

**AN ECONOMIC IMPACT STUDY  
OF ARTS AND CULTURAL  
ORGANIZATIONS  
EASTSIDE KING COUNTY: 2003**

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## Table of Contents

Table of Contents .....	ii
Table of Contents .....	iii
Table of Tables.....	v
Table of Figures.....	vii
Authors Acknowledgements .....	viii
Authors Acknowledgements .....	viii
Sponsors Acknowledgements.....	ix
Executive Summary .....	xi
Aggregate Impact.....	xi
New Money.....	xi
Income.....	xii
Expenditures.....	xii
Employment.....	xiii
Attendance .....	xiv
Patron Spending .....	xv
Volunteers .....	xvi
Values Regarding Cultural Activity.....	xvi
Quality of Life Considerations.....	xvi
I. Introduction.....	1
Goals and Objectives of this Study .....	1
Research Approach: Designing This Study .....	1
Arts and Heritage Organization Survey .....	2
Patron Survey.....	3
Economic Impact Model.....	3
II. Economic Impact of Cultural Organizations in Eastside King County .....	5
Income of Eastside Cultural Organizations.....	5
(1) Total Income .....	5
(2) Earned Income .....	6
(3) Contributed Income.....	7
(4) Government Income.....	8
(5) Other Income.....	9
Expenditures of Eastside Cultural Organizations.....	9
(1) Composition of Employee Expenses .....	10
(2) Operating Expenses.....	10
(3) Endowments and Capital Expenditures .....	12
Employment in Arts and Cultural Organizations.....	13
Expenditures of Patrons .....	18
Economic Impact of Cultural Organizations and Their Patrons .....	20
(1) Aggregate Impacts .....	21
(2) New Money Impacts .....	23
Volunteers in Cultural Organizations.....	25
III. Cultural Organization Patronage Characteristics .....	26
Number of Patrons .....	26
Patrons with Disabilities .....	28
Cultural Organization Performance and Exhibition Statistics .....	28
Patron Trip Reasons .....	28
Patron Origins .....	29
Patron Expenditures .....	30
Patron Group Sizes.....	30

Patron Arts Experience, Participation and Spending, Volunteer Activity, and Children’s Arts Education .....	31
Patron Participation in Arts and Heritage Organizations .....	35
K-12 School Children Participation .....	38
IV. Comparison to Other Studies .....	40
Income.....	40
Expenditures.....	41
Employment.....	41
Economic Impacts.....	42
Capacity Utilization .....	42
Patron Geographic Origins.....	42
Patron Spending Per Capita .....	42
Volunteers .....	43
Contributions.....	43
Attendance Frequency.....	43
Social Purposes of Attendance.....	44
Summary .....	44
V. Concluding Remarks .....	45
Possible Areas For Improvement .....	45
(1) Organization Survey .....	45
(2) Patron Survey .....	45
Some Other Approaches .....	46
References .....	48
Appendices .....	49
Appendix 1: King County organizations either participating or included in this study.....	49
Appendix 2: Input-Output Model Methodology .....	50
Definitions and Conventions .....	50
Output .....	50
Employment.....	50
Income.....	50
Impact Analysis Methodology.....	50
Input-Output Model .....	50
Updating and Augmenting the Input-Output Model.....	51
County Level Impacts .....	51
Impact Estimation Procedure .....	51
Accuracy of the Results .....	52
Direct Economic Impacts: Cultural Organization Expenditures .....	52
Direct Economic Impacts: Patrons .....	52
Appendix 3: Survey Form for Arts Organizations .....	53
Appendix 4: Survey Form for Patrons .....	59
Appendix 5: 2003 ArtsFund Economic Impact Study Measures Summarized.....	63
Appendix 6: 2005 ArtsFund Board of Trustees and Staff.....	65
Index.....	68

## Table of Tables

Table I-1 Cultural Organizations Included in this Study .....	2
Table I-2 Eastside Cultural Organizations Operating Budget Coverage.....	3
Table II-1 Total Income to Eastside Cultural Organizations.....	5
Table II-2 Percentage of Total Income by Income Category .....	6
Table II-3 Percentage Composition of Earned Income.....	7
Table II-4 Percentage Contribution of Contributed Income by Source (Except Governments) ..	7
Table II-5 Individual Contributions to Eastside Cultural Organizations.....	7
Table II-6 Corporate Contributions to Eastside Cultural Organizations.....	8
Table II-7 Private Foundation Contributions to Eastside Cultural Organizations.....	8
Table II-8 In-Kind Contributions to Eastside Cultural Organizations.....	8
Table II-9 Government Income by Source (% of Government Income) .....	8
Table II-10 Other Income .....	9
Table II-11 Aggregate Expenditures of Eastside Cultural Organizations .....	9
Table II-12 Composition of Employee Expenses .....	10
Table II-13 Operating Expenses by Broad Category.....	11
Table II-14 Operating Expenses by Detailed Categories.....	11
Table II-15 Endowments, Interest Income, and Assets Released.....	12
Table II-16 Eastside Capital Expenditures Since 1999 .....	12
Table II-17 Fund Balances of Eastside Cultural Organizations.....	13
Table II-18 Employment Status.....	14
Table II-19 Full-Time Employment in Cultural Organizations.....	14
Table II-20 Part-Time Employment in Cultural Organizations.....	15
Table II-21 Contract Employment - Headcount .....	16
Table II-22 Total Employment Including Full-time, Part-time, Contractual, and Interns/Work- Study Employees.....	16
Table II-23 Full-time Equivalent Number of Part-Time Employees .....	18
Table II-24 Per-capita Patron Expenditures .....	18
Table II-25 Number of Patrons.....	19
Table II-26 Estimated Total Patron Expenditures .....	19
Table II-27 Summary of Washington and King County Impacts.....	21
Table II-28 Total King County Impacts.....	22
Table II-29 New Money Sources.....	24
Table II-30 New Money Impacts, King County .....	24
Table II-31 Volunteers in Cultural Organizations in Eastside King County (# of Volunteers)...	25
Table III-1 Estimated Number of Patrons .....	26
Table III-2 Percentage Distribution of Audience .....	27
Table III-3 Cultural Organization Performance & Exhibition Statistics.....	28
Table III-4 Reason for Patron Trips .....	29
Table III-5 Geographic Origin of Patrons .....	29
Table III-6 Patron Origins and Percentage Making Trip Primarily to Attend an Eastside Cultural Organization Event/Presentation.....	29
Table III-7 Patron Expenditures by Geographic Origin.....	30
Table III-8 Group Sizes Attending Cultural Organizations (% of total).....	31
Table III-9 How Patrons were First Exposed to the Arts.....	31
Table III-10 When Patrons were First Exposed to the Arts.....	31
Table III-11 How Frequently Patrons Attend Arts Events.....	32
Table III-12 How the Value of the Arts Have Changed to Patrons in Recent Years .....	32
Table III-13 How Spending has Changed Since 9/11 and through the Recent Recession.....	32

Table III-14 Why Spending has Increased .....	33
Table III-15 Why Spending has Decreased.....	33
Table III-16 Frequency of Making Cash Contributions to Arts Organizations .....	33
Table III-17 Tendency To Regularly Meet Friends and Families at Arts Events .....	33
Table III-18 Children’s participation outside school.....	34
Table III-19 Text on children participation .....	34
Table III-20 Frequency of Volunteer Activity.....	34
Table III-21 Hours spent volunteering.....	35
Table III-22 Proportions with season tickets and single admissions .....	35
Table III-25 Average Duration of Purchase of Season Tickets/Memberships and Single Tickets/Admissions In Years.....	36
Table III-26 Number of children attending & income status .....	38
Table III-27 Ethnicity of Students .....	38
Table III-28 Geographic Origin of Students .....	39

## Table of Figures

Figure II-1 Percentage of Total Income by Source .....	6
Figure II-2 Aggregate Expenditures of Eastside Cultural Organizations.....	10
Figure II-3 Employment Status .....	14
Figure II-4 Patron Expenditures by Category .....	20
Figure III-1 Percentage Distribution of Attendance by Category .....	27
Figure III-2 Patronage by Discipline.....	28

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It has been a great pleasure to undertake this study of the economic impact of arts and cultural organizations in Eastside King County for the second time. The first study was conducted for the Eastside Arts Coalition, with assistance from ArtsFund, and was authored by Professor Beyers.

ArtsFund has played a critical role in the conduct of this study. Besides obtaining the primary funding for the study from The Paul Allen Foundation, this organization has taken the leadership in seeing that the project was executed through the two surveys that are at its heart—of patrons, and arts and cultural organizations. Dwight Gee has been the mastermind of this effort at ArtsFund, while Peter Donnelly has provided the basic support needed for the project. This project would never have been completed without Dwight's brilliant efforts in data gathering, recruitment of responses, and overall organizational effort. Jane Gibson was helpful in logistics with the project.

The real heroes of this research project are the hundreds of patrons and the dozens of arts and cultural organizations that contributed to this report. We were ultimately dependent upon these people to make this report possible. Their help is a symbol of why this region is regarded as one of the centers of creativity and innovative economic development in the United States and globally today.

We thank the Paul Allen Foundation for providing the primary support to us for this research effort. We hope that this report will help stimulate the growth and development of arts and cultural organizations in Eastside King County in the years to come. The quality of life in our community rests very much on the enterprises and their patrons that we have studied in this report.



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## Sponsors Acknowledgements

The recent growth of the arts in the Puget Sound region is unparalleled in this country. Together King and Pierce Counties have added a remarkable number of first-rank concert halls, theaters and museums that have redefined our cities.

Since 1992, ArtsFund has been putting a yardstick to arts and heritage activity, with comprehensive economic impact studies conducted about every five years. We have been very careful to ensure that the methodology of the studies remains as consistent as possible to allow meaningful comparisons of where the arts are now and how much they have grown.

The current study, based on activity which for most arts and heritage groups fell in fiscal year 2003, shows how significantly arts activity has increased since 1997. It also points to noteworthy shifts in things like sources of contributed support, employment structure and trends in subscription and single-ticket purchase. The study also shows that aggregate arts and heritage organizations' income still narrowly exceeds expenses.

Taken together, the arts and heritage activities in King and Pierce Counties generate more than one-billion dollars in our state's economy and create 3,500 jobs. While this does not make cultural activity one of the region's largest industries, it is significant and is growing quickly. These are the things we can measure about the arts. The ones we can't measure – how much meaning the arts add to our lives, how much they help educate our children, how much more attractive they make this region to highly educated and creative employee talent – are far more important.

First thanks for making this study possible go to The Paul G. Allen Family Foundation for providing primary project funding. The Allen Foundation also funded our previous economic impact study in 1997. Additional funding was provided by public arts agencies listed below, for which we are very grateful.

We also thank the steering committee whose hard work helped identify and secure information from the scores of arts and heritage organizations we surveyed. It is because of their dedication and deep knowledge of the field that this study rests on an unshakable foundation. We also thank Dick Anderson and GMA Research of Bellevue, Washington, which has been our survey partner since our first such study a dozen years ago.

The study would simply not have been possible without the extraordinary dedication, countless hours and remarkable professionalism of Professor William Beyers, the main author of this survey. His intellectual and analytical abilities are a marvel to witness in crafting this report from vast forests of data. A professional colleague of his from a Midwestern university recently and accurately described Professor Beyers as the best in the country in such studies as this.

The greatest credit for this monumental study, however, has to be given to Dwight Gee, ArtsFund's longtime Vice President of Community Affairs, whose intelligence and tenacity have guided this from inception to completion. He has been the person who has cajoled, bargained, begged and bludgeoned the hundreds of overworked arts administrators, upon which the success of such a study falls, to complete the complicated survey. This is his third tour of duty with this rigorous task and as a result, we have some of the most comprehensive data available in the country for our region. A byproduct is that Dwight has become one of the most knowledgeable people in the region as it relates to the trends in the arts industry during the past decade.

While the most important contributions of the arts to our community cannot be expressed in numbers, we believe this study will help reveal another layer of importance of arts and heritage organizations to our region and our economy.



Peter F. Donnelly  
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## Executive Summary

Arts and heritage organizations make significant contributions to the quality of life of people living on the Eastside in King County, as well as to people living elsewhere in Washington State. They also act as a magnet, drawing people to this community as tourists. Patrons described these quality of life considerations this way:

*“The ability to experience a variety of cultural expressions enriches my life, opens my mind, heart and soul.”*

*“I love to hear beautiful music, attend theater, watch ballet, I could not live without the arts.”*

Source: Patron Survey

Cultural organizations are also an important part of the local economy, directly creating thousands of jobs, millions of dollars in labor income and business sales. They are also important in the context of the larger business community:

*“Cultural organizations have the power to bring inspiration, entertainment, political ideas, even positive disruption to people’s lives—all of these things can engage the community in living.”*

Source: Patron Survey

This study measures the economic impact of 35 non-profit cultural organizations, and the expenditures of their patrons, on the Washington State and King County economies. It includes groups with budgets over \$26,000 in dance, theater, music, visual arts, and heritage organizations, as well as public and private sector non-profit organizations supporting the delivery of cultural services.

## Aggregate Impact

The aggregate economic impact of Eastside arts and heritage organizations on the King County economy stems from the spending of patrons attending performances and exhibitions presented by these organizations, and from the expenditures made by these organizations to present their programs. In 2003 \$61 million in business activity was generated in King County by the spending of these Eastside patrons and cultural organizations. In addition some 3,406 jobs and \$29.2 million in labor income was generated due to these activities. State and local governments collected over \$2.4 million in sales and business & occupation taxes due to this business activity. These impacts are significantly higher than measured in the 1999 economic impact study sponsored by the Eastside Arts Coalition; employment impacts are estimated to be 36% higher than found in the 1999 study.

Spending by cultural organization patrons totaled \$16 million, with tickets and admissions accounting for \$6.4 million of these expenditures. Budgets of cultural organizations were \$18 million in 2003.

## New Money

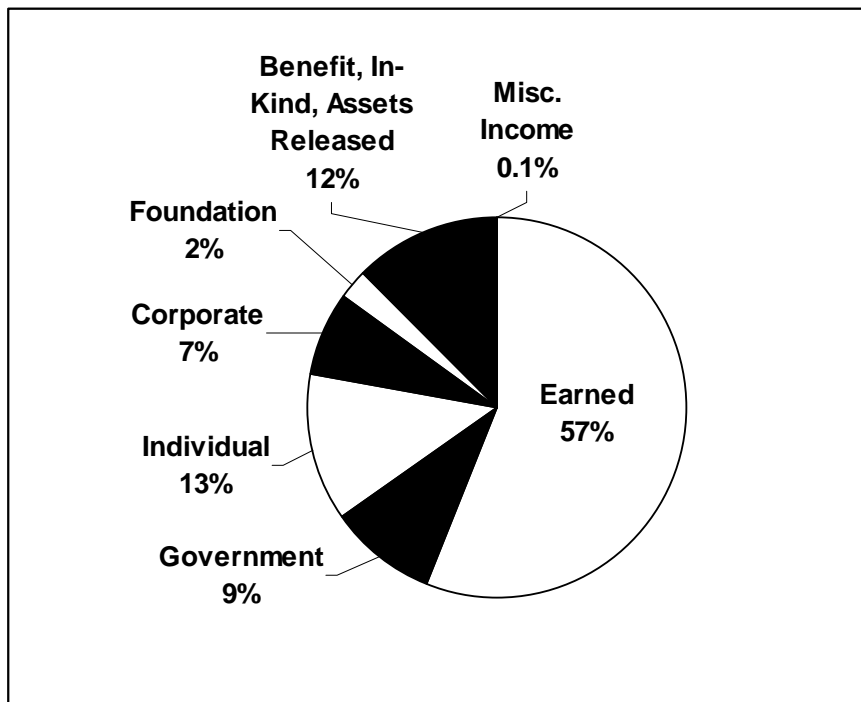
Most of the aggregate economic impacts are due to the spending by residents of this community of their discretionary income on exhibitions and performances by arts and heritage organizations. However, a portion of the economic impacts is due to the expenditures of people traveling from outside the Eastside or King County, and from income earned by local cultural organizations from sources located outside King County. These impacts are referred to as “new money” impacts, because if the cultural organizations included in this study were not here, these

funds would not have flowed into the King County economy. New money provides about 12% of the income of Eastside cultural organizations, and accounted for 13% of total patron outlays. New money impacts in 2003 include \$8 million in business sales, 421 jobs, \$3.7 million in labor income, and \$0.8 million in tax revenues. New money impacts have increased significantly since the 1999 Eastside Arts Coalition economic impact study; new money impact measures have doubled since that study was completed.

## Income

Earned income from tickets, admissions, tuition, retail sales, and other sources accounted for 57% of total income of Eastside arts and heritage organizations. The other 43% was generated through contributions, which included 13% from individuals, 12% from benefits, in-kind, and assets released, 9% from government, 7% from corporate sources, and 2% from foundations.

### Percentage of Total Income by Source

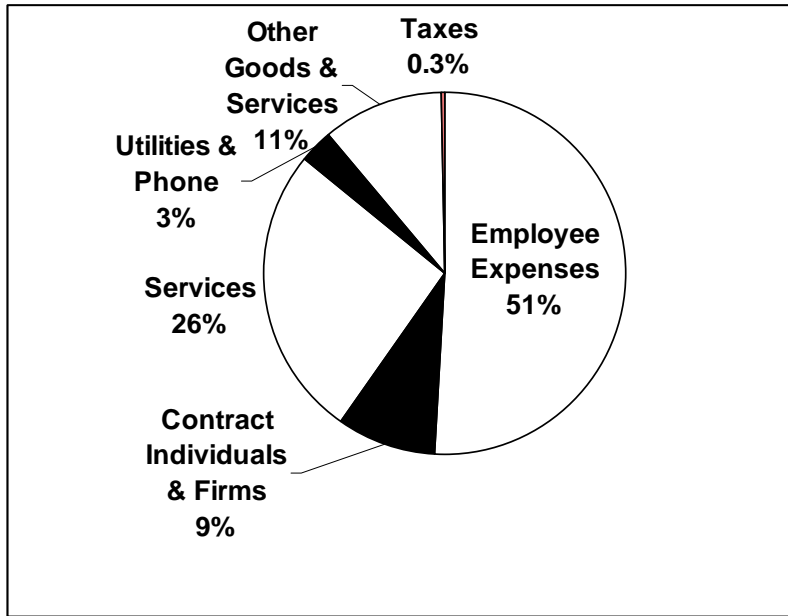


## Expenditures

Expenses are divided between employee expenses (51%) and operating expenses (49%). Most employee expenses (93%) and operating expenses (85%) are incurred in King County. A major component of operating costs are contract individuals and firms (18%), including visiting artists. About one-fourth of these expenditures were made outside King County. Services account for the largest share of operating expenses (53%), and 90% of these were made in King County. These costs include services such as accounting, legal, printing, transportation, marketing, royalties, consulting, and professional services. Arts and heritage organizations also make sales of books, souvenirs, and replicas purchased through wholesale distributors, and buy materials for

exhibits/sets and productions. These costs amounted to 22% of operating expenses, while utility and postage accounted for 6% of operating expenses.

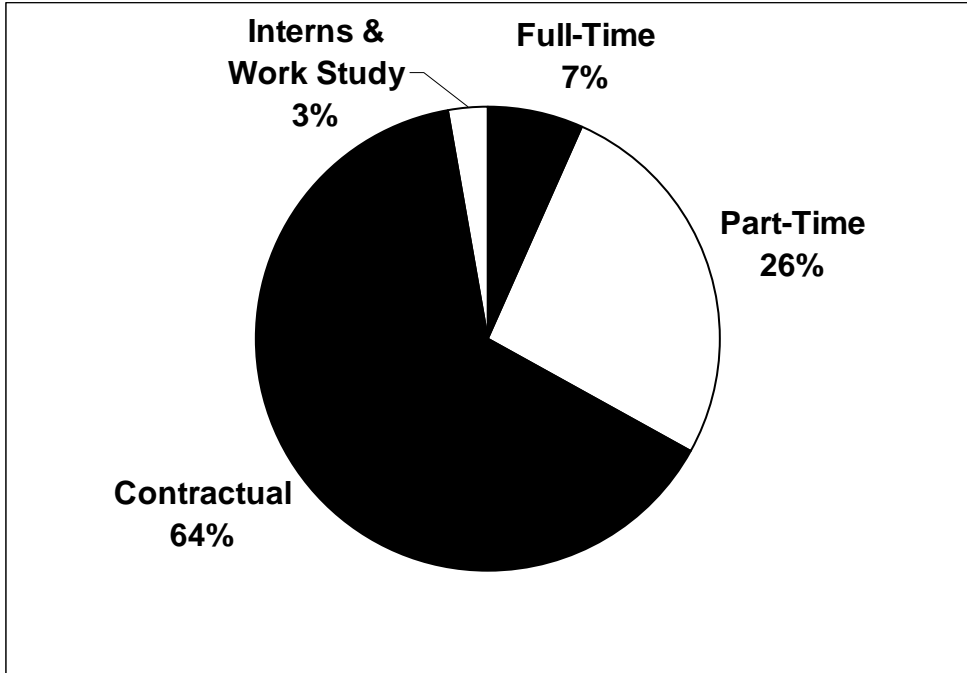
### Aggregate Expenditures of Eastside Cultural Organizations




### Employment

An estimated 3,406 jobs in King County were related to arts and heritage organizations in 2003. Of these 2,035 were directly tied to local arts and heritage organizations. Most of these direct jobs were part time or contractual (90%). Part-time employment is predominantly in the dance, theater, and music disciplines. People employed by Eastside arts and heritage organizations were paid \$9.1 million in labor income in 2003, while contract individuals and firms received an additional \$1.6 million.

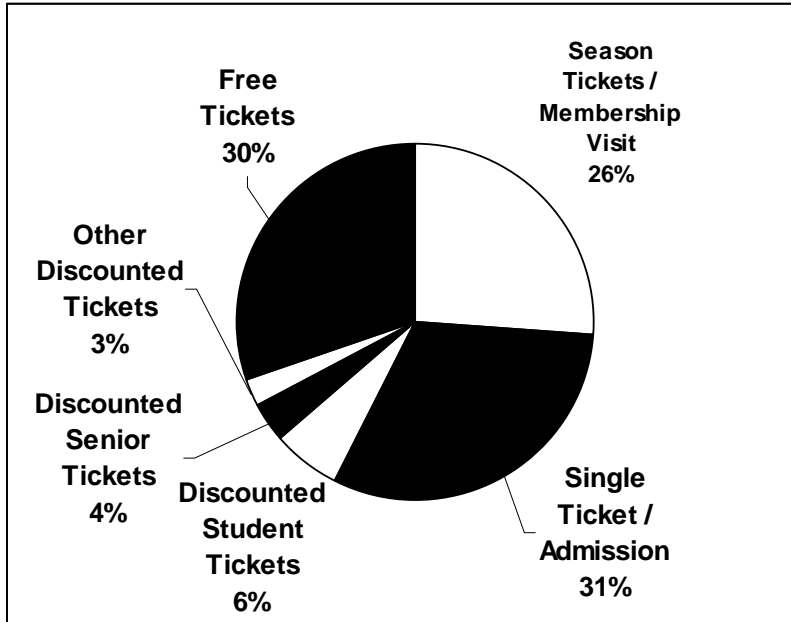
## Employment Status



## Attendance

There were 717 thousand admissions to events sponsored by arts and heritage organizations covered in this study on the Eastside in 2003. Fifty-seven percent of these were season ticket/membership or single ticket visits, while 30% (217 thousand) were free admissions, and the balance (13%) were discounted admissions (87 thousand). K-12 students accounted for 64 thousand of the free or discounted admissions; about 90% of these students were Caucasian, while about 10% were rity students.

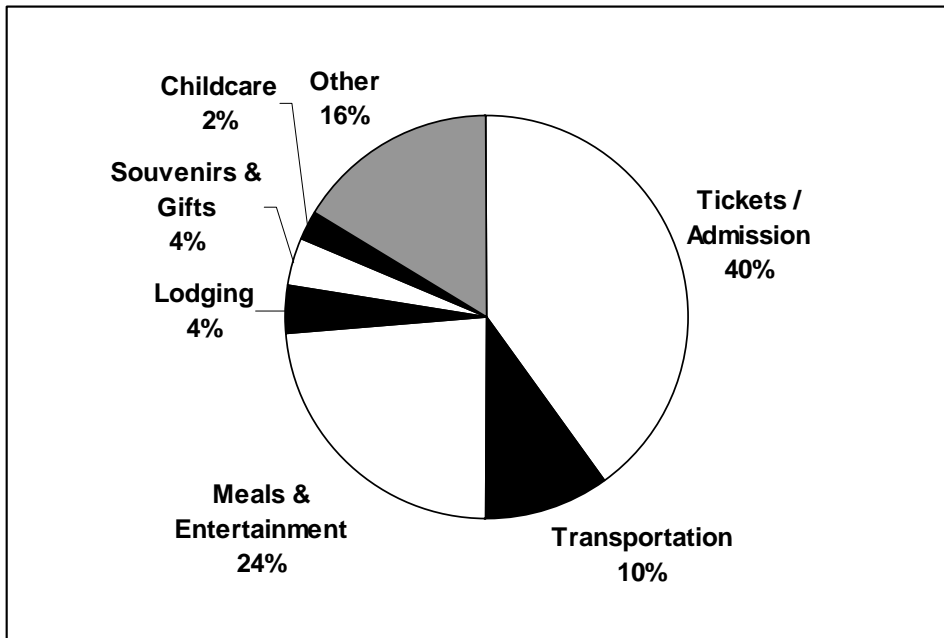
**Percentage Distribution of Attendance by Category**



**Patron Spending**

Patrons spent an average of \$24 on their visits to Eastside cultural organizations in 2003. The largest share of expenditures was for tickets/admissions (40%). Significant outlays also occur for transportation (10%), meals and refreshments (24%), with smaller outlays on lodging, souvenirs and gifts, childcare, entertainment, and other expenditures. The category “other expenditures” includes tuition, an expenditure found to be relatively important for Eastside patrons.

**Patron Expenditures by Category**



## Volunteers

Volunteers play an important role in the activities of arts and heritage organizations. They provide assistance with administrative and artistic/professional/technical work. Cultural organizations estimate over 2,100 people provided 28,000 hours of volunteer service in 2003. The patron survey found a 38% volunteer participation rate, with the typical volunteer working for 40 hours annually.

## Values Regarding Cultural Activity

Most patrons were introduced to the arts while young either in school or through family and friends. Most attend a performance or exhibition at least monthly, and feel as though the value of the arts has increased to them in the last few years. Over half of the patrons regularly make cash contributions to arts and cultural organizations, and almost 70% use attendance at arts and cultural organization events to meet with family and friends. Almost 64% of patrons with children have them participate in arts activity outside of school.

## Quality of Life Considerations

The statistics contained in this economic impact study provide a compelling argument about the contribution of arts and heritage organizations to the Eastside and King County economies. However, the community supports these arts and heritage organizations not primarily because they create jobs, business activity, taxes, and labor income. They support these organizations because they help create the high quality of life that characterizes our community, as documented in the following quotes from the survey of patrons.



## I. Introduction

*“(The arts) make me feel connected to my community, allow me space to think and feel, help me to remember to be grateful.”*

Source: Patron Survey

### Goals and Objectives of this Study

The area east of Lake Washington in King County has had relatively rapid population growth in recent decades, growth that has been accompanied by expansion in arts and cultural activity. This region is often referred to as the “Eastside,” and this report is a second effort at documenting the economic impacts of Eastside arts and cultural organizations and the spending of their patrons. A first study was benchmarked against the years 1999 and 2000, and was published in 2001 (reference; referred to as the 1999 study). The primary goal of the present study was to document the characteristics of patrons attending performances and exhibitions, and to measure the business activity related to Eastside arts and cultural organizations. The economic impact of this spending was then estimated, on the Washington State and King County economies.

The Eastside has been defined for the purposes of this study to include arts and cultural organizations located on Mercer Island and in communities east of Lake Washington, running from Renton north to Bothell, and east to the Cascade foothills. There are several larger cultural organizations on the Eastside, such as Music Works and Village Theatre, but most organizations are small. This study includes only non-profit arts and heritage organizations (e.g., organizations with 501(c)(3) federal tax status), and therefore it excludes the for-profit art cultural activities such as commercial art galleries and clubs with musical performances. This report was prepared as a part of a trio of similar reports for ArtsFund, that also include a report on all arts and cultural organizations in King County, and a report on arts and cultural organizations in Pierce County. The organizations included in this study were those with operating budgets of at least \$26,000<sup>1</sup>. This definition omits many very small non-profit organizations. We have also omitted festivals, commercial art dealers, individual artists, and businesses that supply the materials and services artists need to be creative.

### Research Approach: Designing This Study

One of the main goals of the present study was to develop information that could be used to track changes in the economic impact of Eastside arts and heritage organizations and their patrons. Comparisons will be made in this report to findings of the 1999 study. This desire to draw comparisons meant that the approach used in the 1999 study needed to be used again in the current study. However, some new questions were included in surveys of patrons and arts and heritage organizations.

There have been many approaches to economic impact studies of arts and cultural organizations. Some focus on a particular discipline, while others include for-profit as well as non-profit arts and heritage organizations. Some have used simple multiplier frameworks, and others have adapted the U.S. input-output model for use in calculating regional multipliers. The present study relies on the

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<sup>1</sup> This figure was set to be consistent with the budget levels used in prior ArtsFund (formerly Corporate Council for the Arts) studies. The first of these studies was benchmarked against the year 1992 (see GMA Research and Beyers, 1993), and had a budget floor of \$20,000. A second set of ArtsFund studies were benchmarked against the year 1997, and used a budget floor of \$23,000. Changes in the consumer price index were used to adjust the level of the minimum budget used to determine organizations included in this study.

Washington State input-output model for the development of economic impact estimates. It relies heavily on primary data provided by Eastside arts and heritage organizations and their patrons. This approach yields a solid data base for characterizing patrons at Eastside arts and cultural organization venues, and for estimating the economic impact of Eastside arts and heritage organizations.

It was necessary to develop primary data for this study because there are no data from secondary sources on the cultural organizations included in this study, and no data on their patrons and their spending. Secondary data on employment reported by agencies such as the Washington State Department of Employment Security do not provide information on non-profit arts and heritage organizations separate from other similar for-profit establishments classified in particular industry codes. Moreover, the industry codes are relatively broad, including types of establishments even in the most narrowly defined North American Industry Classification System (NAICS) codes that are outside the scope of this study. Appendix 1 lists the names of the organizations included in this study.

### Arts and Heritage Organization Survey

Analyses of operating budget information for Eastside arts and heritage organizations determined that 35 organizations had budgets that qualified them for inclusion in this study. Table I-1 describes the number of organizations included by discipline. This grouping of disciplines is slightly different than used in the current King and Pierce ArtsFund economic impact studies, reflecting the character of Eastside arts and heritage organizations. Although Table I-1 identifies organizations in each discipline, the number is small in most cases and it was concluded that analyses and tables included in this report would be based on the combined data for all organizations included in this study. The number of organizations included in this study was slightly larger than in the 1999 study, 35 versus 33 organizations.

Organizations received a copy of the questionnaire found in Appendix 3, in digital form, and were asked to return their responses to ArtsFund. Table I-1 indicates that 15 of the 35 organizations included in this study returned surveys, with a request that they use budget information for the year 2003 or a fiscal year close to 2003 in replying to the survey. Each organization provided (1) general information on their level of activity and attendance, (2) detailed information on their operating income, (3) details related to employee expenses including administrative, artistic, professional, and technical employees, (4) detailed operating expense data, (5) data on capital projects, and (6) information on free or discounted students they served.

**Table I-1 Cultural Organizations Included in this Study**

	# of Organization Surveys <u>Returned</u>	# of Other Organizations <u>Included</u>
Theater	4	5
Music & Dance	4	9
Visual	1	0
Heritage	1	4
ASO	4	1
Dance, Theater & Music	<u>1</u>	<u>1</u>
Total	15	20

The level of coverage obtained in each of the disciplines included in this study is presented in Table I-2. Overall, organizations returning a survey accounted for 77% of total estimated operating budgets. The response rate was higher than this level in all disciplines except heritage, where our

coverage was poor. Overall, we increased the level of activity for Eastside cultural organizations by 29.9% from the level estimated in the questionnaires returned by Eastside cultural organizations. ArtsFund staff and staff at Eastside Arts Service Organizations (ASO's) developed budget estimates for organizations included in the study, but not returning organizational questionnaires. Operating budgets of Eastside cultural organizations increased 33% over the level measured in the 1999 study.

**Table I-2 Eastside Cultural Organizations Operating Budget Coverage**

	(1) Covered Expenditures of Organizations Returning Surveys	(2) Estimated Expenditures	(3) Coverage Factor
Theater	\$5,844,085	\$6,981,287	1.195
Music & Dance	2,389,698	3,039,047	1.272
Visual	2,974,543	2,974,543	1.000
Heritage	146,400	1,023,079	6.988
ASO	1,540,793	2,022,793	1.313
Dance, Theater & Music	<u>976,974</u>	<u>1,973,990</u>	<u>2.021</u>
Total	\$13,872,493	\$18,014,739	1.299

### Patron Survey

The patron survey was conducted by the intercept method at performances or exhibitions of each of the disciplines listed in Table I-2. People were asked to take a few minutes to fill out the survey form that is included as Appendix 4 of this report. The surveys were conducted at 8 of the 35 organizations included in this study. A total of 345 useable surveys were obtained. The surveys were conducted between October and December, 2003. The form was very similar to that used in the 1999 study, but it included some new questions related to patrons history of arts and cultural activity, their volunteer activity, their children's arts activity outside of school, and changes in their spending on the arts.

The questionnaire sought information on (1) the number of patrons and their trip purpose, (2) spending attributable to their trip, (3) open-ended information on their attitudes towards arts and heritage activities, (4) the new questions referred to in the preceding paragraph, and (5) some basic demographic information. Responses to the questionnaire were coded by GMA Research into an Excel spreadsheet. Per patron measures were then calculated, and using data from the organization survey, estimates were developed of total patron expenditures and related levels of patron activity.

### Economic Impact Model

The data developed in the survey of arts and cultural organizations and of patrons were used with the 1997 Washington State input-output model to obtain economic impact estimates reported in section II of this report (citation). The 1997 Washington State input-output model is an updated version of the 1987 Washington State input-output model. The update is not based on new survey data on input-output relationships, but rather uses a bi-proportional matrix adjustment technique to develop transaction relationships that are benchmarked against total sales and purchases estimates for the year 1997 (citation). The interindustry multiplier structure of this model does not differ dramatically from the models used in the previous ArtsFund economic impact studies. This model provides estimates of levels of business activity, labor income, employment, and selected taxes.

The economic impact model uses estimates of the portion of organizational outlays and patron expenditures that are made in Washington State to calculate multiplier effects. Some expenditures are on goods or services produced in other states, and should not be counted in an impact analysis of the regional economy. Expenditures were reclassified from the consumer expenditure accounts and from the organizations budget information into the input-output sectors, using standard procedures to yield input-output model final demands and direct requirements expressed in producers prices. Patron spending on tickets/admissions were not “double counted,” as they were a part of the revenue stream to the arts and cultural organizations included in this study. The economic impacts have been calculated for two geographic regions, Washington State and King County. There are some minor differences in methodology and model specification in the current impact study, compared to the 1999 study. However, the goal was to try to have the procedures as comparable as possible.

## II. Economic Impact of Cultural Organizations in Eastside King County

*“Cultural organizations bridge the gap between humanity, fills the void high technology brings, keeps us closer.”*

Source: Patron Survey

In this chapter we estimate the economic impact of arts and cultural organizations spending, and the spending of their patrons. We first report the sources of income to Eastside arts and cultural organizations. Then we turn to estimates of outlays on goods, services, employees, and contract employees. Next we report the estimated expenditures of patrons in relation to their attendance at Eastside arts and cultural organization venues. These data are brought together to develop the estimates of economic impact, which is driven by the combination of organization and patron spending. This chapter also includes estimates of the level of volunteer activity in Eastside cultural organizations.

### Income of Eastside Cultural Organizations

#### (1) Total Income

Table II-1 contains an estimate of the total income of Eastside arts and heritage organizations, while Table II-2 indicates the percentage share of total income by income category. Figure II-1 presents the same information contained in Table II-2 graphically. Earned income is the largest source of income for Eastside arts and heritage organizations, accounting for 57% of total income. The next largest sources of income are individuals and from benefits, in-kind, and assets released; together they account for another 25% of total income. The balance of the contributed income comes from governments, corporate sources, foundations, and a small amount from miscellaneous sources. Total income of Eastside arts and heritage organizations was 26% above the level estimated in the 1999 study.

**Table II-1 Total Income to Eastside Cultural Organizations**

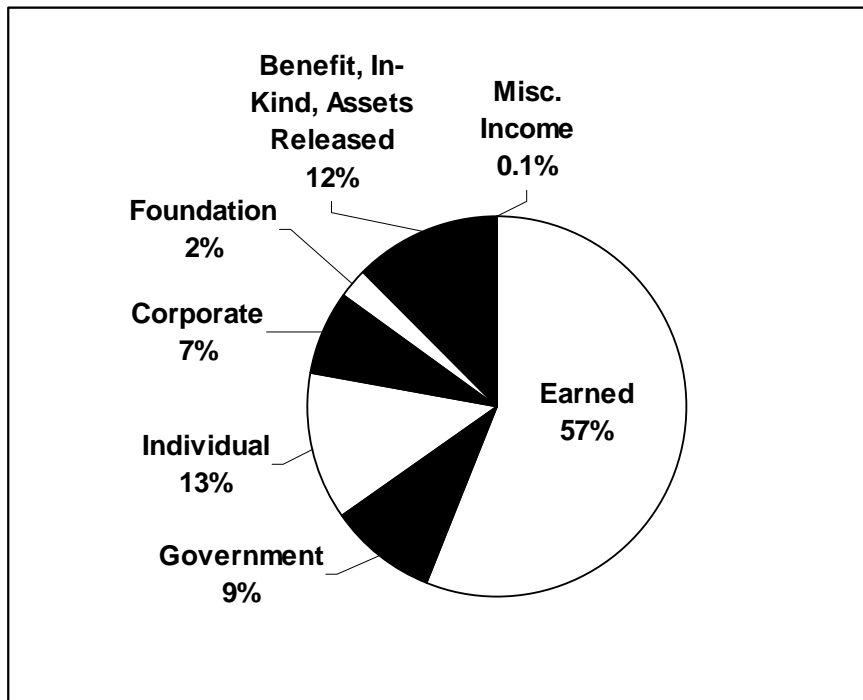
Income Category	Total
Earned	\$10,391,803
Government	1,716,114
Individual	2,342,515
Corporate	1,335,546
Foundation	435,519
Benefit, In-kind, Assets Released	2,306,703
Misc. Income	18,428
Total	\$18,546,628

The shares of total income in the current study differ somewhat in the current study with those measured in the 1999 study. The last column of Table II-2 shows the estimated composition of income in the 1999 study. The earned income share declined slightly, but was still the largest source of income. Benefit, in-kind, and assets released constituted a much smaller share of income in the current study, while there was an increase in the share of income derived from government, individual, and corporate sources.

**Table II-2 Percentage of Total Income by Income Category**

Income Category	Total % Current Study	Total % 1999 Study
Earned	57.0%	58.9%
Government	9.3%	5.3%
Individual	12.6%	7.4%
Corporate	7.2%	4.9%
Foundation	2.3%	3.5%
Benefit, In-kind, Assets Released	12.4%	19.9%
Misc. Income	0.1%	0.1%
Total	100.0%	100.0%

**Figure II-1 Percentage of Total Income by Source**



*(2) Earned Income*

Earned income totaled \$10.4 million, and was derived from a variety of sources. Table II-3 reports on the composition of earned income. Single tickets and admissions accounted for about one-third of earned income, while memberships and season ticket visits accounted for another 21% of earned income. The category “other earned income” is important to a number of Eastside cultural organizations. Tuition/workshop income was also related to a number of Eastside organizations.

Rest and retail/wholesale sales accounted for 2.6% of total earned income.

**Table II-3 Percentage Composition of Earned Income**

<b>Income Category</b>	<b>Total %</b>
Membership/Season Ticket Visits	20.9%
Single Tickets/Admissions	35.0%
Tuition/Workshops	19.3%
Retail/Wholesale Sales	2.2%
Other Earned Income	22.0%
Interest	0.4%
<b>Total Earned Income</b>	<b>100.0%</b>

*(3) Contributed Income*

Contributed income from private sources totaled \$6.4 million, and was derived from the sources identified in Table II-4. The largest source of contributed income was from individuals, followed by benefits and in-kind. Corporate giving accounted for 22% of total private contributed income. The shares of private contributed income have shifted somewhat since the 1999 study. Individual contributions account for a larger share, up to 38% from 31%. In-kind and benefit income has fallen from 35% to 33%, while foundation income has dropped significantly, from 14% to 7%.

**Table II-4 Percentage Contribution of Contributed Income by Source (Except Governments)**

<b>Income Category</b>	<b>Total %</b>
Individuals	37.9%
ArtsFund	2.9%
Other Corporate Giving	18.7%
Foundations	7.1%
Benefits	8.1%
In-Kind	25.0%
Other Contributions	0.3%
<b>Total</b>	<b>100.0%</b>

Tables II-5 through II-8 provide greater detail on earned income from individuals, corporations, private foundations, and in-kind sources. Table II-5 indicates that over 3,400 individual contributors gave an average of \$680 to Eastside cultural organizations. Almost all of these were King County residents. Their average level of giving was more than double the estimate in the 1999 study (\$303), while the number of those giving declined slightly (from 3,609 individuals).

**Table II-5 Individual Contributions to Eastside Cultural Organizations**

Individual Contributions	\$2,342,515
Number of Contributors	3,443
\$/Contributor	\$680
% Outside King County	Less than 0.1%

Corporate contributions to Eastside arts and heritage organizations totaled \$1.3 million, with 258 contributors giving an average of \$4,470, as reported in Table II-6. Most of these contributions were made by King County corporations (including contributions through ArtsFund which received about

60% of its support from corporations). The number of corporate contributions increased significantly from the 1999 study (139), while the average contribution was off slightly (down from \$5,163).

**Table II-6 Corporate Contributions to Eastside Cultural Organizations**

Corporate Contributions	\$1,335,546
Number of Contributors	258
\$/Contributor	\$4,470
\$ outside King County	5.5%

Private foundation contributions to Eastside cultural organizations amounted to \$0.4 million, coming from 54 contributors who gave an average of \$8,065, as reported in Table II-7. Most of these contributors were located in King County. While the number of contributors was up somewhat from the 1999 study (44), the average contribution was down (from \$11,681).

**Table II-7 Private Foundation Contributions to Eastside Cultural Organizations**

Private Foundations	\$435,519
Number of Contributors	54
\$/Contributor	\$8,065
\$ Outside King County	7.5%

In-kind contributions amounted to \$1.5 million for Eastside cultural organizations, with an average valuation of the in-kind contribution being \$10,803. The value of in-kind contributions grew significantly from the 1999 study (\$0.7 million), while the number of contributors declined somewhat (from 191). However, the average valuation of the donations was up significantly (from \$3,458).

**Table II-8 In-Kind Contributions to Eastside Cultural Organizations**

In-Kind Contributions	\$1,543,101
Number of Contributors	143
\$/Contributor	\$10,803
% Outside King County	4.1%

*(4) Government Income*

Government income totaled \$1.7 million, and it came overwhelmingly from local governments. State and federal sources of government income are small to Eastside arts and cultural organizations. Eastside cities and King County provide the bulk of the government income to Eastside cultural organizations. The level of government income has risen sharply from the 1999 study (from \$0.8 million), while the composition of income shows little change.

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

Federal	0.8%
State	5.1%
County	14.3%
Cities	79.8%
Total	100.0%



(5) Other Income

Eastside arts and heritage organizations had a modest reliance of the release of assets from restricted, temporarily restricted, or unrestricted funds. Table II-10 indicates that this was the source of only \$.26 million or 1.4% of total income in the current study. This figure is down from 10.3% in the 1999 study, which noted that the share of income from assets released was subject to significant variation from year to year.

**Table II-10 Other Income**

Net Assets Released	\$261,342
% of Total Income	1.4%

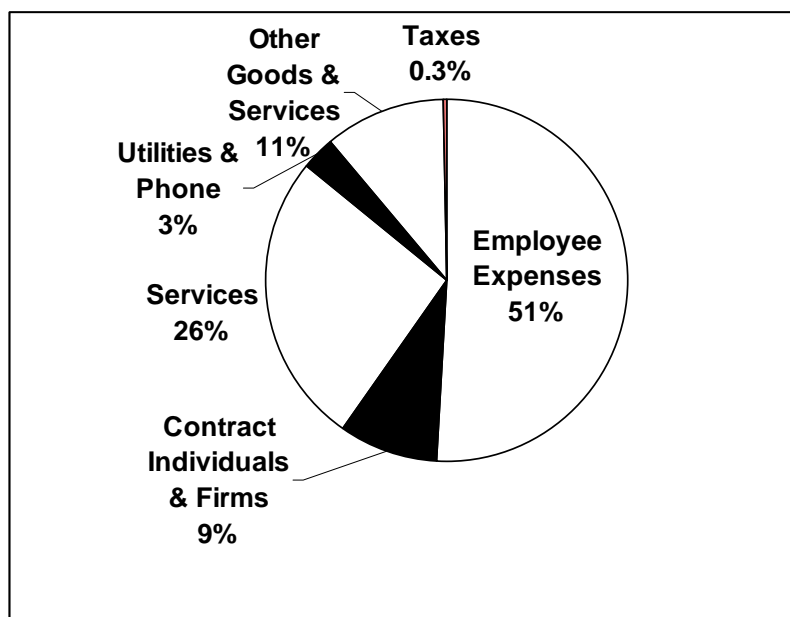
**Expenditures of Eastside Cultural Organizations**

The preceding section has documented the source of income to Eastside arts and heritage organizations. Now we turn to how these organizations spent this income. Table II-11 provides an overview of the expenditures of these organizations. Their spending was slightly below their aggregate income (\$18.5 million). Expenses are almost evenly split between employee expenses and operating expenses (which include payments to contract individuals). Ninety percent of these expenses are payments made in King County to individuals or businesses. A slightly larger share of operating expenses is made outside King County than employee expenses. A more detailed view of the distribution of expenses is presented in Figure II-2, decomposing operating expenses into major categories of outlays. The overall composition of expenses of Eastside arts and heritage organizations remains very similar to the shares documented in the 1999 study. Payments to contract individuals are up somewhat (from 6%), while services purchases are down somewhat (from 29%).

**Table II-11 Aggregate Expenditures of Eastside Cultural Organizations**

	<b>Total</b>	<b>King County</b>
Employee Expenses	\$9,137,653	\$8,479,625
Operating Expenses	8,877,086	7,844,665
Total	\$18,014,739	\$16,324,289

**Figure II-2 Aggregate Expenditures of Eastside Cultural Organizations**



*(1) Composition of Employee Expenses*

Employee expenses are divided between administrative and artistic/professional/technical employee expenses. Table II-12 reports that the majority of these expenses are for artistic/professional/technical employees (61%), while administrative employees account for 39% of employee expenses. Employee expenses include wages and salaries as well as employee benefits. Administrative employees include executive, clerical, marketing/promotion/publicity, fundraising and other administrative occupations. Other artistic/professional/performing occupations include guest artists and lecturers, directors or designers, production or technical personnel, educational or instructional personnel, or other non-administrative people considered to be employees. These shares of employee expenses are very similar to the 1999 study that found 37% of employees to be in administrative jobs and 63% to be in artistic/professional/technical jobs.

**Table II-12 Composition of Employee Expenses**

Expense Category	Percent
Administrative Salaries, Wages & Benefits	38.6%
Artistic / Professional / Technical Salaries, Wages & Benefits	61.4%
Total Salaries, Wages & Benefits	100.0%

*(2) Operating Expenses*

Operating expenses are composed of five broad categories of expenses, as reported in Table II-13. A much more detailed tabulation of operating expenses is contained in Table II-14. Services account for the largest share of operating expenses, and within that category marketing expenses are the largest component. The category Other Goods and Services includes a number of cost accounts of a support nature for productions and exhibitions mounted by Eastside arts and heritage organizations. While contract individuals or firms account for 18% of operating expenditures, they account for 47% of the

headcount of employment (see Figure II-3). The composition of operating expenses is similar to that estimated in the 1999 study. That study found services to account for 57% of total operating costs, and contract individuals and firms to account for 11% of total operating costs. Other operating expense categories are very similar to levels measured in the 1999 study.

**Table II-13 Operating Expenses by Broad Category**

<b>Expense Category</b>	<b>Percent</b>
Contract Individuals & Firms	18.0%
Services	53.1%
Utilities & Phone	6.3%
Other Goods & Services	21.8%
Taxes	0.7%
Total	100.0%

**Table II-14 Operating Expenses by Detailed Categories**

<b>(% of Total Operating Expenses)</b>	
<b>Expense Category</b>	<b>Percent</b>
<b>Contract Individuals or Firms</b>	
Artistic/Performing	2.9%
Guest Artists/Lecturers	0.4%
Director/Design	1.8%
Educational/Instructional	2.9%
Other Personnel	0.5%
Total Contract Personnel	18.0%
<b>Services</b>	
Marketing Expenses	23.6%
Press and Public Relations	0.2%
Photographic Services	0.8%
Banking	3.0%
Insurance	2.4%
Professional Services	1.8%
Janitorial/Protective	1.7%
Transportation	2.1%
Lodging	0.5%
Food/Beverage Services	1.2%
Set/Costume/Exhibit Rental	0.1%
Equipment Rental	2.8%
Hall Rental	0.6%
Office and Work Space Rental	6.0%
Royalties	5.1%
Other Services:	1.1%
Total Services	53.1%

<b>Utilities &amp; Phone</b>	
Telephone	1.2%
Postage	1.7%
Other Utilities	3.5%
Total Utilities & Phone	6.3%
<b>Other Goods and Services</b>	
Printing of Programs etc.	3.0%
Exhibit/Set Materials	0.6%
Production Materials	4.3%
Supplies	4.1%
Maintenance	1.6%
Other Goods & Services	8.2%
Subtotal Other Goods & Services	21.8%
<b>Taxes</b>	
Sales Tax	0.2%
B&O Tax	0.0%
Property Tax	0.1%
Other Taxes:	0.5%
Subtotal Taxes	0.7%
Total Operating Expenses	100.0%

*(3) Endowments and Capital Expenditures*

**Table II-15 Endowments, Interest Income, and Assets Released**

Eastside arts and heritage organizations are estimated to have received \$20.5 million in funds for capital projects since 1999. Table II-6 reports the composition of these funds, with government, individuals, and “other.” The bulk of this income was received by the Bellevue Art Museum. Table II-6 also reports spending on capital projects since 1999, and it indicates that 85% of these funds were expended for construction, 9% for design, and only 6% on capital campaigns.

**Table II-16 Eastside Capital Expenditures Since 1999**

Sources of Capital:	Percent of Total
Corporate	1.9%
Foundation	23.3%
Individual	23.7%
Government	32.3%
Other	18.8%
TOTAL (\$20,492,995)	100.0%
<b>Expenses Related to Capital</b>	
	<b>Percent of Total</b>
Campaign	5.8%
Design (i.e. architect fees, etc.)	8.5%
Construction	85.0%

Other	0.6%
TOTAL EXPENSES (\$21,194,000)	100.0%

Eastside arts and heritage organizations reported funds with over \$30 million in assets, as documented in Table II-17. These funds were divided into those that were unrestricted (ending balance of \$11 million), those with temporary restrictions (ending balance of \$16.9 million), and those permanently restricted (ending balance \$2.7 million). Additions into these funds (\$1.1 million) were less than withdrawals from them (\$2 million).

**Table II-17 Fund Balances of Eastside Cultural Organizations**

<b>Unrestricted Net Assets</b>	
Beginning Fund Balance	\$12,388,047
Additions to Fund for FY	172,786
Transfers out of fund	1,468,078
Ending Fund Balance	11,092,755
<b>Temporarily Restricted Net Assets</b>	
Beginning Fund Balance	16,971,956
Additions to Fund	400,941
Transfers out of fund	497,455
Ending Fund Balance	16,875,442
<b>Permanently Restricted Net Assets</b>	
Beginning Fund Balance	2,152,718
Additions to Fund for FY	508,738
Transfers out of fund	0
Ending Fund Balance	2,661,456
<b>Total All Funds</b>	
Beginning Funds Balance	31,512,721
Additions to Funds for FY	1,082,465
Transfers out of funds	1,965,533
Ending Funds Balance	30,629,653

Note: \$16,439,442 of the Temporarily restricted net assets are the Bellevue Art Museum for their building.  
Note: These figures are reported figures only, they have not been adjusted with the factor used to extrapolate covered budgets to total budgets.

### Employment in Arts and Cultural Organizations

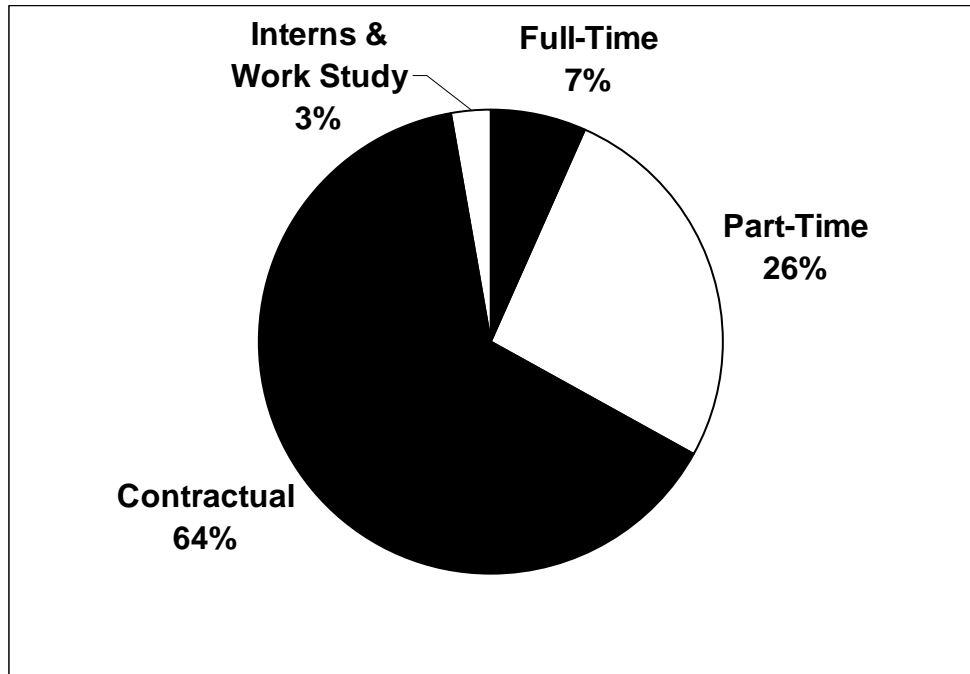
Eastside arts and cultural organizations employ people in full-time, part-time, contractual, and intern/work study positions. Tables II-18 through II-23 provide details regarding the structure of employment in these organizations.

Table II-18 and Figure II-3 summarize the categories of employment in Eastside arts and cultural organizations. An estimated headcount of 2,035 people were employed by these organizations, with most people employed in contractual positions. Table II-18 also indicates that 186 people were under contracts with Actors Equity, AGMA, the Musicians Union, IATSE, or AFTRA.

**Table II-18 Employment Status**

Full-Time	135
Part-Time	538
Contractual	1,304
Interns & Work Study	58
Total	2,035
# of Personnel Under Contracts	186

**Figure II-3 Employment Status**



The composition of employment in Eastside arts and heritage organizations has changed considerably since the 1999 study, while the total of employment is very similar (2,059 in the 1999 study). There has been a significant increase in the share of contractual employment (from 46% to 64%), and a corresponding decrease in part-time employment (from 46% to 26%). The shares of full-time and work study/interns have not changed from the 1999 study.

The occupational mix of employment in Eastside cultural organizations is presented in Table II-19 through Table II-23. These tables distinguish between administrative and artistic/professional/technical occupations. Table II-19 documents the occupational distribution of full-time employment. Administrative full-time occupations account for 55% of full-time employees, and 45% are in artistic/professional/technical full-time occupations. These shares have not changed since the 1999 study.

**Table II-19 Full-Time Employment in Cultural Organizations**

<b>Administrative</b>	
Executive	17
Clerical	16
Marketing	22

Fundraising	16
Other Administrative	4
Total	74
<b>Artistic/Professional/Technical</b>	
Artistic/Performing	1
Guest Artists/Lecturers	0
Director/Design	5
Production/Technical	27
Education/Instructional	23
Other	4
Total Artistic, Professional/Technical	61
<b>Total Jobs</b>	
	135

Part-time employment is predominantly in artistic/professional/technical occupations, as reported in Table II-20. Artistic/performing was the largest category, accounting for about half of all of those employed in the artistic/professional/technical categories. Production/technical and instructional/educational accounted for most of the rest of the artistic/professional/technical employees. Marketing employees constituted the largest share of the administrative part-time employees. The overall structure of part-time employment is similar to the 1999 study, but the aggregate number of part-time employees is down from the 1999 study, largely within the artistic/professional/technical occupations. Eastside arts and heritage organizations have reduced part-time employment in these occupational categories, and have increased reliance on contract employees and firms in similar occupations.

**Table II-20 Part-Time Employment in Cultural Organizations**

<b>Administrative</b>	
Executive	10
Clerical	12
Marketing	43
Fundraising	3
Other Administrative	3
Total	70
<b>Artistic/Professional/Technical</b>	
Artistic/Performing	239
Guest Artists/Lecturers	0
Director/Design	1
Production/Technical	103
Education/Instructional	105
Other	19
Total Artistic, Professional/Technical	467
<b>Total Jobs</b>	
	538

Contract employment is reported in Table II-21, and this table indicates that the majority of this employment is in the artistic/performing category. The reduction of about 400 people considered part time employees between the 1999 and the current study was offset by an almost equal gain in the number of contract employees. Gains in the level of contract employees were found in artistic/performing, guest artists/lecturers, director/design, and production/technical occupations, while educational/instructional contractual employment declined somewhat.

**Table II-21 Contract Employment - Headcount**

Artistic/Performing	958
Guest Artists/Lecturers	52
Director/Design	86
Production/Technical	79
Education/Instructional	118
Other	10
<b>Total Contractual Jobs</b>	<b>1,304</b>

The total number of people employed by Eastside cultural organizations is reported in Table II-22. This table is a head-count measure. The table indicates that 9% of total employment was administrative and 91% was in artistic/professional/technical occupations. These shares are essentially unchanged from the 1999 study. This table includes the employment reported in Tables II-19, II-20, and II-21, and also includes interns/work study positions. The total number of workers is the same as reported in Table II-18. Artistic/performing occupations account for more than half of total employment, followed by production/technical and educational/instructional occupations. Administrative employment had the largest share of employees in marketing/fundraising.

**Table II-22 Total Employment Including Full-time, Part-time, Contractual, and Interns/Work-Study Employees**

<b>Administrative</b>	
Executive	27
Clerical	35
Marketing	71
Fundraising	19
Other Administrative	6
Total	160
	0
<b>Artistic/Professional/Technical</b>	0
Artistic/Performing	1,199
Guest Artists/Lecturers	52
Director/Design	92
Production/Technical	214
Education/Instructional	284
Other	34
Total Artistic, Professional/Technical	1,875
	0
<b>Total Jobs</b>	<b>2,035</b>



Organizations completing the survey were asked to estimate the hours that their part time and contract employees worked. The total hours were tallied, and divided by 2,000 hours annually per full time employee to develop an estimate of full-time equivalent workers. Table II-23 contains an estimate of the full-time equivalent of the part-time employment headcount reported in Table II-20 and the contract employment in Table II-21. The 1842 people tallied in those tables are estimated to represent 85 full-time employees.

**Table II-23 Full-time Equivalent Number of Part-Time Employees**

<b>Administrative</b>	
Executive	5
Clerical	6
Marketing	11
Fundraising	1
Other Administrative	1
Total	23
	0
<b>Artistic/Professional/Technical</b>	
Artistic/Performing	23
Guest Artists/Lecturers	0
Director/Design	7
Production/Technical	20
Education/Instructional	7
Other	6
Total Artistic, Professional/Technical	63
	0
Total	85

### Expenditures of Patrons

Patrons of Eastside arts and heritage organizations incur expenses beyond the cost of tickets or admissions in relation to their visits to these organizations. Travel costs, costs of food and beverages, entertainment, child-care, and lodging costs are also incurred in relation to visits to these organizations. Table II-24 and Figure II-4 present estimates of per-capita patron expenditures, based on the survey of patrons. More detail on patron expenditures is included in Chapter III. The largest cost incurred by Eastside arts and heritage organization patrons was tickets/admissions. Food and beverages either before or after the event, or at it, were the next largest outlay. The category other was dominated by reports of tuition payments at several of the organizations whose patrons were surveyed<sup>2</sup>. Travel costs are relatively modest, reflecting the localized nature of visitation to Eastside arts and cultural organizations (see Table III-5). With the exception of the higher estimated “other” expenditures, the overall distribution of spending reported in the current study mirrors that found in the 1999 study.

**Table II-24 Per-capita Patron Expenditures**

Tickets/Admissions	\$9.77
Parking Fees	0.24
Bus/Ferry/Taxi Costs	0.00
Auto Travel Costs	1.47
Food/Beverages Before or After Event	5.07
Food/Beverages at Event	0.43
Entertainment	0.27

<sup>2</sup> The aggregate reported income from tuition/workshops corresponds well to this estimate from the patron survey. It was estimated to be \$2 million from the organization survey, leaving about \$0.6 million in other patron outlays in this residual “other expenses” category.

Souvenirs & Gifts	0.93
Lodging/Accommodation Costs	0.96
Air Travel Costs	0.73
Child Care	0.59
Other	3.98
Total	\$24.46

The patron outlays reported in Table II-24 were used with the estimated number of patrons to estimate total patron expenditures. Table II-25 reports the overall estimated attendance, and the levels of free and discounted student admissions. We presumed that free and discounted student admissions did not have expenses associated with them that were equivalent to other patrons, although it is likely that these students did incur some expenses. However, they were not included our survey, and we have no basis for estimating their expenses. Therefore, their numbers have been eliminated from the economic impact estimates. The net attendance figure in this table was multiplied by the per-capita spending estimates in Table II-24 to derive total patron outlays, which are reported in Table II-26.

**Table II-25 Number of Patrons**

Total Attendance	717,077
Less Free student	21,563
Less Discounted student	43,207
Net Attendance	652,307

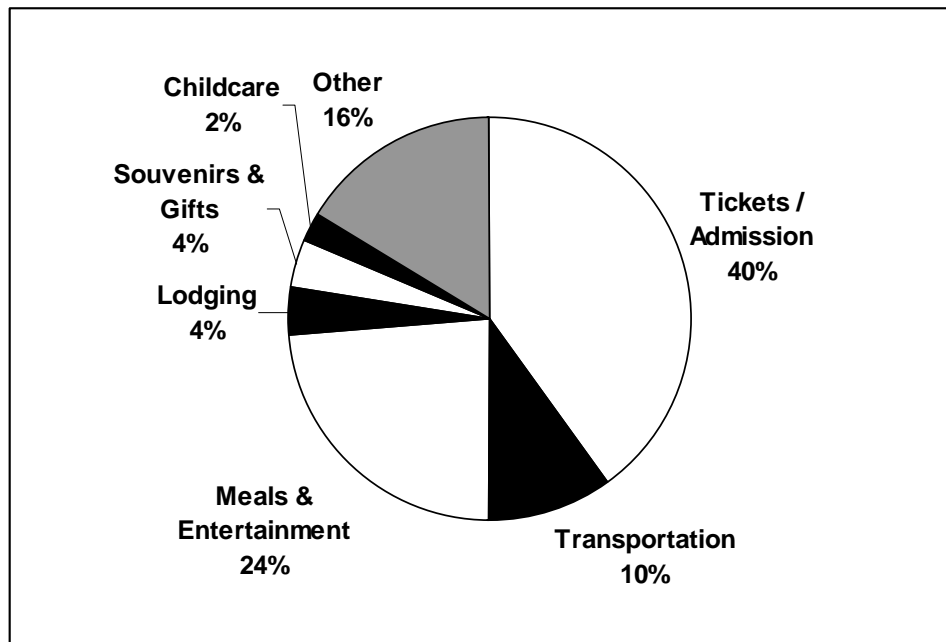
Total patron spending reported in Table II-26 was estimated to be \$16 million. By far the largest category of patron spending was on tickets and admissions, \$6.4 million. Food and beverages at or before or after events constituted the next largest level of expense, \$3.6 million. The “other” category was dominated by expenditures for tuitions/classes, as indicated above, reflecting the community-oriented nature of many Eastside arts and heritage organizations. Total patron spending in the current study was impacted by an adjustment of the free student admissions. In the 1999 study we did not have any measure of their numbers, but the implied total outlay from these patrons that were included in the 1999 study is about \$0.5 million. Thus, patron spending was “flat” between 1999 and 2003, possibly reflecting the recession and economic downturn in comparison to the heady days on the Eastside in 1999.

**Table II-26 Estimated Total Patron Expenditures**

Tickets/Admissions	\$6,374,913
Parking Fees	159,790
Bus/Ferry/Taxi Costs	2,528
Auto Travel Costs	960,763
Food/Beverages Before or After Event	3,306,035
Food/Beverages at Event	279,127
Entertainment	174,960
Souvenirs & Gifts	608,820
Lodging/Accommodation Costs	627,024
Air Travel Costs	474,313
Child Care	387,339

Other	2,597,599
Total	\$15,953,210

**Figure II-4 Patron Expenditures by Category**



### Economic Impact of Cultural Organizations and Their Patrons

The expenditures of Eastside arts and heritage organizations and their patrons were used to estimate their economic impacts on the Washington State and King County economies, using the economic impact model described in Chapter 1. This impact model is described in more detail in Appendix 2. The model requires the translation of expenditure categories for organizations and their patrons from the classification reported earlier in this chapter to “producer prices,” and also tracks which of these outlays are made in the Washington economy. Some expenses are for services or goods produced outside the regional economy; these expenses do not have a direct economic impact on the regional economy and are excluded from this analysis. Expenditures made for goods have been decomposed into producers prices based on the industry of origin and the margins associated with production in the trade and transportation sectors. Estimates of the distribution of these expenditures developed by the U.S. Bureau of Economic Analysis as a part of the benchmark U.S. input-output accounts have been used for these purposes. An example of a consumer expense category in which there are expenditures that need to be reclassified is souvenirs. Consumer spending reported on such purchases is inclusive of sales taxes, margins earned by retailers and wholesalers, transportation costs associated with distribution, and manufacturers cost. These costs were separated for relevant categories in Table II-26 in the process of making economic impact estimates.

The economic impact model used in this analysis is based on the structure of the Washington economy. Economic impacts were estimated at the state level, and a location quotient adjustment technique was used to adjust the state input-output model to the King County level. Appendix 2 describes in greater detail the methods used for this modeling process. Some industries present in the state economy are not present in the King County economy to the same extent as statewide, and they are

not likely to be able to supply King County demands to the same extent as the same industry located statewide. Thus, King County multipliers in this model are somewhat lower than in the statewide model, contributing to lower King County economic impacts compared to statewide economic impacts. It is not possible to separate Eastside economic impacts from those estimated at the King County level. The methodology used in this study is very similar to that used in the 1999 study.

Two estimates of economic impact have been developed as a part of this study. The first is an estimate of the aggregate impact of spending by arts and cultural organizations and their patrons. The second is an estimate of the “new money” associated with their expenditures—funds that would not be spent in the King County economy if these organizations were not located here. The first measure includes much spending that can be considered discretionary. Local residents choose to spend a share of their income at Eastside arts and heritage organizations because they want to do so, and it recognized that if they did not spend at these organizations, their income would go for other goods and services in the local economy. In contrast, some organization income and some patrons spending is from outside the local area, and would not have led to the economic impacts documented here if these arts and heritage organizations were not located in King County. This second estimate of economic impact is referred to as “new money.”

*(1) Aggregate Impacts*


The aggregate impact of Eastside arts and heritage organizations is summarized in Table II-27. This table includes four measures of economic impact: output (or sales), jobs, labor income, and selected tax revenues. Statewide, Eastside cultural organizations created almost \$70 million in income, 3,500 jobs, \$32 million in labor income, and \$2.1 million in tax revenue to state and local governments. This was on top of direct spending by these organizations of \$16.3 million, and non-ticket/admission spending of \$9.5 million by patrons. Thus, for every dollar of direct spending of patrons to Eastside arts and heritage organizations, there were sales of \$2.70 in the Washington economy.

Most of the economic impact of Eastside arts and heritage organizations is felt in King County, as indicated in the last column of Table II-27. The difference between the King County and the statewide impact estimates are due to differences in the multiplier structure of the input-output models used to make these two estimates. The same levels of patron and organization expenditures drive the impact estimates. The bulk of the output impacts are felt in nonmanufacturing sectors, largely in services and wholesale and retail trade. Indirect and induced impacts are strongly influenced by patterns of personal consumption expenditures, which are driven by labor income of Eastside arts and heritage organizations, and by labor income created through patron spending. Tax impacts were estimated by applying current B&O tax rates to the output of various sectors, and by estimating direct sales tax payments made by Eastside arts and heritage organizations, through patron spending, and through an estimate of sales taxes paid as a share of labor income.

**Table II-27 Summary of Washington and King County Impacts**

	Washington	King County
<b>Output (\$ millions)</b>	\$68.801	\$60.577
Manufacturing	4.362	2.358
Nonmanufacturing	64.439	58.220
Wholesale & Retail Trade	12.691	11.435
Services	49.713	45.543

Other	2,035	1,242
<b>Employment</b>	<b>3,500</b>	<b>3,406</b>
Manufacturing	18	11
Nonmanufacturing	3,482	3,395
Wholesale & Retail Trade	246	224
Services	3,213	3,158
Other	23	13
<b>Labor Income (\$ millions)</b>	<b>\$32.117</b>	<b>\$29.211</b>
Manufacturing	0.711	0.422
Nonmanufacturing	31.407	28.789
Wholesale & Retail Trade	4.657	4.189
Services	25.963	24.090
Other	0.786	0.509
<b>Taxes (\$ millions)</b>		
Sales Tax		
State	\$1.593	\$1.486
Local	0.701	0.526
B&O Tax - state	0.352	0.295
B&O Tax - local	0.176	0.147

The economic impacts reported in Table II-27 are considerably larger than estimated in the 1999 study. That study found statewide impacts of \$44.3 million in sales, 2,506 jobs, and \$20.3 million in labor income.  increase in impacts is largely a result of the growth in Eastside arts and heritage organization expenditures, as patron spending did not increase over that measured in the 1999 study.

A more detailed perspective on impacts on output (sales), employment, and labor income is given in Table II-28. This table reports impacts by input-output model sector, and it is clear that impacts are primarily within the service sector. Eastside arts and heritage organizations are included in sector 38; their direct budgets (\$18.5 million), employment (2,035 jobs), and labor income payments (\$11.2 million) are included with the impact estimates in this sector.

**Table II-28 Total King County Impacts**

	Output (\$ millions)	Employment	Labor Income (\$ millions)
1 Field crops, fruits, and vegetables	\$0.007	0	\$0.002
2 Livestock and products	0.006	0	0.002
3 Fishing and forestry	0.066	1	0.025
4 Mining	0.009	0	0.004
5 Food products	1.053	4	0.148
6 Textiles and apparel	0.043	1	0.015
7 Lumber and wood products	0.055	0	0.012
8 Furniture and fixtures	0.033	0	0.013
9 Pulp and paper products	0.132	0	0.027
10 Printing and publishing	0.357	3	0.112
11 Chemicals and products	0.029	0	0.007
12 Petroleum and products	0.393	0	0.007

13 Stone, clay, and glass products	0.079	1	0.021
14 Primary metals	0.002	0	0.000
15 Fabricated metals	0.032	0	0.009
16 Industrial machinery and equipment	0.021	0	0.008
17 Electrical machinery	0.008	0	0.003
18 Aerospace	0.001	0	0.000
19 Ship and boat building and repair	0.013	0	0.006
20 Other transportation equipment	0.003	0	0.001
21 Instruments	0.017	0	0.008
22 Other manufacturing	0.085	1	0.026
23 Construction	1.153	12	0.477
24 Transportation services	1.786	12	0.504
25 Electric utilities	0.734	1	0.118
26 Gas utilities	0.814	0	0.048
27 Other utilities	0.674	3	0.222
28 Communications	1.242	6	0.452
29 Wholesale trade	1.041	9	0.416
30 Eating and drinking places	4.985	125	1.765
31 Other retail trade	5.409	90	2.009
32 Finance and insurance	2.794	21	0.862
33 Real estate	3.230	18	0.381
34 Hotels and lodging	0.751	13	0.283
35 Computer and data processing services	0.032	0	0.020
36 Business and professional services	6.974	107	3.518
37 Health services	2.959	38	1.602
38 Other services	23.553	2,876	13.565
40 State & Local Govt.		64	2.516
Total	\$60.577	3,406	\$29.211

*(2) New Money Impacts*

New money impacts are defined as impacts due to spending related to income or patron spending from outside the region, which for the purposes of analysis is defined as King County. Table II-29 provides information regarding new money sources, which are a combination of non-local income to Eastside arts and heritage organizations, and non-local spending by patrons. Over 12% of organization income came from outside King County. The largest source of earned income was from box office/admissions (\$1.4 million), a figure somewhat higher than derived from the patron survey (\$0.7 million on tickets/admissions). It is not clear if this discrepancy is due to organizations not knowing where their patrons come from, or is related to the sample size and composition of the patron survey. New money as a share of organization income is up from the 1999 study (which reported 9.4%), and the level of organization new money is up sharply (from \$1.4 million), as is estimated patron spending (up from \$1.4 million). The increase in patron new money is a result of a larger proportion of patrons coming from outside King County, when compared to the 1999 study. In the current study 12% of patrons were estimated to come from outside King County, compared to 6% in the 1999 study. Spending of patrons coming from outside King County was considerably higher than spending by Eastside or other King County patrons, increasing the estimated new money from patron spending.

**Table II-29 New Money Sources**

% of Organization Income Outside King County	12.2%
<b>Income Category</b>	
Earned Income	\$1,879,510
Government Income	208,878
<b>Contributed Income</b>	
Corporate	73,433
Other	98,462
Total	\$2,260,282
<b>Patron Expenditures (total)</b>	
Except Tickets	\$1,440,638
Total Gross New Money	\$3,700,920

The economic impacts associated with new money are presented in Table II-30. The levels of impact contained in this table are about 13% of those presented in Tables II-27 and II-28. Business activity in King County was estimated to be \$8 million, with 421 jobs created, and labor income of \$3.7 million. About three-quarters of a million dollars in tax revenues were generated as a result of new money spending. Impacts of new money spending are roughly double those measured in the 1999 study, a result due to the combination of greater new money income to Eastside arts and heritage organizations, and a larger proportion of patrons coming from outside King county.

**Table II-30 New Money Impacts, King County**

Output (\$ millions)	7.911
Manufacturing	0.313
Nonmanufacturing	7.599
Wholesale & Retail Trade	1.411
Services	6.023
Other	0.165
Employment	421
Manufacturing	1
Nonmanufacturing	420
Wholesale & Retail Trade	27
Services	391
Other	2
Labor Income (\$ millions)	3.707
Manufacturing	0.053
Nonmanufacturing	3.653
Wholesale & Retail Trade	0.518
Services	3.068
Other	0.068
Sales Tax related to labor income	



State	0.543
Local	0.192
B&O Tax - state	0.039
B&O Tax - local	0.019

## Volunteers in Cultural Organizations

Eastside arts and heritage organizations rely heavily on volunteers, in addition to those that they employ or hire as contract individuals or organizations. Table II-31 reports the number of volunteers that Eastside arts and heritage organizations reported assisting them. Most volunteers are engaged in administrative functions, especially marketing/promotion/publicity and fundraising.

Artistic/professional/technical volunteers are largely in the production/technical category. The patron survey discussed in section III provides additional information on volunteer activity by patrons interviewed at Eastside arts and heritage organizations.

**Table II-31 Volunteers in Cultural Organizations in Eastside King County (# of Volunteers)**

<b>Administrative</b>	
Executive	266
Clerical	44
Marketing/Promotion/Publicity	760
Fundraising	330
Other Administrative	171
Total Administrative	1,571
<b>Artistic/Professional/Technical</b>	
Artistic/Performing	32
Guest Artists/Lecturers	0
Director/Design	0
Production/Technical	480
Education/Instructional	65
Other Personnel	0
Total Artistic/Professional/Technical	578
<b>Total</b>	
Total	2,149
Volunteer hours	27,631
Hours/volunteer	12.9

### III. Cultural Organization Patronage Characteristics

*“(Cultural organizations) attract a range of people to our area. They give the community richness and variety and benefit citizens, whether they know it or not.”*

Source: Patron Survey


This chapter presents information on a number of characteristics of cultural organization patrons and selected non-economic information from the organization survey. It presents statistics related to the number of patrons, their geographic origin and reasons for trips, group size, frequency of participation in arts and heritage organization activities, and a set of behavioral questions regarding patron and patron family involvement with the arts. It also includes statistics related to free and discounted student visits to arts and heritage organizations on the Eastside.

#### Number of Patrons

Eastside cultural organizations reported information on the number of patrons and other selected statistics with regard to their services in the survey of arts and heritage organizations. These data were used to develop estimates of overall patron numbers, which are reported in Table III-1. The percentage distribution of these patronage statistics is presented in Table III-2, and Figure III-1 illustrates the shares of attendance/admissions by category. The following concepts are applicable to the interpretation of data in these tables. Season ticket/membership visits are not the number of estimated season ticket holders or those with memberships, but rather the estimated number of occasions that patrons attended/visited Eastside arts and heritage organizations in relation to their season tickets or memberships. Season ticket/membership and single ticket/admissions account for 57% of total patron numbers at Eastside arts and heritage organizations, up from 44% in the 1999 study. Free tickets were the next largest category of tickets/admissions (30%) and most of these came from patrons to events sponsored by ASO’s. The balance of admissions were discounted student, senior, or other discounted tickets. About 10% of the free tickets were to students (21,563, see below).

**Table III-1 Estimated Number of Patrons**

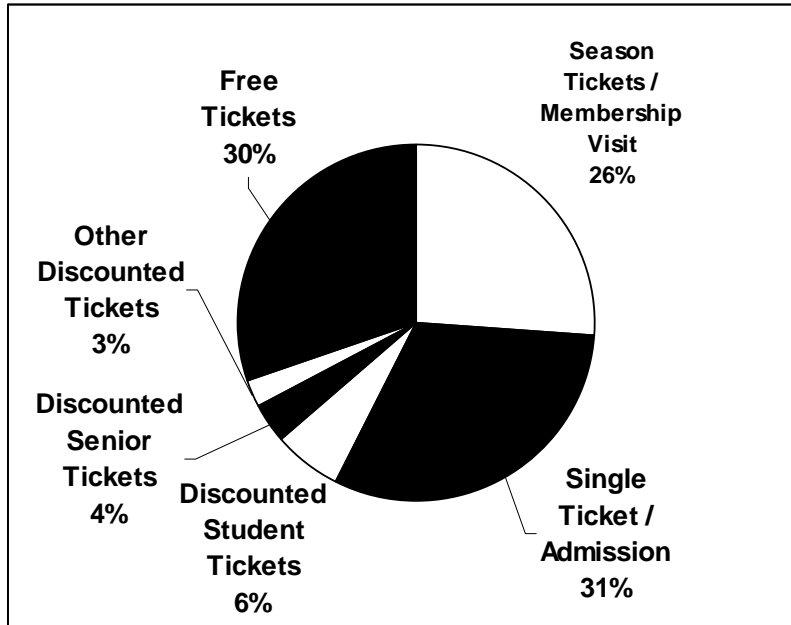
Season Ticket/Membership Visits	187,200
Single Tickets or Admissions Sold	226,014
Discounted Student Tickets	43,207
Discounted senior tickets	25,315
Other Discounted Tickets (rush etc.)	18,719
Free Tickets	216,622
Total Attendance	717,077
Total Attendance Net of Free Student and Discounted Student Tickets	652,307


 distribution of patronage has changed since the 1999 study, with a larger share of season ticket/membership admissions (57% versus 44% in the 1999 study), and a larger number of other admissions. Free admissions fell from 40% documented in the 1999 study to 30% in the current study.

**Table III-2 Percentage Distribution of Audience**

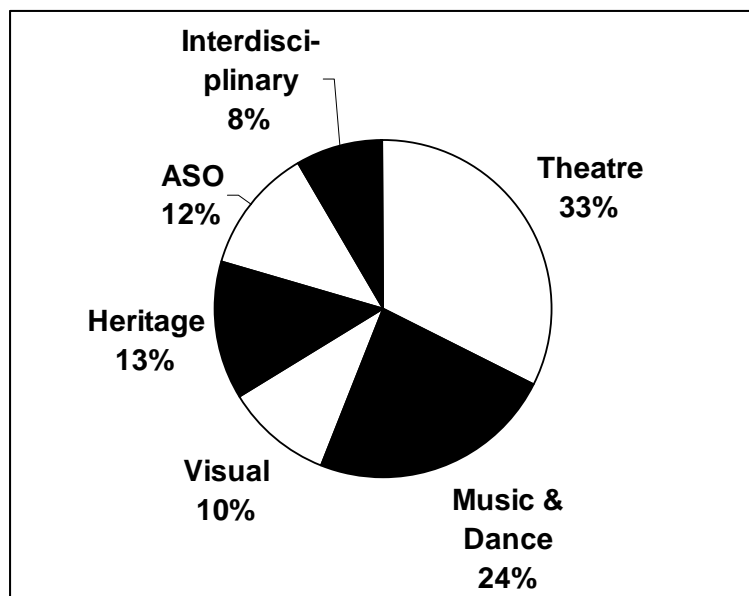
Season Ticket/Membership Visits	26.1%
Single Tickets or Admissions Sold	31.5%
Discounted Student Tickets	6.0%
Discounted senior tickets	3.5%
Other Discounted Tickets (rush etc.)	2.6%
Free Tickets	30.2%
Total Attendance	100.0%

**Figure III-1 Percentage Distribution of Attendance by Category**



The distribution of patronage by discipline is shown in Figure III-2. Theater accounted for one third of total patronage, followed by music and dance, which accounted for about one-fourth of total patronage. The mix of patronage has changed since the 1999 report, with a much smaller estimated patronage at ASO's (down from 35%), and a  larger patronage in music and dance (up from 11%). Other disciplines accounted for similar shares to those measured in the 1999 study.

**Figure III-2 Patronage by Discipline**



### Patrons with Disabilities

Table III-3 indicates that Eastside cultural organizations served over 13,000 patrons with disabilities. This figure is conservative, as a number of organizations did not respond to this question.

### Cultural Organization Performance and Exhibition Statistics

The survey of cultural organizations documented some measures of performance frequency, subscriptions, and in the case of the presenting disciplines of dance, music, and theater a measure of use of facilities. [ ] estimated that 830 exhibitions and productions were mounted by Eastside cultural organizations, up from 643 estimated in the 1999 study. There were 4,600 memberships sold, up from 2,700 in the 1999 study. Over 26,000 subscriptions were sold, up from 18,500 in the 1999 study. Performances in venues used by dance, theater and music organizations used about 69% of capacity, a figure identical to the 1999 study.

**Table III-3 Cultural Organization Performance & Exhibition Statistics**

Number of productions/exhibits	830
Number of memberships sold	4,601
Number of full and/or partial subscriptions sold	26,235
Average percentage of capacity	68.6%
# of Patrons Served With Disabilities	13,316

### Patron Trip Reasons

Patrons were asked if the primary reason for the trip was to attend the performance or exhibition where they were interviewed, and if their trip was not primarily to attend a performance or exhibition, they were asked to indicate the primary reason for their trip. Table III-4 reports that the overwhelming proportion (93%) of the patrons primarily made their trip to attend a particular exhibition or performance. A number of patrons were interviewed at organizations providing classes, and many of

these patrons indicated that the class was the primary reason for their trip. A sampling of other statements about primary trip reasons include: “visiting our kids around,” “house hunting,” “Salish Lodge Spa and Snoqualmie Falls”, and “drive in the country.”

**Table III-4 Reason for Patron Trips**

Went Primarily to Attend	93.2%
Did Not Go Primarily to Attend	6.8%
Total	100.0%

### Patron Origins

Most of the patrons interviewed at Eastside arts and heritage organizations live on the Eastside, as reported in Table III-5. Two-thirds of those interviewed lived on the Eastside, while another 22% lived elsewhere in King County. About 10% of the sample came from elsewhere in Washington State, and 1% came from out of state. These estimates are based on the number of people in groups that reported group size, valid spending, and identified their geographic origin (1290 people in 319 groups). The current study found more people attending Eastside cultural events from outside the Eastside than the 1999 study; in that study 76% of patrons were from the Eastside.

**Table III-5 Geographic Origin of Patrons**

Eastside	66.4%
Elsewhere in King County	21.9%
Other Parts of Washington State	10.6%
Out of State	1.0%
Total	100.0%

N=1290

Patrons from all geographic regions of origin made their trips primarily to attend Eastside cultural organization events or presentations, as reported in Table III-6. Those traveling longer distances reported an even stronger likelihood of making their trip primarily to attend an Eastside arts or heritage organization event or presentation than those living in King County or on the Eastside.

**Table III-6 Patron Origins and Percentage Making Trip Primarily to Attend an Eastside Cultural Organization Event/Presentation**

Eastside	93.0%
Elsewhere in King County	91.0%
Other Parts of Washington State	96.3%
Out of State	100.0%
Total Reporting Origin Location	93.0%


## Patron Expenditures

Patron spending was analyzed based on the geographic regions of origin used in Table III-5, but sample sizes were too small for those coming from elsewhere in Washington State or from outside Washington State to have statistically valid spending estimates. A distinction was made between Eastside and other patrons, as reported in Table III-7. This table reports little difference in aggregate spending by these two origin groups, but there is a difference in the composition of spending. Those from outside the eastside report higher travel, food, and lodging/accommodations costs than Eastside residents. The relatively high “other” expenditure reported by Eastside residents was largely associated with tuitions reported for classes being taken by some patrons in Eastside arts and heritage organization venues. Overall patron spending was similar to that measured in the 1999 study (average spending \$21.67), with slightly lower food and beverage costs, and much higher “other” costs.

**Table III-7 Patron Expenditures by Geographic Origin**

	<b>Eastside</b>	<b>Outside Eastside</b>	<b>Composite</b>
Tickets/Admissions	\$9.65	\$10.01	\$9.77
Parking Fees	0.28	0.18	0.24
Bus/Ferry/Taxi Costs	0.01	0.00	0.00
Auto Travel Costs	1.23	1.95	1.47
Food/Beverages Before or After Event	4.70	5.79	5.07
Food/Beverages at Event	0.42	0.45	0.43
Entertainment	0.32	0.16	0.27
Souvenirs & Gifts	0.91	0.99	0.93
Lodging/Accommodation Costs	0.38	2.11	0.96
Air Travel Costs	0.51	1.15	0.73
Child Care	0.71	0.36	0.59
Other	<u>4.97</u>	<u>2.02</u>	<u>3.98</u>
<b>Total</b>	<b>\$24.09</b>	<b>\$25.18</b>	<b>\$24.46</b>
Number of Patrons in Sample	857	433	1290
Percent	66.4%	33.6%	100%

## Patron Group Sizes

The most common group size for patrons attending Eastside arts and heritage organization events was two persons, as reported in Table III-8. The average size was double the median, reflecting the  of the distribution of group sizes that were most likely school or organizationally related (a few groups with 10-40 persons). Individuals accounted for about 15% of the patron groups interviewed, while groups of three or four persons accounted for another 23% of the groups. The median group size in the current study is the same as in the 1999 study. However, the average group size is larger in the current study (it was 3.15 persons in the 1999 study), due to a relatively higher proportion of groups with five or more persons in the current study.

**Table III-8 Group Sizes Attending Cultural Organizations (% of total)**

# of persons	Percent
1	15.4%
2	37.8%
3 or 4	22.7%
5+	24.2%
Total	100.0%
Average Size	4.02
Median	2


### Patron Arts Experience, Participation and Spending, Volunteer Activity, and Children's Arts Education

A number of questions were included in the current study to ascertain some information on the participation and experiences of arts and heritage organization patrons. This section reports responses to these questions.

Patrons were asked how they were first exposed to the arts. Table III-9 indicates that family or friends first exposed half of the patrons to the arts. School was also important, with 38% of the respondents indicating first exposure through school. One-eighth of the respondents indicated that they were first exposed on their own.

**Table III-9 How Patrons were First Exposed to the Arts**

Through School	38%
Through Family & Friends	50%
On My Own	12%
Total	100%

 Most patrons were exposed to the arts when they were young, as reported in Table III-10. A cross-tabulation of how and when patrons were first exposed to the arts was highly significant from a statistical perspective. Those first exposed by family and friends were much more likely than expected to have this exposure at a grade school age, while those exposed on their own were much more likely to have done so than expected at a college or an adult age.

**Table III-10 When Patrons were First Exposed to the Arts**

Grade School Age	71.4%
Middle School Age	7.7%
High School Age	11.4%
College Age	4.9%
As An Adult	4.6%
Total	100.0%

Patrons were asked how frequently they attended arts events, and as Table III-11 reports, more than half of the respondents indicated that they went either weekly or monthly to an arts event. Only 4% reported a single attendance annually.

**Table III-11 How Frequently Patrons Attend Arts Events**

Weekly	14.8%
About once a month	44.0%
3 or 4 times a year	37.0%
Once a year	4.2%
Total	100.0%

We sought information on changes in the value of the arts to patrons over time. As reported in Table III-12, almost three-quarters of the sample indicated that the arts had increased in importance to them in recent years, while about one fourth reported that the value had decreased.

**Table III-12 How the Value of the Arts Have Changed to Patrons in Recent Years**

Increased	73.3%
Decreased	25.5%
No Change	1.2%
Total	100.0%

Patrons were asked how their spending had changed since the terrorist attacks of September 11, 2001, and through the recent recession. Table III-13 indicates that most patrons had not changed their spending, while almost one-fourth of the patrons indicated an increase in spending, and less than 10% reported decreased spending. A cross tabulation of the responses to the question regarding changes in the value of the arts and spending was highly significant, and found more people than expected indicating an increase in the value of the arts and increased spending on the arts (fewer than expected who said that the value of arts had increased while making no change in spending).

**Table III-13 How Spending has Changed Since 9/11 and through the Recent Recession**

Increased	22.9%
Decreased	9.3%
No Change	67.8%
Total	100.0%

We asked those who indicated that their spending had changed to indicate why it had changed. Tables III-14 and III-15 provide a sampling of the statements made by patrons regarding changes in spending. The statements included in these tables are suggestive of the range of responses obtained to this question. Several of those increasing spending indicate it is related to a rise in their income, or that they have more time now to engage in arts and cultural organizations activities. For those reporting a decrease it is very clear that in most cases it is due to a drop in income, not because their tastes or preferences had shifted.



**Table III-14 Why Spending has Increased**

<i>It's more important than ever, in a time of change and turmoil, that the arts be strong.</i>
<i>Discretionary spending has increased.</i>
<i>The children have grown up and moved out. More time, easier to attend. We really enjoy plays.</i>
<i>I now spend about \$100 per month for piano lessons for me -and I'm 73 years old.</i>
<i>Arts are why we live-reminder of why we are on earth-because we can create.</i>
<i>Not related to 9/11. I'm seeing more things closer to home.</i>
<i>I don't think there is anything to do with 9/11 with my spending on arts activities. I just happen to attend more concerts/operas.</i>
<i>I am retired and can now attend more performances.</i>
<i>Greater interest in the arts. Learning more about the different areas</i>
<i>I make my living teaching and making art. I increased my activities to increase my income.</i>

**Table III-15 Why Spending has Decreased**

<i>Lack of funds</i>
<i>Less money to spend during a layoff.</i>
<i>Husband out of work.</i>
<i>I am older and on a fixed income now so I have had to scale back on my ticket purchases.</i>
<i>Less money to spend.</i>
<i>Tighter budget- go to more free events.</i>
<i>We have less because we both returned to school.</i>
<i>Decreased because my husband was laid off from work.</i>
<i>Change in earnings</i>
<i>Not because of 9/11. Insecurity of husband's job and my own choice to go back to school and thus earn less.</i>

Patrons were also asked if in addition to their tickets and/or memberships they also made cash contributions to one or more than one arts or heritage organization. As indicated in Table III-16, over half indicated that they did make such contributions.

 **Table III-16 Frequency of Making Cash Contributions to Arts Organizations**

They make cash contributions	58.5%
They do not make cash contributions	41.5%
Total	100.0%

We also asked patrons if they used arts/heritage events as a specified, regular location to meet family or friends. As reported in Table III-17, these events play an important role in this regard for over two-thirds of Eastside patrons.

**Table III-17 Tendency To Regularly Meet Friends and Families at Arts Events**

Yes, meet regularly at arts events	68.6%
No, don't meet regularly at arts events	31.4%
Total	100.0%

Eastside arts and heritage organization patrons were also asked if their children participated in arts education activities outside of school. Table III-18 indicates that about two-thirds of the respondents with children had them participating in arts education outside of school. In cases where their children were engaged in arts education outside of school, patrons were asked to describe this activity. Table III-19 includes some examples of the types of responses given to this question, and it is evident that there are a wide variety of arts activities undertaken by families with children. It should be noted that activities reported in response to this question could take place outside of the Eastside, as one-third of the patrons interviewed at Eastside arts and heritage organizations came from a geographic location other than the Eastside. The 1999 study asked a similar question regarding the frequency of children’s arts education outside of school, and the pattern of response was very similar to that recorded in Table III-18.

**Table III-18 Children’s participation outside school**

Yes	33.0%
No	18.7%
Not applicable, no children	48.3%
Total	100.0%

**Table III-19 Text on children participation**

<i>Theater class, piano lessons, pottery.</i>
<i>Art making classes for my daughter at KAC and BAM and when younger thru Bellevue boys and girls club.</i>
<i>Concerts, museums corresponding to their interests.</i>
<i>After school art programs.</i>
<i>Co-op—one musician and artist a month studied. Families take turns teaching.</i>
<i>Church choir, local art activities.</i>
<i>Irish step dance performance and Celtic music.</i>
<i>Bellevue Community College- filming and editing program</i>
<i>Violin, drama, chorus</i>
<i>Ballet\tap\music</i>
<i>Art class, drama class, music lessons</i>

The last question in this section of the survey documented the frequency and amount of volunteer activity undertaken by Eastside arts and heritage organization patrons. Table III-20 indicates that about 38% of those responding to this question engaged in volunteer activity. The 1999 study included a similar question, and reported a somewhat lower percentage (29%) of patrons engaging in volunteer activity.

**Table III-20 Frequency of Volunteer Activity**

Engage in Volunteer Activity	37.7%
Do not Engage in Volunteer Activity	62.3%
Total	100.0%

The amount of time spent on volunteer activity is reported in Table III-21. This table indicates that the median (mid-point in the distribution of responses on volunteer hours) was 40 hours. About 20% spent more than 100 hours annually volunteering (the largest reported number of hours was 1250),

pushing the mean up to 92 hours. The 1999 study recorded very similar median and mean hours of volunteer activity.

**Table III-21 Hours spent volunteering**

Up to 20 Hours	40.6%
21-50	19.8%
51-100	19.8%
Over 100	19.8%
Total	100.0%
Mean = 92 hours	
Median = 40 hours	

### Patron Participation in Arts and Heritage Organizations

Patrons interviewed at Eastside cultural organizations were asked to identify disciplines in which they held season tickets or memberships in Seattle, in King County outside Seattle, and in Pierce County. They were also asked to identify disciplines in which they had purchased single tickets or admissions in these geographic regions. In cases where they had made such purchases, they were asked to indicate the number of years in which they had been making these purchases. Tables III-22 and III-23 report the results of these questions. Table III-22 indicates that the typical patron interviewed at Eastside cultural organization venues held about 1.25 season tickets or memberships, with the largest share of these being held in Seattle. About 45% of these patrons had an Eastside season ticket or membership, and about 4% held a season ticket or membership in Pierce County. Single ticket purchases were much more common than season ticket/memberships, with the typical patron buying about three types of single tickets or admissions annually. Single ticket purchases were also most frequent in Seattle, but the typical patron bought one type of single ticket to Eastside organizations in the past year. About 18% of the patrons had bought a single ticket/admission in Pierce County in the past year.

**Table III-22 Proportions with season tickets and single admissions**

<b>Percent of Sample with Season Tickets or Memberships</b>	
<b>In Seattle:</b>	
Music/opera	18.6%
Theater	28.5%
Dance	11.7%
Heritage	1.8%
Visual	17.2%
<b>In King County Outside Seattle</b>	
Music/opera	6.9%
Theater	21.9%
Dance	2.9%
Heritage	1.8%
Visual	10.6%
<b>In Pierce County</b>	
Music	0.7%
Theater	1.1%

Dance	0.7%
Heritage	0.0%
Visual	1.5%
Total	125.9%
<b>Percent of Sample Purchasing Single Tickets / Admissions</b>	
<b>In Seattle</b>	
Music / Opera	55.5%
Theater	47.4%
Dance	36.9%
Heritage	16.1%
Visual	36.5%
<b>In King County outside Seattle</b>	
Music / Opera	25.2%
Theater	23.4%
Dance	9.5%
Heritage	10.9%
Visual	19.3%
<b>In Pierce County</b>	
Music / Opera	4.7%
Theater	4.0%
Dance	0.4%
Heritage	2.9%
Visual	6.2%
Total	298.9%

N=274

The 1999 study posed a similar question, but the results are not exactly comparable. That study did not ask about Pierce County participation, and found lower levels of overall participation than recorded in the current study.

Table III-25 presents estimates of the average number of years that patrons indicated that they have held season tickets/memberships or have been buying single tickets/admissions. The geography of their purchasing pattern is the same as reported in Table III-24. Sample sizes vary greatly among these subgroups, with some small sample sizes possibly skewing results presented here. \*\*\*\*possibly pick up on differences here between Eastside residents and others in the survey, as in the 1999 study\*\*\* However, on average, it appears as though the typical patron has been purchasing season tickets or memberships for about five years in the markets that dominate this sample, and for a somewhat longer period of time in the single ticket/admission markets that dominate the sample.

**Table III-25 Average Duration of Purchase of Season Tickets/Memberships and Single Tickets/Admissions In Years**

	Dance
<b>Season Tickets / Memberships</b>	
<b>In Seattle:</b>	
Music/opera	5
Theater	7

Dance	5
Heritage	3
Visual	9
<b>In King County Outside Seattle</b>	
Music/opera	4
Theater	5
Dance	4
Heritage	2
Visual	8
<b>In Pierce County</b>	
Music	13
Theater	15
Dance	5
Heritage	None
Visual	8
<b>Single Tickets / Admissions</b>	
<b>In Seattle</b>	
Music / Opera	9
Theater	9
Dance	7
Heritage	6
Visual	8
<b>In King County Outside Seattle</b>	
Music / Opera	9
Theater	7
Dance	7
Heritage	7
Visual	8
<b>In Pierce County</b>	
Music / Opera	4
Theater	6
Dance	1
Heritage	1
Visual	4

*“We are a home schooling family. Cultural organizations comprise a good portion of our learning and exposure to the arts and cultural expressions.”*

*“I enjoy family bonding and learning about our past history.”*

*“I think it’s very important to stay in touch with the arts so that it’s possible to broaden one’s immediate thought process and to have a sense of yourself.”*

Source: Patron Survey

## K-12 School Children Participation

Several questions were included in the organization survey to provide more information on K-12 students coming to arts and heritage organizations on the Eastside. Information was sought on the income status of these children, their ethnicity, and where they came from geographically.

Arts and heritage organizations were asked to indicate the family income status of these students, by indicating if they were on a free lunch program, a reduced-cost lunch program, or not on a free lunch. Table III-26 provides information on the income status of children attending Eastside cultural organization venues. Almost 30% of the respondents did not know the income status of these students. Twice as many students were granted discounted admission as given free admission. However, the shares of those granted various types of lunch programs did not vary significantly among these groups. Of those for whom their lunch status was known, most were not eligible for either a free lunch or a reduced cost lunch program.

**Table III-26 Number of children attending & income status**

	Free Admission	Discounted Admission	Total
Free Lunch	2.4%	1.1%	1.5%
Reduced-cost Lunch	2.2%	2.3%	2.3%
Not on lunch program	69.4%	66.7%	67.6%
Don't know	26.0%	30.0%	28.6%
Total	100.0%	100.0%	100.0%
# of Students	21,563	42,604	64,167

Students coming to Eastside arts and heritage organizations are predominately Caucasian. While the ethnicity of about 35% of the students who came to organizations could not be identified, the majority of those whose ethnicity was identified were Caucasian.

**Table III-27 Ethnicity of Students**

	Free Admission	Reduced Admission	Total
Caucasian	59.3%	56.6%	57.5%
African-American	1.5%	0.8%	1.1%
Asian/Pacific Islander	4.5%	3.0%	3.5%
Hispanic/	1.9%	1.7%	1.7%
Native American	0.7%	0.7%	0.7%
Other	0.2%	0.0%	0.1%
Don't Know	31.8%	37.2%	35.4%
Total	100.0%	100.0%	100.0%

Eastside arts and heritage organizations were asked to identify where the students came from for their free or discounted visits. About one-third of the student's geographic origin could not be identified. This question asked organizations to indicate whether the students were from the city in which the cultural organization was located, or from the other regions listed in Table III-28. The large percentage from "elsewhere in King" is most likely students from Eastside jurisdictions near to the city in which

students had free or discounted admissions, such as students from Issaquah or unincorporated King County coming to a Bellevue arts or heritage organization.

**Table III-28 Geographic Origin of Students**

	Free Admission	Discounted Admission	Total
Your City	23.0%	14.1%	17.1%
Your county outside your city	45.2%	44.0%	44.4%
Washington outside your county	3.1%	3.7%	3.5%
Outside state of Washington	0.0%	0.0%	0.0%
Don't know	28.7%	38.3%	35.1%
Total	100.0%	100.0%	100.0%

## IV. Comparison to Other Studies

*“As we become a more culturally diverse area, it is important to be involved in the community to appreciate how much we are alike and can share and learn from the diversity.”*

Source: Patron Survey

There are a number of studies that have been undertaken in recent years that provide data similar to that reported in this study. Some of these are studies of a particular community, while others are national studies that draw on information from arts and cultural organizations in a sample of communities. This section of this report reviews selected aspects from a sample of these studies. Two recent studies provide a relative wealth of information on many dimensions reported in Chapters II and III: the 2002 PARC household and organization surveys, and the 2003 Americans for the Arts study entitled Arts & Economic Prosperity (Kopczynski & Hager, 2003; Americans for the Arts, 2003). These studies, and a selection of other studies will be reviewed briefly in this section of this study to provide some comparisons on many but not all topics reported upon in this study. Comparisons between results obtained in the current study and earlier studies funded by ArtsFund have already been presented in Chapters II and III. They will not be repeated in this chapter. There are undoubtedly many excellent studies not reviewed in this chapter. In Chapter V some comments are offered with regard to selected studies of a different nature that are in some ways related to the purposes of this study.

The PARC study, undertaken by the Performing Arts Research Coalition (a collaborative project of the Association of Performing Arts Presenters, American Symphony Orchestra League, Dance/USA, OPERA America, and the Theatre Communications Group), was supported by The Pew Charitable Trusts. This project involved household surveys in a number of regions, including Alaska, Cincinnati, Denver, Pittsburgh, and Seattle, as well as surveys of nonprofit performing arts organizations in these regions. It should be noted that the PARC survey did not cover visual, heritage, or ASO organizations, and the surveys of the public did not address these organizations. Arts & Economic Prosperity relied on household surveys undertaken in 91 communities in the United States, ranging in size from small populations to large metropolitan areas. This project was funded by the American Express Company and the National Endowment for the Arts.

### Income

The current study estimates that earned income is 57% of total income, while contributed income accounts for 43% of total income. These percentages are similar to those documented in the PARC study, which found box office & related income plus investment and other earned income accounted for 50% of the income of the sample of 378 organizations included in that study (Kushnar & Pollack, 2003, p.5). The PARC study found individual contributions accounted for 45% of private contributed income, foundations accounted for 18%, business contributions were 16%, and other contributions amounted to 21% of total contributed income. The current study found broadly similar shares, with 38% in individual contributions, 7% foundation contributions, 22% business contributions, and 33% other contributions. The PARC study found that government contributions were 4% of total income, compared to 9% in the current study. The current study finds a higher share of government income coming from local governments than the PARC study (94% versus 44%), and lower shares from state governments (5% versus 42%) and the federal government (1% vs. 16%) than documented in the PARC study (Kushner & Pollak, 2003, p.5). A study in Tucson found a higher share of earned income (75%) than in the current study and in the PARC study. A recent study in Oregon found earned income to be 49% of total income



(WESTAF, 2001, pp. 18-19). A study undertaken by the RAND Corporation relied on data from the 1997 Economic Census, IRS Form 990's, and the National Endowment for the Arts to summarize income to non-profit arts and cultural organizations. This study found earned income in the 1997 Census to be 59% of total income (RAND, p. 84), and noted the changing composition of contributed income. The RAND study found decreasing federal support, and fluctuating non-federal government support. It also found that private contributions had grown as a share of contributed income, a trend consistent with the findings reported in Chapter II of this study (RAND, pp. 84-85). A Princeton University study recently reported on shifting patterns of foundation funding, and noted that this source had declined somewhat from a peak in the year 2001 (Princeton, 2004) . This study presented results that differed somewhat from the RAND study with regard to government arts support; it found rising support from state and local governments as measured in current dollars.

Eastside arts and heritage organizations have an income structure that is quite similar to that reported in these various studies, with regard to the split between earned and contributed income.

## Expenditures

The current study estimated that 51% of the expenditures of Eastside cultural organizations were employee expenses, and 49% of expenditures were operating expenses (including payments to contract individuals and firms). The Americans for the Arts study found that personnel expenses were 41% of total operating expenses (Americans for the Arts, pp. A53-A54, group V data). This study found payments to artists to be 13% of total expenses, compared to 9% to contract individuals and organizations in the current study. The Americans for the Arts study found overhead, administrative, and facility expenses were 46% of total expenses, similar to the 40% estimated in the current study. A recent study in Tucson reported employee expenses to be 56% of total expenditures, contract and artist payments to be 13%, and operating expenses to be 30% of total expenditures (Pavlakovich-Kochi and Charney, 2001, pp. 14-15). The PARC study reported expenditures in a different manner, finding artistic and production costs to be 59%, and marketing, development, education, and administrative costs to be 31%, and "other" costs to be 10% (Kushner & Pollak, 2003, p. 4).

## Employment

This study found 7% of employees to be full-time, 26% to be part-time, 64% to be contract employees, and 3% to be work-study or interns. The Tucson study found 25% of employees to be full time, 72% to be part-time, and 3% to be contractual (Pavlakovich-Kochi and Charney, 2001, pp. 10).

## Economic Impacts

The Americans for the Arts and Tucson studies provide estimates of economic impacts associated with cultural organization and patron expenditures. Given differences in methods of constructing the models used to calculate economic impacts between these studies and the current study, and differences in the size and economic structure of the different communities covered by these studies, it is unlikely that multiplier effects would be identical. The current study estimates that 46.9 jobs are created in the local economy per million dollars of combined organization and patron spending<sup>3</sup>. The Americans for the Arts study finds 32 jobs per million of organization and patron spending, while the Tucson study finds 46 jobs per million of organization and patron spending (calculated from Americans for the Arts, 2003, p. A16; and Pavlakovich-Kochi and Charney, 2001, pp. 19). The current study finds \$0.86 million in labor income created in the local economy per million of combined organization and patron spending, while the Americans for the Arts study estimates \$0.71 million, and the Tucson study \$0.65 million (*ibid*). The current study estimates tax revenue impacts of \$0.073 million per million dollars of combined organization and patron spending, compared to \$0.097 million and \$0.075 million in the Americans for the Arts and Tucson studies, respectively (*ibid*). Thus, the current study has economic impacts results that are reasonably similar to those reported in other studies.

## Capacity Utilization

Chapter III reports that Eastside dance, theater, and music organizations reported 69% utilization of capacity. The PARC study reported a slightly higher overall utilization of capacity, 81% overall. This study found that smaller organizations had lower sales percentages, and organizations with budgets of \$1 million or more typically selling at least 75% of their seats (Kushner & Pollak, 2003, p. 9).

## Patron Geographic Origins

Chapter III reported that 88% of patrons came from King County. This figure is somewhat higher than the Tucson study, which found 76% of patrons were local (Pavlakovich-Kochi & Charney, p.16). The Americans for the Arts study found that 76% of attendees were local in metropolitan regions with 500,000-999,999 persons population (Americans for the Arts, 2003, p. A68). Thus, the Eastside has a slightly higher proportion of local patrons than documented in these other studies.

## Patron Spending Per Capita

Chapter II documented patron spending per capita to be just over \$24, of which tickets and admissions were estimated to be about \$10. Non-ticket/admission expenditures were estimated to be about \$14. This compares with the Americans for the Arts survey for regions with 500,000-999,999 persons population estimate of a non-ticket/admission expenditure of \$24, and overall non-ticket/admission expenditures across all size classes of regions of \$23 (Americans for the Arts, 2003, Table A-20). The Tucson study found a somewhat higher figure, of \$54 for non-ticket outlays, likely a reflection of the tourist and seasonal visitors to that community (Pavlakovich-Kochi & Charney, p.16).

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<sup>3</sup> This figure was estimated by using full-time equivalent direct employment, plus indirect and induced employment calculated through use of the input-output model.

## Volunteers

Two perspectives on volunteers were documented in this study. The first was the estimate of volunteer activity reported by arts and cultural organizations, and the second was the level of volunteer activity documented in the survey of patrons. The organization survey found an average level of volunteer hours of 13, while the patron survey documented a median level of volunteer hours to be 40. The Americans for the Arts study found that the average hours per volunteer were 30.1 (Americans for the Arts, 2003, p. A58). The Tucson study found that the average hours per volunteer to be about 68 (Pavlakovich-Kochi and Charney, 2001, p. 20). The current study found that 38% of those interviewed in arts and cultural organization venues indicated that they volunteered for arts and cultural organizations. The PARC study also documented volunteer activity, but the survey was of the general population (not just patrons interviewed in arts and cultural organization venues), and it simply documented the overall incidence of volunteering in the community. This study found between 71% and 77% of respondents indicating that they volunteer (Kopczynski and Hager, 2003a, p. 47). A Princeton presentation reported a smaller percentage of the general adult population volunteering, 44% (Center for Arts and Cultural Policy Studies, slide 63).

## Contributions

The current study found that 59% of the patrons interviewed said that they regularly made cash contributions to arts and cultural organizations. The PARC study found a lower estimate for the Seattle area (27%) in their sample of the general population (Kopczynski and Hager, 2003b, p. 43. Considering only those who were attender's or frequent attender's, this percentage may be calculated to be 36%, still below the level measured in the current study.

## Attendance Frequency

This study documented the frequency of patrons holding season tickets/memberships, and their purchases of single tickets/admissions. We found that the typical patron held 1.3 season tickets/memberships, and 3.0 types of single tickets or admissions. The questionnaire did not ask how many times they bought each type of single ticket or admission, while organizations provided estimates of the number of visits associated with season tickets or memberships. However, given the multiple visits associated with season ticket holders/memberships (estimated to be 6.0 per season ticket/membership), this would imply at least 7.6 visits (1.3 x 6), plus the 3.0 single tickets/admissions, for a minimum of 10.6 trips on average per annum. Undoubtedly the actual number of trips is higher, as it is likely that patrons bought multiple single tickets or admissions. The Seattle PARC study found that out of the general population, those who attended at least one live performing arts event in the last year attended an average of 9.4 such events (Kopczynski and Hager, 2003b, p.18). (Note that the PARC study did not include visual arts, heritage, or ASO's in their survey). The RAND study reported the average frequency per year of attendance at live arts-related performances to be 5.4, and visits to art museums to average 3.3 per attendee (RAND, 2001, p. 21). Thus, these various studies suggest that the typical patron to arts and cultural organizations attends at least 10.6 times annually, with the likely actual average level of attendance well above this figure. The 2002 Survey of Public Participation in the Arts published by the National Endowment for the Arts found that the typical person attending a classical music

performance in 2002 went to 3.1 such performances (NEA 2004, p. 13). Data from the same survey find the average opera attendee going to 2.0 performances, the typical play attendee going 2.3 times, the typical ballet attendee going 1.7 times, and the typical art museum or gallery attendee going 3.5 times. These participation figures are not additive, as they are not based on a typical individual's participation in all of the categories of performing and visual arts included in this survey.

## Social Purposes of Attendance

The current study found that 69% of the patrons interviewed said that they used attendance at arts and cultural organization events to meet regularly with family and friends. The PARC study included a similar question, and it found that 56% of the Seattle sample strongly agreed that performing arts provided opportunities to socialize with other people. This percentage was higher for attendees (58%) or frequent attendees (61%) than nonattendees (49%) (Kopczynski and Hager, 2003a, p. 41). The Princeton presentation reported a Kansas City study that indicated over 60% said that it “mattered a lot to them” to participate in arts and cultural events so as to be able to gather with family and friends (Princeton presentation, slide 42).

## Summary

This section of this report has presented comparisons of selected findings from this study with results from other recent studies of arts and cultural organizations. In general, the results reported here are consistent with findings documented in other communities. The exact approach to particular topics varies among these studies, contributing to the differences in results reported. However, differences are also likely associated with different attributes of the communities involved, such as their level of income, size, and mix of cultural activities.

## V. Concluding Remarks

*“Without art, the community freezes. We shouldn’t have to state the importance, for it is a need.”*

Source: Patron Survey

In this second report on the economic impact of arts and cultural organizations in Eastside King County we have improved our measurement efforts. This study has documented a vibrant arts community in Eastside King County, which has expanded dramatically since the last study benchmarked against the year 1999. The Executive Summary provides an overview of results of this study, but we feel that it is important to address several issues that are related to how the results of this project could be improved. We also wish to touch upon some other approaches to viewing arts and heritage organizations as industries contributing to the regional economy.

### Possible Areas For Improvement

#### *(1) Organization Survey*

The use of spreadsheets to gather the organization data has minimized arithmetic errors, and has facilitated aggregation and analysis of the data provided by organizations. The two areas where the organization survey could be improved have to do with Net Assets or “Funds,” and the data gathered on free and discounted student attendance. It appears as though organizations have defined their assets in different ways, some include estimates of the value of buildings/structures as assets, while others do not. Clearer definitions of what is to be considered in this part of the survey would be helpful. Many respondents were not able to provide much information about their student attendees. This area of questioning was new in this study, and it is possible that respondents did not have in place mechanisms for monitoring the characteristics of free or discounted student attendees. If this type of question were to be included in future studies, it would be helpful if the organizations with such attendance could be assisted to put in place accounting frameworks to better measure student attendees.

Coverage of organizations in heritage and ASO’s was not as complete as in the other disciplines. Efforts could be undertaken to obtain greater cooperation from organizations in these disciplines.

#### *(2) Patron Survey*

The patron survey included a number of questions not used previously (questions 6 through 16). The questions designed to gather attitudinal information (questions 6 through 15) generally worked well. The questions that could be sharpened include 8 and 16, questions about the frequency of attendance at arts and cultural organization events. Question 8 is very general, and does not lend itself to quantifying actual frequency of participation. Question 16 provided considerable information on the incidence of the purchase of season tickets/memberships and single tickets, but it did not allow quantification of how frequently individual patrons participated across the various disciplines. The question provided useful information on the geography of participation, but the data on the duration of purchases may be less useful than phrasing this question to get at the annual frequency of attendance to different disciplines.

A relatively small number of questionnaires were obtained from ASO venues. Thought should be given to how to improve coverage of patrons attending ASO events.

## Some Other Approaches

The current study has at its heart two surveys that feed into the estimation of economic impacts through the use of the input-output model. These two surveys also gather a wealth of other information that has value to ArtsFund and the arts and heritage organizational community. However, other approaches have emerged that provide alternative perspectives on arts and cultural organizations in communities such as this one.

Various studies have relied on occupational statistics to characterize work that includes people in arts and heritage organizations. Richard Florida and Ann Markusen are scholars that have advocated this approach to the identification of the “creative class” or artists.

Florida defines the creative class as having two components, the super creative class and creative professionals (Florida, 2002, p. 328). The super creative class includes computer and mathematical occupations; architecture and engineering occupations; life, physical, and social science occupations; education, training and library occupations; and arts, design, entertainment, sports, and media occupations (*ibid*). Florida observes the rapid growth of the creative and super creative class, and generally makes the argument that communities which foster development of this class have been rewarded by relatively rapid economic growth (Florida, pp. 72-77). He observes that the income level of people working in the creative class is well above that in other segments of the economy (defined as working class, service class, and agriculture) (Florida p. 77). Much of Florida’s work is focused on defining correlates associated with the development of the creative class. He argues that places that are successful in developing a strong economy built around the creative class need several attributes: (1) a strong “people climate,” (2) strong research universities, (3) social structures that bridge class divides, (4) institutions that foster social cohesion, and (5) visions of where communities intend to go in the development process (Florida, Part Four, Community).

Markusen and colleagues have also used occupational statistics to characterize the distribution of artistic activity in metropolitan areas in the United States (Markusen, Schrock, and Cameron, 2004). Their focus is on a subset of Florida’s creative class, including performing and visual artists, authors, musicians, designers, and architects. Using the public use microsample (PUMS) from the 2000 Census, they have documented the concentration of people in these occupations in the largest 29 metropolitan areas in the U.S. It should be noted that this approach both identifies people working for an organization such as one of the cultural organizations included in this study, as well as self-employed individuals. Markusen, et.al., find that in 2002 some 38% of people employed in arts-related occupations were self-employed, compared to only 8% economy-wide (Markusen et.al., p. 16). Markusen uses index numbers to identify the concentration of artistic workers within metropolitan areas, and Seattle fares quite well, with 33% above the national average working in artistic occupations (Markusen et.al. p. 4).

A similar approach was used by Beyers, et.al., in a recent study of the Seattle music industry (Beyers, Bonds, Wenzl, and Sommers, 2004). This study used the PUMS data to identify people working in music-related activities in the Seattle area, as well as industry-based employment statistics to help define the music “cluster” in Seattle. This project was undertaken as a part of a series of cluster studies of industries in which Seattle was thought to have some comparative advantage. The notion of industry clusters is currently quite fashionable in the regional development literature, strongly influenced by the research of Michael Porter (Porter 2003). The general argument of this line of research is that a concentration of businesses that may be economically interdependent in a given community could

generate competitive advantage for the region, and that public policy and private organizations need to be organized to facilitate the development of such clusters. Through interviews with cluster members suggestions for the types of development policy were articulated in the music study; similar approaches were taken with other clusters in the maritime, film, and health services industries.

A similar approach was taken in Santa Fe to promote the vitality of traditional arts as an element of commerce in that community (Walker, Jackson, and Rosenstein, 2003). Regional Technology Strategies recently identified what it called The Creative Enterprise Cluster in Montana, which includes artists, crafters, entertainers, writers, and performers. It also is flanked by creative services that help facilitate development of the cluster (Regional Technology Strategies, 2003). Americans for the Arts has recently launched a new program entitled *Creative Industries*, that is tracking in the 20 largest metropolitan statistical areas both nonprofit and for-profit arts industry establishments; this project includes a geographical information system (GIS) to display the geographic location of establishments included in this system, which is based on Dun & Bradstreet data files (Americans for the Arts, 2004). Seattle-Tacoma was found to have the strongest concentration of art-related businesses in these 20 metropolitan areas.

Other communities have been characterizing their creative industry complexes, and their role in the economic vitality of their community. The Silicon Valley Creative Community Index developed a set of indicators, based on a survey of residents of Silicon Valley, as well as local arts and cultural organizations (Rawson, 2002). This project identified values of residents regarding creativity and social connectedness, and found that (1) creativity was highly valued in the Silicon Valley economy, (2) creative industries are becoming increasingly important as a part of the region's 'innovation habitat,' (3) cultural participation plays a major role in connecting divergent groups and in connecting individuals to their community, and (4) new creative approaches were needed to address the civic and social challenges facing the region (Rawson, 2002), p. 3). In New York the City government has examined the role of arts and cultural activity in the various boroughs. It found that not only was art and culture a major jobs engine, but that it is growing rapidly outside Manhattan, that there are a complex set of policy needs to facilitate development (space problems, gentrification and displacement, the need for connections between institutions, and a greater need for local organizations to see the development opportunities tied to cultural activities) (Center for an Urban Future, 2002).

This section has sampled some other approaches to arts and cultural organizations in relation to local economic development. Florida's work has considerable emphasis on the types of policies that foster the development of the creative class. Various cluster studies have also articulated the need for and the nature of such policies in localities, largely articulated through survey work with local residents and businesses. Other research, such as the work of Markusen, et.al., and The Americans for the Arts, is more descriptive. There are undoubtedly many other studies that could have been reviewed in this section, including a more comprehensive description of the PARC study, Americans for the Arts Arts & Economic Prosperity study, and the RAND study. However, this overview gives a flavor of types of studies that have been undertaken that differ in their emphasis from the current study.

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## Appendices

### Appendix 1: King County organizations either participating or included in this study

#### *Dance – Organizations Included*

Ballet Bellevue  
International Youth Ballet

#### *Theater – Organizations Surveyed*

Kirkland Performance Center  
Renton Parks and Recreation  
Second Story Repertory  
Village Theatre

#### *Theatre – Organizations Included*

Exchange Theatre  
Renton Civic Theatre  
Studio East  
Wooden O Theatre Productions  
Woodinville Repertory Theatre

#### *Music – Organizations Surveyed*

Bellevue Philharmonic Orchestra  
Cascadia Chorale  
City of Mercer Island Arts Council  
Music Works Northwest

#### *Music – Organizations Included*

Belle Arts Concerts  
Bellevue Youth Symphony Orchestra  
Columbia Choirs Association  
Issaquah Chorale  
Max Aronoff Viola Institute  
Northwoods Quintet  
Pacific Sound Chorus

#### *Visual – Organization Surveyed*

Bellevue Art Museum

#### *Heritage – Organization Surveyed*

Renton Historical Society

#### *Heritage – Organizations Included*

Eastside Heritage Center  
Issaquah Historical Society  
Kirkland Arts Center  
Northwest Railway Museum

#### *Arts Service Organizations Surveyed*

Bellevue Downtown Association  
City of Issaquah Arts Commission  
Duvall Arts Commission  
Redmond Arts Commission

#### *Arts Service Organization Included*

Bellevue Arts Commission

## 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 \$2003 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 \$2003 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 1997 Washington State input-output model developed by Conway and staff of State of Washington Agencies (Office of Financial Management, 2004). 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, that links its demands for factor inputs to the supplies forthcoming from related industries in the economy.

Washington State has estimated six input-output models. Beginning with the model developed for the year 1963, and continuing through the 1997 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 1963-1997 time period, there has been relatively modest changes in the multiplier structure contained in this model (Beyers in Dietzenbaker & Lahr). A complete description of the 1997 Washington input-output model may be found at <http://www.ofm.wa.gov/economy/io/default.htm>

The 1997 update of the Washington input-output model did not involve survey research on the state's interindustry structure. It was an update using a bi-proportional matrix adjustment approach with sales and purchases estimates for the various sectors benchmarked against economic census data for the year 1997. There was some modest redefinition of sectors in this update. An analysis of changes in multipliers undertaken by this author shows that there were only modest changes in their values from the 1987 model, the latest previous model.

## Updating and Augmenting the Input-Output Model

The 1997 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 also has been used to make estimates of sales 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 income and output and the volume of sales tax revenue and B&O tax revenues to the state, as well as to local governments. Calculations of this nature were undertaken in this study.

## County Level Impacts

The state model was modified to make impact estimates at the county level. Location quotients were developed for the various sectors at the county level, 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 county level 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 cultural 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 expenditure and cultural 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 cultural 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 communications 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 is considered as direct requirements in the input-output model.

The input-output model’s multiplier structure translates the direct demands of patrons and cultural 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 cultural 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. Unfortunately, data were not

available to estimate the new money impacts from income generated outside the Washington economy. Instead, it was only possible to estimate new money impacts at the local scale. If we were able to estimate new money impacts at the state scale they would actually be smaller than at the county scale, because a significant portion of the new money impacts stem from Washington residents spending their income within the county, 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 and heritage 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: Cultural 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 well over 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 over 90% of the completed forms contained useable information. 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. Crosschecks 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 and regions.

# Appendix 3: Survey Form for Arts Organizations

**ORGANIZATION INFORMATION**

County:

Name of Organization:

Individ. completing this form:

Address:

City:  State:  Zip+4:

Telephone:  E-Mail:

Fax:  Website:

Date org. established (mm/dd/yy):  **Note: base all information on FY you give here:**

Date form completed (mm/dd/yy):  Most recently completed fiscal year - ending:

**Primary Activity:**

(Enter a number from 1 to 6 in cell to the left - see below)

In the cell above, please enter a number from the following list that best represents your organization's **primary** activity. For purposes of this survey, we need to fit your organization into one of these categories.

- 1. Performing Arts - Dance
- 2. Performing Arts - Theatre
- 3. Performing Arts - Music
- 4. Visual Arts
- 5. Heritage
- 6. Arts Service Organization

**GENERAL INFORMATION**

For FY ending:  
MM/DD/YY

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

**Footnotes for Page 1**

- 1 Performance groups should enter number of individual self-produced productions; visual arts/heritage/etc. groups should enter number of individual exhibits.
- 2 Season/subscription ticket visits equals the number of subscriptions sold times the number of productions or exhibits available to each subscriber for that subscription.

Name of Organization:

**OPERATING INCOME (1)**

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

**Earned Income:**

Enter the actual or estimated amount of earned income from the sources listed, and the percentage sold to patrons or clients outside King County.

	For FY ending: MM/DD/YY	% Outside King County
Box Office/Admissions		
Tuition/Workshops		
Retail/Wholesale Sales		
Other earned income (touring, rents, royalties, etc.)		
Interest		
<b>Total Earned Income</b>	0	#DIV/0!

**Contributed Income:**

Enter the actual or estimated amount of contributed income from the sources listed, percentage of these types of income which originated outside King County, and the number of contributors.

	For FY ending: MM/DD/YY	% Outside King County	Number of Contributors
ArtsFund			
Other corporations			
Foundations			
PONCHO			
Federal Government (NEA/NEH/IMS)			
State Government			
County Government			
City Government			
Individuals			
Benefits / Galas / Guilds			
In-Kind contributions (exclude non-prof. vols.) (2)			
Misc. contributions			
<b>Total Contributed Income</b>	0	#DIV/0!	
<b>Total Earned &amp; contributed Income</b>	0	#DIV/0!	

**Asset Releases ("Fund Transfers") (3)**

Net assets released from restriction

**Total Operating Income**

**Footnotes for Page 2**

- 1 Report only operational activity (earned and contributed income related to programming, operations etc.) on this page.
- 2 Exclude value of time contributed by volunteers except professionals donating professional services in their field.
- 3 Report net assets released from restriction (i.e. "fund transfers") such as earnings from endowments or administrative expenses from a building campaign.

Name of Organization:

Fiscal year ends:

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 6**).

**EMPLOYEE EXPENSES (1)**

- In columns A and B, please enter your employee expenses for administrative and production/exhibition personnel and the percentage of these payments which were made to residents outside King County 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.
- 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.
- 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 please.
- 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 Fiscal Year (Actual - Fiscal 2003))

**Administrative Employees**

- 1 - Executive
  - 2 - Clerical
  - 3 - Marketing/promotion/publicity
  - 4 - Fundraising
  - 5 - Other
- Subtotal Administrative Employees**

A	B	C	D	E	F	G	H
Salaries, Wages & Benefits for FY	% of \$'s spent on employees residing outside King County	Employment Taxes (2)	Number of Full Time Employees	Number of Part Time Employees (Headcount)	Total estimated hours worked by all part-time employees for FY	Number of Work Study/ Interns	Number of Volunteers
0	#DIV/0!	0	0	0	0.00	0	0

**Artistic/Professional/Technical Employees**

- 1 - Artistic/performing
  - 2 - Guest artists/lecturers
  - 3 - Director/design
  - 4 - Production/technical
  - 5 - Educational/instructional
  - 6 - Other personnel
- Subtotal Art/Prof/Tech Employees**

0	#DIV/0!	0	0	0	0.00	0	0

- 1 -  Please estimate the number of hours contributed by the volunteer personnel you identified in Col. H above
- 2 -  If this is a performing arts organization, how many of the personnel listed above are under contract with Actor's Equity, AGMA, Musicians Union, IATSE, or AFTRA?

**Footnotes for Page 3**

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

Name of Organization:

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 6), and 2) other operating expenses (which include contract personnel - enter on this page).

**OPERATING EXPENSES (1)**

Contract Personnel (not employees)	\$ for FY ending:	% Outside King County	Number of contract personnel	Total estimated hours worked by all contract personnel for FY
	MM/DD/YY			
1 - Artistic/performing				
2 - Guest artists/lecturers				
3 - Director/design				
4 - Production/technical				
5 - Educational/instructional				
6 - Other personnel				
<b>Subtotal Contract Personnel</b>	0	#DIV/0!	0	0.00

**Services**

Marketing expenses				
Press and public relations				
Photographic/art services				
Banking				
Insurance				
Professional services				
Janitorial/protective				
Transportation				
Lodging				
Food/beverage services				
Set/costume/exhibit rental				
Equipment rental				
Hall rental				
Office and work space rental				
Royalties				
Other services: <input type="text"/>				
(please specify) <input type="text"/>				
<b>Subtotal Services</b>	0	#DIV/0!		

**Utilities & Phone**

Telephone				
Postage				
Other utilities				
<b>Subtotal Utilities &amp; Phone</b>	0	#DIV/0!		

**Other Goods & Services**

Printing of programs etc.				
Exhibit/set materials				
Production materials				
Supplies				
Maintenance				
Other goods & services				
<b>Subtotal Other Goods &amp; Services</b>	0	#DIV/0!		

**Taxes (2)**

Sales tax				
B&O tax				
Property tax				
Other taxes: <input type="text"/>				
(please specify) <input type="text"/>				
<b>Subtotal Taxes</b>	0	#DIV/0!		

<b>Total Operating</b> (except labor - page 3)	0	#DIV/0!		
--	---	---------	--	--



Name of Organization:

CAPITAL BUILDING ACTIVITY (1) Income:	Total Capital/Building Activity Since Fiscal 1999
Corporate	<input type="text"/>
Foundation	<input type="text"/>
Individual	<input type="text"/>
Government:	<input type="text"/>
Other: <input type="text"/>	<input type="text"/>
<b>TOTAL INCOME AND SUPPORT</b>	0

**Expenses Related to Capital/Building Activity:**

Campaign	<input type="text"/>
Design (i.e. architect fees, etc.)	<input type="text"/>
Construction	<input type="text"/>
Other	<input type="text"/>
<b>TOTAL EXPENSES</b>	0

Capital (2) Projects:		Start date	End date
1 - <input type="text"/>		<input type="text" value="MM/DD/YY"/>	<input type="text" value="MM/DD/YY"/>
2 - <input type="text"/>		<input type="text" value="MM/DD/YY"/>	<input type="text" value="MM/DD/YY"/>
3 - <input type="text"/>		<input type="text" value="MM/DD/YY"/>	<input type="text" value="MM/DD/YY"/>
4 - <input type="text"/>		<input type="text" value="MM/DD/YY"/>	<input type="text" value="MM/DD/YY"/>

**NET ASSETS ("FUNDS") (3)**

	Beginning Fund Balance on End of Previous FY	Additions to Fund for FY ending MM/DD/YY	Transfers out of fund for FY ending MM/DD/YY	Ending Fund Balance on MM/DD/YY
<b>Unrestricted Net Assets ("Funds"): (4)</b>				
(1) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(2) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(3) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Temp. Restricted Net Assets: (5)</b>				
(1) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(2) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(3) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Perm. Restricted Net Assets: (6)</b>				
(1) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(2) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(3) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL NET ASSETS ("FUNDS")</b>	0	0	0	0

**Footnotes for Page 5**

- 1 Please include totals of all capital/building campaigns since fiscal year 1999. If you have conducted more than one campaign, provide totals here of all activity and list the separate campaigns below.
- 2 List individual capital/building campaigns since fiscal year 1999.
- 3 Please report the total current values or your endowments, cash reserves and other net assets ("funds"). Also report contributions to each fund for the last completed fiscal year (fiscal 2003).
- 4 Assets under no restriction by the donor.
- 5 Assets under a restriction or restrictions that can be removed by the passage of time or action of the organization.
- 6 Assets under a restriction by the donor that can never be removed.

Name of Organization:

**Student demographics**

Please report below the **number** of free and discounted and 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. For demographics, please refer to information provided by school districts. That is, if you have a class of students from XYZ middle school, refer to demographics reported by XYZ middle school for the class - **assuming that substantially all of the class are served**. Please compile such information for as many classes served as possible. If you don't know what classes attend - **or if only part of a class attends**, just enter attendance percentage in the "don't know" block. Links to student demographics for two schools are given below. Please have your education director help guide you to information for other schools.

Bellevue School District <http://www.bsd405.org/demographics.pdf>

Seattle School District <http://www.seattleschools.org/area/siso/disprof/2002/DP02indsch.pdf>

For FY ending:

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

	Number of free admissions	Number of discounted admissions
<b>Total student attendance K-12 only</b>	<input type="text"/>	<input type="text"/>
	Enter percent of free admissions below	Enter percent of discounted admissions below
<b>1) Students' Family income indicators</b>		
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"/>
<b>Total this section (to equal 100%)</b>	<b>0%</b>	<b>0%</b>
<b>2) Ethnicity</b>		
Caucasian	<input type="text"/>	<input type="text"/>
African American	<input type="text"/>	<input type="text"/>
Asian/Pacific Islander	<input type="text"/>	<input type="text"/>
Hispanic/Latin	<input type="text"/>	<input type="text"/>
Native American	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
<b>Total this section (to equal 100%)</b>	<b>0%</b>	<b>0%</b>
<b>3) Place of students' residence</b>		
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"/>
<b>Total this section (to equal 100%)</b>	<b>0%</b>	<b>0%</b>

## Appendix 4: Survey Form for Patrons



ARTSFUND

Dear Arts 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.

**Douglas Williams**  
Chair

**Peter Donnelly**  
President

Thank you for your time, your cooperation and your support of arts and heritage activity in the Puget Sound region.

### Economic Impact Study of Cultural Activity in the Puget Sound Region

**Major funding:** The Allen Foundation for the Arts  
**Study conducted by:** GMA Research, Bellevue Washington &  
Dr. William B. Beyers, University of Washington  
**Commissioned by:** ArtsFund

**Additional funding and research support from:**  
Bellevue Arts Commission  
Office of Arts & Cultural Affairs, City of Seattle  
City of Tacoma, Culture & Tourism Division  
Pierce County Arts and Cultural Services Division

**Further research support from:**  
4Culture  
Cultural Council of Greater Tacoma  
Eastside Arts Coalition  
Washington State Arts Alliance  
Washington State Arts Commission

**PATRON SURVEY**

This questionnaire will provide very important information about arts and heritage patrons in King County. Please take a few minutes to fill out all three pages of this brief questionnaire!

- 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/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 ( <b>SPECIFY</b> )	\$ _____
_____	\$ _____
_____	\$ _____

- 4) Please describe the importance of cultural organizations to you personally.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 5) Please describe the importance of cultural organizations to the community.

\_\_\_\_\_  
\_\_\_\_\_

*Please go to the next page of this questionnaire*

- 6) How were you first exposed to the arts?  
 Through school                                       through family/friends                                       on my own
- 7) When were you first introduced to the arts?  
 Grade school age       middle school age       high school age       college age       as adult
- 8) How frequently do you attend arts/heritage performances/exhibitions?  
 weekly    once or more per month    about three to four times a year    about once a year
- 9) How has the value of the arts changed for you over the past few years?  
 Increased in importance                                       No change                                       Decreased in importance
- 10) Since 9/11 and through the current economic downturn has your spending on arts/heritage activities:  
 Increased                                       Decreased                                       Has not changed
- 11) If you checked increased or decreased, please indicate why your spending has changed.

---



---

- 12) In addition to purchasing tickets to arts/heritage events, do you also make cash contributions to one or more arts/heritage organizations?  
 Yes                                       No
- 13) Do you use arts/heritage events as specified, regular occasions to meet with families or friends?  
 Yes                                       No
- 14) Outside of school do your children participate in organized arts education activities?  
 Yes                                       No                                       Not applicable – no children

If yes, please describe the nature of their arts education activities.

---



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- 15) Do you engage in volunteer activities for arts and heritage organizations?  
 Yes                                       No

If yes, please estimate the number of hours you volunteer each year. \_\_\_\_\_ hours

*Please go to the next page of this questionnaire.*

16) In the following table please indicate your participation in arts and heritage organizations by inserting the number of years in the proper box.

	I have held a season ticket/membership for (enter number of years including current year):			I have gone as a single ticket holder to (enter number of years including current year):		
	In Seattle	King County outside Seattle	In Pierce County	In Seattle	King County outside Seattle	In Pierce County
Music/Opera						
Theatre						
Dance						
Heritage						
Visual Arts						

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 years of school completed:

Some high school                                       Four-year college/university degree  
 High school graduate                                       Postgraduate degree  
 Some college or vocational/technical school

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) Please indicate your ethnic origin:

Caucasian     Asian/Pacific Islander  
 Native American     Hispanic/Latin  
 African American     Other

*Thank you very much for participating in our survey!*

## Appendix 5: 2003 ArtsFund Economic Impact Study Measures Summarized

### Appendix 5 Summary of Principal Measures from ArtsFund Economic Impact Studies

	Eastside		King			Pierce		King and Pierce Combined	
	1999	2003	1992	1997	2003	1997	2003	1997	2003
<b>Vital Stats</b>									
# Cultural Orgs. Included	33	35	142	160	219	40	50	200	269
Org. Income – Aggregate (\$millions)	14.8	18.5	85.9	143.6	248.2	15.5	27.1	159.1	275.3
Org. Expenditures - Aggregate (\$millions)	13.6	18.0	85.0	141.9	244.2	16.0	25.5	157.9	269.7
Volunteers	643	2,149	14,000	18,848	16,789	1,900	1,980	20,748	18,769
<b>Aggregate Impacts</b>									
Aggregate Sales Impacts (\$millions)	39.93	60.58	182.68	338.22	844.43	35.08	72.07	373.30	916.50
Total Jobs Created (full & part time)	2,451	3,406	8,853	12,839	23,166	3,228	3,492	16,067	26,658
Labor Income Impacts (\$millions)	18.88	29.21	96.90	170.78	386.94	17.61	31.94	188.37	418.88
Tax Impacts - Aggregate (\$millions)	0.18	2.45	12.90	24.00	31.28	2.60	2.61	26.60	33.89
Patron Spending- Aggregate (\$millions)	15.2	16.0	91.0	203.8	246.8	16.2	20.0	220.0	266.8
Direct Jobs Created	2,059	2,035	6,629	9,587	14,228	2,923	2,808	12,510	17,036
<b>New Money Impacts</b>									
New Money Sales Impacts (\$millions)	4.1	7.9	41.3	99.8	212.5	12.2	30.5	102.8	242.9
New Money Total Jobs Created	238	421	1,790	3,172	4,822	950	1299	3,740	6,121
New Money Labor Income Impacts (\$millions)	1.9	3.7	21.5	51.1	92.8	6.0	13.2	52.5	106.0
Patron Spending- New Money (\$millions)	1.3	2.1	22.4	88.7	104.8	8.6	12.1	84.8	116.9
<b>Expenditures</b>									
% Budget Spent on Employee Expenses	50%	51%	48%	44%	47%	47%	44%	44%	46%
% Budget Spent on Operating Expenses	50%	49%	52%	56%	53%	53%	56%	56%	54%
<b>Income</b>									
Earned Income	59%	57%	48%	62%	49%	40%	39%	60%	48%
Contributed-Government	5%	9%	15%	7%	6%	28%	23%	9%	8%
Contributed-Individual	7%	13%	11%	9%	17%	7%	17%	9%	17%
Contributed-Corporate	5%	7%	8%	5%	5%	6%	4%	5%	5%
Contributed-Foundation	4%	2%	4%	3%	4%	8%	6%	3%	4%
Contributed-Other	20%	12%	14%	14%	18%	12%	11%	12%	18%
<b>Attendance</b>									
total Attendance (millions)	742,558	717,077	3,925,750	5,146,395	6,790,357	787,798	792,791	5,934,193	7,583,148
# of Memberships Sold	2,679	4,601	na	99,479	111,988	12,336	13,261	111,815	125,249
# of Full or Partial Subscriptions Sold	18,598	26,235	na	195,674	207,666	10,517	9,608	206,191	217,274
Season Ticket Visits / Membership Visits	100,967	187,200	968,209	1,343,885	1,632,795	86,840	70,144	1,430,725	1,702,939
Single Ticket / Admission Visits	222,309	226,014	1,884,197	2,097,139	2,714,206	229,019	316,866	2,326,158	3,031,072

**Appendix 5  
Summary of Principal Measures from ArtsFund Economic Impact Studies**

	Eastside		King			Pierce		King and Pierce Combined	
	1999	2003	1992	1997	2003	1997	2003	1997	2003
Student Admissions*	40,580	43,207	295,000	394,196	715,418	71,822	160,951	466,018	876,369
<i>Student Ethnicity (where known)</i>									
Caucasian		90%			60%		60%		60
Of Color		10%			40%		40%		40
Discounted Senior Admissions	12,481	25,315	110,000	67,451	166,175	40,612	54,905	108,063	221,080
Patrons Served with Disabilities	3,759	13,316	30,924	67,404	80,089	23,000	23,718	90,404	103,807

\*Note that measures of student admissions in 2003 include free and discounted admissions. In earlier studies, it included only free admissions. This accounts for some of the sharp increase in 2003.

	2003 Impacts on Entire State's Economy			
	King	Pierce	King & Pierce Combined	Eastside
Aggregate Sales Impacts (\$millions)	956.34	90.47	1046.81	68.80
Total Jobs Created (full & part time)	24,421	3,701	28,626	3,500
Labor Income Impacts (\$millions)	426.00	39.16	465.16	32.12
Tax Impacts - Aggregate (\$millions)	35.79	3.32	39.11	1.59



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## Index

corporate.....	8	Endowments and Capital Expenditures	
in-kind contributions.....	8	summary .....	13
private foundation .....	8	Expenditures	
1997 Economic Census.....	43	allocation .....	xii, 10, 43
2002 Survey of Public Participation in the Arts...47		changes since 1999 study .....	10
Admissions		employment expenses.....	10
student/discounted .....	40	operating expenses .....	10
Aggregate Impact.....	xi	overview .....	10
impacts on sales/employment/labor income.23		Expenditures of Patrons	
Aggregate Impacts		summary .....	19
summary.....	22	Income	
Americans for the Arts.....	42, 43, 44, 46, 51, 53	changes since 1999 study .....	5, 7, 8, 9
Arts Service Organizations (ASOs).....	3	contributed.....	5, 7
ASO .....	48	earned.....	xii, xv, 5, 6, 43
Attendance		government .....	xii, 8, 42, 43
frequency .....	47	government .....	5
Bellevue Art Museum.....	7, 13, 14, 54	new money.....	xii
Bellevue Arts Museum .....	6	other income.....	10
Beyers, Bonds, Wenzl, and Sommers.....	50	IRS Form 99.....	43
Center for an Urban Future.....	51	Kopczynski and Hager.....	46, 47
Creative Class		Markusen, Schrock, and Cameron .....	50
defined.....	50	Methodology .....	48
Cultural		Appendix 3.....	2
Organizations		comparisons with this study .....	44
Eastside Arts Coalition.....	xii	constraints .....	47
Cultural Organizations		constraints/limitations.....	1, 2, 3, 48, 49
spending.....	xi	designing this study.....	1, 2, 4
Cultural Organizations		estimates used .....	22
Appendix 1 .....	2	GMA Research .....	4
Bellevue Arts Museum.....	6	improvements.....	48
budgets .....	xi	industry clusters.....	50
Eastside Arts Coalition .....	xi	modeling.....	4
Music Works .....	1, 6	models.....	2
performance and exhibition statistics .....	29	other data sources .....	43
Studio East .....	7	other data sources .....	43
Village Theatre .....	1	patron survey .....	3, 48
Village Theatre .....	6	Washington State input-output model .....	2
Washington Academy of the Performing Arts.7		Michael Porter.....	51
Dun & Bradstreet.....	51	Models	
Economic		input-output.....	50
Impact		U.S. input-output model .....	2
New Money.....	xi	Washington State input-output model.....	2
Economic Impact .....	21	Music Works .....	1, 6, 54
new money .....	25	National Endowment for the Arts....	42, 43, 47, 53
Economic Impact Model.....	4	New Money Impacts	
Employee expenses		definition/summary .....	24
changes since 1999 study.....	11	North American Industry Classification System... 2	
classifications.....	11	Operating Expenses	
composition.....	11	categories.....	11
Employment.....	xi	changes since 1999 study .....	12
changes since 1999 study.....	15	Other Reports .....	1
costs.....	10	Other Studies .....	1, 51
income.....	xi	"Arts & Economic Prosperity" .....	42
summary.....	xiii, 14	1999.....	1

2002 PARC.....	42	spending composition .....	31
2002 Survey of Public Participation in the Arts		student .....	48
.....	47	value of the Arts.....	33
Center for an Urban Future .....	51	when first exposed .....	32
comparisons .....	47	with disabilities .....	29
comparisons with.....	52	youth participation .....	xvi, 35, 40
comparisons with current study .....	42	Pavlakovich-Kochi and Charney .....	43, 44, 46
comparisons with this studyxi, 2, 3, 4, 42, 43, 50		Princeton.....	43, 46, 47, 53
funding organizations.....	42	Princeton University.....	43
Kansas City study .....	47	PUMS.....	50
Princeton University.....	43	RAND.....	43, 46, 52, 53
RAND Corporation .....	43	Regional Technology Strategies.....	51, 53
Tucson .....	43	Richard Florida and Ann Markusen.....	50
WESTAF, 2001.....	43	Santa Fe.....	51
PARC.....	42, 43, 44, 46, 47, 51	Studio East .....	7, 54
Patronage .....	1	The Creative Enterprise Cluster.....	51
Arts & Heritage patterns of spending/duration		The Eastside	
.....	36	defined.....	1
attendance.....	xiv, 46	The Silicon Valley Creative Community Index ...	51
cash contributions .....	xvi, 34	Ticketing/Admissions	
changes in spending .....	33	changes in income.....	6
changes since 1999 study.....	37	season tickets .....	6
characteristics .....	27	Tickets/Admissions	
distribution by category .....	27	sales .....	xi
distribution by discipline.....	28	Tucson .....	43, 44, 45, 46, 53
ethnicity.....	40	U.S. Bureau of Economic Analysis .....	21
frequency of attendance.....	xvi, 32, 47	Village Theatre .....	1
geographic origin .....	xii, 40, 44	Village Theatre .....	6
group sizes.....	31	Volunteers .....	26
how first exposed .....	32	participation level .....	xvi, 46
motivation.....	xvi, 29, 47	participation levels.....	35
origins.....	30	Walker, Jackson, and Rosenstein.....	51
participation by discipline.....	47	Washington Academy of the Performing Arts.....	7
patterns of spending/duration.....	37	Washington State Department of Employment	
perceived value.....	xvi	Security .....	2
spending.....	xi, xv, 44		