

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

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It has been a great pleasure to undertake this study of the economic impact of arts and cultural organizations in King County for the third time. The first two studies were conducted for the Corporate Council for the Arts, the predecessor to ArtsFund. No other region in the United States has made such a rich commitment to studies of this type, to the best of our knowledge.

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 thousands of patrons and the hundreds 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 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 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:

“Quality of life has been taken for granted a bit...It’s become more important since 9/11 to experience what our communities have to offer...a richness that should not be taken for granted.”

“I want my family and me to spend more time together in a way that enriches our lives.”

“My husband and I moved to Seattle from San Diego. King County/ Seattle is much more culturally affluent.”

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:

“The importance of cultural organizations is: to bring beauty and vision/ hope through them, to bring insight and challenge in grappling with tough issues.”

Source: Patron Survey

This study measures the economic impact of 219 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 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 \$835 million in business activity was generated in King County by the spending of these patrons and cultural organizations. In addition some 23,006 jobs and \$383 million in labor income was generated due to these activities. State and local governments collected over \$30 million in sales and business & occupation taxes due to this business activity. These impacts are significantly higher than measured in the 1997 economic impact study sponsored by ArtsFund; employment impacts are estimated to be 79% higher than found in the 1997 study.

Spending by cultural organization patrons totaled \$247 million, with tickets and admissions accounting for \$102 million of these expenditures. Budgets of cultural organizations were \$248 million in 2003.

New Money

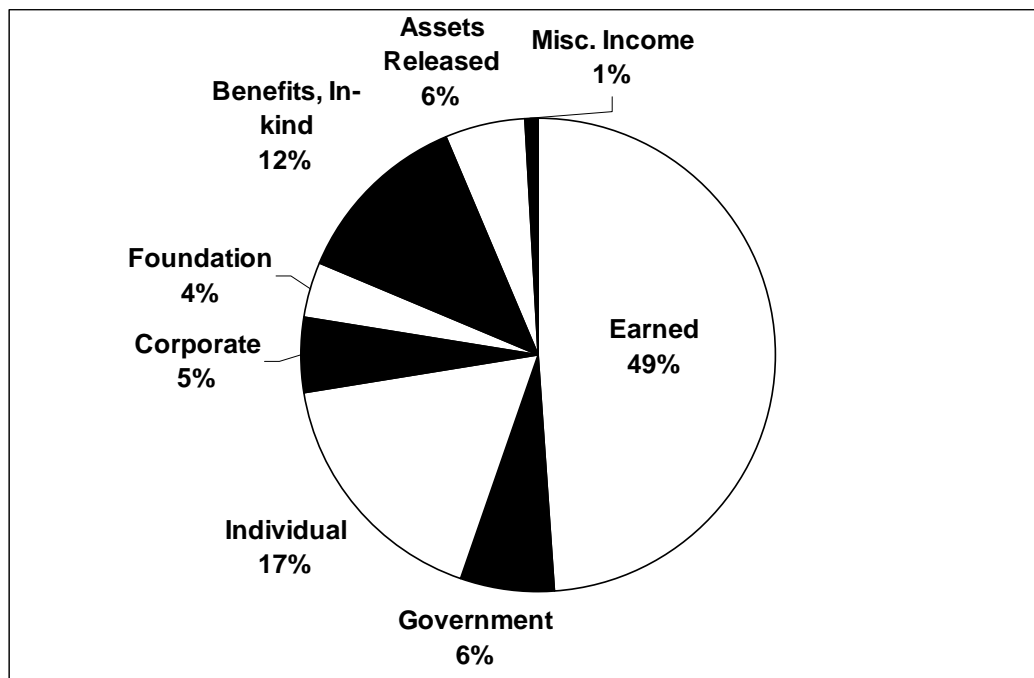
Most of the aggregate economic impacts are due to the spending by residents of this community of their discretionary income on exhibitions and performances by arts and heritage

organizations. However, a portion of the economic impacts are due to the expenditures of people traveling from outside 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 16% of the income of cultural organizations, and accounted for 43% of total patron outlays. New money impacts in 2003 include \$208 million in business sales, 4,700 jobs, \$91 million in labor income, and \$8 million in tax revenues. New money impacts have increased significantly since the 1997 ArtsFund economic impact study; employment impacts have risen by 52% in five years.

Income

Earned income from tickets, admissions, tuition, retail sales, and other sources accounted for 46% of total income of King County arts and heritage organizations. The other 54% was generated through contributions, which included 17% from individuals, 12% from benefits and in-kind, 10% from governments, 5% each from assets released and from corporate sources, and 4% from foundations.

Percentage of Total Income by Source

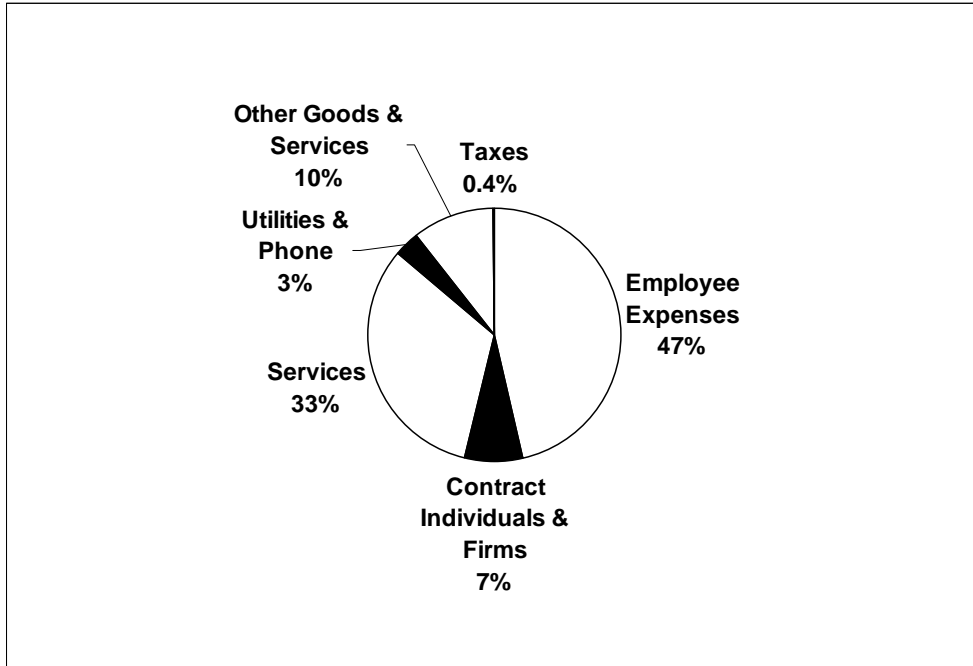


Expenditures

Expenses are divided between employee expenses (47%) and operating expenses (53%). Almost all employee expenses are incurred in King County, while operating expenses are more widely distributed. A major component of operating costs are contract individuals and firms (14%), including visiting artists. Almost half of these expenditures were made outside King County. Services account for the largest share of operating expenses (60%), and 88% 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 makes sales of books, souvenirs, and replicas purchased through wholesale distributors, and buy materials for exhibits/sets and productions. These costs amounted to 19% of operating expenses, while utility and postage accounted for 6% of operating expenses.

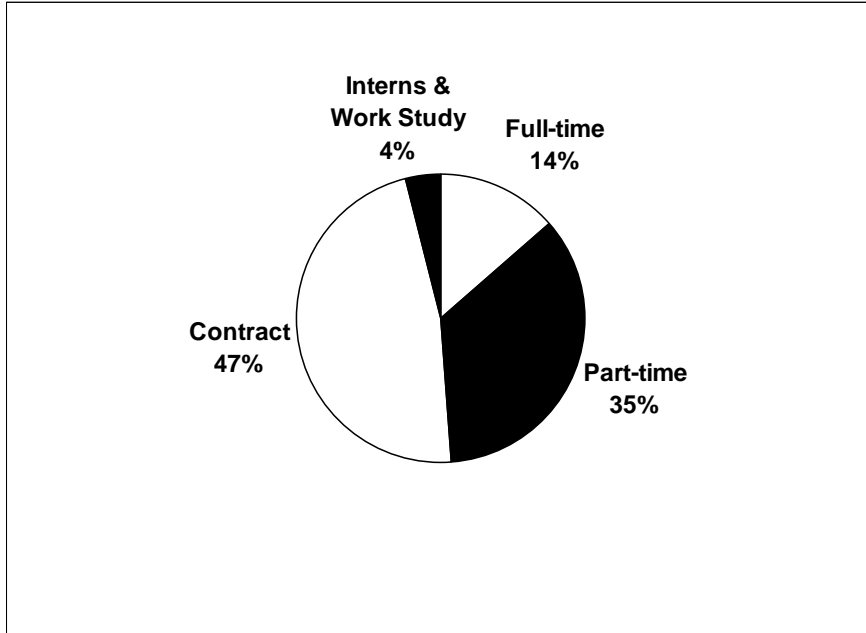
Aggregate Expenditures of King County Cultural Organizations



Employment

An estimated 23,009 jobs in King County were related to arts and heritage organizations in 2003. Of these 14,851 were directly tied to local arts and heritage organizations. Most of these jobs were part time or contractual (82%), and many were held by the same individuals working for more than one local cultural organization, such as musicians playing for the Seattle Symphony, the Seattle Opera, and Pacific Northwest Ballet. Part-time employment is predominantly in the dance, theater, and music disciplines, although arts service organizations contract with many artists to provide art services on a short-term basis. People working in King County arts and heritage organizations were paid \$113.4 million in labor income in 2003, while contract individuals and firms received an additional \$18.2 million.

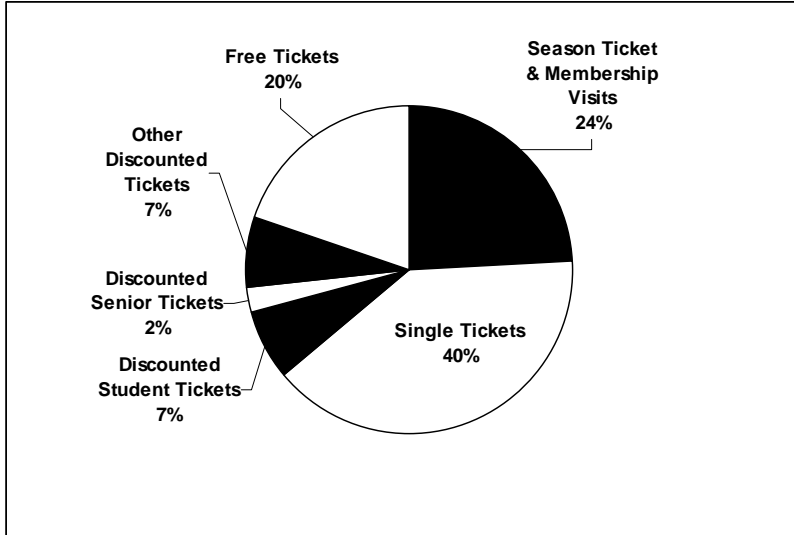
Employment Status



Attendance

There were 6.3 million admissions to events sponsored by arts and heritage organizations covered in this study in King County in 2003. The majority of these were season ticket / membership or single ticket visits (64%), while 20% (1.3 million) were free admissions, and the balance (16%) were discounted admissions (1.1 million). K-12 students accounted for .64 million of the free or discounted admissions; about 60% of these students were Caucasian, while about 40% were minority students.

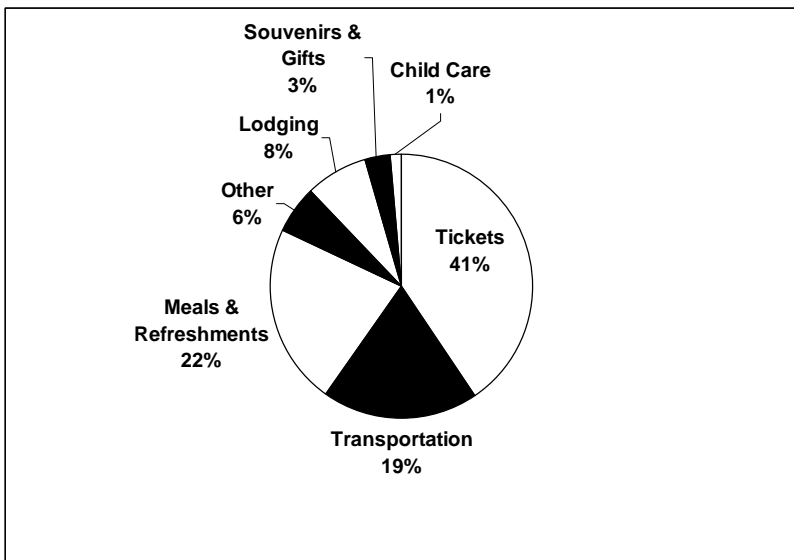
Percentage Distribution of Attendance by Category



Patron Spending

Patrons spent an average of \$40 on their visits to King County cultural organizations in 2003. Local residents spent less (\$32) per trip than those coming from elsewhere in Washington State (\$43) or from out of state (\$99). The largest share of expenditures was for tickets/admissions (41%). Significant outlays also occur for transportation (19%), meals and refreshments (22%), with smaller outlays on lodging, souvenirs and gifts, child care, entertainment, and other expenditures. The composition of these outlays varies by region of origin. Local residents have lower travel and lodging costs, while non-local residents expenditures on these categories of expenditure are much higher.

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 almost 17,000 people provided over 500,000 hours of volunteer service in 2003. The patron survey found a 28% 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 60% use attendance at arts and cultural organization events to meet with family and friends. Nearly 65% 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 King County economy. 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.

“The opera, ballet and theater help us to interpret our times and civil society. They act as our conscience and help us to question and consider the larger themes of human existence. They are critical to our society and community.”

“It wouldn’t be a first class city without the arts.”

“Art is a cornerstone of culture. Without organizations that support the arts, a culture cannot thrive.”

Source: Patron Survey

I. Introduction

“Without cultural arts we are a soul-less society, bankrupt of our human individual expression of inspiration and beauty.”

Source: Patron Survey

Goals and Objectives of this Study

In 2003 ArtsFund embarked on the conduct of a third study of the economic impact of arts and cultural organizations in King County. Like the earlier studies, this study provides comprehensive measures of spending by arts and cultural organizations and their patrons, and the economic impacts of these expenditures. The earlier studies were benchmarked against the years 1992 and 1997 (GMA Research & Beyers, 1993; GMA Research & Beyers, 1999). The period 1992-1997 was one of rapid growth in the local economy, and that study documented strong growth in arts and cultural organization activity in the regional economy. The year 2003 had a very different economic climate locally, with the events of 9/11 still in people’s minds, the national recession, and the declines in the very important local aerospace sector leading to relatively high levels of unemployment in the region. However, it was felt that the region had experienced significant development in the arts and cultural community, and there was a need for another assessment of the economic impacts of local arts and cultural organizations. In the process of making this assessment, the goal was to have the current analysis be as consistent as possible with the earlier efforts from a methodological standpoint, so that comparisons could be drawn regarding the changing position of arts and cultural organizations in our community. The current study also has as its goal an expanded understanding of the role of arts and cultural organizations in the region.

Arts and cultural organizations lie at the heart of the set of institutions that make the quality of life very high here in the Central Puget Sound region. King County has been touted recently as one of the centers of the “creative class,” people who value the services rendered by arts and cultural organizations to their clients. However, these arts and cultural organizations are businesses that generate jobs, income, tax revenue, and sales in the community and in the larger regional economy. Their impact is felt through the spending that the arts and cultural organizations make themselves in the process of providing their services, and through the expenditures of their patrons in relation to attendance at exhibitions, performances, and lectures. This study documents these impacts.

Arts and cultural organizations in King County include a mix of for-profit and non-profit entities, and range from small to large organizations. This study focuses only on non-profit arts and cultural organizations with 501(c)(3) federal tax status. As such it excludes a very large proportion of art and cultural business activity located in King County. It excludes commercial art dealers, individual artists, those selling equipment to make art work, festivals, broadcasting of music, repair of equipment such as musical instruments, etc. Large organizations with high levels of visibility include institutions such as the Seattle Symphony, Seattle Repertory Theatre, Pacific Northwest Ballet, Seattle Art Museum, and the Museum of Flight. However, there is also a large population of smaller organizations, and this study includes many of them. In the process of developing the definition of organizations to be included in the study, a budget limit of \$26,000 was used as a threshold for inclusion. This figure was settled upon after considering the change

in the consumer price index since the 1997 study, so as to have a reasonably similar price-adjusted floor for inclusion of organizations in the current study 1992 and 1997 (GMA Research & Beyers, 1993; GMA Research & Beyers, 1999).

This report is organized as follows. This section discusses the research approach taken to this study. Section II reports on the economic impacts of arts and cultural organizations in King County. Section III presents detailed information on patrons interviewed at cultural organizations in King County. Section IV presents some comparisons between the current study and research undertaken by others similar to this project. Section V makes some concluding remarks. There are six appendices. Appendix 1 identifies the arts and cultural organizations included in this study. Appendix 2 describes the input-output modeling methodology. Appendices 3 and 4 include the survey documents used by arts organizations and patrons. Appendix 5 is a summary of economic impact measures. Finally, Appendix 6 documents the ArtsFund Board of Trustees and Staff, who played an instrumental role in the execution of this study.

Research Approach

A key goal in the present study was to develop measures that were comparable to the 1992 and 1997 impact studies, undertaken by ArtsFund's name-successor, the Corporate Council for the Arts (CCA). Decisions taken with regard to the design of these earlier studies constrained the approach that we have taken in this study. We have tried to improve upon some of the questions that produced ambiguous responses in the earlier studies. We have based all three studies on surveys of patrons and arts organizations in the region, developing primary data used in the impact studies and analyses. We have done this because information is not available from secondary sources that would permit the completion of a study of this type. There are no survey data gathered by other organizations on patron expenditures similar to those used in this study. Data on arts and cultural organizations are not reported separately in economic models with sufficient detail to identify the 501 (c)(3) organizations.

Arts and cultural organizations included in this study are included in statistical reports by agencies such as the Washington State Department of Employment Security (ESD) or the Washington State Department of Revenue (DOR) with other establishments. Neither ESD nor DOR distinguish between 501(c)(3) establishments and for-profit establishments, and they do not break out information on a "discipline" basis. In this report we have chosen to provide information built around six categories of arts and cultural organizations, which we refer to as "disciplines" in this report: (1) dance, (2) theater, (3) music, (4) visual arts, (5) heritage, and (6) arts service organizations (ASO). Moreover, these agencies do not report within their databases information on the establishments with at least \$26,000 in expenditures in the year 2003. In approaching this project, we developed budget information on each establishment included through collaboration with ArtsFund, and ASO's. Appendix 1 shows the names of the organizations that we have included in this study.

Arts and Cultural Organization Survey

ArtsFund and ASO's developed lists of names of organizations included in this study located in King County. There were 219 organizations that met this budget test in 2003, compared with 160 in 1997 and 142 in the 1993 study. Clearly, there has been substantial growth in the number of organizations meeting the threshold of \$20,000 used in the 1993 study. Table I-1 describes the number of organizations included in the current study by discipline. There has been strong growth in both the organizations returning questionnaires in the current study compared to the 1997 study (94 versus 81), but even more impressive growth in the number of other organizations included (125 versus 79). Theater, music, and heritage have had strong growth in organizations included in the current study, compared to the 1997 study.

Table I-1 Cultural Organizations Included in this Study

Discipline:	# of Questionnaires Returned	# of Other Organizations Included
Performing Arts - Dance	6	9
Performing Arts - Theater	24	27
Performing Arts - Music	26	30
Visual Arts	12	5
Heritage	7	29
Art Service Organizations (ASO)	19	25
Total	94	125

Each organization asked to participate in this study was sent a digital copy of the questionnaire found in Appendix 3. Those that responded sent their data to ArtsFund. ArtsFund had staff make efforts to get responses from as many organizations as possible, including many that do not receive funding from ArtsFund. Organizations were asked to provide information for their most recent budget year, benchmarked, in most cases, against the year 2003. As indicated in Table I-1, we received information from 94 organizations, up from 81 in the 1997 study. Each organization was asked to provide information on their (1) general activity and attendance, (2) detailed activity on income, (3) detailed activity on employee expenses including administrative as well as artistic, technical, and professional employees, (4) disaggregate operating expense data including expenses for contract employees, services, taxes, and other costs, (5) capital projects and assets, (6) and free or reduced admissions of K-12 students.

The organizations covered in this survey constituted the bulk of the economic activity within each discipline. Table I-2 reports the estimates in column (1) of the expense budgets of organizations returning a survey, reports estimates in column (2) of all organizations expense budgets included in this study, and then reports the ratio of covered to total estimated expense budgets¹. We had coverage of \$213.3 million of the estimated \$244.2 million expense budgets of organizations included in this study, 87% of the total estimated expense budget level. The last

¹ ArtsFund staff developed expense budget data for all organizations included in this study from information provided from its own sources and from other ASOs which receive application for funds from many of the arts and heritage groups that detail operating budgets in their grant applications. These budget estimates are not equivalent to income, which is reported in section 2 of this report.

column in Table I-2 was used to extrapolate the reported values by the coverage factor. Thus, we increased reported results from the organization survey (except in a few selected questions, as noted in the tables below) by the factor included in Table I-2. For example, in the case of visual arts, the reported data came within 8% of our estimated overall activity in this discipline. As with the two preceding ArtsFund studies, we have an excellent level of coverage in this survey of organizations.

Table I-2 King County Cultural Organizations Budget Coverage

Discipline	(1) Covered Expense Budgets	(2) Estimated Total Expense Budgets	(2)/(1) Factor	Share of Budget Related to Newly Included Organizations
Dance	\$16,235,238	\$18,407,175	1.134	4.9%
Theater	76,018,183	82,530,355	1.086	5.8%
Music	67,174,424	73,792,145	1.099	32.4%
Visual	28,972,815	31,278,044	1.080	4.2%
Heritage	13,736,886	21,665,708	1.577	21.0%
ASO	11,209,348	16,580,270	1.479	25.2%
Total	\$213,346,893	\$244,253,696	1.145	16.2%

This study includes a number of organizations not included in the 1997 study. Some of these did not exist in 1997, and some had budgets that fell below the threshold for inclusion in that study (\$23,000). Budgets of organizations included in the 1997 study increased from \$143.6 million to \$204.5 million, an increase of 42.4%. The last column of Table I-2 reports the share of the total expense budgets associated with organizations included in the current study that were not part of the 1997 study. In the aggregate, they account for 16.2% of the expense budgets. Dance, theater, and visual arts show little increase in the number of organizations contributing to increased overall expense budgets, while growth was relatively strong in music, heritage, and ASO's. It is not possible to report the relative importance of new organizations versus those with budgets that fell below the 1997 study threshold. Of the roughly \$100 million gain in expense budgets between the 1997 and the current study about 60% is gains in budgets of organizations included in the 1997 study, and 40% comes from newly included organizations.

Patron Survey

The patron survey was conducted by the intercept method in venues for each discipline. People were approached by staff or volunteers of the arts and cultural organizations and asked to take a few minutes to complete the patron survey found in Appendix 4. The surveys were undertaken at 38 (verify!!) different events on weekdays and weekends, and during the day as well as the evening. The surveys were conducted between August 2003 and January 2004. Almost 2,400 surveys were obtained from patrons of King County arts and cultural organizations, and 2,358 of these were considered to contain valid information for the development of the patron expenditure estimates (they contained "reasonable" spending entries and reported the number of patrons). The questionnaire was not pre-tested, but it did go through a careful review process by a committee convened by ArtsFund to oversee the development of this project. Many of the questions are the same as used in the two prior ArtsFund economic impact studies. Ex-post

analysis of the responses does not reveal design problems which should have been dealt with prior to the administration of the survey.

The questionnaire was designed to obtain data on (1) expenditures attributable to their visit to the arts or cultural organization by each group of patrons, (2) the number of patrons in the group and the primary reason for their trip, (3) open-ended responses regarding the importance of the arts to the patron personally and with regard to the importance of the arts to the community, (4) a series of questions regarding the development of their interest in the arts, their volunteer activity, their children's arts participation, (5) the level of their attendance at different disciplines as either a season ticket/membership or single ticket holder in Seattle, elsewhere in King County, and in Pierce County, and some basic demographic information. These responses were aggregated by discipline, and were used along with the data on attendance to estimate total spending for use in the economic impact analysis. The many tables in Sections II and III of this report were developed using data from this patron survey.

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 (Conway 2004). 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 (Conway 2004). 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 1992 and 1997 studies. However, the goal was to try to have the procedures as comparable as possible.

II. Economic Impact of Cultural Organizations in King County

“The world faces the reality and horror of human fear; beauty through the arts is the only way to access the outstanding side of the human spirit.”

Source: Patron Survey

This chapter provides estimates of the economic impact of arts and cultural organizations and their patrons. The first two sections of this chapter document the levels and nature of the income to arts and cultural organizations in King County, and their expenditures on goods and services. Then the expenditures of patrons are reported, in relation to their attendance at events sponsored by the organizations covered in this study. This section is followed by estimates of economic impacts resulting from the combination of organizational and patron spending. The chapter also includes information on capital activity (both income and expense-related) and volunteer activity in arts and cultural organizations in King County.

Income of King County Cultural Organizations

Cultural organizations in King County obtain their income from a combination of earned and contributed sources. The overall structure of income by discipline is documented in the next section of this report. Then the structure of earned, contributed, government, and other income is documented.

(1) Total Income

Total income to arts and cultural organizations in King County is reported in Table II-1, and Figures II-1, II-2, and II-3 contain graphic representations of the income profile of King County arts and cultural organizations. These organizations are estimated to have had income of \$248.2 million in the year 2003 (this estimate is based on the latest budget year for the organizations included, and this may not be the same as the calendar year 2003). Figure II-1 depicts the same information as in the last row of Table II-1, showing the share of total income by discipline. Figure II-2 represents in graphic form the composition of income, whose absolute magnitude is contained in the last column of Table II-1, and is the same as the last column of percentages in Table II-2.

Table II-1 Total Income To King County Cultural Organizations (\$ in millions)

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Earned	\$11.1	\$44.9	\$38.5	\$13.1	\$11.0	\$2.8	\$121.4
Government	0.5	1.7	1.5	2.1	3.5	6.3	15.5
Individual	3.9	5.8	25.2	4.9	1.3	1.6	42.8
Corporate	1.0	2.8	2.7	1.6	0.5	4.3	12.9
Foundation	1.5	2.9	2.1	1.3	0.9	0.9	9.6
Benefits, In-kind	0.4	2.8	3.7	5.5	10.5	7.3	30.2
Assets Released	1.1	1.1	4.2	4.3	2.4	0.6	13.7
Misc. Income	0.7	0.3	0.2	0.0	0.5	0.4	2.2
Total	\$20.1	\$62.2	\$78.2	\$32.8	\$30.7	\$24.2	\$248.2
Discipline Income as a % of total income	8%	25%	32%	13%	12%	10%	100%

The relative size of the disciplines has changed somewhat in the current study compared to the 1997 study. In the current study, music has emerged as the largest discipline, replacing theater with that position. Budgets in theater increased from \$54.5 million in the 1997 study to \$62.2 million in the current study. However, budgets for music expanded dramatically, from \$29.7 million to \$78.2 million. A major contributor to this growth in budgets for music is the EMP (Experience Music Project). The classification of EMP in the music discipline was made after considerable discussion with EMP, recognizing the multiple functions taking place at this organization (partly heritage, partly visual, partly music, and with a significant educational program). The shares of income accounted for by dance, visual arts, and heritage organizations remained almost unchanged from the 1997 study. ASO income grew significantly, from 6% to 10% of total revenue. This growth was related to the inclusion in the present study of a larger number of ASO's.

Table II-2 and Figure II-3 show that the composition of income varies significantly across the disciplines included in this study. Earned income accounts for the largest share of income in all disciplines except for ASO's, that depend most strongly on government for their income. The relatively high level of corporate income to ASO's reflects the income to ArtsFund from corporate sources; ArtsFund is in the ASO discipline. The share of earned income in this study is considerably lower than in the 1997 study, when it averaged 62%. However, it is similar to the 1992 study, which reported earned income to be 48% across all the disciplines. In the current study, earned income is lower in all of the disciplines except ASO when compared to the 1997 study; ASO earned income increased from 8% to 12%. Offsetting the reduction in the share of earned income was an increase in the importance of individual, government, benefit and in-kind, and assets released sources of income, when compared to the 1997 study.

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

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Earned	55%	72%	49%	40%	36%	12%	49%
Government	2%	3%	2%	6%	11%	26%	6%
Individual	19%	9%	32%	15%	4%	7%	17%
Corporate	5%	4%	3%	5%	2%	18%	5%
Foundation	7%	5%	3%	4%	3%	4%	4%
Benefits, In-kind	2%	4%	5%	17%	34%	30%	12%
Assets Released	6%	2%	5%	13%	8%	2%	6%
Misc. Income	4%	0%	0%	0%	2%	2%	1%
Total	100%	100%	100%	100%	100%	100%	100%

Tables II-1 and II-2, and Figure II-2 indicate that private sector income provides the largest share of income beyond earned income. Individual, corporate, and foundation income provided 26% of total income in the current study, up from 17% in the 1997 study. Government income accounted for 6% of total income in the current study, down from 7% in the 1997 study. Benefits, in-kind, and assets released provided considerably more income in the current study (17%) compared to the 1997 study (12%).

Figure II-1 Percentage of Total Income by Discipline

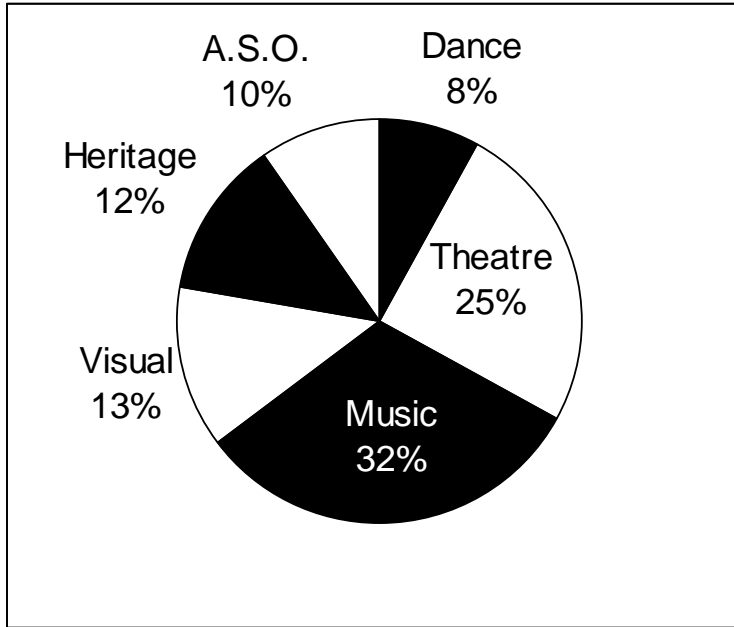


Figure II-2 Percentage of Total Income by Source

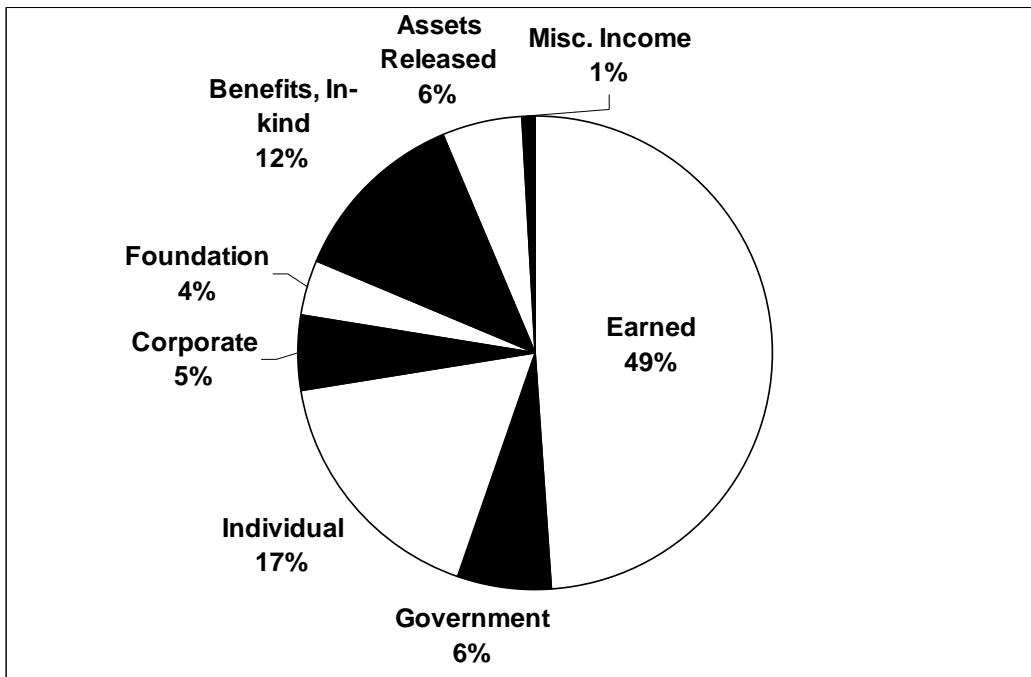
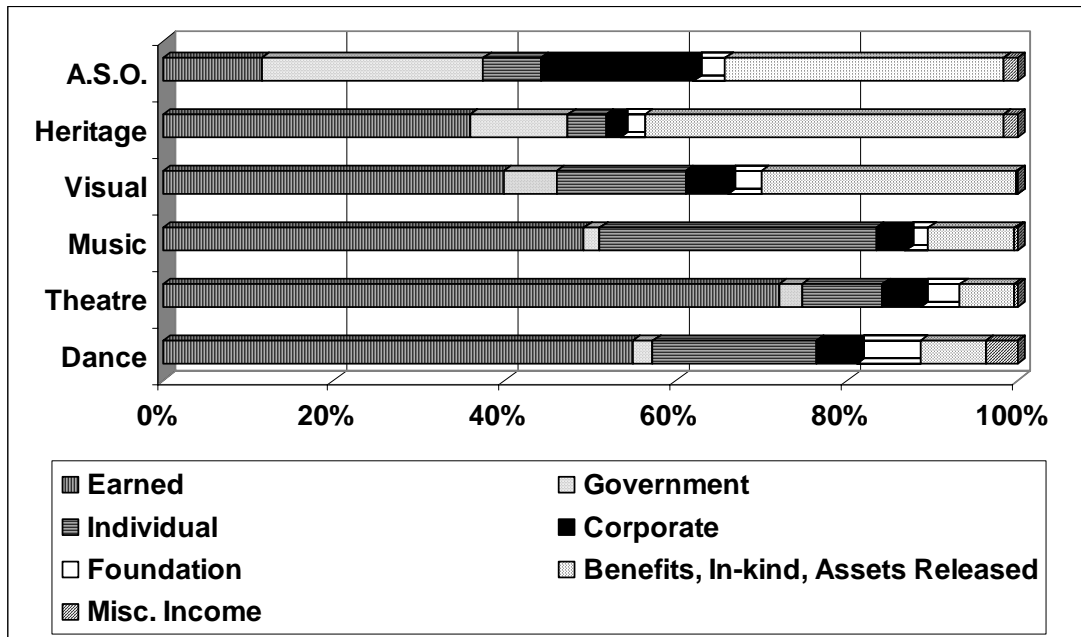


Figure II-3 Percentage of Total Income by Discipline and Source



(2) Earned Income

Table II-3 presents detail with regard to the composition of earned income, and this table indicates that there are major differences in the importance of different earned income categories among the disciplines. Season Tickets and single admissions are relatively important for dance, theater, and music. Tuition and workshops are relatively important for dance, visual arts, and ASO's. The sale of goods was relatively important for visual and heritage organizations. Interest income provided a relatively large share of heritage organization earned income.

Table II-3 Percentage Composition of Earned Income

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Season Ticket/Membership Visits	23.4%	26.3%	22.1%	16.1%	6.0%	3.6%	20.5%
Single Ticket/Admissions	55.1%	60.7%	43.3%	22.9%	30.3%	34.7%	48.0%
Tuition/Workshops	18.5%	3.6%	8.2%	16.4%	9.5%	16.1%	8.6%
Retail/Wholesale Sales	0.5%	1.5%	12.4%	24.1%	18.9%	5.7%	9.0%
Other Earned Income	2.4%	7.2%	13.2%	13.5%	21.8%	34.4%	11.3%
Interest	0.1%	0.7%	0.8%	7.0%	13.5%	5.5%	2.6%
Total Earned Income	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(3) Contributed Income

Contributed income is derived from many sources, including individuals, corporations, foundations, benefits, and in-kind sources. Table II-4 presents detail with regard to the importance of these various sources of contributed income by discipline. Individuals were the largest source of contributed income (44%), and this share was up sharply from the 1997 study (34%). In-kind income was the second largest source (22%), and this was also up sharply from the 1997 study (11%). Other categories of contributed income accounted for a smaller share of contributed income in the current study, when compared to the 1997 study. Corporate contributions declined from 15% to 11%, ArtsFund declined from 5% to 2%, foundations from 12% to 9%, and benefits from 14% to 9%. It should be noted that in-kind contributions also appear as expenditures on goods and services equal to their value in the expenditures data provided by arts and cultural organizations.

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

	<u>Dance</u>	<u>Theater</u>	<u>Music</u>	<u>Visual</u>	<u>Heritage</u>	<u>ASO</u>	<u>Total</u>
Individual	52%	40%	74%	37%	10%	11%	44%
ArtsFund	4%	5%	2%	3%	0%	0%	2%
Other Corporate-Giving	9%	14%	6%	9%	4%	30%	11%
PONCHO	2%	3%	1%	2%	0%	0%	1%
Foundations	18%	17%	5%	8%	7%	6%	9%
Other-benefits	2%	11%	3%	12%	11%	18%	9%
Other-in kind	3%	8%	8%	30%	65%	32%	22%
Other	10%	2%	1%	0%	4%	3%	2%
Total	100%	100%	100%	100%	100%	100%	100%

There are major differences in the composition of contributed income across the disciplines, but income from individuals are important in all cases. The high value of other corporate giving in ASO is related to corporate income received by ArtsFund. ArtsFund giving is spread across dance, theater, musical and the visual arts, and was not distributed to heritage or ASO's in this study. In-kind income is very important for heritage organizations, and relatively important to visual arts and ASO organizations. Foundation income was relatively important to dance and theater organizations. Music organizations show a very strong reliance on contributed income from individuals.

Arts and cultural organizations obtained donations from over 105,000 individual contributors, as indicated in Table II-5. This number is roughly double the number of individual contributors documented in the 1997 study (53,000). The average donation was also up sharply, up from \$248 in the 1997 study to \$405 in the current study. In absolute dollars, the funds raised from individual contributors were triple the level reported in the 1997 study (\$13.1 million). The number of contributors was up significantly in all disciplines, while the share of the contributions coming from outside King county dropped from 13.5% in the 1997 study to 9.2% in the current study (a figure similar to the 1992 study's 9.5%).

Table II-5 Individual Contributions to King County Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Individual Contributions (\$ millions)	\$3.9	\$5.8	\$25.2	\$4.9	\$1.3	\$1.6	\$42.8
Number of Contributors	6,127	21,473	43,132	7,952	19,784	7,217	105,686
\$/Contributor	\$630	\$270	\$585	\$619	\$68	\$222	\$405
% outside King County	24.0%	7.4%	7.1%	9.1%	17.7%	7.3%	9.2%

Corporate contributions totaled \$12.9 million in 2003 (including ArtsFund), as reported in Table II-6. The average level of corporate giving was much higher than for individuals (\$5,499 versus \$405). Corporate support grew much more slowly than individual support, rising by 67% between 1997 and 2003 (individual support tripled). The number of donors also grew relatively slowly, expanding 21% over the number of contributors in the 1997 study. Almost 7% of these corporate contributions came from outside King County, down from 10.9% in the 1997 study. The average corporate contribution was up considerably from the 1997 study, increasing from \$3,631 to \$5,499.

Table II-6 Corporate Contributions to King County Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Corporate Contributions (\$ millions)	\$1.0	\$2.8	\$2.7	\$1.6	\$0.5	\$4.3	\$12.9
Number of Contributors*	53	375	331	282	103	777	1,919
\$/Contributor*	\$12,041	\$5,341	\$5,770	\$4,230	\$4,762	\$5,569	\$5,499
% Outside King County	13.4%	5.1%	10.4%	17.9%	0.0%	2.8%	6.8%

*Refers to corporate contributions except ArtsFund.

Table II-7 reports contributions from private foundations. This source provided \$8.4 million to King County arts and cultural organizations in 2003, a sizeable increase over the \$4.6 million in private foundation contributions reported in the 1997 study (an increase of 83%). The average size of private foundation donations is much larger than individual and corporate contributions, and remained at a level approximately the same as reported in the 1997 study (when adjusted for inflation). The sharp increase in total private foundation contributions was due to a much larger number of private foundation contributions in the present study, compared to the 1997 study (561 versus 334 contributors, a gain of 68%). A significant share of the private foundation contributions came from outside King County (30%), but this percentage was down from the 41% reported in the 1997 study.

Table II-7 Private Foundation Contributions to King County Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Private Foundation Contributions (\$ in millions)	\$1.4	\$2.4	\$1.8	\$1.1	\$0.9	\$0.8	\$8.4
Number of Contributors	41	177	152	67	71	53	561
\$/Contributor	\$33,653	\$13,772	\$11,774	\$15,777	\$12,737	\$15,453	\$14,948
% Outside King County	19.1%	50.8%	10.3%	35.4%	33.1%	21.6%	30.3%

In-kind contributions provided \$21.6 million to arts and cultural organizations in King County in 2003, a sharp increase over the \$4.3 million reported in the 1997 study. Almost all of these in-kind contributions are made by local individuals and businesses. The very large number of contributors in music and ASO were related to two organizations (Folklife and Poncho) that reported large numbers of in-kind contributors with a low average level of contribution. The very high average value per contributor in heritage is related to the report from the Museum of Flight, that had only a few contributors but a very large value associated with these contributions. Even after these particular cases are considered, there was still a strong increase in the number of contributors and the total value of in-kind contributions in comparison to the 1997 study.

Table II-8 In-Kind Contributions to King County Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
In-Kind Contributions (\$ millions)	0.3	1.1	2.6	4.0	8.9	4.7	21.6
Number of Contributors	204	600	7,356	302	35	3,411	11,908
\$/Contributor	1,237	1,885	357	13,106	256,823	1,369	1,810
% Outside King County	11.3%	15.0%	12.1%	6.1%	0.0%	0.4%	3.6%

(4) Government Income

Government income levels were \$15.5 million in 2003, representing 6% of the income of arts and cultural organizations in King County. Table II-9 documents the sources of government income by discipline, and it can be seen that there are major differences in the composition of government income across the disciplines. Government income as a share of total income fell from 7% in the 1997 study, even though there were many more ASO's included in the current study (44 versus 34), and these organizations rely heavily on local governments for their income. Across all disciplines, federal funds dropped from 16% in the 1997 study to 8% in the current

study. State funds increased considerably in the current study, up from 6% to 29% of government income. These increases in state support were evident in dance, music, and especially in visual arts and heritage organizations. As in the 1997 study, county and city governments accounted for most of the government income, with city governments remaining as the largest source of government income. City and county governments provide funds to help ensure access to high quality arts experiences for large numbers of people, and also help support a wide range of arts education and other activities.

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

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Federal	22%	23%	15%	9%	8%	1%	8%
State	18%	17%	22%	44%	78%	3%	29%
County	22%	22%	27%	11%	5%	34%	22%
Cities	38%	38%	35%	36%	10%	62%	41%
Total	100%	100%	100%	100%	100%	100%	100%

(5) Other Income

Table II-10 reports the value of assets released from restricted, unrestricted, and other special funds by arts and cultural organizations in King County in 2003. This income accounted for 5.3% of total income, a percentage unchanged from the 1997 study. There are clear differences across the disciplines in the relative importance of assets released. Heritage and visual arts show relative dependence on this source of income, while it is only a small fraction of income to theater and ASO's.

Table II-10 Other Income

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Net Assets Released (\$ millions)	\$1.12	\$1.07	\$4.21	\$4.29	\$2.37	\$0.59	\$13.66
% of Total Income	5.6%	1.7%	5.4%	13.1%	7.7%	1.7%	5.3%

Expenditures of King County Cultural Organizations

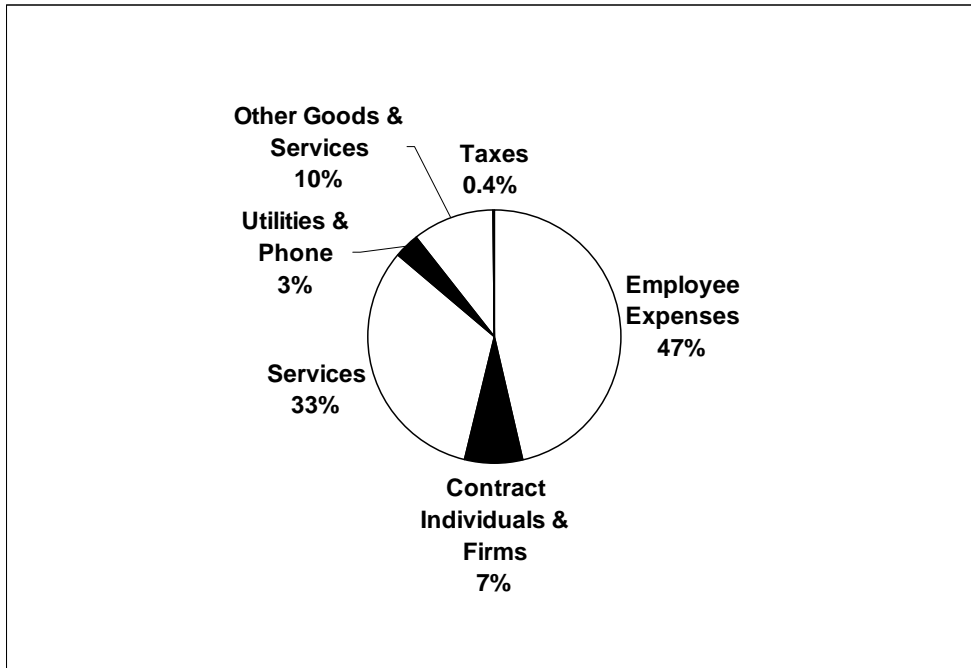
As reported in Table II-1, arts and cultural organizations in King County had income of \$258.9 million in 2003. We now focus on how these organizations spent this income. Table II-11 provides an overview of these expenditures, which totaled \$244.2 million, leaving a slight surplus of income over expenses across all of the organizations included in this study. Expenses in Table II-11 have been divided into two categories, employee expenses (47%) and operating expenses (53%). Figure II-4 provides a more detailed perspective on the composition of expenses. It can be seen in Table II-11 that most of the employee expenses were incurred in King County (96%), while a larger proportion of operating expenses were made outside King County (18% outside King County). In the aggregate, 89% of total expenditures were made locally. The split between employee and operating expenses in the current study is similar to the 1997 study, that found

employee expenses accounted for 44% of total expenses, and operating expenses accounted for 56% of total expenses.

Table II-11 Aggregate Expenditures of King County Cultural Organizations

	Total	King County
Employee Expenses	\$113,401,204	\$108,694,988
Operating Expenses	\$130,769,613	\$109,754,218
Total	\$244,170,817	\$218,449,206

Figure II-4 Aggregate Expenditures of King County Cultural Organizations



The composition of expenses by discipline varies, as is reported in Table II-12. In dance, music, heritage, and ASO's the share of employee expenses was above the average for all organizations. Theater has a distinctly lower level of employee expenses than the other disciplines, due to relatively high payments to contract individuals and organizations. The composition of expenses by discipline was almost the same as measured in the 1997 study in all disciplines except heritage. In the 1997 study heritage organizations were estimated to have 41% of their expenses related to employees, compared to 55% in the current study.

Table II-12 Employee and Operating Expenses by Discipline

	Employee Expenses (%)	Operating Expenses (\$)	Total (%)
Dance	55	45	100
Theater	35	65	100
Music	55	45	100
Visual	47	53	100
Heritage	55	45	100
ASO	48	52	100
Total	47	53	100

(1) Composition of Employee Expenses

Employee expenses are divided into two broad categories of employment: administrative and artistic/professional/technical employees. Within the administrative category there are executive, clerical marketing/promotion/publicity, fundraising and other administrative occupations. The artistic/professional/technical classification includes those who may be artistic/performing personnel, guest artists & lecturers, directors or designers, production or technical personnel, educational or instructional personnel, or other personnel. Table II-13 reports the percentage of employees in these two broad categories for each discipline and in total. In the aggregate, 37% of total employment is related to administrative employees, while 63% is related to artistic/professional/technical employees. Artistic/professional/technical employees dominate all five presenting disciplines, while ASO's employment is dominated by administrative occupations. These results are quite similar to the 1997 study, which found 35% of employment in administrative occupations, and 65% in artistic/professional/technical occupations.

Table II-13 Composition of Employee Expenses

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Expense Category	%	%	%	%	%	%	%
Administrative Salaries, Wages & Benefits	22	36	32	47	29	71	37
Artistic/Professional/Technical Salaries, Wages & Benefits	78	64	68	53	71	29	63
Total Salaries, Wages & Benefits	100	100	100	100	100	100	100

(2) Operating Expenses

Operating expenses are divided into five broad categories: (1) contract individuals and firms, (2) services, (3) utilities and postage, (4) taxes, and (5) "other goods and services." Table II-14 presents an overview of the structure of operating expenses, while Table II-15 breaks down the five broad categories into detailed expense categories.

Services account for the largest share of operating expenses in all disciplines (60%), followed by other goods and services and contract individuals (19% and 14% respectively). Utilities and postage accounted for 6% and taxes for 1% of operating expenses. There are significant differences in the composition of these expense categories across disciplines. Music and ASO's have much higher proportions of their expense budgets going to contract individuals and firms, while heritage organizations report very little spending for this category. Dance and theater have relatively high service expenses, and the other four disciplines have lower than average service costs. Visual and heritage organizations report relatively high other goods and services costs, in part that would be related to the purchase of the products that they sell in their retail shops. The composition of expenses documented in Table II-14 is similar to that reported in the 1997 study. In that study services accounted for 54% of total expenses, compared to 60% in the current study. Spending on contract individuals was reported to be 19% in the 1997 study compared to 14% in the current study. Other goods and services was reported to be 21% in the 1997 study, compared to 19% in the current study. Utility, postage, and taxes accounted for almost the same shares in the two studies.

Table II-14 Operating Expenses by Broad Category

	<u>Dance</u>	<u>Theater</u>	<u>Music</u>	<u>Visual</u>	<u>Heritage</u>	<u>ASO</u>	<u>Total</u>
	%	%	%	%	%	%	%
Contract Individuals & Firms	9	12	22	8	3	23	14
Services	69	72	45	56	51	53	60
Utilities & Postage	4	4	8	9	12	5	6
Other Goods & Services	18	12	25	26	31	18	19
Taxes	0	0	0	1	3	1	1
Total	100	100	100	100	100	100	100

A much more detailed picture of operating expenses is reported in Table II-15. Within the contract individuals and firms category, dance, theater, and ASO's had the largest share of their expenses for artistic/performing activity, while in music guest artists were the largest component of expense. Music organizations also report relatively large expenses for artistic/performing activity. The relatively high "other services" expense in theater is related to the cost of events or productions; about a quarter of these costs are for events or productions from outside the region. Dance organizations report relatively high marketing and public relations and professional services purchases, while ASO's report relatively high marketing expenses. The other goods and services category within the broader group Other Goods and Services is high for visual and heritage organizations, reflecting their purchase of goods sold in their retail shops.

Table II-15 Operating Expenses by Detailed Categories (% of Total Operating Expense)

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Expense Category	%	%	%	%	%	%	%
Contract Individuals or Firms							
Artistic/performing	8.6	6.0	8.9	1.8	0.4	11.5	6.3
Guest artists/lecturers	0.0	0.2	9.1	0.1	0.6	2.6	2.7
Director/design	0.0	2.8	2.0	0.4	0.0	0.5	1.8
Production/technical	0.2	1.2	0.7	0.6	0.2	1.9	0.9
Educational/instructional	0.3	1.0	1.0	3.6	1.4	4.2	1.5
Other personnel	0.1	0.8	0.5	1.1	0.2	2.1	0.8
Total Contract Personnel	9.2	11.9	22.2	7.7	2.7	22.7	13.9
Services							
Marketing expenses	3.3	10.6	10.4	5.6	7.5	18.2	9.7
Press and public relations	15.7	0.4	0.2	10.0	2.6	0.2	2.7
Photographic Services	0.0	0.3	0.2	0.6	0.6	2.4	0.4
Banking	1.6	1.3	0.4	0.8	1.6	1.0	1.0
Insurance	1.3	1.4	1.0	3.1	5.9	1.8	1.9
Professional services	16.2	1.8	4.1	7.9	6.8	6.2	4.7
Janitorial/protective	0.0	0.9	0.3	2.1	1.1	1.2	0.9
Transportation	4.8	1.1	1.4	2.9	1.3	0.7	1.7
Lodging	0.4	1.4	2.2	1.8	0.9	0.2	1.5
Food/beverage services	0.0	1.3	4.5	6.3	0.7	5.7	2.9
Set/costume/exhibit rental	0.4	1.1	0.2	1.7	0.7	0.6	0.8
Equipment rental	0.2	0.7	0.8	1.9	2.8	3.6	1.2
Hall rental	17.1	1.6	2.6	1.0	0.2	1.9	2.7
Office/space rental	0.4	1.1	0.2	1.7	0.7	0.6	0.8
Royalties	2.7	3.6	0.5	1.7	0.0	0.0	2.0
Other Services	4.3	42.8	5.8	7.1	7.5	2.6	20.9
Subtotal Services	68.9	72.5	44.6	56.2	51.0	53.0	60.0
Utilities and Phone							
Telephone	0.9	0.7	2.6	1.2	1.8	1.1	1.4
Postage	2.4	1.2	2.5	2.1	2.1	1.7	1.8
Other utilities	0.8	1.8	3.1	5.8	7.8	2.0	3.0
Subtotal Utilities & Phone	4.1	3.7	8.1	9.0	11.7	4.8	6.2
Other goods & services							
Printing of programs etc.	3.4	0.8	2.1	5.7	3.4	3.9	2.3
Exhibit/set materials	0.1	1.0	6.1	1.6	4.8	1.0	2.6
Production materials	5.6	2.4	3.8	1.2	1.2	0.9	2.6
Supplies	0.6	2.6	5.8	2.5	5.7	1.5	3.5
Maintenance	3.1	1.1	0.9	3.2	4.0	0.8	1.6
Other goods & services	5.1	3.8	6.0	11.6	12.1	9.8	6.4
Subtotal Other Goods & Services	17.8	11.6	24.7	25.8	31.2	17.9	19.1
Taxes							
Sales tax	0.0	0.0	0.1	1.3	1.0	0.5	0.3
B&O tax	0.0	0.0	0.0	0.1	0.0	0.2	0.0
Property tax	0.0	0.1	0.2	0.0	0.0	0.6	0.1
Other Taxes	0.0	0.1	0.1	0.1	2.3	0.2	0.3

Subtotal Taxes	0.0	0.3	0.4	1.4	3.3	1.4	0.8
Total Operating expense	100.0	100.0	100.0	100.0	100.0	100.0	100.0

(3) Capital Activity & Assets

Arts and cultural organizations in King County report having received income of \$143.3 million in relation to capital or building activity since fiscal year 1999, as reported in Table II-16.

Individuals accounted for the largest share of income for capital projects, about 41%.

Foundations and government accounted for 23% and 21% respectively. The bulk of the income for capital activity was generated by visual and heritage organizations. Visual arts organizations obtained a relatively large share of their capital activity income from foundations, while heritage organizations had relatively strong government and corporate support.

Table II-16 Capital Building Activity Income since Fiscal 1999

(Columns show source of funds)

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Corporate	2.9%	7.8%	3.0%	3.2%	13.9%	17.4%	8.9%
Foundation	12.5%	29.0%	26.1%	40.3%	8.0%	11.3%	22.6%
Individual	49.3%	19.7%	57.3%	32.1%	49.3%	11.9%	40.7%
Government:	0.0%	19.3%	13.0%	13.9%	28.6%	35.6%	21.3%
Other:	35.3%	24.2%	0.6%	10.5%	0.1%	23.8%	6.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total \$(millions)	3.2	5.6	3.6	58.4	70.2	2.3	143.3

Values here were increased by blowup factors

Expenditures related to capital and building activity since fiscal 1999 were estimated to be \$126 million, concentrated in the visual and heritage disciplines, as reported in Table II-17.

Across all disciplines most of the funds went for construction, 72%. Campaign costs were relatively low in all disciplines, averaging only 4%. Design and other costs accounted for the balance of the expenses related to capital and building activity.

Table II-17 Expenses Related to Capital/Building Activity

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Campaign	0.0%	1.2%	0.0%	6.6%	2.3%	0.0%	3.8%
Design (i.e. architect fees, etc.)	0.0%	7.6%	13.0%	9.3%	18.0%	3.6%	12.5%
Construction	100.0%	70.7%	82.7%	73.2%	68.7%	83.7%	72.4%
Other	0.0%	20.5%	4.3%	11.0%	11.1%	12.6%	11.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total \$(millions)	3.3	10.9	4.4	52.5	52.5	2.8	126.4
Number of projects	1	15	10	9	9	7	

(# projects is just a count of those listed, not extrapolated)
values are inclusive of blowup factors

Arts and cultural organizations in King County have various funds that can be used under varying restrictions. Table II-18 reports the levels of these funds at the beginning of the accounting period used by organizations participating in the survey, the additions to these funds and transfers out of them, and their ending balance. The table is divided into funds that are unrestricted, temporarily restricted, and permanently restricted. In total, the beginning and ending balance for all three funds were almost identical. Unrestricted funds had a reduction in balances of about \$30 million, while temporarily restricted funds gained \$20 million, and permanently restricted funds gained \$10 million.

Table II-18 Net Assets (Funds) \$ Millions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Unrestricted - Beginning	5.9	47.5	351.4	79.6	57.0	4.4	545.7
Additions	16.8	32.6	13.4	1.1	4.5	8.9	77.4
Transfers	16.5	35.9	31.5	4.6	11.4	9.3	109.2
Ending Balance	6.2	44.2	333.4	76.1	50.1	4.0	513.9
Temporarily Restricted - Begin	3.8	4.7	8.7	50.3	14.1	17.6	99.1
Additions	2.9	0.9	7.3	17.1	17.4	2.3	47.8
Transfers	4.5	1.3	5.3	5.0	8.3	3.1	27.5
Ending Balance	2.2	4.2	10.6	62.4	23.1	16.8	119.4
Permanently Restricted Begin	0.0	3.6	30.1	77.1	11.5	6.0	128.3
Additions	0.0	0.9	1.8	6.8	1.3	0.2	10.8
Transfers	0.0	0.0	0.5	0.0	0.0	0.0	0.5
Ending Balance	0.0	4.4	31.3	83.8	12.8	6.2	138.6
Total- Begin	9.7	55.7	390.2	206.9	82.6	28.0	773.1
Additions	19.7	34.3	22.4	24.9	23.2	11.4	136.1
Transfers	21.0	37.2	37.3	9.6	19.8	12.4	137.2
Ending Balance	8.4	52.8	375.3	222.3	86.1	27.0	771.9

Data not extrapolated

Employment in Cultural Organizations

King County arts and cultural organizations employ a combination of full-time, part-time, contractual, and intern & work study employees. They also have a considerable number of volunteers. Tables II-19 through II-24 present detailed information on the structure of employment in these organizations.

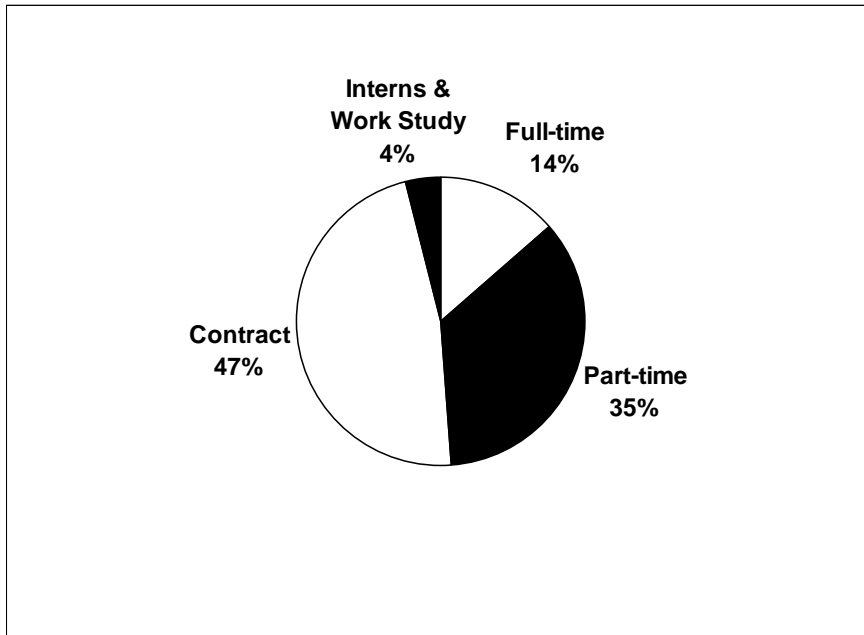
Table II-19 and Figure II-5 present an overview of the structure of employment of King County arts and cultural organizations. A headcount estimate indicates 14,228 people had some form of employment in these organizations, with the largest number of people being employed at part-time or contractual workers. The largest number of people are employed in theater and music, followed by ASO's, visual arts, dance, and heritage. The composition of employment as shown in Figure II-5 is very similar to the 1997 study. That study found 14% of employment full-time, 39% part-time, 44% contractual, and 3% interns and work study. The major shift in

the current study is a somewhat increased fraction of the work force to be contractual, and a somewhat smaller fraction of the work force on a part-time basis. The number of people employed in these organizations is up sharply from the 1997 study, increasing from 9,587 to over fourteen thousand.

Table II-19 Employment Status

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Full-time	146	449	662	304	240	121	1,924
Part-time	264	2,442	1,562	498	226	59	5,050
Contractual	329	2,274	1,675	358	106	1,944	6,686
Interns & Work Study	8	145	144	144	91	35	568
Total	747	5,311	4,044	1,304	662	2,160	14,228
# Personnel under contracts	57	1,121	646	0	0	0	1,824

Figure II-5 Employment Status



Tables II-20 through II-24 contain details on the occupational composition of the work force described in a summary manner in Table II-19. These tables report administrative and artistic/professional/technical employment separately. Table II-20 describes the composition of full-time employment. Within the administrative occupations, the aggregate number of individuals is similar in each occupation. Marketing and fundraising administrative employees are the largest component in the five presenting disciplines. Within the artistic/professional/technical occupations, artistic and production occupations are the largest in numbers, with these concentrated in dance, theater, music, and visual arts disciplines. While overall employment in the artistic/professional/technical occupations grew between 1997 and 2003, the number of people in full-time artistic/performing employment declined (from 388 to 341).

Table II-20 Full Time Employment in Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
<u>Administrative</u>							
Executive	6	36	34	19	17	33	145
Clerical	0	31	46	13	11	19	121
Marketing/Promotion/ Publicity	19	54	46	28	11	9	168
Fundraising	12	41	52	28	19	12	164
Other Administrative	10	63	12	44	8	15	152
Total Administrative	48	226	190	133	66	87	750
<u>Artistic/Professional/ Technical</u>							
Artistic/Performing	63	86	150	36	0	6	341
Guest Artists/Lecturers	0	0	0	0	0	0	0
Director / Design	6	5	2	3	14	0	31
Production / Technical	6	86	278	96	13	1	480
Education/Instructional	24	29	30	23	47	4	157
Other Personnel	0	17	12	14	99	22	165
Total A/P/T	99	224	472	172	173	34	1,174
Total Jobs	146	449	662	304	240	121	1,924

Part-time employment occupations are reported in Table II-21. This table indicates that the majority of this employment is in artistic/professional/technical occupations. Only 14% of part-time employment is in administrative categories, and nearly half of this is related to market/promotion/publicity (especially in theater). Nearly half of the part time employment was in theater, followed by music. Most of the artistic/professional/technical employment is in production/technical and artistic/performing occupations.

The composition of contract employment is presented in Table II-22. This category of employment constitutes the largest number of workers, as measured by a headcount. Employment in this category is largely in theater, music, and ASO's (many of these are related to programs presented in local communities by these organizations). The bulk of the people employed on a contract basis are in artistic/performing occupations. The number of people working in this category doubled from the 1997 study, while the number of contract guest artists/lecturers declined slightly (from 842 to 628).

Table II-21 Part-Time Employment in Cultural Organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
<u>Administrative</u>							
Executive	7	7	5	2	6	7	35
Clerical	1	34	20	15	9	16	95
Marketing/Promotion/ Publicity	7	227	29	23	0	3	288
Fundraising	3	62	3	13	9	4	95
Other Administrative	75	24	54	26	5	0	183
Total Administrative	93	353	111	79	30	31	697

Artistic/Professional/ Technical							
Artistic/Performing	17	560	588	10	0	3	1,178
Guest Artists/Lecturers	6	83	1	0	0	0	89
Director/Design	11	12	13	3	5	0	44
Production/Technical	66	1,246	439	126	19	1	1,898
Education/Instructional	71	48	91	266	60	12	548
Other Personnel	0	140	319	14	112	12	596
Total A/P/T	171	2,089	1,451	419	196	28	4,354
Total Jobs	264	2,442	1,562	498	226	59	5,050

Table II-22 Contract Employment - Headcount

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Artistic/Performing	297	1,441	1,112	130	47	1,441	4,467
Guest Artists/Lecturers	2	46	268	23	58	231	628
Director/Design	6	344	40	2	0	15	406
Production/Technical	12	175	70	12	0	124	394
Education/Instructional	8	216	152	149	0	112	637
Other Personnel	3	53	34	43	0	21	155
Total	329	2,274	1,675	358	106	1,944	6,686

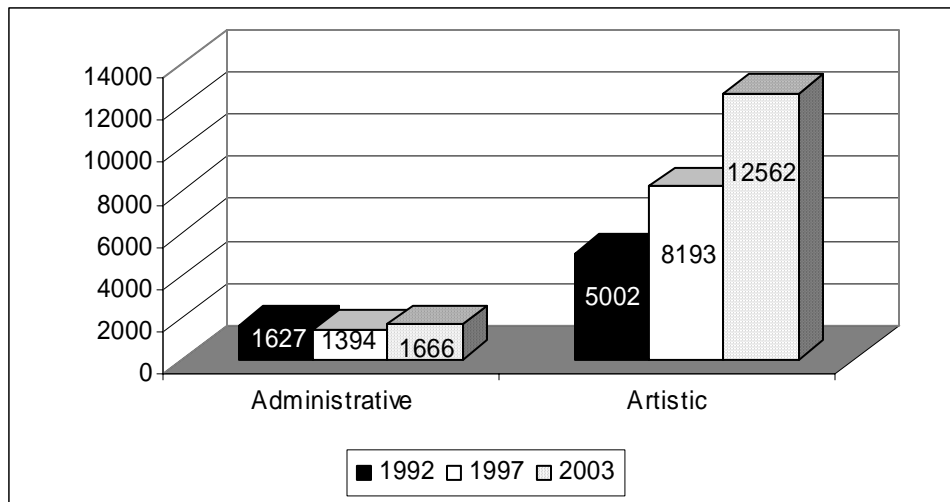
The total number of people employed in King County arts and cultural organizations is presented in Table II-23. This table adds together the full-time, part-time, and contract employee estimates, as well as those working as interns or in work study positions. The total number of jobs documented in Table II-23 is the same as in Table II-19. Across all the disciplines, some 88% of employment in King County arts and cultural organizations are in artistic/professional/technical occupations, while 12% are in administrative occupations. These administrative share is slightly lower than in the 1997 study, which estimated administrative employment to be 15% of total employment. Figure II-6 presents estimates of employment in administrative and artistic/professional/technical occupations in the 1992 and 1997 studies, and the current study. This figure clearly depicts the strong growth in employment in artistic/professional/technical occupations over the past decade in King County arts and cultural organizations.

There are different employment structures across the disciplines reported in Table II-23. Within music and ASO's, there are relatively large numbers of guest artists and lecturers. Theater has a relatively large number of people working in marketing/promotion/publicity. Artistic/performing and production/technical jobs dominate employment in dance, theater, music and ASO's. Visual arts organizations report relatively large numbers of educational/instructional employees. The large number of other artistic/technical/professional employees in heritage may be related to strong retail sales activity at several of these organizations.

Table II-23 Total Employment Including Full and Part-Time, Contractual, and Interns/Work Study Workers

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Administrative							
Executive	12	48	41	28	27	43	199
Clerical	3	80	83	68	41	44	321
Marketing/Promotion/ Publicity	27	295	77	60	22	18	500
Fundraising	17	109	58	46	44	21	295
Other Administrative	85	98	68	72	13	16	352
Total Administrative	145	630	327	275	147	142	1,666
Artistic/Professional/ Technical							
Artistic/Performing	378	2,095	1,853	216	47	1,455	6,045
Guest Artists/Lecturers	8	128	269	23	58	231	717
Director/Design	23	362	55	14	19	15	487
Production//Technical	86	1,562	809	252	46	127	2,881
Education/Instructional	104	324	287	453	126	130	1,424
Other Personnel	3	211	447	71	219	59	1,011
Total A/P/T	602	4,681	3,716	1,029	516	2,018	12,562
Total Jobs	747	5,311	4,044	1,304	662	2,160	14,228

Figure II-6 Employment Categories Compared, 1992, 1997, and 2003



Organizations participating in this study were asked to convert their part-time employment into a full-time equivalent, both for their employees and for contract employees. Responses were not complete with regard to this question. Table II-24 presents results of estimates of full-time equivalent based on responses provided. The overall structure of the employment estimate mirrors the headcount measures presented in Tables II-21 and II-22 most of the employment is in artistic/professional/technical occupations, and within that group in

artistic/performing/technical the largest share of employment is in the artistic/performing and production/technical occupations—the same structure as reported above.

Table II-24 Full-Time Equivalent Number of Part Time and Contractual Employees

	Dance	Theater	Music	Visual	Heritage	ASO	Total
<u>Administrative</u>							
Executive	2	2	9	1	3	3	20
Clerical	0	12	8	7	5	5	37
Marketing/Promotion/ Publicity	3	42	14	11	0	0	71
Fundraising	1	11	1	5	5	2	25
Other Administrative	38	8	13	4	3	0	65
Total Administrative	44	76	44	29	16	10	218
<u>Artistic/Professional/ Technical</u>							
Artistic / Performing	5	119	87	9	1	9	230
Guest Artists / Lecturers	3	13	2	0	1	0	19
Director / Design	6	12	6	1	3	0	29
Production / Technical	21	187	102	35	2	3	351
Education / Instructional	29	9	8	22	28	4	100
Other Personnel	0	24	12	5	47	8	96
Total A/P/T	65	364	216	73	83	24	825
Total FTE PT & Contract	109	440	260	102	98	34	1,043

Expenditures of Patrons

Patrons visiting arts and cultural organizations incur costs over and above their ticket or admission costs in relation to their trips. They incur travel costs, costs for food and beverages, lodging, and other outlays associated with their trips. Table II-25 documents the average per capita patron expenditure based on a survey of patrons conducted as a part of this study. There are significant differences in the average overall spending across the disciplines. The relatively high expenditures by dance and music patrons are largely related to the relatively high cost of tickets to these organizations performances. Patrons of visual arts, heritage, and ASO's reported lower food and beverage costs than was the case for dance, theater, and music patrons. ASO

events tend to be community-based, and do not draw patrons from longer distances, as is the case with the other disciplines.

Table II-25 Per Capita Patron Expenditures

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Tickets/Admissions	\$43.12	\$20.94	\$34.20	\$5.40	\$8.23	\$8.22	\$16.16
Parking Fees	2.37	1.07	1.91	0.94	0.41	0.02	1.15
Bus/Ferry/Taxi Costs	0.93	0.52	0.67	0.67	0.15	0.02	0.51
Auto Travel Costs	1.83	1.32	2.16	1.10	2.89	0.88	1.76
Food/ Beverages Before or After Event	8.48	8.69	11.42	4.54	4.03	3.55	7.67
Food/Beverages at Event	2.62	0.87	2.15	0.73	0.54	0.60	1.17
Souvenirs & Gifts	2.80	0.69	1.44	1.52	1.62	0.51	1.24
Entertainment	0.53	0.41	1.80	1.37	0.23	0.44	0.86
Lodging / Accommodation Costs	0.00	1.59	4.51	5.00	4.32	0.00	3.09
Air Travel Costs	7.37	0.95	5.74	4.89	8.81	0.00	4.29
Child Care	0.84	0.45	0.65	0.91	0.21	0.19	0.53
Other	0.44	0.41	1.86	5.03	0.48	1.19	1.48
Total	\$71.32	\$37.90	\$68.52	\$32.09	\$31.92	\$15.61	\$39.91

There are major differences in patron spending related to the region of origin of the patrons. These differences are discussed in Chapter III, which also reports on a number of other characteristics of patrons.

The per capita spending of patrons in the current study is below the spending reported in the 1997 study. There are several reasons for this difference. In the 1997 study we did not survey ASO's, and we developed an estimate of expenditures for ASO patrons by averaging non-ticket expenditures by patrons at the other five disciplines. This produced an expenditures estimate that is well above that estimated in the current study, which included ASO's in the patron survey. Second, tickets at theater events were estimated in the 1997 study to be considerably above the average outlay documented in this study. Third, as discussed in Chapter III, the patrons are estimated to have a somewhat more local pattern of origin in the current study than was the case in the 1997 study, which has associated with it a lower average expenditures distribution. It is also possible that patrons may have been slightly more restrained in their spending in 2003 due to the economic recession and relatively high unemployment rate that was present in King County at the time of this study.

The per capita patron expenditures estimated in Table II-27 were used with the estimate of the total number of patrons found in Table II-26 to estimate total patron spending, which is reported in Table II-28. The levels of attendance were estimated from the survey of organizations. Discounted and free student tickets were not considered as subject to the same expenditure patterns as other admissions. It is likely that these students did in fact have expenses in relation to their visits, but they have not been included in the survey of patrons, so there is no basis for determining their expenditures. The net attendance figure in Table II-26 was used to calculate the total patron expenditures reported in Table II-27. It should be noted that the 1997

and 1992 studies did not exclude free student tickets because we did not have statistical estimates of the number of these tickets.

Table II-26 Number of Patrons

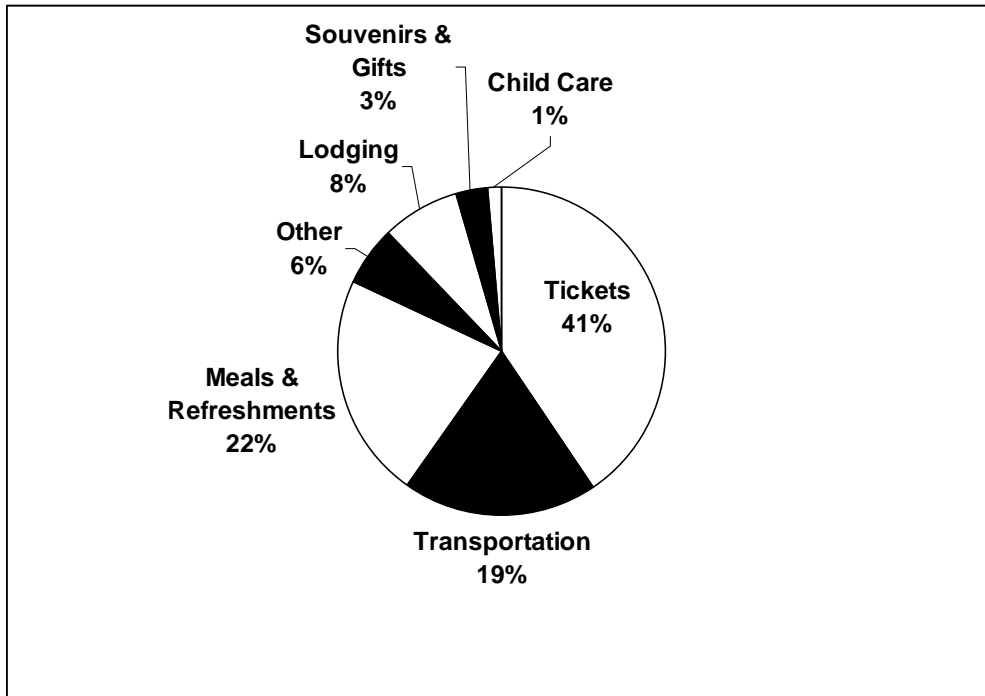
	Dance	Theater	Music	Visual	Heritage	ASO	Total
Total Attendance	324,242	2,286,429	1,598,449	1,032,025	1,222,821	326,391	6,790,357
Discounted Student Tickets	5,873	99,487	95,927	107,494	142,308	16,444	467,534
Free student tickets	33,460	96,021	45,475	15,618	35,255	22,245	248,074
Net Attendance	284,909	2,090,921	1,457,047	908,913	1,045,257	287,703	6,074,750

The 6.1 million patrons of arts and cultural organizations located in King County were estimated to have spent over \$245 million in relation to their visits, with the largest share of these costs being for tickets/admissions. Figure II-7 graphically presents the composition of patron expenditures. Other major outlays include food and beverages (\$54 million), lodging (\$26 million), and transportation (\$40 million). In constant dollars, this spending level is 8% above that estimated in the 1997 study. Although patronage was 33% higher than in the 1997 study, the lower average spending per patron and the exclusion of free student tickets results in more modest growth in aggregate patron expenditures.

Table II-27 Estimated Total Patron Expenditures (\$ Millions)

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Tickets/Admissions	\$12.3	\$42.4	\$36.4	\$4.1	\$5.9	\$1.2	\$102.2
Parking Fees	0.7	2.2	2.8	0.9	0.4	0.0	7.0
Bus/Ferry/Taxi Costs	0.3	1.1	1.0	0.6	0.2	0.0	3.1
Auto Travel Costs	0.5	2.8	3.1	1.0	3.0	0.3	10.7
Food/ Beverages Before or After Event	2.4	18.2	16.6	4.1	4.2	1.0	46.6
Food/Beverages at Event	0.7	1.8	3.1	0.7	0.6	0.2	7.1
Souvenirs & Gifts	0.8	1.4	2.1	1.4	1.7	0.1	7.6
Entertainment	0.1	0.8	2.6	1.2	0.2	0.1	5.2
Lodging / Accommodation Costs	0.0	3.3	6.6	4.5	4.5	0.0	19.0
Air Travel Costs	2.1	2.0	8.4	4.4	9.2	0.0	26.1
Child Care	0.2	0.9	0.9	0.8	0.2	0.1	3.2
Other	0.1	0.9	2.7	4.6	0.5	0.3	9.1
Total Expenditures	\$20.3	\$77.8	\$86.4	\$28.3	\$30.6	\$3.3	\$246.8

Figure II-7 Patron Expenditures by Category



Economic Impact of Cultural Organizations and their Patrons

The expenditures of arts and heritage organizations and their patrons were used with the economic impact model described briefly in Chapter 1 to estimate direct, indirect, and induced economic impacts in Washington State and King County. Appendix II discusses in greater detail technical aspects of this model. The model utilizes expenditure data presented in this chapter for arts and heritage organizations employee expenses and operating expenses, as well as patron outlays to develop the impact estimates. The values of the consumer expenditure categories used in the patron survey and the classification of expenses used in the organization survey were reclassified into the sectoring plan used in the input-output model (the sectors are identified in Table II-29 according to conventions used in input-output models). These models operate in producers prices and separate margins from consumer prices. For example, a purchase of a souvenir at a retail store is composed of state and local sales taxes, margins of the retailer, transportation costs associated with the distribution of the souvenir, and the manufacturer's value of the product. Estimates of the magnitude of margins were obtained from the U.S. Bureau of Economic Analysis decomposition of personal consumption expenditures into producers prices and margins, developed as a part of the benchmark U.S. input-output models. Only expenses incurred in Washington State or King County were included in this analysis; expenses made outside the region were not considered to be part of the regional economic impacts.

Two versions of the Washington State input-output model were used to estimate economic impacts. One version estimated statewide impacts of spending in King County by arts and cultural organizations and their patrons. The other version utilized a multiplier structure specific to King County, to estimate impacts in the King County region. The state model has

stronger interindustry linkages than the King County model. Some industries that are present in the state economy and that are impacted by spending of King County arts and cultural organizations and their patrons are not found in the local economy to the same extent as they are in the state economy. A good example of an industry with these characteristics is petroleum refining. The expenditures of arts and cultural organization patrons on automobile operations includes the purchase of petroleum products, which in Washington State are refined in the north part of Puget Sound, and not refined in King County. The modeling system used here is somewhat different than used in the 1997 impact study; the 1997 study used a scaling procedure to adjust state impacts to the county level.

Two estimates of economic impacts have been developed. The first is an aggregate estimate based upon the overall spending of arts organizations and their patrons. This first measure captures the spending of local patrons as well as patrons traveling to King County from elsewhere, and includes the impacts of the spending by arts and cultural organizations of locally derived and externally derived earned and contributed income. The second estimate is referred to as “new money” impacts; this estimate is based on the export income of arts and cultural organizations, and the spending of patrons who travel into the local area from elsewhere. This second estimate can be interpreted as a measure of the contribution of arts and cultural organizations to the economic base of King County.

(1) Aggregate Impacts

The aggregate economic impacts of King County cultural organizations are summarized in Table II-28. Four measures of impact are provided: output or sales of industries, employment, labor income, and selected taxes. Output impacts in the Washington economy are estimated to be \$956 million, labor income impacts are estimated to be \$426 million, with 24,421 jobs supported by arts and heritage organizations and their patrons. The majority of these impacts are felt locally. The level of output in King County is estimated to be \$844 million, with \$387 million in labor income linked to 23,166 jobs.

Arts and cultural organizations pay taxes to the federal, state, and local governments, with the largest payments (over \$10 million) being related to employment costs. They pay only modest sales and business and occupation taxes (about \$.5 million). However, patron spending generates sales taxes on some categories of outlays (such as souvenirs or food), and both organization spending and patron spending generates tax revenues to state and local governments through multiplier relationships. The output of industries stimulated by patron and cultural organization spending is subject to state and local B&O tax, and the labor income generated leads to consumer spending that yields state and local sales tax revenues. Table II-28 indicates tax revenue to Washington State included about \$20 million in sales taxes, and \$5 million in B&O taxes. Local governments in Washington State received an estimated \$8.5 million in sales taxes, and \$2.5 million in B&O taxes. There are other types of tax impacts that were not estimated in this study, including property taxes, hotel-motel taxes, motor vehicle excise taxes, and gasoline taxes.

Table II-28 Summary of Washington State and King County Impacts

	Washington	King County
Output (\$ millions)	\$956.342	\$844.427
Manufacturing	59.191	30.870
Nonmanufacturing	897.151	813.557
Wholesale & Retail Trade	172.350	155.543
Services	696.852	640.931
Other	27.949	17.083
Employment	24421	23166
Manufacturing	245	146
Nonmanufacturing	24177	23019
Wholesale & Retail Trade	3396	3112
Services	20468	19732
Other	312	175
Labor Income (\$ Millions)	\$425.997	\$386.937
Manufacturing	9.466	5.564
Nonmanufacturing	416.531	381.374
Wholesale & Retail Trade	63.125	56.865
Services	342.609	317.506
Other	10.797	7.002
Taxes (\$ Millions)		
State Sales Taxes	19.950	18.506
Local Sales Taxes	8.457	6.548
B&O Tax - state	4.922	4.152
B&O Tax - local	2.461	2.076

A more detailed tally of King County economic impacts is presented in Table II-29. This table decomposes the summary measures presented in Table II-28 into the individual sectoral impact measures tracked by the input-output model. The largest impacts are estimated to occur in various services, which reflects patterns of spending of labor income by consumers. In the other services sector, \$248.2 million of the total impact is the direct impact of arts and cultural organizations, which are classified in this sector.

Table II-29 Total King County Impact

	Output (\$ Millions)	Employment	Labor Income (\$ Millions)
1 Field crops, fruits, and vegetables	0.098	2	0.028
2 Livestock and products	0.089	1	0.026
3 Fishing and forestry	0.926	10	0.350
4 Mining	0.128	1	0.051
5 Food products	14.805	56	2.080

6 Textiles and apparel	0.576	8	0.194
7 Lumber and wood products	0.753	4	0.170
8 Furniture and fixtures	0.435	5	0.167
9 Pulp and paper products	1.792	6	0.362
10 Printing and publishing	4.074	35	1.279
11 Chemicals and products	0.396	1	0.089
12 Petroleum and products	4.391	1	0.079
13 Stone, clay, and glass products	1.104	7	0.297
14 Primary metals	0.034	0	0.006
15 Fabricated metals	0.448	3	0.128
16 Industrial machinery and equipment	0.289	2	0.110
17 Electrical machinery	0.111	1	0.035
18 Aerospace	0.027	0	0.006
19 Ship and boat building and repair	0.182	1	0.081
20 Other transportation equipment	0.047	0	0.010
21 Instruments	0.232	2	0.106
22 Other manufacturing	1.174	11	0.366
23 Construction	15.841	162	6.547
24 Transportation services	43.310	284	12.215
25 Electric utilities	9.795	19	1.575
26 Gas utilities	10.749	6	0.629
27 Other utilities	9.171	42	3.025
28 Communications	17.162	80	6.246
29 Wholesale trade	14.126	128	5.647
30 Eating and drinking places	74.827	1872	26.490
31 Other retail trade	66.590	1112	24.728
32 Finance and insurance	34.480	257	10.636
33 Real estate	43.263	238	5.099
34 Hotels and lodging	21.084	363	7.939
35 Computer and data processing services	0.461	2	0.279
36 Business and professional services	107.689	1649	54.321
37 Health services	39.201	499	21.228
38 Other services	304.565	15408	159.402
40 State & Local Govt.		883	34.913
Total	844.427	23166	386.937

Growth in the aggregate impacts of arts and heritage organizations in Washington State and King County has been significant since the 1997 study, as documented in Table II-30 and Figure II-8. Output and labor income were measured in constant \$2003 in Table II-30. At the Washington State level the three measures of changes in impacts are relatively similar. The larger measures of impact for King County are a byproduct of the difference in modeling approaches used in the 1997 and current study. There are several reasons for the increase in impacts. The number of patrons has risen by about 31%, as documented in Table III-3. The number of organizations included in this study has also risen, providing a larger direct basis for impacts. The budgets of organizations included in the 1997 study have also risen, at a rate well above their inflation-adjusted 1997 budgets. As noted earlier, per capita patron spending did not rise

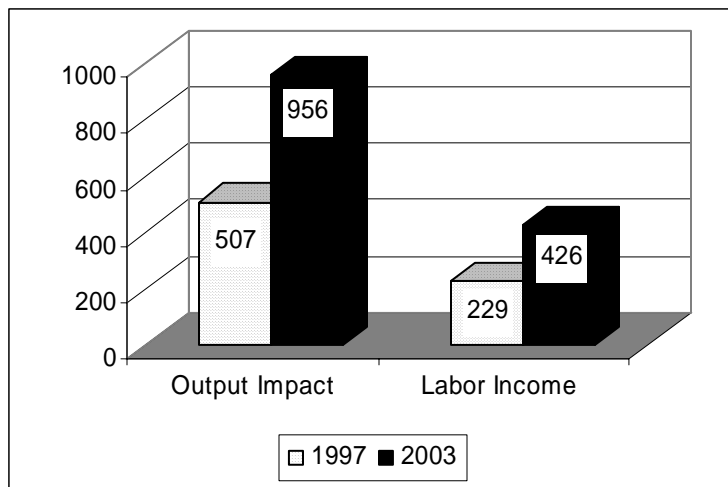
significantly, possibly reflecting the relatively depressed state of the regional economy in 2003. One way of providing context for these changes is presented in Table II-30, which has as background measures changes in population and total employment in Washington State and King County between 1997 and 2003. Measures of activity in arts and cultural organizations outstripped these background measures by a considerable margin.

Table II-30 Change in Impact Measures

	Washington State	King County
Output (constant \$)	69%	123%
Employment	63%	80%
Labor Income (constant \$)	66%	102%
Background Measures		
Population	7%	4%
Employment	7%	7%

Source for background measures: U.S. Bureau of Economic Analysis

Figure II-8 Aggregate Impacts in Washington State Compared, 1997 and 2003



(2) New Money Impacts

A second perspective on the economic impact of arts and heritage organizations is the “new money” perspective, that considers only the funds that came into King County from outside sources. These funds include income to arts and cultural organizations, as well as patron spending by people coming from outside King County, as reported in Table II-31. King County arts and cultural organizations received about 16% of their income from outside sources, down from 20% in the 1997 study. About 43% of patron spending is estimated to be new money.

Table II-31 New Money Sources

	% outside King County
Dance	14.1%
Theater	22.4%
Music	8.7%
Visual	14.7%
Heritage	32.3%
ASO	3.7%
Total – All Disciplines	15.8%
Income Category	\$ millions
Earned	\$24.0
Government	5.9
Contributed	
Corporate	0.7
Other Contributed	8.5
Total Organization Income	\$39.2
Patron Expenditures (total)	\$104.8
Except Tickets	76.8
Total Gross New Money	\$116.0

(Ticket income included with earned income)

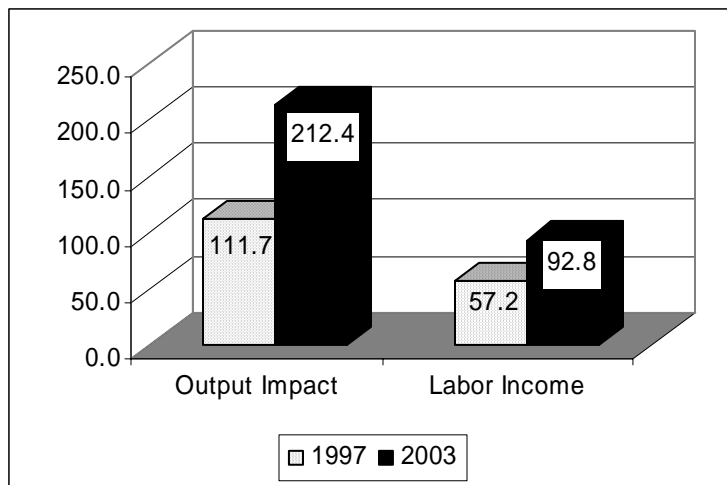
There are clear differences in the share of new money accruing to the various disciplines identified in Table II-31. Most of this is estimated to be earned income, primarily tickets/admissions purchased by people coming from outside the local area. Patron new money spending was estimated to be \$116 million, with \$77 of that for goods and services other than tickets/admissions. The economic impact of new money spending is presented in Table II-32 for King County. We did not have data that would have allowed a new money estimate for Washington State, but it would be smaller than the King County estimate because a substantial share of the new money outlays are made by people coming to King County from elsewhere in Washington state. New money impacts are about 23% of the aggregate impacts documented in Table II-28, a slightly smaller share than in the 1997 study (29%).

Table II-32 King County New Money Impacts

Output (\$ millions)	\$212.462
Manufacturing	8.852
Nonmanufacturing	203.610
Wholesale & Retail Trade	41.603
Services	157.177
Other	4.831
Employment	4,822
Manufacturing	36
Nonmanufacturing	4,786
Wholesale & Retail Trade	843

Services	3,893
Other	50
Labor Income (\$ millions)	\$92.824
Manufacturing	1.388
Nonmanufacturing	91.436
Wholesale & Retail Trade	15.186
Services	74.268
Other	1.981
Sales Tax	
State	\$4.756
Local	1.683
B&O Tax - state	1.145
B&O Tax - local	0.573

Figure II-9 New Money Impacts in King County Compared, 1997 to 2003 (\$million 2003)



Although the share of new money impacts is somewhat below the level measured in the 1997 study, the absolute level of these impacts up sharply, as depicted in Figure II-9 and shown in Table II-33. The employment and labor income growth rates are slightly below those shown in Table II-30 (overall growth), while the output impact change is well above that shown in Table II-30. The share of patron spending associated with new money (43%) was almost the same as in the 1997 study (44%), while organization income from new money sources declined slightly as a share of total income (20% versus 16%). Even taking these factors into account, new money impacts show substantial growth, indicating that arts and cultural organizations have continued to show real growth in their contribution to the economic base.

Table II-33 Percentage Change in King County New Money Impacts (In Constant Dollars)

Output	90%
Employment	52%
Labor Income	62%

Volunteers in Arts and Heritage Organizations

Arts and cultural organizations in King County have thousands of volunteers, as documented in Table II-34 in addition to their paid employees and contract employees. Table II-34 reports the number of volunteers within each discipline by the type of occupation in which they are volunteering. The mix of administrative versus artistic/professional/technical volunteers is quite different than the mix for employees. About one-seventh of employees or contract workers were in administrative occupations, but more than half of the volunteers are reported in this category, with the largest share associated with fundraising. The number of volunteers is similar to the number estimated in the 1997 study (which had a very large number in heritage related to Folklife that does not show up in the current study), but the hours reported for volunteers in the current study is more than double that reported in the 1997 study. Average hours per volunteer are 32.5 in the current study, versus 13 in the 1997 study, and average hours per volunteer are higher in all disciplines in the current study compared to the 1997 study.

Table II-34 Volunteers in Arts and Heritage Organizations in King County (# of volunteers)

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Administrative							
Executive	17	107	83	55	172	484	919
Clerical	0	462	144	25	13	121	765
Marketing/Promotion/ Publicity	5	1,397	102	46	3	10	1,564
Fundraising	19	448	381	368	538	1,528	3,283
Other Administrative	3	1,213	593	190	3	271	2,273
Total Administrative	44	3,628	1,304	684	729	2,414	8,804
Artistic/Professional/ Technical							
Artistic / Performing	0	51	291	103	24	0	468
Guest Artists/Lecturers	0	17	27	0	16	333	393
Director / Design	1	1	27	6	355	4	395
Production / Technical	9	77	645	1,057	345	83	2,216
Education / Instructional	0	143	275	356	610	359	1,744
Other Personnel	0	536	1,488	1	136	606	2,768
Total A/P/T	10	826	2,754	1,523	1,486	1,386	7,985
Total	54	4,454	4,058	2,208	2,214	3,800	16,789
Total Volunteer Hours	1,102	157,885	75,725	107,703	139,417	63,251	545,084
Hours/Volunteer	20.3	35.4	18.7	48.8	63.0	16.6	32.5

III. Cultural Organization Patronage Characteristics

“Arts are why we live—a reminder of why we are on earth—because we can create.”

Source: Patron Survey

This chapter presents information on the patrons attending cultural organization performances, exhibitions, and programs in King County. It describes the categories of patrons by discipline, and reports on a number of characteristics of patrons, such as group size, trip reasons, frequency of participation in arts and cultural activities, and a set of behavioral questions regarding patron and patron family involvement with the arts.

Number of Patrons

Arts and cultural organizations reported information on the number of patrons and other selected statistical information on their cultural services in the survey of arts and cultural organizations. These data are summarized by discipline in Table III-1, and were used to calculate the percentage distribution of attendance shown in Table III-2 and Figure III-1. Line (1) in Table III-1 shows the number of season ticket or membership visits. This is not an estimate of how many memberships or season tickets were sold, but rather the number of occasions members or season ticket holders are estimated to have attended. The number of season ticket holders and memberships is reported in Table III-4. Line (2) reports the number of single tickets or admissions. These two categories provide the majority of the box office/admission income to arts and cultural organizations. In addition, discounted student tickets are reported in line 3, discounted senior tickets are reported in line 4, other discounted tickets are reported in line 5, and free tickets are reported in line 6. The sum of these six categories is reported as total attendance. In the calculation of the economic impacts, the total attendance figures were reduced by the number of free and discounted student tickets. The number of patrons in the last line of Table III-1 were used with the patron expenditures shown in Table II-27 to derive the patron spending estimates shown in Table II-29.

Table III-1 Estimated Number of Patrons by Discipline

	Dance	Theater	Music	Visual	Heritage	ASO	Total
1 - Season ticket/membership visits	86,726	641,804	391,308	356,536	141,491	14,929	1,632,795
2 - Single tickets or admissions sold	156,229	1,139,067	525,283	312,705	464,939	115,984	2,714,206
3 - Discounted student tickets	5,873	99,487	95,927	107,494	142,308	16,444	467,534
4 - Discounted senior tickets	1,757	34,963	44,491	31,560	44,404	8,999	166,175
5 - Other discounted tickets (rush etc.)	40,196	207,812	102,535	55,929	63,406	1,532	471,411
6 - Free tickets	33,460	163,296	438,905	167,801	366,271	168,503	1,338,237
TOTAL ATTENDANCE	324,242	2,286,429	1,598,449	1,032,025	1,222,821	326,391	6,790,357
Net of Free and Discounted Students	284,909	2,090,921	1,457,047	908,913	1,045,257	287,703	6,074,750

Figure III-1 and Table III-2 indicate the percentage composition of patron types by discipline, while Figures III-2 and III-3 show the percentage distribution of attendance by category and by discipline, respectively. Season ticket/membership visits are much more important for dance, theater, music, and visual arts than is the case for heritage and ASO's. Heritage and ASO's have a larger fraction of free entrances. The composition of types of attendance are very similar to that documented in the 1997 study. However, the mix of overall attendance has changed, mirroring budget and employment data presented in Chapter 2, and shows that music accounted for a much larger share of attendance in the current study compared to the 1997 study (24% in the current study vs. 10% in the 1997 study). The shares of total attendance in dance, theater, visual, and ASO did not change dramatically from the 1997 study, but the share of attendance at heritage organizations dropped significantly, from 29% in the 1997 study to 18% in the current study.

Table III-2 Percentage Distribution of Attendance

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Season Ticket/Membership Visits	27%	28%	24%	35%	12%	5%	24%
Single Ticket/Admissions	48%	50%	33%	30%	38%	36%	40%
Discounted Student Tickets	2%	4%	6%	10%	12%	5%	7%
Discounted Senior Tickets	1%	2%	3%	3%	4%	3%	2%
Other Discounted Tickets	12%	9%	6%	5%	5%	0%	7%
Free Tickets	10%	7%	27%	16%	30%	52%	20%
Total	100%	100%	100%	100%	100%	100%	100%

Figure III-1 Percentage of Patrons by Discipline

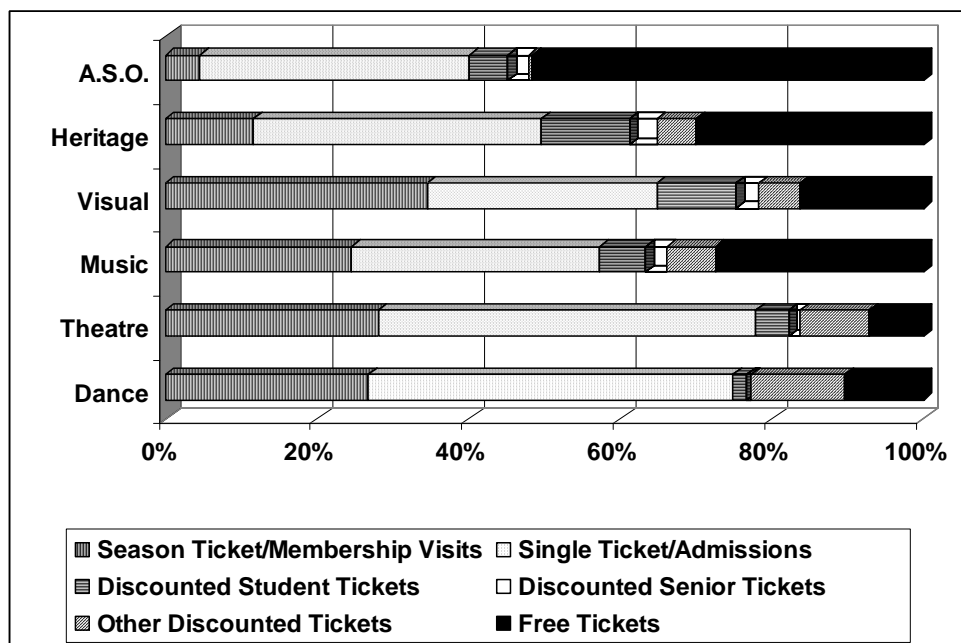


Figure III-2 Percentage Distribution of Attendance by Category

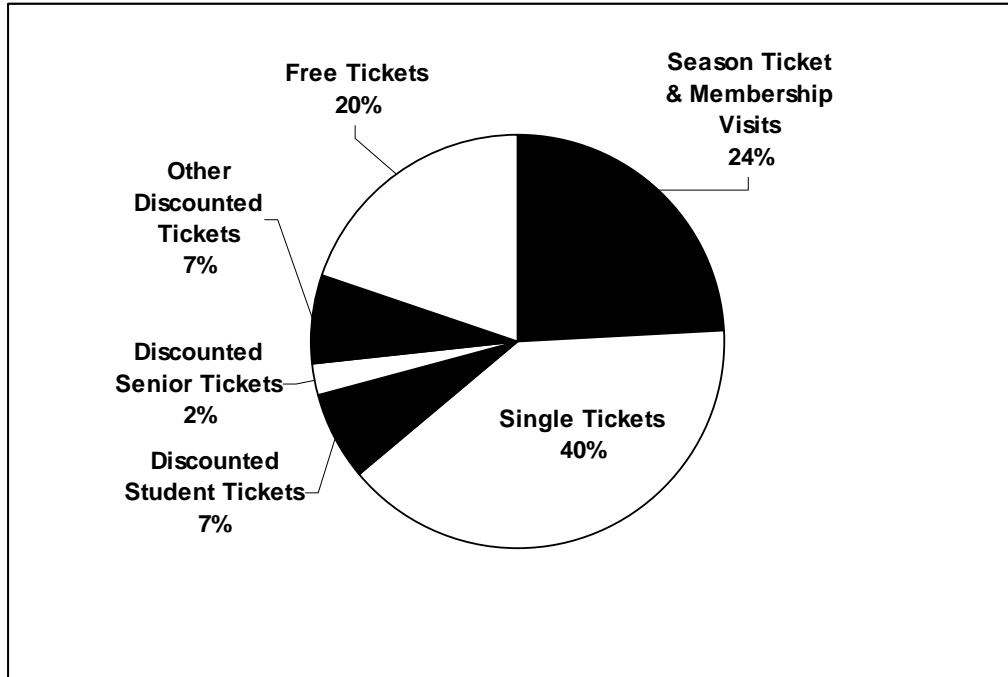


Figure III-3 Percentage Distribution of Attendance by Discipline

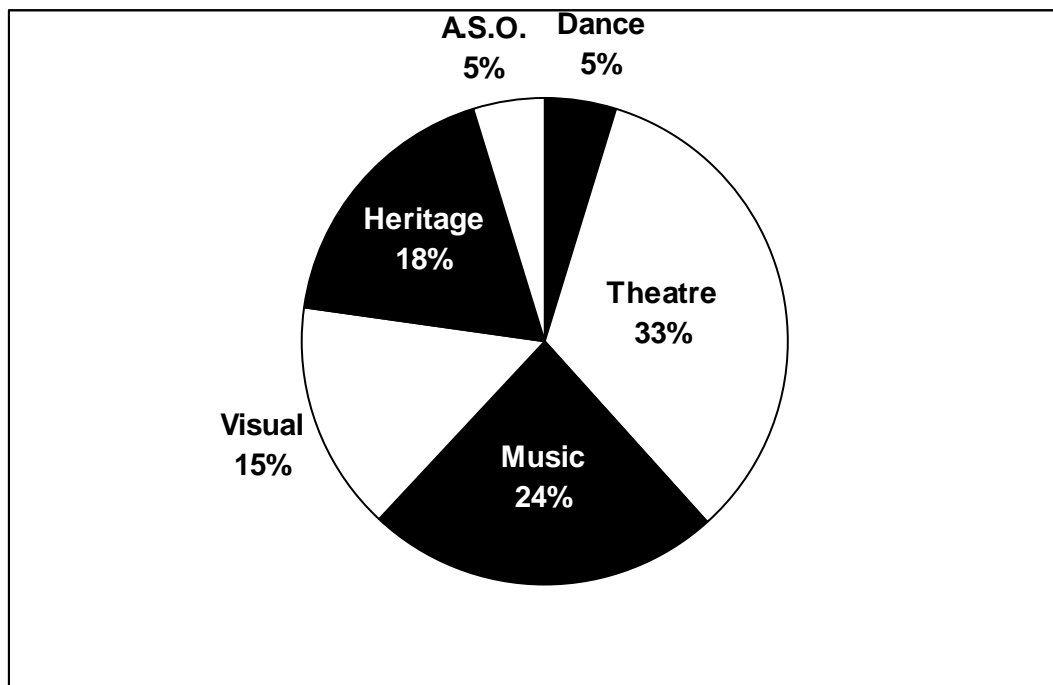


Table III-3 provides a comparison of the number of patrons in the 1997 and current study, the percentage change in patron numbers, and the shares of total visits accounted by different types of visits. The overall growth of 32% was led by a more than doubling of the number of discounted senior tickets. The core sources of patron season ticket/membership

visits and single tickets/admissions grew more slowly than overall admissions. Free and “other discounted tickets” had relatively rapid growth between 1997 and 2003. Although there were these differences in growth rates by type of admission, the last two columns of Table III-3 indicate that the shares of total admissions accounted for by the various admission categories did not have major changes between 1997 and 2003.

Table III-3 Comparison of Patronage Levels and Composition

	1997 patrons (#)	2003 patrons (#)	% Change	1997 % of Total	2003 % of Total
Season Ticket/Membership Visits	1,343,885	1,632,795	21.5%	26.1%	24.0%
Single Ticket/Admissions	2,097,139	2,714,206	29.4%	40.7%	40.0%
Discounted Student Tickets	394,196	467,534	18.6%	7.7%	6.9%
Discounted Senior Tickets	67,451	166,175	146.4%	1.3%	2.4%
Other Discounted Tickets	309,105	471,411	52.5%	6.0%	6.9%
Free Tickets	934,619	1,338,237	43.2%	18.2%	19.7%
Total Attendance	5,146,395	6,790,357	31.9%	100.0%	100.0%

Patrons with disabilities

Table III-4 indicates that arts and cultural organizations in King County served over 80,000 patrons with disabilities in the year 2003. Dance and theater organizations reported the largest number of patrons with disabilities. A number of organizations did not report any patrons with disabilities served, and it is likely that many did not keep statistics on this class of patrons.

Cultural Organization Performance and Exhibition Statistics

The survey of arts and cultural organizations documented measures of performance frequency, utilization of facilities, and subscriptions sold for the presenting disciplines of dance, theater, and music, as reported in Table III-4. Over 200,000 full and partial subscriptions were sold in 2003, resulting in over 1.1 million season ticket visits (see Table III-1). These disciplines played in venues with 65% to 77% of capacity. Over 86,000 memberships sold by visual and heritage organizations are estimated to have led to almost 500,000 membership visits, or about 5.7 visits per annum by those holding memberships in these organizations. Over 8,000 different productions or exhibitions were mounted in King County in 2003, up from 3,200 in 1997. Theater, music, visual arts, and ASOs all reported strong increases in the number of performances or exhibitions compared to levels reported in the 1997 study.

Table III-4 Cultural Organization Performance and Exhibition Statistics

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Number of productions/exhibits	142	1,970	3,700	1,075	85	1,467	8,440
Number of memberships sold	0	1,353	20,820	45,295	40,961	3,559	111,988
Number of full and/or partial subscriptions sold	15,066	122,704	66,759	1,810	1,136	191	207,666
Average percentage of capacity	65.1%	72.4%	77.0%	NA	NA	NA	NA

Number of patrons with disabilities served	51,416	14,287	1,150	5,409	6,821	1,006	80,089
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NA – Not applicable or data not available

Patron Trip Reasons

Patrons were asked whether the primary reason for their trip was to attend the performance or exhibition at which they were interviewed. Table III-5 indicates that a weighted average of 86% went primarily to attend the arts or cultural organization event at which they were interviewed. Almost all dance, theater, ASO, and music patrons made their trips primarily to attend performances in these venues. A much larger share of visual and heritage patrons were involved with multiple purpose trips. There were a wide variety of reasons expressed by those who attended an arts or cultural organization on a trip not primarily to come to one of these organizations. Typical responses include the following: *“To See Everything, Family Trip,” “Birthday Party For Our Daughter Who Turned Twelve,” “To See The EMP (not interviewed at EMP),” “A Class Assignment To See Artifacts First Hand,” “Spend Time With My Grandson,” “Rainy-Day Activity!,” “Birthday Party,” “Was Out For A Walk And Wanted To See The Museum,” “To Eat In Your Yummy Café (interviewed at a visual arts organization),” “Seattle Marathon,” “Shopping For Christmas,” “Random.”* It is interesting to note that business-related reasons did not appear to be primary triggers for trips, but rather they tended to revolve around family activities or personal activities.

Table III-5 Reason for Patron Trips

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Went primarily to attend	99%	98%	97%	63%	75%	98%	86%
Did not go primarily to attend	1%	2%	3%	37%	25%	2%	14%

Patron Origins

Most patrons attending King County arts and cultural organization exhibitions and performances are local residents, as reported in Table III-6. This table indicates that an estimated 73% of the patrons are from King County. This table reports the share of patrons by geographic region of origin from the survey of patrons. Thus, 76.8% of patrons interviewed at dance events were from King County. The weighted average was calculated by estimating the share of overall patronage associated with each discipline, and weighting the individual discipline patron origins shares to obtain the weighted average shown in Table III-6. This table indicates that heritage and visual arts organizations draw a relatively large share of their patrons from out of state. Nearly 27% of the patrons came from outside King County. The number of patrons from outside the local area is smaller in the current study than documented in the 1997 study. That study found 65.6% King County patrons, 16.9% from elsewhere in Washington State, and 17.5% from out of state. The decrease in those from out of state may be related to the events of 9-11 and the recession that was evident in 2003 when sampling was conducted for this study. The current study documents a share of nonlocal patrons that is well above the 1992 study, that found 14.5% of patrons coming from outside King County.

Table III-6 Geographic Origin of Patrons

	King County	Other WA	Out of State
Dance	76.8%	21.6%	1.6%
Theater	81.6%	17.7%	0.7%
Music	65.9%	24.1%	9.9%
Visual	65.6%	17.3%	17.2%
Heritage	67.5%	19.4%	13.1%
ASO	88.2%	11.8%	0.0%
Weighted Average	73.2%	19.3%	7.4%

A cross-tabulation of patron origins and the percentage of patrons who indicated that their primary reason for a trip was to attend an exhibition or performance is presented in Table III-7. This table indicates that there is a geographic bias in the reasons for trips, as 90% of King County patrons came primarily to see the exhibition or performance, compared to 86% for the entire sample (which is predominately King County patrons). As distance from King County increases, the share of patrons with other primary trip reasons increases. But it should be noted that a majority of patrons coming from out of state claimed that their primary reason for making a trip was to visit a King County arts or cultural organization.

Table III-7 Patron Origins and Percentage Making Trip Primarily to Attend a King County Cultural Organization Event/Presentation

	Dance	Theater	Music	Visual	Heritage	ASO	Total
King	100%	99%	98%	71%	77%	97%	90%
Other WA	94%	98%	97%	54%	71%	100%	85%
Out of State	100%	71%	84%	38%	72%	100%	61%

Another perspective on the origin of patrons is presented in Table III-8. This table documents the share of patrons interviewed by geographic region of origin and discipline. For example, overall 25% of patrons were interviewed in a theater, but 27% of patrons originating in King County were interviewed at a theater. Patrons from King County and other parts of Washington State had similar frequencies in the overall sample of patrons. However, out of state patrons were much more likely to be interviewed at a heritage or visual arts organization.

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

	King County	Other Washington	Out of State	Total
Dance	4%	5%	1%	4%
Theater	27%	24%	3%	25%
Music	28%	33%	26%	28%
Visual	21%	19%	43%	23%
Heritage	13%	16%	27%	15%
ASO	7%	4%	0%	6%
Total	100%	100%	100%	100%
	n=1662	n=362	n=202	n=2226

Patron Expenditures

Patron spending by discipline was reported in Chapter II. The average spending reported in that chapter was based on a weighted average of spending by patrons coming from different geographic origins. Analyses of patron spending documented significant differences across all disciplines based on the distance traveled. Table III-9 summarizes these differences in expenditures by three patron origin regions: local patrons from King County, those coming from elsewhere in Washington State, and those coming from out of state. There is a clear increase in costs as distance traveled increases. The primary bases for these cost increases are higher travel, lodging, souvenir and gift costs, entertainment, and child care.

Table III-9 Patron Expenditures

	King County	Other WA	Out of State
Tickets/Admissions	\$16.34	\$18.91	\$8.43
Parking Fees	1.16	1.31	0.75
Bus/Ferry/Taxi Costs	0.28	1.38	0.47
Auto Travel Costs	1.22	2.41	4.74
Food/ Beverages Before or After Event	7.42	8.61	7.66
Food/Beverages at Event	1.16	1.31	0.93
Souvenirs & Gifts	1.09	1.44	2.09
Entertainment	0.67	1.21	1.57
Lodging / Accommodation Costs	0.32	2.40	27.69
Air Travel Costs	0.42	2.61	40.21
Child Care	0.44	0.43	1.49
Other	1.38	1.42	2.50
Total	\$31.90	\$43.45	\$98.52

Patron Group Sizes

The size distribution of groups attending King County arts and cultural organizations is presented in Table III-10. While the median group size was two persons, mean group sizes are higher than this figure due to the share of the sample in groups with three or more persons. The mean group size varied somewhat across the disciplines, with heritage organizations having considerably larger groups than the other organizations. Group sizes in the current study are uniformly larger across the disciplines than documented in the 1997 study. That study found the mean group size to be 2.7 persons, compared to 3.5 persons in the current study. The median group size was two persons, the same as in the 1997 study.

Table III-10 Group-Sizes Attending Cultural Organizations (% of Total)

# of Persons	Dance	Theater	Music	Visual	Heritage	ASO	Total
1	13%	6%	9%	24%	15%	9%	13%
2	56%	50%	55%	41%	22%	53%	46%
3 or 4	24%	28%	25%	22%	38%	30%	27%
5+	7%	15%	11%	13%	25%	8%	14%
Total	100%	100%	100%	100%	100%	100%	100%
Mean	2.5	3.7	3.2	3.6	4.1	2.7	3.5

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

In this study a number of questions were included in the patron survey that were new and intended to shed light on a variety of issues related to patron participation in activities of arts and cultural organizations. This section reports results of these questions.

Patrons were asked to identify how they were first exposed to the arts. Table III-11 presents results of this question. In almost every discipline, family and friends were the key to first becoming exposed to the arts, and even in heritage and ASO family and friends were quite important, if but slightly overshadowed by school. This table also makes it clear that school has been a very important place for exposure to the arts. A very consistent undercurrent of responses indicate self-discovery of the arts.

Table III-11 How patrons were first exposed to the arts

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Through School	25%	43%	31%	40%	44%	39%	38%
Through Family and Friends	65%	47%	57%	44%	43%	37%	48%
On My Own	10%	10%	13%	16%	13%	23%	13%
Total	100%	100%	100%	100%	100%	100%	100%

Patrons were asked when they were first exposed to the arts. Table III-12 reports that almost three-quarters were first exposed when they were young. The responses for all disciplines except ASO are quite similar. ASO patrons were more likely to be exposed as an adult, in college or in high school that was the case for patrons interviewed in the other disciplines.

Table III-12 When patrons were first exposed to the arts

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Grade School Age	73%	69%	76%	76%	73%	61%	73%
Middle School Age	7%	9%	8%	8%	9%	6%	8%
High School Age	11%	10%	7%	8%	10%	12%	9%
College Age	2%	7%	6%	4%	3%	8%	5%
As an Adult	6%	5%	3%	4%	5%	12%	5%
Total	100%	100%	100%	100%	100%	100%	100%

Valid – N= 2300

A cross-tabulation of how patrons were first exposed to the arts and at what point in their life they were exposed yielded a highly significant pattern of responses to these two questions. Patrons first exposed through family and friends were much more likely than expected to have this exposure when they were young (grade school age). Patrons first exposed at school when they were young were represented in the sample in numbers about as expected, but had much higher than expected citations for first exposure at middle and high school years. Thus, many patrons not exposed when they were at grade school age with family and friends became first exposed while in middle or high school. Those first exposed on their own were much more likely than expected to have had their first exposure as an adult, or in college, or in high school. There is a clear relationship found here—early first exposure tends to be strongly

with family and friends, first exposure in school has its most powerful influence in middle and high schools, and first exposure by patrons themselves comes at a later stage in life.

Patrons were asked to classify how frequently they attended performances/exhibitions of arts and cultural organizations in King County. Table III-13 presents responses to this question, and it indicates that the typical patron goes monthly to some event. The overwhelming number of patrons go to events either monthly or several times a year. About 10% go to events on a weekly basis, and a similar percentage annually.

Table III-13 How frequently patrons attend arts/heritage performances/exhibitions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Weekly	7%	10%	9%	15%	9%	7%	10%
About once a month	74%	51%	52%	39%	37%	38%	46%
3 or 4 times a year	17%	34%	33%	35%	39%	48%	35%
Once a year	2%	6%	6%	10%	15%	7%	8%
Total	100%	100%	100%	100%	100%	100%	100%

N=2335

Patrons were asked several questions regarding changes in their regard for the arts and spending on the arts. Table III-14 reports responses to a question asking patrons to indicate how the value of the arts had changed for them over the past few years. There is a uniform pattern of responses indicating an increase in the value of the arts to about two-thirds of patrons—and a decrease in the value of the arts for about one-third of patrons. Across the disciplines there are only minor differences in the responses to this question.

Table III-14 How the value of the arts changed for patrons over the last few years

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Increased	70%	60%	65%	72%	63%	69%	66%
Decreased	30%	39%	34%	26%	34%	31%	33%
No Change	0%	2%	1%	1%	3%	0%	1%
Total	100%	100%	100%	100%	100%	100%	100%

Patrons were also asked whether their spending had changed since the 9/11 attacks and through the recent recession. Table III-15 indicates that for most patrons these events have not affected their participation in arts and cultural activities. However, there are more people indicating an increase in spending than citing a decrease. Heritage patrons were the only discipline to show more patrons indicating a decrease in spending than an increase in spending.

Table III-15 How patron spending has changed since 9/11 and through the recent economic downturn

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Increased	25%	15%	20%	18%	11%	13%	17%
Decreased	14%	11%	13%	11%	17%	13%	12%
Not Changed	61%	74%	67%	72%	72%	74%	71%
Total	100%	100%	100%	100%	100%	100%	100%

Patrons were asked to explain in open-ended text why their spending had increased or decreased. There were about 400 cases of text regarding increases, and about 300 cases of text regarding decreases. Tables III-16 and III-17 present a sampling of answers to this question. The reasons cited were quite diverse, and the text in Tables III-16 and III-17 should not be regarded as representative, but rather a sampling of responses designed to convey the flavor of patron responses. Two statements were selected for each of the disciplines. The texts of those increasing spending tend to emphasize an improved economic position, a change in status, or a shift in values. In contrast, most of the statements related to decreases speak about decreased income, and they do not convey a decision to shift spending away from the arts towards other goods or services because of dissatisfaction with their experiences.

Table III-16 Why spending has increased

Dance	<i>We are retired and have the time and economic means to increase our spending.</i>
Dance	<i>Not correlated to 9/11, simply doing what i've wanted- but been previously unable to do</i>
Theater	<i>It's more important than ever, in a time of change and turmoil, that the arts be strong.</i>
Theater	<i>The children have grown up and moved out. More time, easier to attend. We really enjoy plays.</i>
Music	<i>My financial situation has allowed me to spend more on the arts, which is a priority for me.</i>
Music	<i>Because i happen to have more free time now. No relation to 9/11</i>
Visual	<i>Because it is through the arts that new perspectives emerge and that is more important to me now.</i>
Visual	<i>I got more interested in arts.</i>
Heritage	<i>Because it's more important and i am personally doing better financially.</i>
Heritage	<i>Reached a stage of life when i want to devote more time and money to arts.</i>
ASO	<i>Arts are the heart and soul of a culture. Keep the heart going and anything can be overcome or dealt with.</i>
ASO	<i>Has to do with the people i'm associated with now.</i>

Table III-17 Why Spending has Decreased

Dance	<i>I'm retired and income doesn't keep up with inflation.</i>
Dance	<i>Less disposable income.</i>
Theater	<i>Economic concerns.</i>
Theater	<i>Less money to spend during a layoff.</i>
Music	<i>Children in teens-spending less due to saving for college</i>
Music	<i>Was In Doldrums, "Cocooning" 1st Year After 9/11- Picking Up Now- I Gotta Live!</i>
Visual	<i>Less discretionary money.</i>
Visual	<i>Had a child- less money available.</i>
Heritage	<i>Limited resources. Uncertainty of jobs</i>
Heritage	<i>We used to contribute/ donate, now we just pay for attending and make smaller donations</i>
ASO	<i>Our income has decreased</i>
ASO	<i>Income gradually decreasing while cost of living increases.</i>

A cross tabulation of responses to the questions about changes in the value of the arts and spending showed a highly significant relationship. Considering those that said the value of the arts had increased, many more people than would be expected also said that they had increased their spending on the arts. And for those indicating that their spending had decreased, a much larger than expected number also indicated that the value of the arts to them had decreased. For the large proportion of respondents indicating no change in spending, a slightly smaller number than expected said that the value of the arts to them had increased, and a slightly larger number than expected said that the value of the arts to them had decreased. Patterns of spending change were also associated with income. A cross-tabulation of changes in spending and household income was also highly significant, with many more in the upper income

categories increasing their spending than expected, and more of those in the lowest income categories decreasing their spending than expected.

Patrons were also asked if they made cash contributions to one or more arts or heritage organizations. Table III-18 indicates that about half of those interviewed do make such contributions, but with some variation by discipline. Patrons interviewed at visual arts and ASO's were less likely than the overall sample to make such contributions, while those attending dance, theater, and music were more likely than the overall sample to make cash contributions. A cross-tabulation of changes in spending on the arts and whether cash contributions were made was highly significant. Those increasing their spending were much more likely to make cash contributions than was expected, and just the reverse was the case for those decreasing their spending. Those decreasing their spending were much less likely to make contributions than expected. There was also a statistically significant relationship between patron income and the likelihood of making cash contributions. Those in the upper income categories were more likely than expected to make such contributions, and those in the lower income categories were less likely than expected to make cash contributions.

Table III-18 Patron's frequency of making cash contributions to arts and cultural organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Yes	62%	56%	61%	44%	53%	46%	54%
No	38%	44%	39%	56%	47%	54%	46%
Total	100%	100%	100%	100%	100%	100%	100%

N=2335

The patron survey also asked if specified arts/heritage events were used on a regular basis to meet with families or friends. Table III-19 indicates that most patrons do use these events to socialize with family and friends. There was not much variation in the response to this question across the disciplines.

Table III-19 Patron's tendency to use attendance at arts and cultural organization events to meet regularly with family and friends?

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Yes	60%	63%	58%	57%	55%	63%	59%
No	40%	37%	42%	43%	45%	37%	41%
Total	100%	100%	100%	100%	100%	100%	100%

N=2325

Patrons were also asked about the participation of their children in arts activity outside of school. Table III-20 reports that about half of the sample did not have children, and that the question did not apply to them. Of the respondents with children, many more indicated that their children participated in arts activity outside of school than did not participate in such activity. Differences are apparent among the disciplines, with patrons interviewed at dance events much more likely to have their children involved with arts activity outside of school. Music and visual arts patrons percentages appear low, and that is because a relatively high percentage of these patrons did not have children, as a strong majority of the patrons with

children participated in arts activity outside of school. Patrons were asked to describe the nature of this arts activity outside of school. Over 700 comments were provided on this question. Table III-21 reports a selection of responses by discipline. There was a strong tendency for dance, theater and music comments to involve those disciplines, while there were less focused comments in the other disciplines.

Table III-20 Patron’s likelihood of having children participate in arts activity outside of school.

	<u>Dance</u>	<u>Theater</u>	<u>Music</u>	<u>Visual</u>	<u>Heritage</u>	<u>ASO</u>	<u>Total</u>
Yes	47%	32%	29%	26%	35%	33%	31%
No	6%	19%	13%	15%	25%	17%	17%
Not applicable- No children	47%	49%	59%	59%	40%	50%	53%
Total	100%	100%	100%	100%	100%	100%	100%

N=2288

Table III-21 Typical Statements about Children’s outside arts activity

Dance	<i>One child in violin, one in ballet and piano</i>
Dance	<i>Pnb school; cinematography classes; music lessons; poetry class</i>
Theater	<i>Irish step dance performance and celtic music.</i>
Theater	<i>Drama classes, music lessons and oil painting/pottery.</i>
Music	<i>Seattle girls choir, music.</i>
Music	<i>Musical experiences from outside lessons to attending shows.</i>
Visual	<i>Music and art lessons</i>
Visual	<i>Family visits to galleries, museums.</i>
Heritage	<i>They sing, attend performances, write.</i>
Heritage	<i>They join music classes and painting classes. They also join literature activities (sometimes.)</i>
ASO	<i>Son does community theater, does vocal shows.</i>
ASO	<i>Co-op - one musician and artist a month studied. Families take turns teaching.</i>

Patrons were asked if they volunteered to work for arts and heritage organizations. Table III-22 reports that 28% of those interviewed said they did engage in volunteer activity. Considering all non-discounted student attendance reported in Table III-1, if 28% of these patrons engaged in volunteer activity, that would imply 1.6 million volunteers, roughly triple the number estimated by the patron survey (see Table II-36). However, many of these patrons participate in multiple arts and heritage organizations, as discussed in the next section of this report. Table III-23 presents estimates of the number of hours spent volunteering annually. The mean is well above the median because of a cohort of volunteers that spend large amounts of time volunteering. The median figure of 40 hours corresponds reasonably well to the 33 hours reported by the arts and heritage organizations (see Table II-36).

Table III-22 Patron’s tendency to volunteer to work for arts and cultural organizations

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Yes	16%	29%	27%	29%	24%	34%	28%
No	84%	71%	73%	71%	76%	66%	72%
Total	100%	100%	100%	100%	100%	100%	100%

N=2341

Table III-23 Estimated Hours Annually Volunteering

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Mean	30	80	92	90	86	93	86
Median	30	40	50	40	40	40	40
Percentage Distribution of Hours Volunteering							
Up to 20	42%	39%	30%	40%	34%	38%	36%
21-40	42%	17%	15%	15%	19%	13%	16%
41-100	17%	30%	39%	26%	30%	26%	31%
101-500	0%	12%	13%	16%	15%	21%	14%
Over 500	0%	2%	3%	3%	1%	3%	3%
Total	100%	100%	100%	100%	100%	100%	100%

Patron Participation in Arts and Heritage Organizations

Patrons were asked to indicate if they had a season ticket or membership in arts and heritage organizations in Seattle, in King County outside Seattle, or in Pierce County. They were also asked if they attended arts and heritage organizations through the purchase of single tickets or admissions. If they made such purchases, they were asked to enter the number of years that they had made them. Tables III-24 and III-25 report results of responses to this question. These tables are based on responses that made at least one entry into this part of the patron questionnaire. The responses to this question make it quite clear that arts and cultural organization patrons interviewed in all disciplines participate in multiple in arts and heritage organization activities. The typical patron held 1.33 season tickets or memberships, and bought 2.41 categories of single tickets or admissions. Patrons indicating that they made single ticket or admissions purchases could have made multiple purchases within a particular category; we have no data on the frequency of such purchases. Dance patrons exhibited a high tendency to hold season tickets or memberships, while visual arts and heritage patrons were less likely to hold season tickets or memberships. It is clear that the majority of the participation was with organizations located in Seattle. The fractions of patrons indicating that they made purchases elsewhere in King County or in Pierce County was not large, but there is an undercurrent of purchases outside Seattle.

Table III-24 Participation in Arts and Cultural Activity

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Percent of Sample Holding Season Tickets or Memberships							
In Seattle:							
Music/opera	44.9%	24.1%	60.5%	16.0%	26.0%	16.3%	34.5%
Theater	48.7%	56.6%	28.8%	23.3%	31.1%	28.8%	36.3%
Dance	74.4%	13.2%	12.3%	7.3%	11.3%	8.7%	13.9%
Heritage	3.8%	5.2%	4.7%	4.9%	14.7%	2.9%	5.7%
Visual	24.4%	11.7%	23.7%	28.5%	22.0%	7.7%	20.4%
In King County Outside Seattle							
Music/opera	5.1%	3.6%	4.3%	1.4%	0.6%	11.5%	3.6%
Theater	7.7%	13.8%	6.0%	3.3%	1.7%	16.3%	7.8%
Dance	2.6%	1.5%	1.1%	2.2%	0.6%	1.0%	1.4%

Heritage	2.6%	0.8%	0.4%	1.4%	1.7%	1.9%	1.0%
Visual	2.6%	1.5%	1.3%	7.3%	1.7%	3.8%	2.8%
In Pierce County							
Music	1.3%	1.3%	3.1%	0.5%	1.1%	1.0%	1.4%
Theater	1.3%	1.9%	2.4%	0.5%	1.7%	2.9%	1.8%
Dance	1.3%	0.4%	0.4%	0.0%	0.0%	0.0%	0.3%
Heritage	0.0%	0.2%	0.5%	0.0%	1.7%	1.0%	0.5%
Visual	3.8%	1.5%	2.2%	1.6%	1.7%	2.9%	1.9%
Total	224.4%	137.3%	151.6%	98.1%	117.5%	106.7%	133.4%
Percent of Sample buying Single Tickets							
In Seattle							
Music / Opera	43.6%	42.3%	53.1%	58.8%	51.4%	48.1%	50.5%
Theater	44.9%	46.1%	39.1%	55.3%	40.1%	32.7%	44.4%
Dance	35.9%	28.9%	26.8%	35.8%	28.2%	26.0%	29.8%
Heritage	16.7%	14.5%	12.5%	23.8%	26.0%	10.6%	16.8%
Visual	26.9%	32.5%	34.1%	57.2%	38.4%	24.0%	38.0%
In King County Outside Seattle							
Music / Opera	3.8%	8.8%	9.4%	13.8%	14.1%	39.4%	12.2%
Theater	10.3%	14.9%	8.3%	14.9%	12.4%	25.0%	13.0%
Dance	5.1%	4.0%	3.8%	7.6%	7.3%	16.3%	5.8%
Heritage	3.8%	5.2%	4.5%	6.5%	63.8%	12.5%	5.9%
Visual	7.7%	7.1%	5.8%	15.4%	10.7%	22.1%	9.7%
In Pierce County							
Music / Opera	1.3%	2.7%	4.5%	5.4%	5.6%	11.5%	4.6%
Theater	1.3%	3.4%	2.7%	3.8%	4.0%	10.6%	3.6%
Dance	0.0%	1.0%	0.9%	1.4%	2.8%	2.9%	1.2%
Heritage	0.0%	1.0%	1.1%	1.9%	5.1%	3.8%	1.8%
Visual	3.8%	3.4%	3.1%	6.5%	6.8%	6.7%	4.5%
Total	205.1%	215.9%	209.8%	308.1%	316.9%	292.3%	241.8%

N=1757

The duration of purchases of season tickets or memberships, and for the purchase of single tickets is reported in Table III-25. This table reports the mean length of purchase for those responding to this question. The mean appears to be about 6-10 years for most of the categories, with small sample sizes in some cases likely yielding responses that are of questionable accuracy. The mean length of time for purchasing season tickets or memberships and single tickets does not appear to be very different.

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

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Patrons buying Season Tickets or Annual Memberships							
In Seattle:							
Music/opera	8	10	10	6	6	7	9
Theater	11	12	11	7	8	10	10
Dance	7	7	7	5	5	9	7
Heritage	7	13	7	7	7	12	9

Visual	11	12	8	7	8	11	8
In King County Outside Seattle							
Music/opera	3	6	7	8	5	6	7
Theater	11	7	7	2	3	5	6
Dance	4	8	11	3	1	3	6
Heritage	1	7	11	1	5	10	5
Visual	3	8	7	8	22	6	8
In Pierce County							
Music	2	18	15	14	8	1	16
Theater	5	10	9	13	7	5	9
Dance	7	5	8	None	None	None	6
Heritage	None	20	10	None	14	1	12
Visual	2	11	12	5	4	3	8
Patrons buying Single Admissions or Tickets							
In Seattle							
Music / Opera	9	9	11	7	9	13	9
Theater	10	9	11	7	10	11	9
Dance	9	8	9	6	10	7	8
Heritage	12	9	12	7	9	1	9
Visual	12	10	10	7	9	10	9
In King County Outside Seattle							
Music / Opera	29	9	10	7	9	11	9
Theater	14	7	11	5	7	13	8
Dance	21	6	6	5	8	12	8
Heritage	25	6	11	6	1	7	9
Visual	18	10	9	6	9	10	9
In Pierce County							
Music / Opera	3	10	6	5	4	9	7
Theater	1	9	9	4	5	10	7
Dance	none	3	8	2	7	9	6
Heritage	none	5	12	3	7	11	7
Visual	2	6	6	4	5	9	6

“The importance of the arts is made even more valuable by the stress of world conflict.”

“Every community and/ or society needs cultural organizations as much as food, water, shelter and faith.”

“It (the arts) has more of a priority –taking time to explore the arts, and seeing the beauty and talent around us”

Source: Patron Survey

Characteristics of K-12 Student Attendance

Arts and heritage organizations were asked to estimate some characteristics of the K-12 students that attend their exhibitions and performances. This section summarizes results of this part of the organizational survey.

Table III-26 contains estimates of free and discounted student admissions. The number of discounted admissions is somewhat lower than reported in Table III-1 (467,000), with the difference presumably being used by students outside the K-12 system (such as preschool and college students). Theater accounts for nearly half of these school admissions, with discounted tickets accounting for about 68% of these admissions being discounted tickets. Most dance and ASO admissions were free, while visual arts and heritage organizations have a roughly equal split between free and discounted student admissions.

Table III-26 K-12 Student Attendance Statistics

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Free	33,460	96,021	45,475	15,618	35,255	22,245	248,074
Discounted	2,302	206,841	117,573	14,605	40,722	9,097	391,139
Total	35,762	302,862	163,048	30,223	75,976	31,342	639,213

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. Tables III-27 and III-28 report the results of this question for free admissions and discounted admissions. In the case of free admissions, except for heritage organizations, respondents in the other disciplines in most cases did not know the lunch program status of these students. In the case of discounted admissions, one quarter of the student's lunch program status was not known. In the cases where it was possible to estimate the lunch program status, for those getting free admission about half were on a free or reduced-cost lunch program. In the cases where a discounted admission was paid, about one third of the students were on a free or reduced cost lunch program. Thus, a substantial proportion of the K-12 students participating in arts and heritage organization programs come from families with limited income.

Table III-27 Student's Family Income Indicators – Free Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
On Free Lunch Program	6%	6%	4%	19%	28%	10%	10%
On reduced-cost lunch program	26%	4%	16%	1%	18%	6%	12%
Not on lunch program	0%	17%	32%	21%	53%	26%	22%
Don't know	69%	74%	48%	59%	1%	57%	56%
Total	100%	100%	100%	100%	100%	100%	100%

Table III-28 Student's Family Income Indicators – Discounted Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
On Free Lunch Program	0%	14%	8%	0%	0%	0%	10%
On reduced-cost lunch program	0%	15%	16%	11%	29%	0%	16%
Not on lunch program	1%	48%	53%	45%	59%	0%	49%
Don't know	99%	22%	24%	43%	11%	100%	25%
Total	100%	100%	100%	100%	100%	100%	100%

The arts and heritage organizations were also asked to identify the ethnicity of students getting free or discounted admissions. The results of this question are presented in Tables III-29 and III-30. In the case of both free and discounted admissions, where the ethnicity was known, Caucasian students accounted for the majority of admissions, but about 40% of admissions were from minority students.

Table III-29 Ethnicity of Students with Free Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Caucasian	46%	77%	32%	51%	46%	46%	55%
African-American	14%	6%	8%	8%	20%	8%	10%
Asian/Pacific Islander	15%	9%	9%	20%	23%	4%	12%
Hispanic	8%	2%	5%	7%	8%	4%	5%
Native American	2%	0%	1%	2%	2%	1%	1%
Other ethnicity	1%	0%	0%	0%	0%	1%	0%
Don't know ethnicity	15%	5%	45%	11%	1%	37%	16%
Total	100%	100%	100%	100%	100%	100%	100%

Table III-30 Ethnicity of Students with Discounted Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Caucasian	89%	37%	53%	41%	78%	72%	47%
African-American	2%	15%	14%	3%	6%	8%	13%
Asian/Pacific Islander	5%	15%	18%	6%	7%	13%	14%
Hispanic	3%	8%	7%	3%	2%	6%	7%
Native American	0%	2%	2%	1%	1%	1%	2%
Other ethnicity	0%	0%	0%	0%	0%	0%	0%
Don't know ethnicity	1%	24%	6%	46%	6%	0%	17%
Total	100%	100%	100%	100%	100%	100%	100%

The geographic origin of K-12 students with free or discounted admissions was also sought from the arts and heritage organizations, as reported in Tables III-31 and III-32. These tables indicate that the majority of students came from the local area—either the city in which the arts or heritage organization was located or in King County. A modest share of these students come from elsewhere in Washington State or outside Washington State.

Table III-31 Geographic Origin of Students with Free Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Your City	49%	27%	33%	75%	48%	36%	40%
Your County	43%	37%	27%	18%	23%	4%	30%
Other WA	8%	20%	4%	6%	15%	0%	12%
Outside WA	0%	3%	0%	0%	13%	0%	3%
Don't Know	0%	13%	37%	0%	1%	60%	15%
Total	100%	100%	100%	100%	100%	100%	100%

Table III-32 Geographic Origin of Students with Discounted Admissions

	Dance	Theater	Music	Visual	Heritage	ASO	Total
Your City	21%	11%	24%	20%	26%	79%	18%
Your County	59%	16%	16%	67%	53%	21%	22%
Other WA	20%	7%	16%	10%	15%	0%	11%
Outside WA	0%	0%	6%	3%	0%	0%	2%
Don't Know	0%	66%	38%	0%	6%	0%	47%
Total	100%	100%	100%	100%	100%	100%	100%

IV. Comparison to Other Studies

“A culture is refined through the arts, otherwise we are all just walking cavemen.”

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 49% of total income, while contributed income accounts for 51% of total income. These percentages are almost identical 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 44% in individual contributions, 10% foundation contributions, 13% business contributions, and 33% other contributions. The PARC study found that government contributions were 4% of total income, compared to 6% in the current study. The current study finds a higher share of government income coming from local governments than the PARC study (63% versus 44%), and lower

shares from state governments (29% versus 42%) and the federal government (8% 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.

King County 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 47% of the expenditures of King County cultural organizations were employee expenses, and 53% 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 VI data). This study found payments to artists to be 14% of total expenses, compared to 7% to contract individuals and organizations in the current study. The Americans for the Arts study found overhead, administrative, and facility expenses were 45% of total expenses, very similar to the 46% 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 (Pavlovich-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 14% of employees to be full-time, 35% to be part-time, 47% to be contract employees, and 4% 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 (Pavlovich-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 46.5 jobs are created in the local economy per million dollars of combined organization and patron spending. 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 \$0.77 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 \$0.062 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 King County dance, theater, and music organizations reported 65%, 72%, and 77% utilization of capacity, respectively. 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 73% of patrons came from King County. This figure compares quite closely with the Tucson study, which found 76% of patrons were local (Pavlakovich-Kochi & Charney, p.16). The Americans for the Arts study found that 78% of attendees were local in metropolitan regions with more than 1 million persons population (Americans for the Arts, 2003, p. A69). Thus, King County has a slightly higher proportion of non-local patrons than documented in these other studies.

Patron Spending Per Capita

Chapter II documented patron spending per capita to be just under \$40, of which tickets and admissions were estimated to be about \$16. Non-ticket/admission expenditures were estimated to be about \$24. This compares with the Americans for the Arts survey for regions with more than 1 million population estimate of a non-ticket/admission expenditure of \$31, 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).

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 32.5, 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 38.7 (Americans for the Arts, 2003, p. A59). 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 28% 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 54% of the patrons interviewed said that they regularly made cash contributions to arts and cultural organizations. The PARC study found a lower estimate for Seattle (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 2.4 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 5.1 per season ticket/membership), this would imply at least 6.6 visits (1.3×5.1), plus the 2.4 single tickets/admissions, for a minimum of 9 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 9 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 59% 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 attenders (58%) or frequent attenders (61%) than nonattenders (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

“People can connect through the arts in ways unattainable in other venues and sharing an experience together as simple as the ‘Gingerbread Man’ is satisfying.”

Source: Patron Survey

In this third report on the economic impact of arts and cultural organizations in King County we have come a long way since the first report in developing our approach to this project and improving our measurement techniques. This study has documented a vibrant arts community in King County, which has expanded dramatically since the last study benchmarked against the year 1997. 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 different organizations have defined their assets in differing ways, some including estimates of the value of buildings/structures as assets, and others not including these facilities. 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 is 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 ASOs 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 question 8 and 16, questions asking 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. This study surveyed patrons in these venues for the first time, and this was an improvement over the coverage compared to the two previous studies. However, 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 two 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 identifies both 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 Surveyed

33 Fainting Spells
Maureen Whiting Company
Meany Hall (UW World Series at Meany Hall for the Performing Arts)
Pacific Northwest Ballet
The Evergreen City Ballet
The Pat Graney Company

Dance – Organizations Included

Ballet Bellevue
Cranky Destroyers
International Youth Ballet
LeGendre Performance
Lingo dancetheater
Ragamala
Spectrum Dance Theater
TURF!
Washington Academy of Performing Arts

Theater – Organizations Surveyed

5th Avenue Theatre
A Contemporary Theatre, Inc.
ArtsWest
Auburn Performing Arts Center
Civic Light Opera
Consolidated Works
Freehold Studio/Theatre Lab
INTIMAN Theatre
Kirkland Performance Center
Northwest Film Forum
Northwest Puppet Center
On the Boards
Renton Parks and Recreation
Seattle Children's Theatre
Seattle Mime Theatre
Seattle Repertory Theatre
Seattle Theatre Group
SecondStory Repertory
Taproot Theatre Company
The Empty Space Theatre
Theatre at Meydenbauer
Unidentified Moving Objects Company, Inc.
Village Theatre
Wing-It Productions

Theater, Organizations Included

Book-It Repertory Theatre
Burien Little Theater
Centerstage Theatre Arts Conservatory, Inc.
Cry of the Rooster Theatre
Degenerate Art Ensemble (Young Composers Collective)
Exchange Theatre
House of Dames Productions
Lake Union Civic Orchestra
Langston Hughes Cultural Arts Center
Living Voices
Northwest Asian American Theatre
One World Theatre
Printer's Devil Theatre
Puget Sound Musical Theatre
Red Eagle Soaring Native American Theater Group
Renton Civic Theatre
Repertory Actors Theatre
Seattle Fringe Theatre Productions
Seattle Public Theater
Seattle Shakespeare Company
Studio East
Theater Schmeater
Thistle Theatre
Wooden O Theatre Productions
Woodinville Repertory Theatre
Young Shakespeare Workshop
Youth Theatre Northwest

Music – Organizations Surveyed

Bellevue Philharmonic Orchestra, Inc
Cascadian Chorale
City of Mercer Island Arts Council
Early Music Guild of Seattle
Earshot Jazz
Experience Music Project
Jack Straw Foundation/Productions
Music of Remembrance
Music Works Northwest
Northwest Chamber Orchestra
Northwest Folklife
Northwest Girlchoir
Seattle Baroque Orchestra

Seattle Chamber Music Society
Seattle International Children's Festival
Seattle Opera
Seattle Pro Musica
Seattle Repertory Jazz Orchestra
Seattle Symphony Orchestra
Seattle Youth Symphony Orchestras
Shoreline-Lake Forest Park Arts Council
The Esoterics
The Federal Way Symphony Orchestra
The Northwest Choirs - Northwest Boychoir
& Vocalpoint! Seattle
The Tudor Choir
Town Hall Association

Music, Organizations Included

Bellevue Chamber Chorus
Bellevue Youth Symphony Orchestra
Chinese Arts and Music Association
Choral Sounds Northwest
Columbia Choirs Association
Federal Way Chorale
Gallery Concerts
Gamelan Pacifica
Hi-Liners Inc., The
Issaquah Chorale
Klondike Gold Rush National Hist.
Ladies Musical Club
Max Aronoff Viola Institute, The
Medieval Women's Choir
Music Center of the Northwest
Northwest Chamber Chorus
Northwest Symphony Orchestra
Northwoods Quintet
Orchestra Seattle / Seattle Chamber Singers
Pacific Sound Chorus
Prabha Rustagi Memorial Trust
Rainier Chamber Winds
Seattle Chamber Players
Seattle Choral Company
Seattle Classic Guitar Society
Seattle Conservatory of Music
Seattle Men's Chorus
Seattle Philharmonic Orchestra

Visual Arts Surveyed

911 Media Arts Center
Bellevue Art Museum
Center on Contemporary Art
Cinema Seattle

Frye Art Museum
Henry Art Gallery
Nordic Heritage Museum
Phinney Center Gallery
Pratt Fine Arts Center
Seattle Academy of Fine Art
Seattle Art Museum
Secluded Alley Works

Visual Arts – Organizations Included

Children's Museum (Seattle), The
Heart and Soul
Pottery Northwest
Seward Park Art Studio
Three Dollar Bill Cinema

Heritage Organizations Surveyed

Densho: The Japanese American Legacy
Project
Museum of Flight
Museum of History and Industry (MOHAI)
Renton Historical Society
Schooner Martha Foundation
The Burke Museum of Natural History and
Culture
Wing Luke Asian Museum

Heritage, Organizations Included

ARCADE (Northwest Architectural League)
Assoc. of Pac NW Quilters
Center for Wooden Boats, The
Chinese Information and Service Center
Daybreak Star Arts Center
Duwamish Tribal Services Inc.
Eastside Heritage Center
El Centro de la Raza
Eleventh Hour Productions
Floating Bridge Press
Issaquah Historical Society
It Plays in Peoria Productions
Kirkland Arts Center
KT / Dance
Maritime Heritage Foundation
Muckleshoot Indian Tribe Cultural Resources
Program
Northwest Railway Museum
Northwest Seaport
Odyssey the Maritime Discovery Center
Seattle Architectural Foundation
Seattle Arts & Lectures

Seattle Cherry Blossom and Japanese Cultural Festival Committee
Shoreline Historical Museum
Southwest Seattle Historical Society
The Raven Chronicles
Virginia V Foundaton
White River Valley Museum

Arts Service Organizations Surveyed

Artist Trust
Arts Corps
ArtsFund
Bellevue Downtown Association/BDArts
City of Enumclaw Arts Commission
City of Issaquah Arts Commission
City of Kent Arts Commission
Clarion West
Cultural Development Authority of King County
Duvall Arts Commission (NOTE: 8 of these performances were free concerts)
Historic Seattle
History Link
Literacy Celebrations dba Northwest Bookfest
PONCHO
Redmond Arts Commission
Richard Hugo House
Seattle Office of Arts and Cultural Affairs
The Nature Consortium
Vashon Allied Arts
Velocity Dance Center
Washington State Arts Alliance/Foundation

Arts Services Organizations Included

Allied Arts Foundation
Archdiocesan Housing Authority / Lao Community of Seattle
Arts and Visually Impaired Audiences
ArtSpace Seattle
Auburn Arts Commission
Bellevue Arts Commission
Burien Arts Commission
City of Seatac Arts Commission
Consejo Counseling & Referral / Manana Coalition
Eritrean Association of Greater Seattle
Ethnic Heritage Council
Federal Way Arts Commission
Institute for Community Leadership Training & Organizing
Interurban Center for the Arts
Rakumi Arts International
Sand Point Arts & Cultural Exchange (SPACE)
Seattle Capoeira Angola
Seattle Center Foundation
South East Seattle Arts Council (SouthEast Effective Development)
Standing Ovation
Theatre Puget Sound
Tukwila Arts Commission
Very Special Arts Washington
Arts 2000
Washington Lawyers for the Arts

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 biproportional 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 are 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. Cross-checks between the results obtained here and with other studies lead us to believe that we obtained an accurate sample of patron expenditures (and related information), especially given the sample sizes achieved in the various disciplines 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"/>
Attendance	
1 - Season ticket/membership visits (2)	<input type="text"/>
2 - Single tickets or admissions sold <small>(other than member tickets/admissions)</small>	<input type="text"/>
3 - Discounted student tickets <small>(other than season tickets)</small>	<input type="text"/>
4 - Discounted senior tickets <small>(other than season tickets)</small>	<input type="text"/>
5 - Other discounted tickets (rush etc.)	<input type="text"/>
6 - Free tickets	<input type="text"/>
TOTAL ATTENDANCE (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		
Total Earned Income	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			
Total Contributed Income	0	#DIV/0!	
Total Earned & contributed Income	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

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

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)

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

Utilities & Phone

Telephone				
Postage				
Other utilities				
Subtotal Utilities & Phone	0	#DIV/0!		

Other Goods & Services

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

Taxes (2)

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

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

Footnotes for Page 4

- 1 Report only operational activity (programming, administration, fundraising etc.) on this page. Exclude employees (non-contract personnel); employee information should be entered on page 3. All information should be entered as dollars, not counts.
- 2 Do not include employment taxes here. Employment taxes should be included as part of your labor costs on page 3.

Name of Organization:

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

Capital (2)	1 -	Start date	MM/DD/YY	End date	MM/DD/YY
Projects:	2 -	Start date	MM/DD/YY	End date	MM/DD/YY
	3 -	Start date	MM/DD/YY	End date	MM/DD/YY
	4 -	Start date	MM/DD/YY	End date	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
Unrestricted Net Assets ("Funds"): (4)				
(1) _____	<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"/>
(3) _____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Temp. Restricted Net Assets: (5)				
(1) _____	<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"/>
(3) _____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Perm. Restricted Net Assets: (6)				
(1) _____	<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"/>
(3) _____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL NET ASSETS ("FUNDS")	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="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
Total student attendance K-12 only	<input type="text"/>	<input type="text"/>
	Enter percent of free admissions below	Enter percent of discounted admissions below
1) Students' Family income indicators		
On free lunch program	<input type="text"/>	<input type="text"/>
On reduced-cost lunch program	<input type="text"/>	<input type="text"/>
Not on lunch program	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
Total this section (to equal 100%)	0%	0%
2) Ethnicity		
Caucasian	<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"/>
Total this section (to equal 100%)	0%	0%
3) Place of students' residence		
Your City	<input type="text"/>	<input type="text"/>
Your county outside your city	<input type="text"/>	<input type="text"/>
Washington outside your county	<input type="text"/>	<input type="text"/>
Outside state of Washington	<input type="text"/>	<input type="text"/>
Don't know	<input type="text"/>	<input type="text"/>
Total this section (to equal 100%)	0%	0%

Appendix 4: Survey Form for Patrons



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 (SPECIFY)	\$ _____
_____	\$ _____
_____	\$ _____

- 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.

- 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
Vital Stats									
# 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
Aggregate Impacts									
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
New Money Impacts									
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
Expenditures									
% 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%
Income									
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%
Attendance									
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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