus, incomes in the current study have a somewhat higher profile than documented in Minnesota and by Americans for the Arts.

Table IV-7 Household Income of Patrons

	AMERICANS FOR THE ARTS	CENTRAL PUGET SOUND REGION
Less than \$40,000	16.1%	20.0%
\$40,000 to \$59,999	18.1%	13.0%
\$60,000 to \$74,999	18.3%	12.0%
\$75,000-\$99,999	15.5%	15.0%
Over \$100,000	32.0%	40.0%
TOTAL	100.0%	100.0%

The age distribution of arts and cultural organization patrons was also reported by Americans for the Arts. Table IV-8 reports these data, for metropolitan areas with populations over one million participating in the Americans for the Arts study (Americans for the Arts 2012b, Table 27). The data in Table IV-8 report a larger cohort of younger patrons in the Central Puget Sound region than reported by Americans for the Arts, and a smaller cohort of patrons in the oldest age group in the Central Puget Sound region.

Table IV-8 Age Distribution of Patrons

	AMERICANS FOR THE ARTS	CENTRAL PUGET SOUND REGION
18-34	21.1%	31.0%
35-44	17.1%	20.0%
45-54	18.3%	16.0%
55-64	20.8%	17.0%
65 or older	22.7%	17.0%
TOTAL	100.0%	100.0%

LaPlaca Cohen is a consulting organization that has “helped many of the world’s leading cultural and creative organizations build powerful connections and achieve greater impact through strategy, design, and advertising. All of our work is grounded in a strategic understanding of cultural audiences, which we gain through ongoing research and experience with clients who span the spectrum of the cultural world” (p. 113). The latest LaPlaca Cohen report is a study based on 4,026 patron interviews across the 50 states (LaPlaca Cohen 2014). This is: “A national study based on the attitudes, behaviors, and motives of culturally active audiences” (p. 5). This presentation resonates with some of the questions in the ArtsFund patron survey.

LaPlaca Cohen notes participation has grown for many art forms (living museums, science museums, history museums, art museums, musical theatre, classical music), but there were declines for some (dramatic theatre, modern and classical dance, opera). “Although audiences are attending a wider variety of activities, frequency is down” (compared to 2011 and 2007). They recorded the following annual frequency for the years 2014, 2011, and 2007: None 30% vs. 27% and 27%; 1-2 events 54% vs. 51% and 42%; 3+ events 15% vs. 22% and 31%. “The effect of the economic downturn lingers” (LaPlaca Cohen, p. 28). Economic reasons for decreasing cultural participation were cited to be: reducing expenses across the board, cutting back on leisure activities, reprioritizing time/money spent on leisure, and preferring to spend more time at home. The results of this study contrast with the ArtsFund survey, that finds only 7% of patrons reporting a decrease in attendance, 51% with no change in attendance frequency, and 41% having increased their frequency.

The LaPlaca Cohen study also reported: “But people are defining culture even more broadly...and they are open to new experiences” (LaPlaca Cohen, p. 30). They document examples including visiting a national state or municipal park, going to a live performance in a movie theatre (such as the Metropolitan Opera Live in HD broadcasts), street art, food and drink experiences, listening to a live or recorded lecture, going to an independent film, or watching non-commercial television. These results are consistent with the ArtsFund patron survey, which found growth in virtual and in-person modes of engagement, and a desire to go to more diverse settings to engage in cultural activities.

LaPlaca Cohen discusses motivations and barriers for participation. Motivations for participation include: subject matter, cost, being invited by family or friends, recommendation of friend, interest by spouse or partner, ease of getting a ticket. Barriers include: “cost, unappealing topics, it’s a hassle to get there, can’t find anyone to go with, and inconvenient hours” (LaPlaca Cohen p. 45). These responses mirror the text in Tables III-20 and III-21 in this report.

Information sources are also discussed by LaPlaca Cohen, and print & broadcast media all show declines in use from that recorded in their 2011 study. Online information sources also tended to be down, but strong use of mobile devices was recorded to take photos, share photos, browse cultural organization websites, and to use search engines (LaPlaca Cohen, p. 74). These findings also mirror results reported in the current ArtsFund study, in Table III-17 and the comparisons to data reported in the 2009 ArtsFund Economic Impact Study.

Loyalty to visual and performing arts declined, as measured by the percent of respondents with memberships or subscriptions, according to the LaPlaca Cohen report (LaPlaca Cohen p. 77). Table III-3 reports a decline in season ticket/membership visits for Central Puget Sound arts and cultural organizations, a trend consistent with that reported by LaPlaca Cohen. The motivations to purchase performing arts experiences by LaPlaca Cohen were related to getting less expensive tickets, the types of performances, the desire to support local organizations, and the existence of subscriber only events (LaPlaca Cohen, pp. 79-81).

Similar dynamism is evident in the report from Americans for the Arts, in their 2014 National Arts Index. They argue: “How the public participates in and consumes the arts is ever-expanding. Tens of millions of people attend concerts, plays, operas, and museum exhibitions every year—and those that go frequently attend more than once and enjoy multiple art forms (sometimes called the “cultural omnivore”). Digital tools afford consumers access to more personally-curated engagement in their arts experiences. Technology lets consumers select between in-person participation and experiences

as well as remote experience through media. The evolving delivery model is digital, so arts producers whose business model relies on in-person engagement by the audience have to compete in different ways. The public is certainly not walking away from the arts, but they are walking away from some traditional models of delivery. Here are some interesting shifts in how audiences consume and participate in the arts:

“Technology is changing audience engagement and the arts delivery models: The effects of technology have been undeniably swift, but it depends where one sits on the arts production-to-consumption food chain as to who the winners and losers are. For example, since 2003, half of the nation’s CD and record stores have disappeared. The public, however, has hardly stopped listening to music. Annual data about downloads was not even collected until 2004, yet in 2012 it accounted for 40 percent of total music industry sales, and recent evidence shows that it has grown since then. “Access models” from providers like Pandora and Spotify represent an additional 15 percent of recording revenues. Similarly, bookseller revenues are down even though the number of books in print is increasing, thanks to more self-publishing, print on demand, eBooks, and downward pressure on prices. Savvy nonprofit arts organizations are using technology to broaden their audience base and enrich the audience experience, like the successful Metropolitan Opera simulcasts (2,000 theatres in 66 countries and 3 million tickets sold annually). As ever, technology can be a two-edged factor. There is concern that simulcasts of the arts are cannibalizing live attendance. While growing evidence suggests that this is not the case, nor does it seem to provide a bridge to increased live attendance. Technology has even altered the business model for artists. More musicians now deal directly with consumers via websites—selling songs to fans and even allowing them to vote on touring venues—thus bypassing traditional record labels and ticket services.”

“Consumer arts spending flat at \$151 billion: Since 2002, discretionary consumer spending on the arts (e.g., admissions, musical instrument purchases) has remained in the \$150 billion range. Because total consumer spending increased over time, however, the arts’ share slipped from 1.83 percent in 2002 to 1.35 percent in 2012. As noted in the Key Findings, one of the economic factors most strongly correlated with the health of the arts is total employment in the economy. As economic revitalization in coming years builds employment, consumer buying power, and the charitable instinct, the arts are poised to compete better.”

“Arts organizations foster creativity and innovation through new work: Year after year, entrepreneurial arts organizations nurture new ideas, innovative leaders, and creative energy. One Index indicator tracks premiere performances and films. Between 2002 and 2012, audiences were treated to more than 10,000 new works—over 130 new operas, 1,342 orchestral works, 2,744 plays, and almost 5,900 movies. Regardless of the economic cycles, America’s arts industries continued to produce new and exciting work for their audiences” (Americans for the Arts 2014).

These comments from Americans for the Arts on arts and cultural organization participation are not directly parallel to data gathered in the current ArtsFund Economic Impact Study. Future ArtsFund Economic Impact Studies could consider an expanded framework for measuring local economic impacts of these evolving media approaches to consumption of arts, cultural, and scientific activities.

BROADER APPROACHES

The Creative Vitality Index has been promoted by organizations such as Western States Arts Federation (WESTAF). An example is Creative Vitality in Washington State published by the Washington State Arts Commission in Dec. 2013. They make it clear this is not an economic impact study – rather an index created around (1) revenue from nonprofit arts organizations, (2) earnings from for-profit arts related businesses, and (3) employment numbers for arts-related jobs. The index is essentially a location quotient, which is an index number comparing a measure for a region against a benchmark region. Using the United States as the benchmark, Washington comes off with a score of 1.02, while Oregon has an index of 1.05 and Idaho an index of 0.71. King County comes in with an index of 2.09, while Snohomish & Pierce come in with scores between 0.3 and 0.69, and Kitsap has a score between 0.7 to 0.99. This report uses Washington State workforce development regions for analysis, and uses the industry-x-occupation data to track creative jobs.

Americans for the Arts also produces an index related to creative industries, which includes non-profit and for-profit industries with a scope similar to the BEA cultural production and satellite accounts. The American for the Arts indices are available for states, counties, congressional districts, and state legislative districts. This index makes use of a Dun & Bradstreet classification of industry categories, with great detail in industry categories at the national level. Americans for the Arts refers to this index as a means to understand the scope and economic importance of the arts in the United States. It should be noted that this index is limited to businesses that have registered with Dun & Bradstreet, and it excludes self-employed individuals who compose a large share of employment in some artistic occupational categories as reported by the U.S. Census Bureau’s non-employer series.

In 2013 the U.S. Bureau of Economic Analysis (BEA) and the NEA reported a new series, entitled the U.S. Arts and Cultural Production Satellite Account (ACPSA) (NEA 2013). This framework includes both for-profit and non-profit businesses in the North American Industry Classification System (NAICS) codes deemed to be part of ACPSA. It also includes data from self-employed workers counted by the U.S. Census Bureau Non-employer statistical system. BEA does not report on the relative importance of for-profit, non-profit, and self-employed activity by NAICS codes, making it difficult to compare measures from this series with those developed by NEA or Americans for the Arts. The Otis School of Art and Design in Los Angeles has used a similar definition to ACPSA for a series of reports on the “creative economy” (LAEDC 2014). Otis recently expanded this analysis from the Los Angeles region to the entire state of California.

Complementing the advocacy of organizations like ArtsFund are government programs, such as those developed by the Washington State Arts Commission and local governments. The Washington State Arts Commission states: “We envision a Washington where the arts are thriving and celebrated throughout the state--woven into the fabric of vital and vibrant communities” (Washington State Arts Commission 2015). They attempt to achieve this goal through programs that distribute state and federal dollars, through grants to expand opportunities for people statewide to participate in the arts, by connecting the arts to economic development, and tracking the impact of the arts on Washington communities.

Efforts have emerged locally to create a cultural access program similar to that found in Denver. These efforts were galvanized by the industry cluster strategies developed by the Puget Sound Regional Council (PSRC) through its Prosperity Partnership project that began in 2004 to help stimulate employment in the regional economy. This effort identified quality of life dimensions to be of importance to all industry clusters, including strong arts, cultural, and scientific organizations. A decade later there is still interest in this initiative, and today this effort is being pursued by Cultural Access Washington (Cultural Access Washington 2015). The 2015 Washington State Legislature authorized the taxing authority for a program of this type in Washington State. Local governments can now present the voters with measures that, if approved, would implement a cultural access program in the local area.

SUMMARY COMMENTS

This brief review of comparative findings from studies in other regions and this ArtsFund Economic Impact Study leads to several conclusions. First, the broad contours of results presented in this study resonate with results presented in other studies conducted around the United States. Second, the results attest to the strong position of arts, cultural, and scientific organizations in our community. Research of the type presented in this report has become less common as national arts & cultural advocacy organizations have mounted frameworks for providing analyses of the economic impact of and values regarding arts and cultural organizations. “Independent” studies such as this one may be more costly for their funder, but they also provide customized results and greater detail on dimensions of importance to local arts and cultural organizations than provided by studies done through national arts and cultural support organizations. The authors hope that ArtsFund will continue its pioneering tradition of supporting research of this type.

V. CONCLUDING REMARKS

This report on the economic impact of arts, cultural, and scientific organizations in the Central Puget Sound region has built upon prior research efforts by ArtsFund. It has utilized a new disciplinary classification—Interdisciplinary/Festival—recognizing the changing nature of programming by arts and cultural organizations. The Executive Summary presents conclusions from the detailed reporting found in the main body of this document. This section provides reflections on aspects of the research approach, and suggests ways in which future studies could be improved.

POSSIBLE AREAS FOR IMPROVEMENT IN THE CURRENT RESEARCH APPROACH

Organization Survey

Data from arts, cultural, and scientific organizations were obtained through use of a spreadsheet (See Appendix 3), that generally provided excellent statistical results. This spreadsheet somewhat simplified data requests from participating organizations, making it easier for them to supply the data needed for the economic impact study. This simplification does not appear to have compromised the accuracy of the economic impact calculations. There were few cases where data supplied by organizations were evidently in error, but in some cases clearer instructions would have been helpful. Some organizations reported responses to the section on General Information that were problematic. While a footnote was provided defining how to respond to the question about the number of productions/exhibits, some organizations had difficulty relating to this definition. Future studies could explain this request in greater detail, possibly with the use of examples. Some organizations reported unlikely estimates of the number of patrons with disabilities served. There was no explanation of how organizations were expected to respond to this question. Future studies could provide some explanations as to how organizations could consider this question. Questions about student demographics had large percentages reporting “don’t know” to all three questions (student family income indicators, ethnicity, and place of residents). Future studies could consider more detailed instructions that would reduce the percentage of responses not providing useful data.

Patron Survey

The patron survey used in this ArtsFund Economic Impact Study had minimal problems with layout or data collection. Data with valid answers for the economic impact calculations were obtained from 90% of respondents. Several questions were included in the current study that were new, and not used in prior ArtsFund Economic Impact Studies. These new questions generally worked well. However, the questions with Likert scale values related to culture and quality of life in this region; the importance of culture to the identity of the region, and regarding the importance of cultural life in the region

to the patron's decision about where to live or work tended to have answers at the extreme (very important) end of the scale. Future survey questions related to these topics could be phrased in a way that yields more useful information, possibly having patrons provide open-ended text similar to that sought about the importance of cultural activities to the patron, and related to the importance of culture to the identity of this region. A single version of the patron questionnaire was utilized. Future studies could have a slightly different version for patrons interviewed at science organizations, as some of the questions phrased for patrons interviewed at arts and cultural organizations were problematic for those interviewed at some science organizations.

POSSIBLE BASES FOR EXPANSION IN THE SCOPE OF THIS STUDY

In section IV of this report there was a review of a selection of other studies of arts and cultural organizations and their patrons. The patron questionnaire used by Americans for the Arts includes several questions not utilized in this study, and also has somewhat different categories of patron expenditures than used in this study. ArtsFund could consider including some of these additional questions and categories in future patron studies. Americans for the Arts also requests information on capital expenditures, and includes these as expenditures used in the calculation of economic impacts. Earlier ArtsFund economic impact studies did include questions about capital expenditures, but these were not used in the economic impact analysis. With the rise of standardized data entry systems, such as developed by the Cultural Data Project and Americans for the Arts, future ArtsFund surveys of arts and cultural organizations could be modified to be more consistent with these national data gathering approaches. This comment is not intended to be taken as a criticism of the current organizational survey instrument—it has worked well. Rather, ArtsFund should stay abreast of these evolving national approaches to studies of arts and cultural organizations and their patrons.

It has been five years since ArtsFund last provided a detailed portrait of the cultural community. As this report is released it would be useful for readers to suggest types of data that they would like to see reported that are not contained in this report. Comments from funders of this project, from reporters and the media, from arts, cultural, and scientific organizations, and others who read this report are welcome. If ArtsFund undertakes another study of this kind, it would be useful to know how its dimensions should be modified to provide more relevant information on these important institutions in our community.

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APPENDIX 1

CENTRAL PUGET SOUND REGION ORGANIZATIONS EITHER PARTICIPATING IN OR INCLUDED IN THIS STUDY

ARTS SERVICE ORGANIZATIONS SURVEYED

4Culture
 Artist Trust
 Arts Corps
 Auburn Arts Commission
 City of Burien Arts Commission
 City of Kent Arts Commission
 City of Redmond Arts
 and Culture Commission
 Coyote Central
 Phinney Neighborhood Assoc.
 Richard Hugo House
 Seattle Office of Arts & Culture
 Shoreline Lake Forest Park Arts Council
 Arts Impact
 Bellevue Downtown Association
 Burien Arts Association
 ArtsFund
 Vashon Allied Arts
 Everett Cultural Commission
 B.A.R.N. (Bainbridge Artisans
 Resource Network)
 Bainbridge Island Arts
 & Humanities Council
 Arts Council of Snohomish County
 Edmonds Arts Commission

Schack Art Center
 Washington Lawyers for the Arts

ARTS SERVICE ORGANIZATIONS INCLUDED

Duvall Arts Commission
 Shunpike Arts Collective
 Youngstown Cultural Arts Center
 Ethnic Heritage Council of the Pacific
 Northwest/Rainbow Bookfest
 Federal Way Arts Commission
 Floating Bridge Press
 Fremont Arts Council
 Hedgebrook
 Pacific Northwest Writers Association
 Reel Girls
 Sundiata African American
 Cultural Association
 Theatre Puget Sound
 Washington Alliance for Arts Education
 Washington State Arts Alliance
 Foundation
 Whit Press
 Artworks
 Bellevue Arts Commission
 Bureau of Fearless Ideas
 Seattle Center Foundation
 Bainbridge Island Senior Center

DANCE ORGANIZATIONS

SURVEYED

Pacific Northwest Ballet
Spectrum Dance Theatre
The Evergreen City Ballet
Velocity Dance Center
Whim W'him
zoe | juniper

DANCE ORGANIZATIONS

INCLUDED

The Anunnaki Project
Arc Dance Productions
International Ballet Theatre
Khambatta Dance Company
Northwest Dance Network
Pacific Ballroom Dance
School of Acrobatics & New Circus Arts
Seattle Dance Project
Ballet Bellevue
Tacoma City Ballet
Olympic Ballet Theatre

FESTIVAL & INTERDISCIPLINARY ORGANIZATIONS

SURVEYED

Kent International Festival
Seattle Cherry Blossom Festival
The Talented Youth
Clarion West
EMP Museum
Mill Creek Festival
On the Boards
Seattle Arts & Lectures
Seattle Theatre Group
Town Hall Association

UW World Series at Meany Hall
for the Performing Arts

Broadway Center for the
Performing Arts

FESTIVAL & INTERDISCIPLINARY ORGANIZATIONS

INCLUDED

Moisture Festival
Northwest Folklife
One Reel
Seattle Jewish Film Festival
Seattle Young Artist Music
Festival Association
Three Dollar Bill Cinema
Wintergrass Music Festival
Central District Forum
911 Media Arts
Langston Hughes Performing
Arts Institute
Northshore Performing Arts Center
Raven Chronicles
Puget Sound Revels
D.A.S.H. Center for the Arts
Edmonds Center for the Arts
Kirkland Performance Center

HERITAGE ORGANIZATIONS

SURVEYED

Burke Museum of Natural History
and Culture
Camlann Medieval Association
Center for Wooden Boats
Densho: The Japanese American
Legacy Project
MOHAI
Nordic Heritage Museum

Northwest African American Museum
 Northwest Railway Museum
 Redmond Historical Society
 Wing Luke Asian Museum
 Issaquah Historical Society
 Washington State Historical Society
 Bainbridge Island Historical Museum
 Points N.E. Historical Society

**HERITAGE ORGANIZATIONS
 INCLUDED**

Duwamish Tribal Services
 Eastside Heritage Center
 Greater Kent Historical Society
 Highline Historical Society
 Historic Seattle
 Hydroplane & Raceboat Museum
 Maple Valley Historical Society
 Morning Star Korean Cultural Center
 Muckleshoot Indian Tribe
 Northwest Art Center
 Renton Historical Society
 Seattle Chinatown International District
 Preservation and Development Authority
 Shoreline Historical Museum
 Southwest Seattle Historical Society
 The Nature Consortium
 United Indians of All Tribes
 (Foundation Daybreak Star Arts Center)
 Vashon-Maury Island Heritage
 Association
 WA Trust for Historic Preservation
 Washington State Jewish
 Historical Society
 White River Valley Museum
 Kitsap County Historical Society Museum

Ezra Meeker Mansion
 Fife Historical Museum
 Fort Nisqually Living History Museum
 Gig Harbor Peninsula Historical Society/
 Harbor History Museum
 Blackman House Museum
 Edmonds Historical Museum
 Marysville Historical Society
 Asia Pacific Cultural Center
 Job Carr Cabin Museum

**MUSIC ORGANIZATIONS
 SURVEYED**

Auburn Symphony Orchestra
 Bellevue Chamber Chorus
 Bellevue Youth Symphony Orchestra
 Choir of the Sound
 Early Music Guild of Seattle
 Earshot Jazz
 Flying House Productions
 Jack Straw Foundation
 Ladies Musical Club
 Lake Union Civic Orchestra
 Music Center of the Northwest
 Northwest Associated Arts
 (formerly Choral Sounds Northwest)
 Seattle Chamber Music Society
 Seattle JazzEd
 Seattle Opera
 Seattle Repertory Jazz Orchestra
 Seattle Symphony Orchestra
 The Vera Project
 The Esoterics
 Northwest Choirs
 Bainbridge Chorale
 Tacoma Youth Symphony
 Association, Inc.

Tacoma Symphony Orchestra
Everett Philharmonic

**MUSIC ORGANIZATIONS
INCLUDED**

Federal Way Symphony
Chamber Music Madness
Chinese Arts & Music Assoc.
Choral Arts
Columbia Choirs Association
Federal Way Chorale, The
Gamelan Pacifica
Kirkland Choral Society
Lake Washington Symphony Orchestra
Master Chorus Eastside
Medieval Women's Choir
Music Northwest
Music of Remembrance
Music Works Northwest
Northwest Chamber Chorus
Northwest Girlchoir
Northwest Symphony Orchestra
Orchestra Seattle
Philharmonia Northwest
Rainier Symphony
Rock School Kirkland
Sammamish Symphony Orchestra
Seattle Choral Company
Seattle Circle
Seattle Classic Guitar Society
Seattle Conservatory Of Music
Seattle Girls' Choir Guild
Seattle Jewish Chorale
Seattle Music Partners
Seattle Peace Chorus

Seattle Pro Musica
Seattle Youth Symphony Orchestra
Simple Measures
Tudor Choir
Washington Blues Society
Gallery Concerts
Pacific Sound Chorus
Island Music Guild
Bremerton Symphony Assn
Northwest Sinfonietta
Peninsula Youth Orchestra
Second City Chamber Series
Tacoma Concert Band
Tacoma Opera
Tacoma Youth Chorus
Academy of Music NW
Cascade Symphony Orchestra
Civic Music
Everett Chorale
Snohomish County Music Project

**SCIENCE ORGANIZATIONS
SURVEYED**

Seattle Aquarium Society
Woodland Park Zoo
Pacific Science Center
Bloedel Reserve
IslandWood
Kids Discovery Museum
Future of Flight Foundation, The

**SCIENCE ORGANIZATIONS
INCLUDED**

Arboretum Foundation
Friends of the Issaquah Salmon Hatchery
Museum of Flight

Northwest Seaport
Naval Undersea Museum
Northwest Trek
Point Defiance Zoo & Aquarium
(The Zoo Society)
Tacoma Nature Center
The Puget Creek Restoration Society

**THEATRE ORGANIZATIONS
SURVEYED**

5th Ave Theatre Association
ACT Theatre
Book-It Repertory Theatre
Burien Actors Theatre
Intiman Theatre
Jet City Improv
Seattle Children's Theatre
Seattle Musical Theatre
(Civic Light Opera)
Seattle Repertory Theatre
Studio East
Taproot Theatre Company
The Hi-Liners Musical Theatre
Theater Schmeater
Twelfth Night Productions
Unexpected Productions
Village Theatre
Washington Ensemble Theatre
Youth Theatre Northwest
Admiral Theatre
Bainbridge Performing Arts
Lakewood Playhouse
Tacoma Musical Playhouse

**THEATRE ORGANIZATIONS
INCLUDED**

ArtsWest Playhouse and Gallery
Seattle Public Theater
Annex Theatre
Bellevue Youth Theatre Foundation
Broadway Bound Children's Theatre
Centerstage Theatre
Freehold Theatre Lab Studio
GreenStage
Lingo Dance Theater
Live Girls! Theater
Living Voices
Looking Glass Theatre,
dba Mirror Stage Company
Macha Monkey Productions
Mirror Stage
New Century Theatre
Northwest Puppet Center
Carter Family Marionettes
Red Eagle Soaring Native Youth Theatre
Renton Civic Theatre
Repertory Actors Theatre
Seattle Gilbert and Sullivan Society
Seattle Shakespeare Company
Second Story Repertory
Strawberry Theatre Workshop
Theatre Off Jackson
Thistle Theatre
Young Shakespeare Workshop
Ovation! Musical Theatre Bainbridge
Paradise Theatre
Tacoma Little Theatre
Driftwood Players
Historic Everett Theatre
Phoenix Theatre

VISUAL ARTS ORGANIZATIONS

SURVEYED

artEAST
Frye Art Museum
Gage Academy of Art
Henry Gallery
KidsQuest Children’s Museum
Kirkland Arts Center
Northwest Film Forum
Path with Art
Seattle Art Museum
Seattle Children’s Museum
SIFF
Suyama Space
Youth In Focus
Bellevue Arts Museum
Pratt Fine Arts
Children’s Museum of Tacoma
LeMay Museum
Museum of Glass
Tacoma Art Museum
Imagine Children’s Museum

Northwest Watercolor Society
Grand Cinema, The
Hilltop Artists in Residence
Edmonds Arts Festival
Foundation/Museum
Bainbridge Arts and Crafts
Bainbridge Island Museum of Art

VISUAL ARTS ORGANIZATIONS

INCLUDED

Center on Contemporary Art
Eastside Association of Fine Arts
Northwest Arts Alliance
Photographic Center Northwest
Pilchuck Glass School
Pottery Northwest
Sanctuary Art Center
Seward Park Clay Studio
SOIL
Urban ArtWorks

APPENDIX 2

INPUT-OUTPUT MODEL METHODOLOGY

DEFINITIONS AND CONVENTIONS

Output

Output is the value of production or sales within a given industry. In most industries it is measured in producers' prices. In certain industries, notably transportation services, retail and wholesale trade, and in selected financial services, the industry's output is its margins for performing its services. Thus, in retail trade, the value of output is defined as the value of sales less the cost of goods sold. Output has been measured in \$2014 in this study.

Employment

The measure of employment used in this study is a headcount of total full-time and part-time employment, including estimates of self-employed workers.

Income

Income as measured in the model used in this study refers to labor income. This is inclusive of wages and salaries, as well as the value of benefits. Labor income has been measured in \$2014 in this study.

IMPACT ANALYSIS METHODOLOGY

Input-Output Model

The input-output model used in this study is a standard regional Leontief input-output model, based upon the 2007 Washington State input-output model developed by Beyers and staff of State of Washington agencies (Beyers & Lin 2012). This model is ultimately rooted in measures of the transactional relationships between industries in the state economy, and with final markets and sources of goods and services imported to the state economy. The heart of this model is a "production function" for each industry, which links its demands for factor inputs to the supplies forthcoming from related industries in the economy.

Washington State has estimated eight input-output models. Beginning with the model developed for the year 1963, and continuing through the 2007 model, this state has developed an unmatched series of models tracking the input-output relations of Washington industries. Although the state economy has grown significantly over the 1963-2007 time period, there has been relatively modest changes in the multiplier structure contained in this model (Beyers & Lin 2013).

The 2007 Washington input-output model involved extensive survey research on the state's economic structure. Over 2,500 businesses across the economy provided data on their final markets (sales to households, investors, state and federal government, and exports to the rest of the U.S. and to foreign markets). They also provided data on their purchases within the state economy, payments of labor income and other value added, and imports from elsewhere in the United States and from foreign countries. The interindustry structure of the 2007 Washington Input-Output model was developed by adjusting the structure of the 2002 Washington input-output model, which in turn was based on the 2002 U.S. benchmark input-output model.

Adjusting and Augmenting the Input-Output Model

The 2007 Washington transactions matrix was used to develop estimates of multipliers used in this study. A direct, indirect, and induced requirements matrix was estimated by closing the model with regard to personal consumption expenditures and state and local government. Personal consumption expenditures were considered to be a function of labor income. State and local government demands were considered to be a function of other value added.

The current model has also been used to make estimates of sales, hotel-motel use tax, and B&O tax revenues. Tax sectors are not contained directly in the model. However, it is possible to form relationships between the aggregate levels of personal income and the volume of sales tax revenue to estimate state and local sales taxes resulting from income earned as a result of economic activity related to arts, cultural, and scientific organizations and their patrons. State B&O tax revenues were estimated by developing sector-specific ratios of B&O taxes per dollar of sales, based on reports from the Washington State Department of Revenue. Direct estimates of sales taxes paid by patrons in relation to food and beverage, souvenir, and entertainment purchases were made, with an estimate 6.5% paid to the State of Washington, and 3% to local governments. Direct estimates of hotel-motel taxes paid by patrons were calculated based on the City of Seattle tax rate of 15.6%.

REGIONAL LEVEL IMPACTS

The state model was modified to make impact estimates at the regional level. Location quotients were developed for the various sectors for King, Pierce, Kitsap, and Snohomish counties, using the state as a benchmark. Direct requirements coefficients were modified in sectors with location quotients below one, and the adjusted matrix of coefficients was then used to calculate a Central Puget Sound region inverse matrix of multipliers.

Impact Estimation Procedure

The estimation of total and “new money” economic impacts involves two steps: (1) the estimation of direct economic impacts, and (2) the use of the input-output model to estimate indirect and induced economic impacts. Information was requested from arts, cultural, and scientific organizations on the location of their purchases, so that out-of-region purchases would not be considered as local economic impacts.

The development of step (1) involves bringing together the patron expenditures and arts, cultural, and scientific organization expenditures information in a consistent accounting system that is compatible and consistent with the structure of the input-output model. This required in both cases the translation of the data as measured into the accounting concepts used with the input-output model. In the case of arts, cultural, and scientific organization expenditures, this was largely a process of classifying their purchases by input-output model sector. For example, the purchase of telephone services is from the telecommunications sector in the input-output model. In some cases the purchases needed to be decomposed into manufacturers (producer price) values, transportation, and trade margins. Thus, the purchase of supplies and materials for the construction of sets is valued as a combination of margins and the producer’s prices of factor inputs such as cloth, paint, or wood products. Similarly, the patron expenditures had to be translated from the expenditure categories reported in Chapters II and III into the sectors used in the input-output model. This was accomplished in part by using estimates produced by the U.S. Bureau of Economic Analysis that report national level estimates of the relationship between consumer expenditure categories and values as measured in producer’s prices. The sum of these two sets of expenditures information are considered as direct requirements in the input-output model.

The input-output model’s multiplier structure translates the direct demands of patrons and arts, cultural and scientific organizations into total measures of impact. Two conceptions of these impacts are presented in this report. The first—the gross impacts—are based on aggregate expenditures of patrons and arts, cultural, and scientific organizations. The second—the “new money” impacts—are estimated by considering only that portion of the expenditure stream that accrues from outside the local economy. Data were not available to estimate the new money impacts at the state level, as we did not ask organizations participating in the survey to distinguish between purchases made outside of Washington State and purchases made in Washington State outside the Central Puget Sound region. Instead, it was only possible to estimate new money impacts at the regional scale. If we were able to estimate new money impacts at the state scale they would actually be smaller than at the regional scale, because a

significant portion of the new money impacts stem from Washington residents spending their income within the region, and at the state level these expenditures would not be considered new money.

Accuracy of the Results

The economic impact measures presented in this report should be considered as estimates. They are subject to measurement error from a variety of sources: incomplete coverage of the income of arts, cultural, and scientific organizations; errors made by patrons in estimating their expenditures; errors in the input-output model itself; and errors introduced in translating the raw data used in this study into the impact analysis results. In general, a conservative approach has been taken to the estimation of the results presented in this study. Although it is not possible to calculate a margin of error for the results presented in this study, they appear to be reasonable, and consistent with the results of similar studies.

DIRECT ECONOMIC IMPACTS: ARTS, CULTURAL, AND SCIENTIFIC ORGANIZATION EXPENDITURES

Impact analysis of this type depends upon good estimates of the economic activity levels of the industries under study. In this study we were fortunate to have 80% of the aggregate budgets covered by our surveys. This is a very high rate of coverage, and should be related to a relatively accurate estimate of direct regional economic effects. The digital approach to gathering cultural organization budgets yielded surveys with few arithmetic errors.

DIRECT ECONOMIC IMPACTS: PATRONS

The survey of patrons was conducted by the intercept method, which reduces dramatically self-selection bias in participation. Although it is not possible to present an estimate of the percentage of people asked to complete a survey form who did so, it is possible to say that 86% of the completed forms contained useable information on patron spending. An issue which arises with intercept measures of the type used in this study is whether the patrons can anticipate the level of expenditures that they will incur after they are interviewed, in relation to their visit to a cultural organization. Cross-checks between the results obtained here and with other studies lead us to believe that we obtained an accurate sample of patron expenditures (and related information), especially given the sample sizes achieved in the various disciplines.

APPENDIX 3

SURVEY FORM FOR ARTS, CULTURAL,
AND SCIENTIFIC ORGANIZATIONS

ArtsFund Economic Impact Study 2015

Instructions

1. Please answer every question; this is NOT an accounting document: **ESTIMATES ARE ACCEPTABLE.**
2. Please enter a "0" if you have no activity related to a question. With a "0" we know you've considered the question. A blank cell looks like it was skipped over.
3. Please provide information for the **most recently completed operating year only.**
4. **Arts Service Organizations:** If your organization is a commission or service organization, please **DO NOT** include funds you "pass-through" to cultural organizations. Include only information relating to the operation of your organization. That is, if your organization's total revenue is \$100,000 and you make grants of \$80,000 to other cultural organizations and use \$20,000 for your own operations, report only on the \$20,000 used for your operations.
5. Bold numbers in parentheses, (1) for example, indicate that further instructions for that section or line can be found at the bottom of the page. For most versions of Excel, holding your mouse over the indicated cell will also display the footnote.
6. Please do not alter the structure of this Excel workbook. This is critical for correct transfer of your information to the database used for impact analysis.
7. Some questions ask for information for the local area. **Please consider King, Pierce, Snohomish and Kitsap Counties to be the local area.**
8. If you have questions regarding the completion of this form or the economic impact study, please contact Graham Mills at 206.788.3048, or economic@artsfund.org.

Due date/submission instructions

Please submit completed survey by May 30th, 2015 (Wednesday) via email to Economic@artsfund.org

Working with attachments

Read this only if you need some prompting. To prevent losing your work, we recommend you immediately "save as" this file to a directory on your computer system (outside your email program). When you finish the survey, please attach the completed file to an email and send it to economic@artsfund.org with "Completed Financial Survey" in the address line.

This Study is Co-Sponsored by



Additional Research and Support

4Culture
Office of Arts & Culture, City of Seattle
Snohomish County Arts Commission
Tacoma Arts Commission
Association of King County Heritage Organizations

ArtsFund
10 Harrison Street, Suite 200
Seattle, WA 98109
206 281-9050 P 206 494-7415 F
www.artsfund.org



ORGANIZATION INFORMATION

ESTIMATES ARE ACCEPTABLE!

Name of Organization:

Address:

City: State: Zip:

Telephone: E-Mail:

Date org. established (mm/dd/yy):

Date form completed (mm/dd/yy):

Note: base all information on FY you give here:
 Most recently completed fiscal year - ending:
 (mm/dd/yy)

Primary Activity:

1. Art Service Organization	3. Festival	5. Music	7. Theater	9. Interdisciplinary
2. Dance	4. Heritage	6. Science	8. Visual	10. Other

GENERAL INFORMATION

For FY ending:
1/0/00

Number of productions/exhibits (1)	<input type="text"/>
Number of memberships sold (for museums, zoos, etc.)	<input type="text"/>
Number of full and/or partial subscriptions sold (performing groups)	<input type="text"/>
Average percentage of capacity (museums, zoos, etc. enter n/a)	<input type="text"/>
Attendance	
1 - Season ticket/membership visits (2)	<input type="text"/>
2 - Single tickets or admissions sold <small>(other than member tickets/admissions)</small>	<input type="text"/>
3 - Discounted student tickets including school groups <small>(other than season tickets)</small>	<input type="text"/>
4 - Discounted senior tickets <small>(other than season tickets)</small>	<input type="text"/>
5 - Other discounted tickets (rush etc.)	<input type="text"/>
6 - Free tickets/admissions	<input type="text"/>
TOTAL ATTENDANCE (add lines 1-6)	<input type="text" value="0"/>
Number of patrons with disabilities served	<input type="text"/>

Footnotes for Page 1

- 1 Performance groups should enter number of individual productions; science/visual arts/heritage/etc. groups should enter number of exhibits.
- 2 Enter total number of visits made during year by people using subscription tickets or membership privileges.

OPERATING INCOME (1)

ESTIMATES ARE ACCEPTABLE!

NOTE: Report operational activities only (see Note "1" of Footnotes).

Earned Income:

	For FY ending: 1/0/00	% Outside Local Area
Box Office/Admissions (incl. revenues from season tickets, etc.) (2)		
Tuition/Workshops		
Retail/Wholesale Sales		
Other earned income (touring, rents, royalties, etc.)		
Interest		
Total Earned Income	0	#DIV/0!

Contributed Income:

Report only operational activity. **Do not include temporarily or permanently restricted gifts.**

	For FY ending: 1/0/00	% Outside Local Area	Number of Contributors
Corporations			
Foundations			
Federal Government (100% outside local area)		100%	
State Government (100% outside local area)		100%	
County Government			
City Government			
Individuals (zoos, museums, incl membership rev if deductible) (2)			
Benefits / Galas / Guilds			
In-Kind contributions (exclude non-prof. vols.) (3)			
Misc. contributions			
Total Contributed Income	0	#DIV/0!	
Total Operating Income	0	#DIV/0!	

Footnotes for Page 2

- 1 Report only operational activity. Do not include any temporarily or permanently restricted gifts. If any previously restricted gifts are released as time or purpose requirements are met, include them in the appropriate revenue category.
- 2 Zoos, museums, etc., include revenues from memberships if memberships are tax deductible, but do NOT double count memberships under "Box Office/Admissions" AND individual contributions.
- 3 Exclude value of time contributed by volunteers except professionals donating professional services in their field.

Fiscal year ends: 1/0/00

For the purposes of this economic impact study, general operating expenses are measured in two categories: 1) Labor-related expenses for your employees (or non-contract personnel - **entered on this page**); and 2) other operating expenses (which include contract personnel - **entered on page 4 of 5**). Employees may be paid benefits, or have deductions from earnings for purposes such as income tax, while contract employees are only paid an agreed upon sum for their services.

EMPLOYEE EXPENSES: enter information on contract workers next page (1)

Note: enter information on this page ONLY for persons you consider to be direct employees. Enter information on contract workers on page 4.

ESTIMATES ARE ACCEPTABLE!

1. In columns A and B, please enter your employee expenses for administrative and other personnel and the percentage of these payments which were made to residents outside the local area for the reported FY. Include employee compensation which you consider to be to direct employees only; report payments to individuals and firms you contract with on page 4. In column C, report amounts you pay in employment taxes.
2. In column D enter the number of people you consider to be full-time employees. For the purposes of this survey, we consider a full-time employee to be an individual employed approximately 40 hours per week year-round.
3. In column E report how many people you consider to be part-time employees. This includes all employees not meeting the above definition of full-time employees. Enter head count only, no decimals or fractions.
4. In column F please enter the total number of hours you estimate are worked by all part-time employees in your organization for the reported FY.

(NOTE: Report activity for Most Recent FY)

	A	B	C	D	E	F	G	H
	Salaries, Benefits for FY	% of \$'s spent residing outside Local Area	Employment Taxes (2)	Number of Full Time Employees	Number of Part-Time Employees (Headcount)	Total est. hours all part-time employees for FY	Work Study/ Interns	Number of Volunteers
	for full- and part-time employees							
Administrative Employees	-		-	-	-	-	-	-
Other Employees	-		-	-	-	-	-	-
0								
0								

Please estimate the number of hours contributed by the volunteer personnel you identified in Col. H above
Please enter number of people listed above who work for your organization under a union contract.

Footnotes for Page 3

- 1 Report only operational activity (programming, administration etc.) on this page. Exclude contract personnel; enter contract personnel information on page 4.
- 2 This should include the total of all employment taxes (e.g. social security, Medicare, employment security and labor & industries).

For the purposes of this economic impact study, general operating expenses are measured in two categories: 1) labor-related expenses for your employees (or non-contract personnel - **enter on page 3 of 5**), and 2) other operating expenses (which include contract personnel - **enter on this page**).

Do NOT report on endowments, capital projects or other non-operational activity.

Do NOT report on debt service and interest payments; those do not figure into impact calculations.

ESTIMATES ARE ACCEPTABLE!

CONTRACT PERSONNEL

	1/0/00 Total Amount Paid	% of \$		Number of contract personnel	Estimated total hours worked by contract personnel
		Outside Local Area	Local Area		
Total Contract Personnel (not employees)		0%		-	-

OPERATING EXPENSES (1)

Services	\$ for FY ending: 1/0/00	% of \$	
		Outside Local Area	Local Area
Marketing expenses			
Press and public relations			
Photographic/art services			
Banking			
Insurance			
Accounting, auditing			
Transportation			
Lodging			
Food/beverage services			
Set/costume/exhibit rental			
Equipment rental			
Hall rental			
Office and work space rental			
Royalties			
Other services: <i>(please specify)</i>			
Subtotal Services	0	#DIV/0!	
Utilities & Postage			
Telephone			
Postage			
Other utilities			
Subtotal Utilities & Postage	0	#DIV/0!	
Other Goods & Services			
Printing of programs etc.			
Exhibit/set materials			
Production materials			
Supplies			
Other goods & services			
Subtotal Other Goods & Services	0	#DIV/0!	
Taxes (2)			
Sales tax			
B&O tax			
Property tax			
Other taxes: <i>(please specify)</i>			
Subtotal Taxes	0	#DIV/0!	
Total Operating Expenses (except labor - page 3)	0	#DIV/0!	
NON-Operating Expenses and Information			
Most recent year capital improvement expenses			
Current balance of endowment			

Footnotes for Page 4

- Report only operational activity (programming, administration, fundraising etc.) on this page. Exclude employees (non-contract personnel); employee information should be entered on page 3. **Do NOT report on endowments, capital projects or other non-operational activity.**
- Do not include employment taxes here. Employment taxes should be included as part of your labor costs on page 3.

Student demographics

ESTIMATES ARE ACCEPTABLE!

Please report below the **number** of free and discounted admissions for K-12 students whom your organization serves either at your facility or at programs your organization takes into the schools or other spaces.

Please enter estimated percentages of both free student admissions and discounted student admissions for 1) income indicators, 2) ethnicity and 3) place of residence.

For FY ending:

	Number of free admissions	Number of discounted admissions
Total student attendance K-12 only	<input type="text"/>	<input type="text"/>
	Enter percent of free admissions below	Enter percent of discounted admissions below
1) Students' family income indicators		
On free lunch program	<input type="text"/>	<input type="text"/>
On reduced-cost lunch program	<input type="text"/>	<input type="text"/>
Not on lunch program	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
Total this section (to equal 100%)	0%	0%
2) Ethnicity		
Caucasian/White	<input type="text"/>	<input type="text"/>
African American/Black	<input type="text"/>	<input type="text"/>
Asian/Asian American	<input type="text"/>	<input type="text"/>
Hispanic Origin	<input type="text"/>	<input type="text"/>
Native American/Inuit/Aleut	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
Total this section (to equal 100%)	0%	0%
3) Place of students' residence		
Your city	<input type="text"/>	<input type="text"/>
Your county outside your city	<input type="text"/>	<input type="text"/>
Washington outside your county	<input type="text"/>	<input type="text"/>
Outside state of Washington	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
Total this section (to equal 100%)	0%	0%

APPENDIX 4

SURVEY FORM FOR PATRONS



ARTSFUND

Sandy McDade
Board Chair

Mari Horita
President and CEO

Dear Cultural Organization Patron,

Cultural organizations in the Puget Sound region make important contributions to the vitality of our communities and to our economic prosperity. To measure the economic impact of cultural activity, we ask you to take a few minutes to complete this survey. Your anonymous answers will enable us to update our comprehensive economic impact study of the arts.

Thank you for your time, your cooperation and your support of cultural activities in the Puget Sound region.


Economic Impact Study of Cultural Activity in the Puget Sound Region
 Study conducted by: GMA Research, Bellevue, Washington &
 Dr. William B. Beyers, University of Washington


Commissioned by: ArtsFund


This Report is Co-Sponsored by:



















Additional Research Support from:

4Culture

Snohomish County
Arts Commission

Seattle Office of Arts & Culture

Tacoma Arts Commission

P.O. Box 19780, Seattle WA 98109

206 281 9050

www.ArtsFund.org

PATRON SURVEY

This questionnaire will provide very important information about patrons of cultural activities in the Puget Sound region. Please take a few minutes to fill out all three pages of this brief questionnaire!

For the purposes of this survey, cultural organizations refer to science centers, zoos, aquariums, art and history museums, theatres, symphonies, dance organizations, etc.

1. Including yourself, how many people are in your party? _____
2. Was the primary reason for your trip today/tonight to attend this performance/exhibition? Yes No
- If no, what was the primary reason for your trip?

3. Please estimate the total expenditures made by your party for each of the following. Include only those expenditures you would attribute to attending today's/tonight's performance/exhibition. (One person should estimate expenditure for the entire party.)

Tickets/admissions	\$ _____
Souvenirs and gifts	\$ _____
Parking fees	\$ _____
Bus/ferry/light rail/taxi costs	\$ _____
Auto travel costs (gas, rentals)	\$ _____
Food/beverages before or after event	\$ _____
Food/beverages at the event	\$ _____
Entertainment before or after event	\$ _____
Lodging/accommodation costs	\$ _____
Air travel costs	\$ _____
Child care/baby-sitting	\$ _____
Other costs (SPECIFY BELOW)	
_____	\$ _____
_____	\$ _____

4. How often do you attend cultural performances/exhibitions?
 Weekly Once a month Once or twice a year More than twice a year
5. How far are you willing to travel to attend a cultural event?
 Less than 5 miles 5-10 miles 11-19 miles 20-29 miles >30 miles
6. What was your main source for learning about the cultural activity you are attending today? (Please check only one):
 friend/family newspaper TV radio website blog social media
 mail Tourism organization other: _____

Please go to the next page of this questionnaire.

7. Over the past three years:

Has your attendance at cultural activities: Increased Stayed the same Decreased

If it has changed, why? _____

Has your spending on cultural activities: Increased Stayed the same Decreased

If it has changed, why? _____

8. Over the past 3 years, how has your mode of engagement in cultural activity changed?

In-person attendance: More often About the same Less often

Hands on Participation (e.g. Art classes, art making): More often About the same Less often

Virtual Participation (e.g. Videos, streaming, downloads.): More often About the same Less often

9. Please describe the importance of cultural activities to you and your life.

10. Please describe the importance of culture to the identity of this region.

11. Where are you currently most likely to go for cultural activities? Check all that apply.

- Formal Venues
- Museums or Galleries
- Open-air Venues or Parks
- Informal Areas (e.g. businesses, storefronts)
- Community Facilities
- Art Schools
- Not Sure
- Other, Please describe: _____

12. Where would you like to see more cultural activities? Check all that apply.

- Formal Venues
- Museums or Galleries
- Open-air Venues or Parks
- Informal Areas (e.g. businesses, storefronts)
- Community Facilities
- Art Schools
- Not Sure
- Other, Please describe: _____

Please go to the next page of this questionnaire.

13. How important is culture to the quality of life of this region?

Not at All Important 1 2 3 4 5 6 7 Very Important

14. How important is culture to the identity of this region?

Not at All Important 1 2 3 4 5 6 7 Very Important

15. If you live in the Puget Sound region (King, Kitsap, Pierce & Snohomish Counties), how important was the cultural life in this region in your decision of where to live or work?

Not at All Important 1 2 3 4 5 6 7 Very Important

16. How many years have you lived in the Puget Sound region?

N/A <1 1-3 4-6 7-9 10-19 20-29 30-39 40-49 50-59 >59

17. Are you: Male Female

18. Your age: 19 or younger 35-44 65-74
 20-24 45-54 75 or older
 25-34 55-64

19. Please indicate your highest level of education completed:

High school diploma or equivalency Graduate degree
 College or vocational/technical degree Post-graduate degree
 Four-year college/university degree

20. Please indicate your household income:

Under \$20,000 \$75,000-\$99,999
 \$20,000-\$39,999 \$100,000-\$124,999
 \$40,000-\$59,999 \$125,000-\$249,999
 \$60,000-\$74,999 Over \$250,000

21. What is your zip code? _____

22. How many people are currently living in your household, including yourself? _____

23. Race (check all that apply):

African American/Black Caucasian/White
 Asian/Asian American Other (Please specify): _____
 Hispanic Origin Prefer not to answer
 Native American/Inuit/Aleut

Thank you very much for participating in our survey!

To be completed by staff

Date _____

Time of Day _____

APPENDIX 5

ARTSFUND ECONOMIC IMPACT STUDY
MEASURES SUMMARIZED (\$2014)

	KING & PIERCE COMBINED		CENTRAL PUGET SOUND REGION	
	1997	2003	2009	2014
Vital Stats				
# Cultural Orgs. Included	200	269	357	313
Org. Income - Aggregate (\$millions)	234.67	354.20	538.83	512.93
Org. Expenditures - Aggregate (\$millions)	232.90	347.0	532.03	496.38
Volunteers	20,748	18,769	48,013	28,849
Productions/Exhibits	3,789	12,629	6,822	10,134
Aggregate Impacts				
Aggregate Sales Impacts (\$millions)	550.61	1,179.18	2,255.60	2,375.26
Total Jobs Created (full & part time)	16,067	26,658	33,920	35,376
Labor Income Impacts (\$millions)	277.84	538.93	1,034.29	996.26
Tax Impacts - Aggregate (\$millions)	39.23	43.60	96.11	104.71
Patron Spending- Aggregate (\$millions)	324.50	343.31	785.56	694.0
Direct Jobs Created	12,510	17,036	17,052	18,778
New Money Impacts				
New Money Sales Impacts (\$millions)	151.63	312.54	631.85	647.48
New Money Total Jobs Created	3,740	6,121	8,273	8,182
New Money Labor Income Impacts (\$millions)	77.44	136.37	272.08	257.01
Patron Spending- New Money (\$millions)	125.08	150.34	339.76	312.11
Expenditures				
% Budget Spent on Employee Expenses	44%	46%	52%	54%
% Budget Spent on Operating Expenses	56%	54%	48%	46%

	KING & PIERCE COMBINED		CENTRAL PUGET SOUND REGION	
	1997	2003	2009	2014
Income				
Earned Income	60%	48%	55%	56%
Contributed-Government	9%	8%	12%	12%
Contributed-Individual	9%	17%	14%	14%
Contributed-Corporate	5%	5%	4%	4%
Contributed-Foundation	3%	4%	5%	5%
Contributed-Other	12%	18%	10%	9%
Attendance				
Total Attendance	5,934,193	7,583,148	13,243,030	13,411,037
# of Memberships Sold	111,815	125,249	220,073	206,595
# of Full or Partial Subscriptions Sold	206,191	217,274	230,405	152,760
Season Ticket Visits / Membership Visits	1,430,725	1,702,939	2,604,098	2,300,155
Single Ticket / Admission Visits	2,326,158	3,031,072	5,885,462	5,473,958
Student Admissions	466,018	876,369	1,652,143	1,255,673
Caucasian		60%	60%	53%
Of Color		40%	40%	47%
Discounted Senior Admissions	108,063	221,080	291,831	272,063
Patrons Served with Disabilities	90,404	103,807	113,033	54,999

APPENDIX 6

ARTSFUND BOARD OF TRUSTEES AND STAFF (2014-2015)

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& General Counsel (retired)*
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Partner

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Senior Vice President, Market Leader

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The Satterberg Foundation
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Bill Predmore

POP
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Puget Sound Business Journal
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Sellen Construction
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General Counsel for Productions &
Services Legal & Corporate Affairs*

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INDEX

Aggregate impactxx
 cultural organizations budget totalsxxi
 generated job and labor incomexx
 government sales and taxesxx
 gross business activity.xx
 total spending.xx

Aggregate impacts.34
 labor income37
 output in Central
 Puget Sound region34
 taxes34

Attendancexxiii

Comparisons with other studies77

Contributed income 11
 corporate 12
 differences in composition11
 individual11
 in-kind 12
 private foundations 12

Cultural organizations
 budget criteria for inclusion in2
 coverage.5
 criteria for inclusion2
 total income for 20147

Earned incomexxi

Economic impact model
 description of.6

Economic impacts of cultural organizations and their patrons32
 methodology33

Employment xxii
 comparison of labor
 to contract income. xxii
 composition of26
 full time equivalencies27
 part-time/contractual xxii

Employment in cultural organizations25

Expendituresxxi, 18
 composition by discipline 19
 composition of employee expenses . 19
 operating20

Expenditures of patrons.28, 51
 differences across disciplines.28
 estimated total spending32
 per capitaxxiv

Goals of study1
 compared to previous studies1
 organization of study2

Government income 13

income.xxi, 7
 contributed 12
 earnedxxi, 11
 government. 13
 total7

Methodology3
 organization survey constraints3
 organization survey data collection . .4
 patron survey data collection.5
 patron survey responses received . . .5

New money	xx
definition of	xx
impacts	xx
New money impacts	38
sources.	38
Patron characteristics	
attendance	48
attitudes related to quality of life.	66
attitudes related to regional identity	66
attitudes related to residential and work locations.	66
change in attendance and spending	58
demographics	72
frequency of attendance	54
group sizes	53
locations sought or wanted for cultural activities	63
modes of engagement.	62
number of	43
origins	49
sources of information.	57
student demographics.	68
trip reasons	49
willingness to travel	55
Patron spending	xxiv
Patron survey5
Patron values	xxiv
See Quality of Life	xxiv

Quality of life	xxv
Student attendance	68
admissions.	68
ethnicity	70
geographic origin	71
income indicators	69
Survey of organizations1
budget criteria for inclusion in2
coverage.5
data obtained.4
organization criteria for inclusion in1
Survey of patrons	
data obtained.5
Volunteers.	xxiv, 41
Washington State Department of Employment Security.3
Washington State Department of Revenue3
Washington State input-output model	6



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