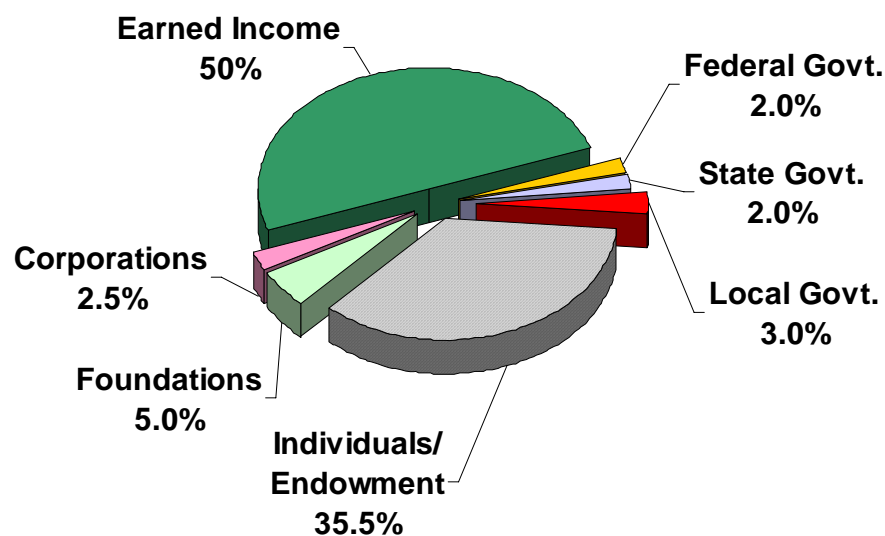




Arts Facts . . . Arts Organization Revenues

Nonprofit arts organizations are generally able to earn only half of the money it takes to sustain their operation. The other half of their revenue must be raised through contributions and grants. Even small fluctuations in contributed revenue can mean deficits for many organizations.

Average Source of Revenue for Nonprofit Arts Organizations (Estimated)



- Earned income is the largest source of revenue for the typical nonprofit arts organization. Yet most people are unaware of the funding challenges that must be met to keep America's arts organizations in operation.
- Support for the nonprofit arts is a mosaic of funding sources—a delicate balance of earned revenue, government support, and private sector contributions. The pie chart above provides a snapshot of what the average revenue picture looks like for a nonprofit arts organization in the U.S.
 1. Earned income represents roughly half of the pie (ticket sales, sponsorships, and fundraising events, for example)
 2. Private sector philanthropy is the next largest portion (corporate, foundation, and individual giving)
 3. Finally, the smallest of the three is government support. (Note that federal arts support includes NEA, Kennedy Center, Smithsonian, and other direct arts funding—a total of about \$1.4 billion annually.)

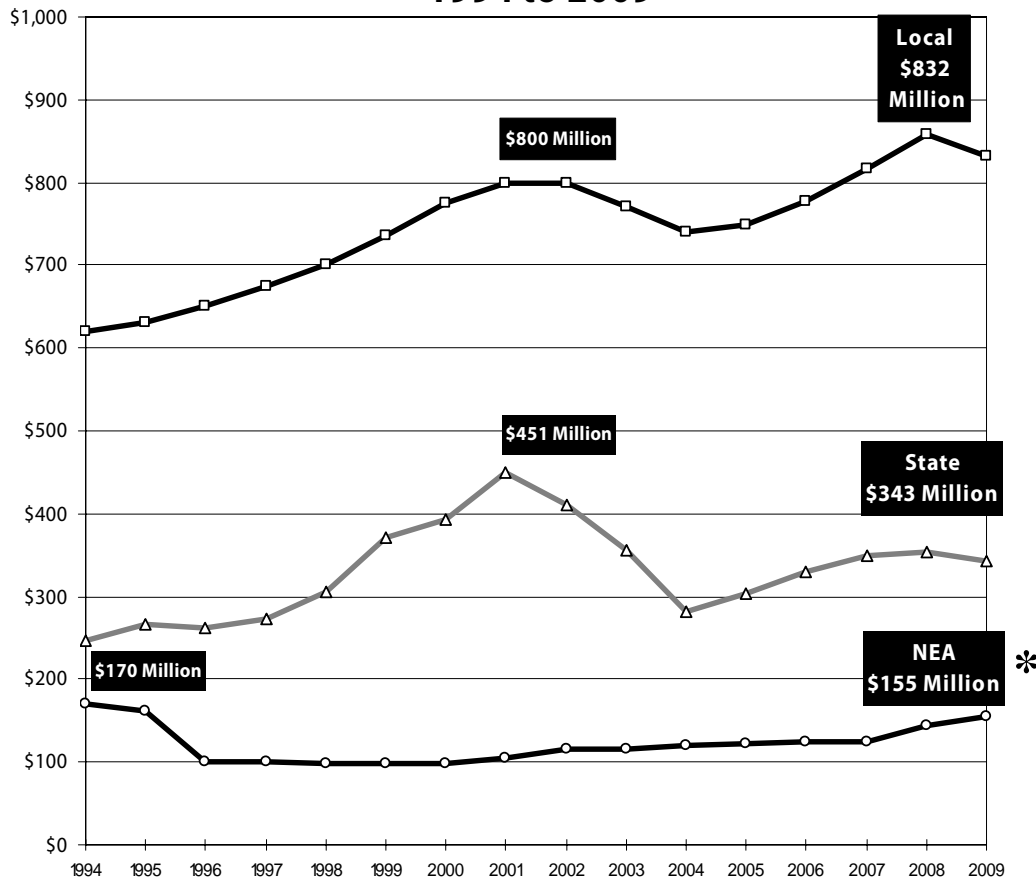
Source: Americans for the Arts, 2007.



Arts Facts . . . Government Arts Funding

In 2009, local and state government fell 3.0 percent and 4.6 percent, respectively. Congress passed The American Recovery & Reinvestment Act, giving the NEA special supplemental funding of \$50 million.

Government Support for the Arts Federal, State and Local 1994 to 2009



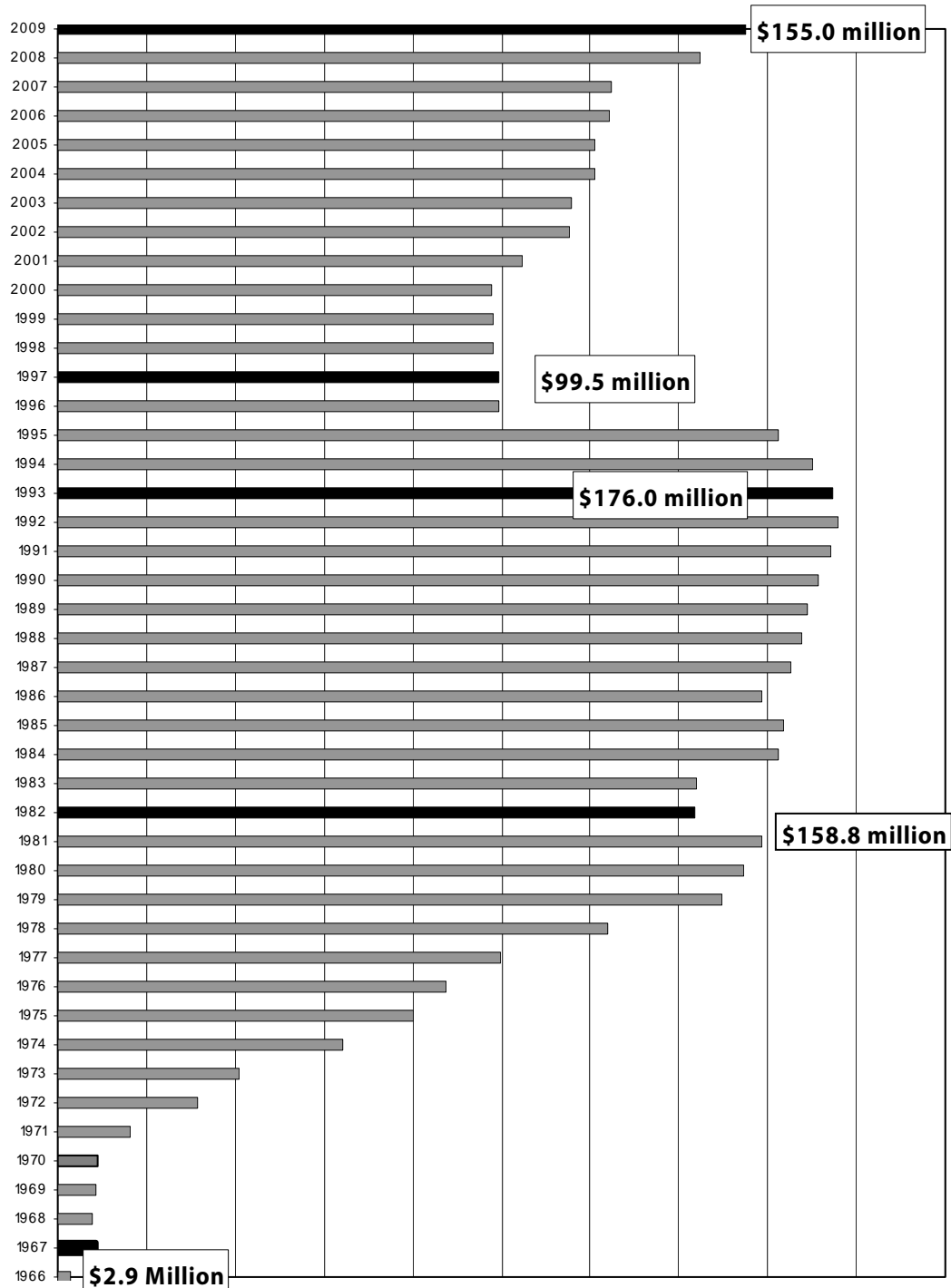
- In 2009, **state** legislative arts appropriations decreased for the first time in four years—down 3.3 percent to \$343.1 million. State arts funding, which tracks closely with the economy, had record growth in the late 1990's—reaching a high of \$451 million in 2001—followed by a precipitous drop to \$281 million by 2004 (38 percent decrease).
- Based on preliminary figures subject to rescissions, **local** government arts funding declined 3.0 percent, down from \$858 million to \$832 million. This reverses a positive trajectory that was sidetracked by cuts in 2003, when **local** government arts funding dropped for the first time in 15 years, due to the sluggish economy and post-9/11 drops in tourism.
- In 2009, the **NEA** received an increase in Congressional appropriations, up 7 percent from \$145 million to \$155 million. This continues an upward trend in federal funding for the arts, but still falls short of the historical highpoint of \$172 million designated by Congress in 1992.
- *The American Recovery & Reinvestment Act of 2009 included \$50 million in funding to support jobs in the arts through National Endowment for the Arts grants.



Arts Facts . . . National Endowment for the Arts
 The NEA supports the creation, preservation, and presentation of the arts in America—a profound responsibility, yet funded by Congress at a per capita rate of just 51 cents.

NEA Appropriations History Fiscal Years 1966 to 2009

Fiscal Year	Total Funds
2009	\$ 155,000,000*
2008	\$ 144,706,800
2007	\$ 124,561,844
2006	\$ 124,406,355
2005	\$ 121,263,614
2004	\$ 120,970,000
2003	\$ 115,731,000
2002	\$ 115,234,000
2001	\$ 104,769,000
2000	\$ 97,627,600
1999	\$ 97,966,000
1998	\$ 98,000,000
1997	\$ 99,494,000
1996	\$ 99,470,000
1995	\$ 162,311,000
1994	\$ 170,228,000
1993	\$ 174,459,382
1992	\$ 175,954,680
1991	\$ 174,080,737
1990	\$ 171,255,000
1989	\$ 169,090,000
1988	\$ 167,731,000
1987	\$ 165,281,000
1986	\$ 158,822,040
1985	\$ 163,660,000
1984	\$ 162,223,000
1983	\$ 143,875,000
1982	\$ 143,456,000
1981	\$ 158,795,000
1980	\$ 154,610,000
1979	\$ 149,585,000
1978	\$ 123,850,000
1977	\$ 99,872,000
1976	\$ 87,455,000
1975	\$ 80,142,000
1974	\$ 64,025,000
1973	\$ 40,857,000
1972	\$ 31,480,000
1971	\$ 16,420,000
1970	\$ 9,055,000
1969	\$ 8,456,875
1968	\$ 7,774,291
1967	\$ 8,475,000
1966	\$ 2,898,000

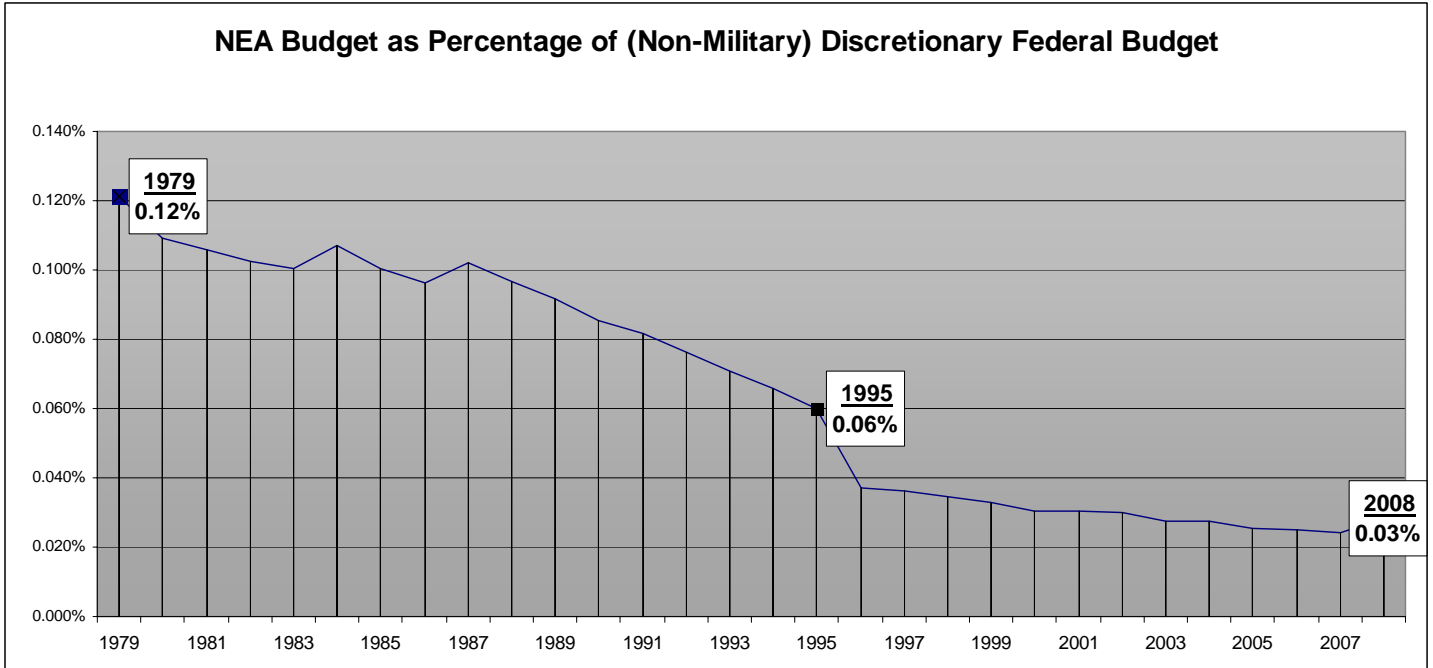


Source: National Endowment for the Arts, U.S. Census Bureau, 2008.
 *Pending Congressional approval of Omnibus appropriations bill

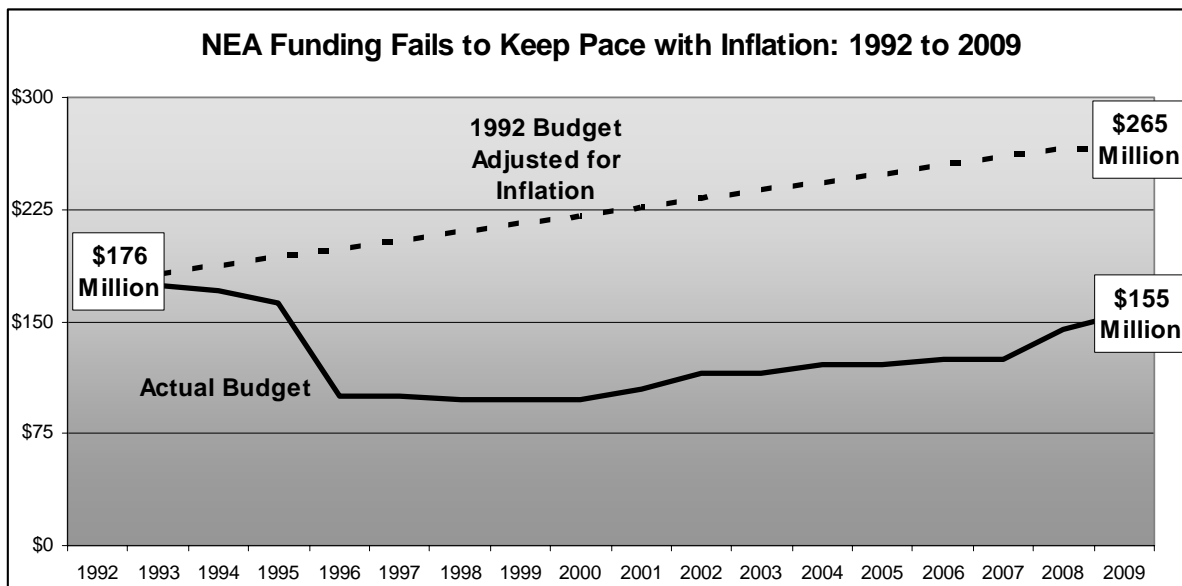


NEA: Losing Share of Federal Discretionary Spending for 30 Years

- As a percentage of non-military discretionary federal spending, NEA funding represented just 0.03% in 2008 (3 cents per \$100 of spending).
- If the NEA simply maintained its 1979 percentage of discretionary funding (0.12%), its 2008 budget would have been \$613 million.



If the NEA's budget remained constant since 1992 and was only adjusted for inflation, it would be \$265 million in 2009, instead of \$155 million. Raising the NEA budget to \$200 million would bring it to 75 percent of its 1992 inflation-adjusted level.



Source: National Endowment for the Arts, U.S. Office of Management and Budget, 2009. Analysis by Americans for the Arts.



Arts Facts . . . Business Support to the Arts
 With its more than \$3 billion in arts funding, businesses play a key role in ensuring the health and vitality of the nation’s arts sector. Financial support parallels the performance of the nation’s economy. Following post-9/11 decreases, business arts support rebounded in 2005. **A decrease is forecast for 2009.**

Business Support to the Arts Changes with the Economy

Business support to the arts largely follows the performance of the nation’s economy. There were significant decreases between 2000 and 2005, followed by modest increases between 2006 and 2008. Americans for the Arts is forecasting a decrease in business arts support in 2009.

The Business Committee for the Arts’ *National Survey of Business Support to the Arts* indicates that, while the percentage of businesses contributing to the arts increased from 36 to 42 percent between 2003 and 2006, total arts support actually decreased 5 percent to \$3.16 billion.

Business support to the Arts: 2003 to 2006 (-5 percent)		
	2003	2006
Percent of businesses contributing to the arts	36%	42%
Median arts contribution per business	\$800	\$800
Total	\$3.32 billion	\$3.16 billion

Source: Business Committee for the Arts, 2007.

- CEOs are typically involved in funding decisions (90 percent) and nearly all business giving is local (93 percent)—usually in the communities in which the company’s employees reside.

Business Arts Support is Becoming Less Philanthropy-Oriented, More Strategic

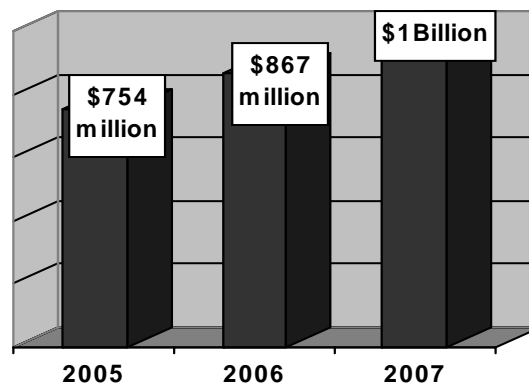
Businesses use a variety of means to support the arts, including charitable contributions, sponsorships, art collections, employee the arts, including charitable contributions, sponsorships, art collections, employee matches, in-kind services, executive loan programs, and workplace giving.

Business support to the arts has shifted from general charitable giving to a more marketing-based and sponsorship-oriented strategy. This enables businesses to support the arts as well as use the arts to meet business goals, expand markets for products, and engage employees.

Sources of Business Contributions to the Arts		
	2003	2006
Marketing/Sponsorship Budget	30%	43%
Annual Contributions Budget	51%	39%
Advertising Budget	42%	35%
Executive Budget	22%	16%
Company Foundation	12%	11%

Source: Business Committee for the Arts, 2007.

- While the dollar amount of arts sponsorships has increased, the arts are actually getting a smaller piece of the total sponsorship-pie, dropping from 6 to 5 percent since 2005. Total sponsorships in North America are expected to be \$16.8 billion in 2008. In 2007, arts sponsorship topped \$1 billion for the first time (up from \$867 million in 2006).



Source: IEG, 2008.

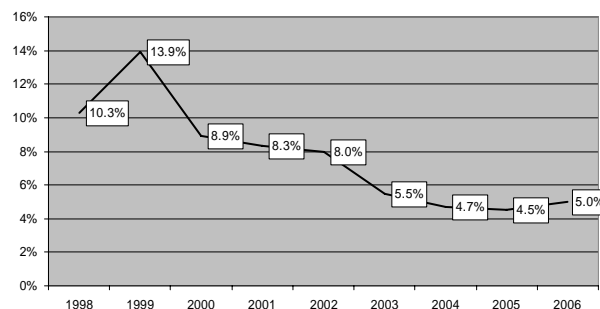
Downward Pressure on Business Support to the Arts

- In an effort to achieve more measurable results from their philanthropy, more businesses are reducing their charitable focus to a single funding category, such as health or education. This single-focus giving rarely focuses on the arts.

- Mergers and acquisitions are resulting in a negative impact on local giving, by reducing the number of corporate headquarters distributed across the country. Following the mergers, those local dollars are likely to be redirected to national and global issues such as health, education, and the environment—and seldom to the arts.

- The arts have been steadily losing market share of total business support, according to longitudinal research conducted by the Conference Board. While much of this can be attributed to a huge increase of in-kind contributions of medications by drug companies, further analysis still demonstrates that the arts' "piece of the pie" is getting smaller.

Arts Losing Market Share of Business Support



Source: Conference Board, 2008.

There is renewed interest in business support for the arts as it relates to building the 21st century workforce.

In October 2008, the Conference Board released *Ready to Innovate*, a new research report that touts the importance of arts education in building the 21st century workforce. Innovation is the key to the nation's economic recovery and global competitiveness. Arts participation—in school or in the workplace—strengthens our "creativity muscles," which builds our creativity—the fuel that drives innovation.

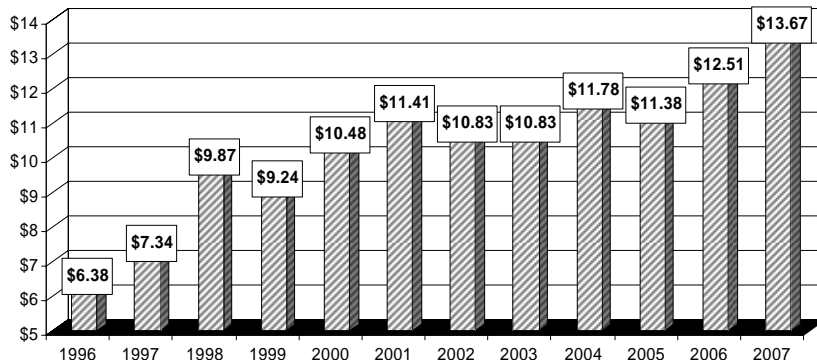




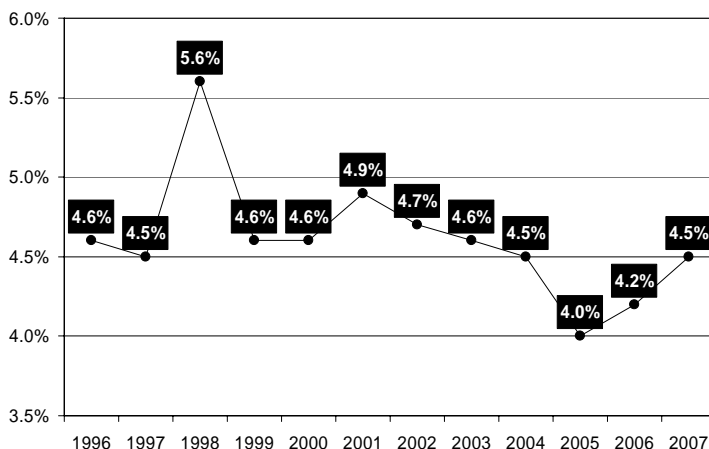
Arts Facts . . . Private Sector Philanthropy

Giving to the arts by individuals, foundations, and corporations was \$13.67 billion in 2007, representing 4.5 percent of total charitable giving.

Private Giving to Arts, Culture and Humanities: 1996-2007
(Billions of Current Dollars)



Private Giving to Arts & Culture as Percent of Total Philanthropy (1996-2007)



- In 2007, private sector giving to the arts (by individuals, foundations, and corporations) was \$13.67 billion, a 7.8 percent increase from 2006. Private contributions to all charities in 2007 was \$306.4 billion—a 3.9 percent increase from \$294.9 billion in 2006.
- While total arts giving in dollars increased, the sector is still recovering from a loss of philanthropic “market share” in the first half of this decade. 2007, however, represents the second year of increased share. In 2001, the arts received 4.9 percent of all charitable giving. If the arts had merely maintained its 4.9 percent “market share” in 2007, they would have received \$15 billion instead of \$13.67 billion—a \$1.5 billion difference. (Maintaining the 5.6 percent share from 1998 yields an additional \$3.5 billion.) Whose piece of the pie is getting larger? Education, human services, and international development.
- This financial pinch is compounded by the fact that there continues to be growth in the number of nonprofit arts and culture organizations, thus increasing demand.
- Note: In *Giving USA 2008*, data for all charitable sub-sectors was revised (except religion and foundations). Thus, while trends are similar to past reports, the actual dollar and percentage figures differ.

Source: The Center on Philanthropy at Indiana University, *Giving USA 2008*



Arts Facts . . . Economic Impact of the Arts
When public and private leaders fund the arts, they not only enhance our quality of life, but also invest in our economic well-being.

Economic Impact of the Nonprofit Arts Industry

Total Economic Activity **\$166.2 Billion**

Total Spending by Nonprofit Arts Organizations \$63.1 Billion

Total Spending by Nonprofit Arts Audiences \$103.1 Billion

Total Full-Time Equivalent Jobs Supported **5.7 Million**

Total Tax Revenue Generated **\$29.6 Billion**

Federal Income Tax Revenue \$12.6 Billion

State Government Revenue \$9.1 Billion

Local Government Revenue \$7.9 Billion

Total Household Income Generated **\$104.2 Billion**

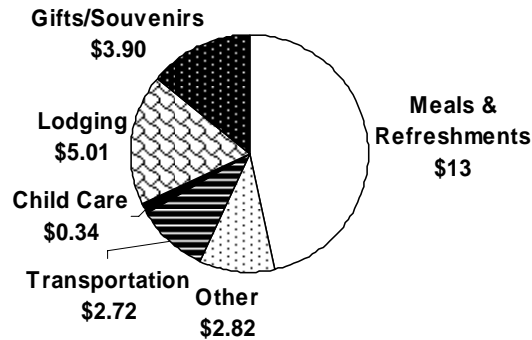
- Arts organizations are responsible businesses, employers, and consumers. Spending by nonprofit arts and culture organizations—only a fraction of the total arts and entertainment industry—was an estimated \$63.1 billion in fiscal 2005, and leveraged an additional \$103.1 billion in event-related spending by arts audiences. This \$166.2 billion in total economic activity supports 5.7 million FTE jobs and generates \$29.6 billion in government revenue annually.
- From large urban cities to small rural towns, this research shows that the nonprofit arts are an economically sound investment. They attract audiences, spur business development, support jobs, and generate government revenue. Locally, as well as nationally, the arts mean business.
- The arts are a growth industry. In five years, the economic activity of nonprofit arts organizations and their audiences grew nearly 24 percent from \$134 billion in 2000 to \$166.2 billion (11 percent when adjusted for inflation).

Source: *Arts & Economic Prosperity III*, Americans for the Arts. 2007.

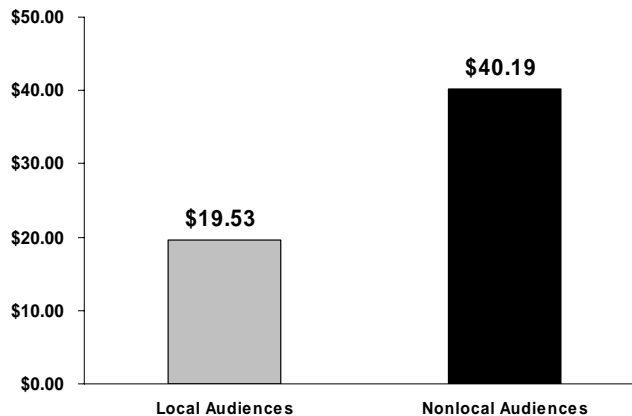


Arts Facts . . . Spending by Arts Audiences
 The nonprofit arts, unlike most industries, leverage significant amounts of event-related spending by their audiences. Attendance at arts events generates related commerce for hotels, restaurants, parking garages, and more.

Nonprofit Arts Attendees Spend an Average of \$27.79 Per Person



Non-Local Arts Audiences Spend Twice as Much as Local Audiences

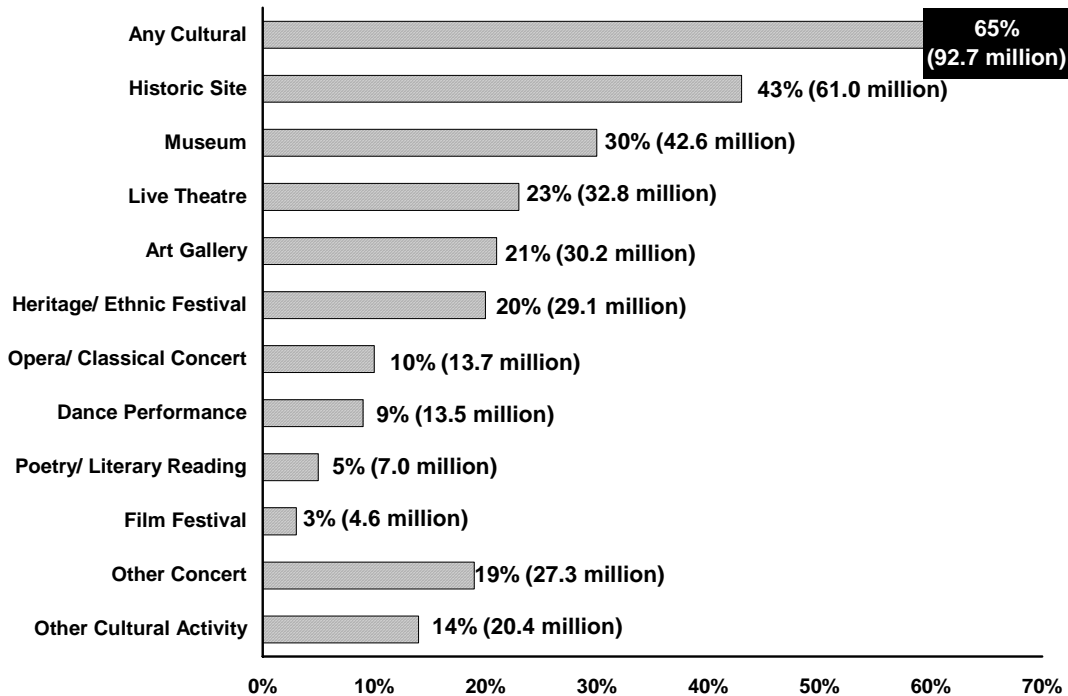


- When governments reduce their support for the arts, they are not cutting frills. Rather, they are undercutting an industry that is a cornerstone of tourism, economic development, and the revitalization of many downtowns. When governments increase their support for the arts, they are generating tax revenues, jobs, and a creativity-based economy.
 - Data collected from 95,000 attendees at a range of arts events reveal an average spending of \$27.79 per person, not including the price of admission. This spending generates an estimated \$103.1 billion of valuable revenue annually for local merchants and their communities.
 - Non-local audiences spend nearly twice as much as local attendees (\$40.19 compared to \$19.53), demonstrating that a community that attracts cultural tourists stands to harness significant economic rewards.
- Source: *Arts & Economic Prosperity III*, Americans for the Arts, 2007.



Arts Facts . . . Cultural Tourism
 65 percent of American adult travelers included a cultural event during a trip in 2001. Cultural travelers are ideal tourists—they spend more and stay longer.

Percentage of 143.3 million U.S. Adult Travelers that Included Cultural Events on Trips of 50+ Miles (2001)



- Two-thirds (65 percent) of American adult travelers say they included a cultural, arts, heritage, or historic activity or event while on a trip of 50 miles or more, one-way, in the past year. This equates to 92.7 million cultural travelers.
 - Of the 92.7 million adult travelers who included a cultural event on their trip, 32 percent (29.6 million travelers) added extra time to their trip because of a cultural, arts, heritage, or historic activity or event. Of those who extended their trip, 57 percent did so by one or more nights.
 - Compared to all U.S. travelers, cultural tourists spend more (\$631 vs. \$457), are more likely to use a hotel (62 percent vs. 56 percent), travel longer (5.2 nights vs. 4.1 nights), and are more likely to spend \$1,000+ (18 percent vs. 12 percent).
- Source: Partners in Tourism and Travel Industry Association of America, 2002.



Arts Facts . . . Creative Industries

An analysis of Dun & Bradstreet data reveals that the creative industries comprise 4.20 percent of all U.S. businesses and 2.04 percent of all U.S. jobs.

Creative Industries: Business & Employment in the Arts

Nationally, 686,076 arts businesses in the U.S. employ 2.8 million creative workers.



The ten states with the greatest number of arts businesses are: CA, NY, TX, FL, IL, PA, MI, NG, GA, and WA, respectively.

■ 3K or less ■ 3K-6K ■ 6K-12K ■ More than 12K

- The *Creative Industries* study provides a research-based approach to understanding the **scope and importance of the arts to the nation's economy**. This study is a unique representation of both the nonprofit *and* for-profit businesses involved in the creation or distribution of the arts.
- The creative industries are composed of arts-centric businesses that range from **non-profit** museums, symphonies, and theaters to **for-profit** film, architecture, and advertising companies.
- **Nationally, there are 686,076 businesses in the U.S. involved in the creation or distribution of the arts. They employ 2.8 million people, representing 4.20 percent of all businesses and 2.04 percent of all employees, respectively.** These data are current as of January 2009.
- The source for these data is Dun & Bradstreet, widely acknowledged as the most comprehensive and trusted source for business information in the United States.
- Using "geo-economic analysis," Americans for the Arts can detail and map the creative industries by any political or geographic area (*e.g.*, city, county, state, or Congressional District). See the next page for an example of a Creative Industries report for a specific Congressional district. (Creative Industries reports for EVERY Congressional District and state in the country can be downloaded at www.AmericansForTheArts.org/CreativeIndustries.)

Source: Dun & Bradstreet. Analysis by Americans for the Arts, 2009.



Creative Industries Maps for Every Congressional District and State can be downloaded at www.AmericansForTheArts.org/CreativeIndustries

The Creative Industries in Pennsylvania Congressional District 19 U.S. Representative Todd Platts

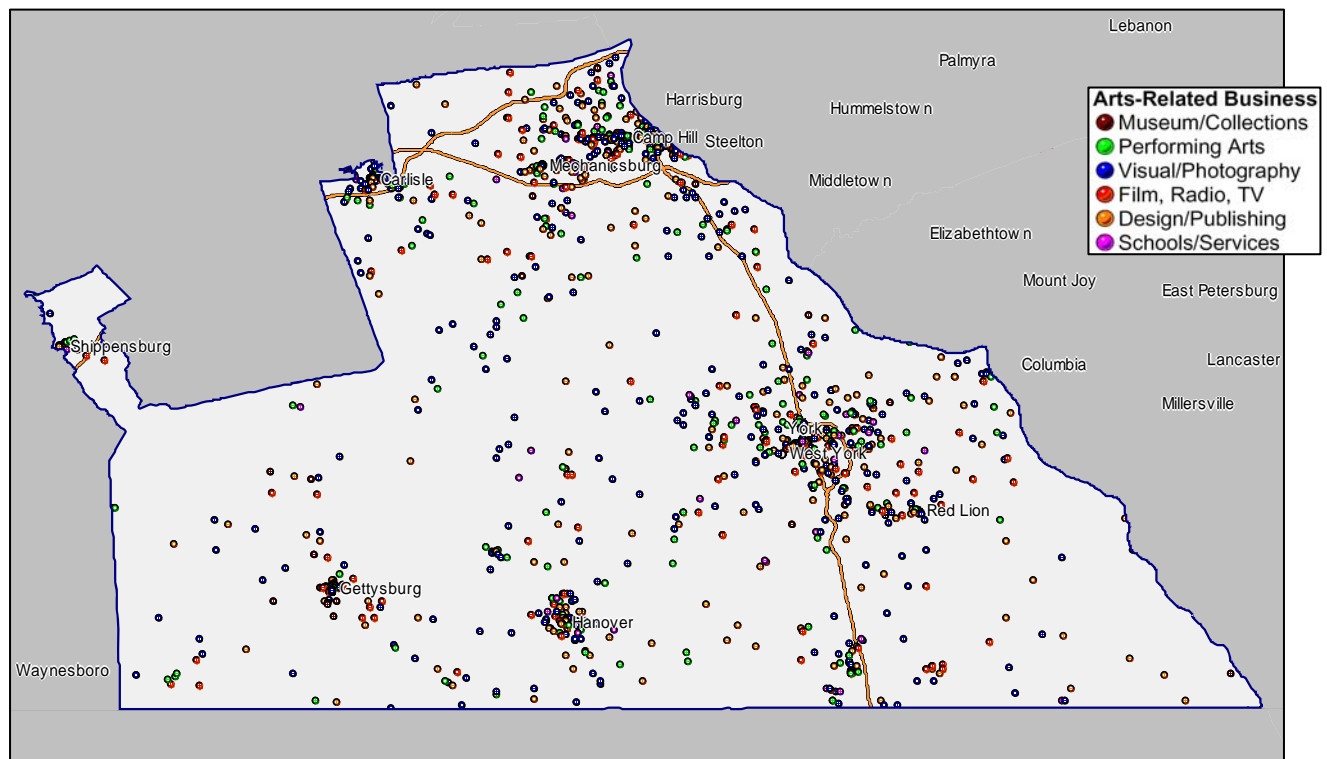
SAMPLE

This *Creative Industries* report offers a research-based approach to understanding the scope and economic importance of the arts in **Pennsylvania Congressional District 19**. The creative industries are composed of arts businesses that range from non-profit museums, symphonies, and theaters to for-profit film, architecture, and advertising companies. Arts businesses—and the creative people they employ—stimulate innovation in today's global marketplace.

Nationally, there are 686,076 businesses in the U.S. involved in the creation or distribution of the arts. They employ 2.8 million people, representing 4.20 percent of all businesses and 2.04 percent of all employees, respectively. The source for these data is Dun & Bradstreet, the most comprehensive and trusted source for business information in the U.S.

As of January 2009, Pennsylvania Congressional District 19 is home to 1,188 arts-related businesses that employ 6,201 people. These arts businesses play an important role in stimulating and sustaining economic vibrancy. They employ a creative workforce, spend money locally, generate government revenue, and are a cornerstone of tourism and economic development. The map below provides a clear picture of the creative industries in **Pennsylvania Congressional District 19**, with each dot representing an arts business.

1,188 Arts-Related Businesses in Connecticut Congressional District 19 Employ 6,201 People





Arts Facts . . . Preparing Students for the Workplace

Schools and employers rank a *degree in the arts* as the most significant indicator of a job candidate's creativity and skills of innovation.

Business and School Leaders See the Arts as Key to Preparing Students to Be Creative Workers for the Global Marketplace

85 percent of surveyed business executives indicated that they are currently having difficulty recruiting individuals who possess creative ability. The demand for creative people will increase as U.S. firms pursue innovation.

- U.S. employers rate creativity/innovation among the top five skills that will increase in importance over the next five years, and rank it among the top challenges facing CEOs.
- Employers (56 percent) and superintendents (79 percent) agree that a college degree in the arts is the most significant indicator of creativity in a prospective job candidate.
- Among eleven subjects offered in high school, superintendents rank arts activities in the top four that are most likely to develop creativity. Yet, three out of four top rated arts subjects are offered as an only as elective by a majority of respondents. Creative writing is the sole required course in more than half the districts. Less than 1 in 5 require a music class.

Improving access to arts education for all students and strengthening the arts in NCLB is critical to building tomorrow's creative workforce.

The source for this information comes from *Ready to Innovate*, a new study conducted by The Conference Board, Americans for the Arts, and the American Association of School Administrators.

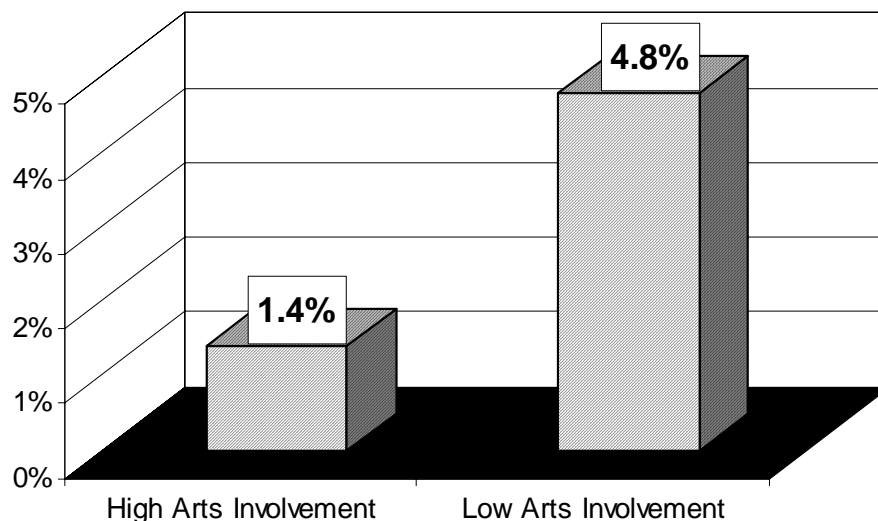


The Conference Board is a global, independent association of business executives dedicated to creating and disseminating knowledge about management and the marketplace.



Arts Facts . . . Improved Academic Performance
Students who participate in the arts, both in school and after school, demonstrate improved academic performance and lower dropout rates.

Students with High Levels of Arts Involvement: Less Likely To Drop Out of School by Grade 10



- Arts in the schools increase test scores and lower dropout rates. The Arts Education Partnership's publication, *Critical Links*, contains 62 academic research studies that, taken together, demonstrate that arts education helps close the achievement gap, improves academic skills essential for reading and language development, and advances students' motivation to learn.

Source: Arts Education Partnership

- Longitudinal data of 25,000 students demonstrate that involvement in the arts is linked to higher academic performance, increased standardized test scores, more community service and lower dropout rates (see chart above). These cognitive and developmental benefits are reaped by students regardless of their socioeconomic status.

Source: Dr. James S. Catterall, Graduate School of Education and Information Studies, UCLA

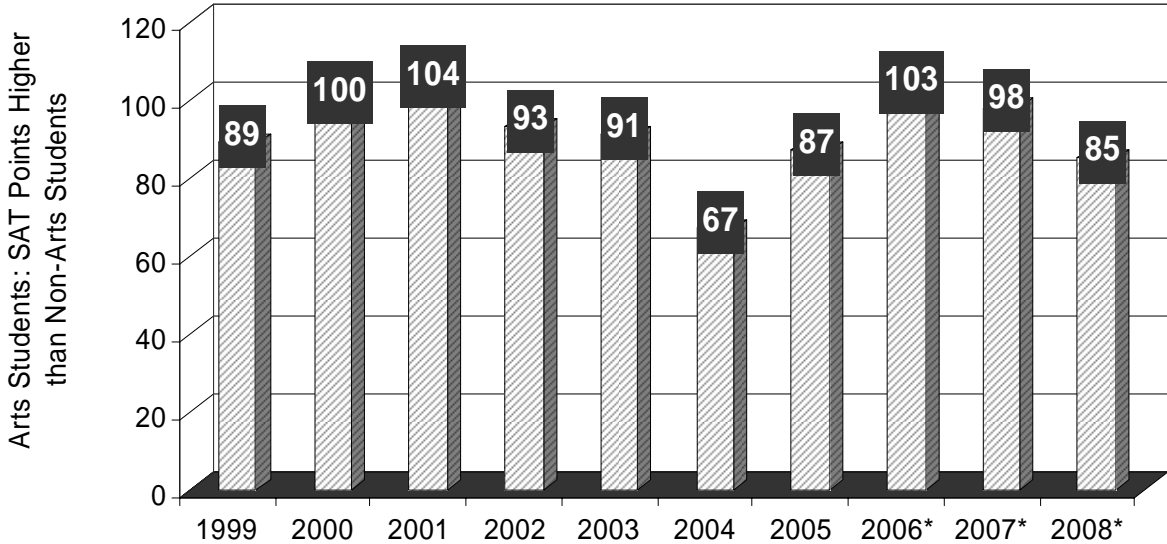
- Research conducted between 1987 to 1998 on young people working in the arts for at least three hours on three days of each week throughout at least one full year, demonstrated the following:
 - 4 times more likely to have been recognized for academic achievement
 - Being elected to class office within their schools more than 3 times as often
 - 4 times more likely to participate in a math and science fair
 - 3 times more likely to win an award for school attendance
 - 4 times more likely to win an award for writing an essay or poem

Source: Dr. Shirley Brice Heath, Stanford University, for Carnegie Foundation for The Advancement of Teaching



Arts Facts . . . SAT Scores and the Arts
 Students with four years of high school arts classes have higher SAT scores than students with one-half year or less.

Arts Students Outperform Non-Arts Students on SAT (Average Points Better on SAT by Arts Students)



- Data from The College Board shows that students who take four years of arts and music classes while in high school score 85 points better on their SATs than students who took only one-half year or less (scores of 1,063 vs. 978, respectively).
 - *Reflect the *Critical Reading* and *Mathematics* portions of the SAT only. The new *Writing* section of the test is excluded from this analysis for year-to-year comparison purposes. Students with four years of art and music classes averaged 523 on the *Writing* portion of the test—52 points higher than students with one-half year or less of arts/music classes (471).
- Source: The College Board, 2008. *2008 College-Bound Seniors: Total Group Profile Report.*



Arts Facts . . . Impact on Cognitive Development
Neuroscientists find training in the arts improves cognition. Music, acting, and dance improve a range of life and academic skills.

ARTS EDUCATION AND COGNITIVE DEVELOPMENT

Neuroscientists from seven universities across the country used brain imaging studies and behavioral assessments to advance our understanding of the effects of music, dance, and drama education on other types of learning. The findings from their coordinated three-year study suggest that children motivated in the arts develop attention skills and strategies for memory retrieval that also apply to other academic subject areas.

- Training in music appears to improve skills in geometric representation, as well as the acquisition of reading skills and sequence learning.
- Training in acting classes appears to lead to improved memory, via learning and manipulating language skills.
- Learning to dance by effective observation relates closely to physical practice, and that training appears to improve other cognitive skills.

Scientist's research findings include the following:

1. An interest in a performing art leads to a high state of motivation that produces the sustained attention necessary to improve performance and the training of attention that leads to improvement in other domains of cognition.
2. Specific links exist between high levels of music training and the ability to manipulate information in both working and long-term memory; these links extend beyond the domain of music training.
3. In children, there appear to be specific links between the practice of music and skills in geometrical representation, though not in other forms of numerical representation.
4. Correlations exist between music training and both reading acquisition and sequence learning. One of the central predictors of early literacy, phonological awareness, is correlated with both music training and the development of a specific brain pathway.
5. Training in acting appears to lead to memory improvement through the learning of general skills for manipulating semantic information.
6. Learning to dance by effective observation is closely related to learning by physical practice, both in the level of achievement and also the neural substrates that support the organization of complex actions. Effective observational learning may transfer to other cognitive skills.

Source: *LEARNING, ARTS, AND THE BRAIN, The Dana Consortium Report on Arts and Cognition*, Dana Press (2008).

SUMMARY OF ADDITIONAL ARTS EDUCATION RESEARCH AND FACTS

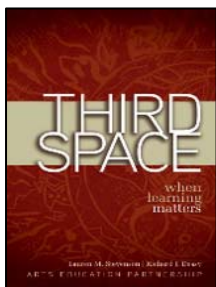
The arts boost learning and achievement for students.



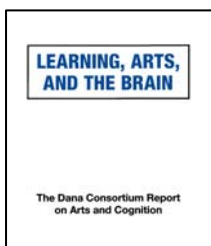
- The collection of research described in *Critical Links: Learning in the Arts and Student Academic and Social Development* (2002) finds that learning in the arts may be uniquely able to boost learning and achievement for young children, students from economically disadvantaged circumstances, and students needing remedial instruction.



- According to the Arts Education Partnership publication *Champions of Change: The Impact of the Arts on Learning* (1999), a compilation of studies on the impact of arts on learning, students who participate in the arts outperform their peers on virtually every measure. Researchers found that "sustained learning" in music and theater correlates to greater success in math and reading, and students from lower socioeconomic backgrounds see the greatest benefits. In fact, "learning in and through the arts can help 'level the playing field' for youngsters from disadvantaged circumstances," the researchers contended.

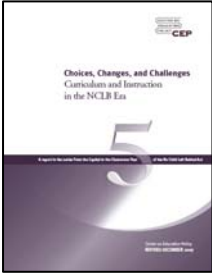


- A book by the Arts Education Partnership, *Third Space: When Learning Matters* (2005), finds that schools with large populations of students in economic poverty—often places of frustration and failure for students and teachers alike—can be transformed into vibrant and successful centers of learning and community life when the arts are infused into their culture and curriculum.



- Cognitive neuroscientists at seven major universities have found strong links between arts education and cognitive development (e.g. thinking, problem solving, concept understanding, information processing and overall intelligence.) According to the Dana Consortium study, *Learning, Arts, and the Brain* (2008) children motivated in the arts develop attention skills and memory retrieval that also apply to other subject areas.

Instruction time for the arts is decreasing across the nation since implementation of No Child Left Behind (NCLB).

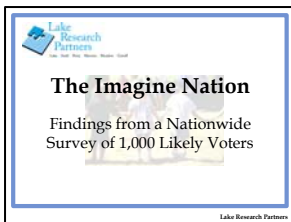


- A 2007 study from the Center on Education Policy concludes that, since the enactment of NCLB, *thirty percent* of districts with at least one identified school—those with the students most responsive to the benefits of the arts—have decreased instruction time for art and music.
- In 2008, a follow-up study from the Center on Education Policy found that these cuts in instructional time were deeper than first considered.

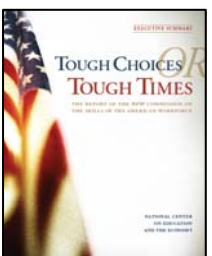


- Among the school districts that reported both increasing time for English language arts or math and reducing time in other subjects, 72% indicated that they reduced time by a total of at least 75 minutes per week for one or more of these other subjects.
- Among districts that reported a decrease in instructional time since 2001-02, 23% reported decreasing total instructional time for arts and music by 50% or more below pre-NCLB levels - greater than social studies, science and physical education.

Arts education helps prepare a creative workforce.



- A recent national poll of 1,000 likely voters conducted by Lake Research Partners (2007) has identified a new and growing constituency of voters in America who advocate building capacities of the imagination in public education.
 - Voters believe that, in order to meet the demand for innovation in the marketplace, we must teach skills of the imagination in the classroom. They are concerned that America, a historic leader in innovation, is falling behind other nations as it devotes less attention to developing what they perceive to be essential skills of the imagination and innovation.
 - 91% of voters indicate that arts are essential to building capacities of the imagination.
 - 73% of voters believe that building capacities of the imagination is just as important as the “so called” basics for all students in public schools. 82% of voters want to build imagination and creative skills in schools.



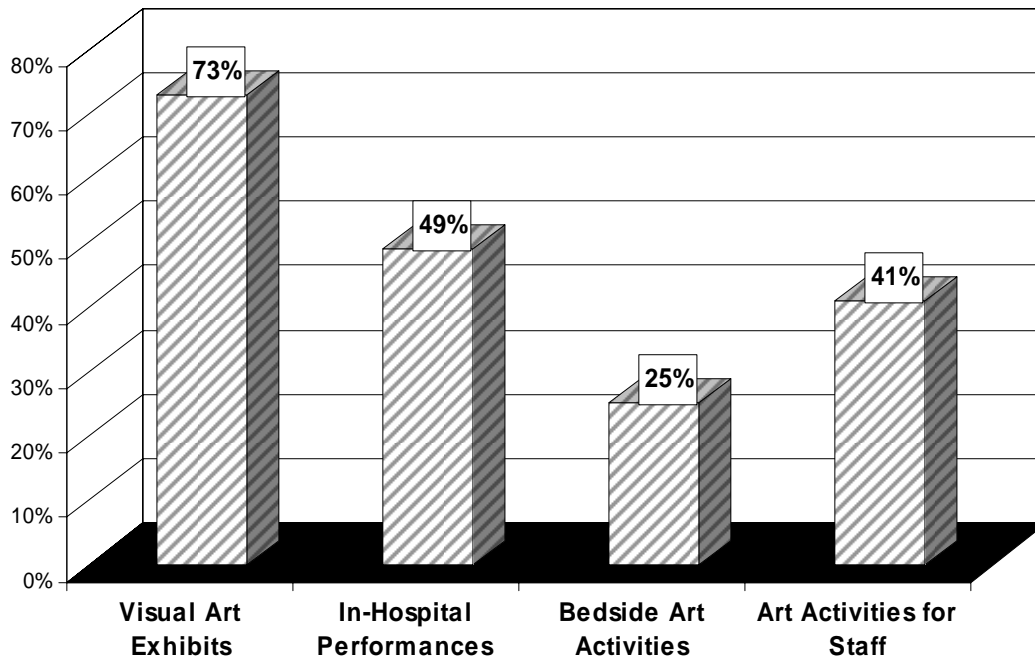
- The New Commission on the Skills of the American Workforce, a bi-partisan commission, comprised of former Cabinet secretaries, governors, college presidents and business, civic and labor leaders, in the report Tough Choices or Tough Times (2006) called for “a total shakeup in how America educates its people with an innovative system that boosts students to unprecedented levels of learning throughout their lives while creating a structure that gives them the best teachers and schools the country can offer.”
 - The executive summary of the Commission’s report states, “This is a world in which a very high level of preparation in reading, writing, speaking, mathematics, science, literature, history and the arts will be an indispensable foundation for everything that comes after for most members of the workforce. It is a world in which comfort with ideas and abstractions is the passport to a good job, in which creativity and innovation are the key to the good life...”



Arts Facts . . . Arts and Healthcare

Nearly half of the nation's healthcare institutions provide arts programming for patients, families, and staff. 78 percent provide these programs because they benefit patients and create a healing environment.

Arts Programs in U.S. Healthcare Institutions



- In a 2004 national survey about arts programs in healthcare institutions, 1,023 of the 2,336 responding organizations (44 percent) have on-site programming for their patients and staff. The reasons are many—but 73 percent present the arts because it aids in a patient's mental and emotional recovery and 46 percent because it aids in physical recovery.
- Arts programs in healthcare institutions serve multiple audiences: 79 percent are designed to serve patients directly; 46 percent include the patient's family; and 41 percent serve staff as a means to deal with the stress in the healthcare environment.
- Hospital arts programs are largely funded by the hospital itself—66 percent of arts programs are funded by the hospital's general operating fund. Programs engage many diverse art forms and are often conducted in partnership with local performing and visual arts organizations, or their local arts agency.

Source: Americans for the Arts, 2008. Survey conducted by The Joint Commission, Americans for the Arts, and Society for the Arts in Healthcare.

FIELD AT A GLANCE

Trend Information on Various Arts Fields and Specific Disciplines



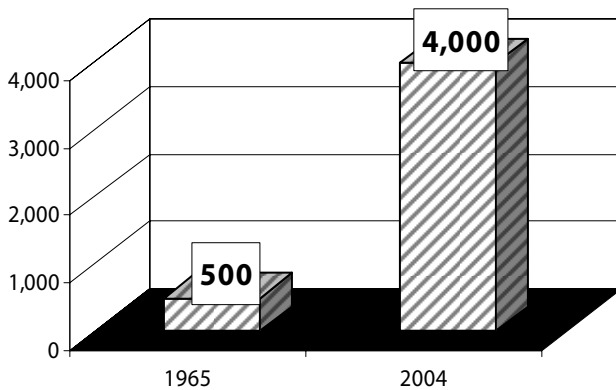
1000 Vermont Avenue, NW
6th Floor
Washington, DC 20005
T 202.371.2830 F 202.371.0424
www.AmericansForTheArts.org
nrome@artsusa.org



Arts Facts . . . Local Arts Agencies

Local arts agencies are a growing presence in communities across the country. They provide vital services to sustain their local arts industry, and endeavor to make the arts accessible to each member of the community.

Estimated Growth in Number of Local Arts Agencies: 1965 to 2004



Local Arts Agency Programs

Cultural Programming	92%
Grantmaking	50%
Facility Management	62%
Services to Artists and Organizations	89%
Arts Education	60%
Cultural Planning	22%

A local arts agency (LAA) is a community organization or an agency of local government that supports cultural organizations, provides services to artists and/or arts organizations, and presents arts programming to the public. Each LAA in America is unique to the community that it serves, and each changes as its community changes—no two are exactly alike. In 2007, local arts agencies administered an estimated \$858 million in local government funds for the arts.

- **Partnerships:** 96 percent of LAAs maintain at least one collaboration or partnership with other public or community agencies (e.g., School Districts, Parks & Recreation, Social Services, Economic Development, Chamber of Commerce). 89 percent have three or more ongoing collaborations.
- **Funding Innovations:** Many LAAs have facilitated the establishment of local option taxes in their communities—designated tax revenue streams used to fund the arts: Examples include St. Louis' property tax (\$60 million per year), San Francisco's hotel tax (\$30 million per year), and Denver's sales tax (\$40 million per year).
- **Cultural Planning:** LAAs typically lead community cultural planning—a community-inclusive process of assessing local cultural needs and mapping a plan of implementation. In communities with a cultural plan, local government arts funding grows at a significantly faster rate than communities without a cultural plan.
- **Arts Education:** 60 Percent of LAAs implement arts education programs and activities, including providing artists in the schools, teacher training, and arts education advocacy.

Source: Americans for the Arts, 2005, 2008.

National Assembly of State Arts Agencies

STATE ARTS AGENCY FUNDING AND GRANT MAKING

Each of the 50 states and six special jurisdictions has a government agency that promotes a meaningful role for the arts in the lives of individuals, families and communities. Through services and grant making, these agencies provide cultural, civic, educational and economic benefits to every state's residents. State arts agencies are also publicly-guided entities that rely on the commitment of citizen volunteers to serve as council members, grant adjudication panelists, and participants in the agency's strategic planning process.

State Arts Agency Funding

State arts agencies will manage more than \$412 million in fiscal year 2009. The vast majority of this revenue comes from state general funds, allocated to state arts agencies through appropriations from state legislatures. Funding from the National Endowment for the Arts (NEA) is another essential form of support for state arts agencies. By law, the NEA must allocate 40 percent of its annual program funds to states and regions, which use these funds to address local needs and broaden the reach of federal dollars across the nation. In addition to state and NEA funds, some state arts agencies receive funding from private sources or other federal programs.

- Total legislative appropriations to state arts agencies currently stand at \$343.1 million or \$1.12 per capita. Between fiscal years 2008 and 2009 appropriations declined by 3.3 percent, a loss of \$11.6 million.
- The decrease in aggregate appropriations among state arts agencies mirrored the deteriorating situation in state general fund spending. State governments are projecting a \$350 billion budget gap through 2011.
- Appropriations have decreased by 12.5 percent over the past ten years, due in part to cuts experienced following the 2001 recession. When adjusted for inflation, appropriations have decreased by 30.1 percent.

State Arts Agency Facts

- States currently invest \$343.1 million—about \$1.12 per capita—in state arts agencies.
- State arts agency appropriations comprise 0.044 percent (less than one tenth of one percent) of total state general fund expenditures in fiscal year 2009.
- Each year, state arts agencies fund approximately 18,000 organizations, schools and artists in more than 5,100 communities across the United States.

State Arts Agency Grant Making

State arts agencies provide a wide array of citizen services. Among the most important of these services—which include public information, partnership building, technical assistance, research and planning—is grant making. State arts agencies invest their funds through a variety of programs designed to foster:

- **educational success**, by investing in arts education opportunities for students;
- **arts participation**, by supporting performances, exhibitions and lifelong learning programs;
- **accessibility**, by investing in programs that widen the availability of the arts, especially in rural areas and among underserved populations;
- **cultural infrastructures**, by investing in operating support for cultural organizations and by supporting the development of grassroots arts networks;
- **innovation**, by supporting individual artists and the development of new creative programs; and
- **artistic heritage**, by investing in the preservation of cultural traditions.



MUSEUM FACTS

Museums Serve the Public:

- Museums are working every day in the public interest, educating and engaging our communities, preserving our cultural, artistic, historic, natural, and scientific heritage.
- Museums of all kinds – including aquariums, arboretums, archaeological museums, art museums, botanical gardens, children's museums, culturally specific museums, historic sites, history museums, maritime museums, military museums, natural history museums, nature centers, planetariums, science and technology centers, zoological parks, and other specialty museums – are important institutions that are struggling to maintain essential services.
- Only a small percentage of America's 17,500+ museums receive federal funding of any kind.

Museums are Trustworthy:

- Americans view museums as one of the most important resources for educating our children and as one of the most trustworthy sources of objective information.
- A public opinion survey commissioned by AAM in 2001 found that 38% of Americans believe museums to be among the most trustworthy sources of information while 87% believe they are trustworthy overall.
- According to a study by Indiana University, museums are considered a more reliable source of historical information than books, teachers, or even personal accounts by grandparents or other relatives.
- Museums preserve and protect more than a billion objects (Heritage Health Index).

Museums are Popular

- Americans from all income and education ranges visit museums.
- According to IMLS, two-thirds (66.4%) of American adults visited a museum in 2006 (including virtual visits via the Internet).
- There are 850 million visits per year to American museums, more than the attendance for all professional sporting events and theme parks combined (478 million in 2006).
- And there are an equally impressive number of virtual visits to museums. A 2008 IMLS study estimates the number of virtual museum visits via the Internet at 542 million.

Museums Serve Every Community:

- At least 22% of museums are located in rural areas and other museums frequently reach rural communities by incorporating traveling vans or portable exhibits.
- More than one-third (35%) of U.S. museums are always free to the public, and more than 97% of the rest offer discounts, special fee schedules, or free admission days, according to AAM's 2005 Museum Financial Information Survey.
- Teachers, students, and researchers are benefiting from access to trustworthy information through online collections and exhibits, although most museums need more help in developing their digital collections to meet this need. This is especially important when geographical distance prevents travel to a wide range of museums.
- Museum websites serve a diverse and growing online community.

- Museums are reaching a whole new tech-savvy audience by engaging the online public in creative ways such as adding museum exhibits to their Facebook page or opening a virtual museum on *Second Life*.

Museums Partner with Schools:

- According to a 2006 IMLS Study, *True Needs True Partners: Museums Serving Schools*, museums spend more than \$1 billion annually on educational programming.
- Museums receive more than 90 million visits each year from students in school groups (IMLS study).
- Museums tailor educational programs in math, science, art, literacy, language arts, history, civics and government, economics and financial literacy, geography, and social studies, often in coordination with state and local curriculum standards (IMLS study).
- Each year, museums provide more than 18 million instructional hours for educational programs such as guided tours for students, staff visits to schools, school outreach through science vans and other traveling exhibits, and professional development for teachers (IMLS study).

Museums Educate our Communities:

- The educational role of museums is at the core of their service to the public.
- People of all ages and backgrounds come to learn about the past and present, the natural and cultural world, and human creativity through unique museum experiences.
- Children find the spark that inspires them to become scientists, artists, political leaders, historians, and entrepreneurs.
- Museums tell these stories by collecting, preserving, researching, and interpreting objects, living specimens, and information.
- Museums are reaching increasingly diverse audiences, helping communities better understand and appreciate cultural diversity.
- Through museums, visitors make tangible connections to their heritage, art, or the natural world regardless of their ages, the size of their communities, or their economic and ethnic backgrounds.

Museums are Economic Engines

- Museums employ more than a half-million Americans, according to AAM's analysis of the 2007 American Community Survey conducted by the US Census.
- U.S. museums spend more than \$14.5 billion a year, encouraging economic growth in their communities (AAM estimate).
- Museums rank among the top three family vacation destinations.
- Trips including cultural and heritage activities comprise one of the most popular and significant segments of the travel industry, accounting for over 23% of all domestic trips, according to the U.S. Travel Association.
- Visitors to historic sites and cultural attractions, including museums, stay 53% longer and spend 36% more money than other kinds of tourists (U.S. Travel Association).
- Quality of life issues contribute significantly to decisions businesses make in choosing to relocate, including access to cultural resources that includes a dynamic museum community.
- The National Governors Association has found, "...civic leaders are beginning to take stock of artistic and cultural assets, recognizing that they are essential to quality of life."
- The U.S. Conference of Mayors has found, "The arts, humanities, and museums are critical to the quality of life and livability of America's cities. It has been shown that the nonprofit arts and culture industry generates over \$166 billion in economic activity annually, supports over 5.7 million full time jobs, and returns over \$12 billion in federal income taxes annually. Governments which support the arts on average see a return on investment of over \$7 in taxes for every \$1 that the government appropriates."



Association of Art Museum Directors

120 East 56th Street
Suite 520

New York, NY 10022

Tel: 212.754.8084

FIELD AT A GLANCE

The Association of Art Museum Directors (AAMD), founded in 1916, represents approximately 197 art museums in the United States along with a number in Canada and Mexico. Collectively, the directors set standards for the art museum field and the profession of director. AAMD members believe in the power of art and the responsibility of art museums to serve and educate the public through collection, research, preservation, exhibition, and the advancement of knowledge about works of art.

AAMD museums in the U.S. alone serve approximately 50 million visitors each year, including millions of children and teachers for organized school programs, as well as families, individuals, scholars, and researchers. Our institutions also contribute unique services to community organizations and projects, bringing artistic resources to bear on educational and human services, especially for disadvantaged and underserved populations.

Some statistical averages among our museums include:

Annual attendance.....	322,741
K-12 attendance	23,895
Education budget	\$900,290
Full Time Equivalent (FTE) Employees	115
Volunteers	355

It costs museums on average \$63 per visitor, while the average revenue from admission fees per visitor is just \$2.75. The remainder comes from donations, earned income, and public funding. Many museums offer free admission all the time, while others have free days and discounts for children, students and seniors.

AAMD and its members are guided by five fundamental principles: Artistic Excellence, Education, Artistic Expression, Diversity, and Outreach & Community Service.

For more information, please contact Andrew Finch, Co-Director of Government Affairs, at 202-638-4530 or afinch@aamd.org.



FIELD AT A GLANCE: PRESENTING

The Association of Performing Arts Presenters, based in Washington DC, is the national service organization for the field of arts presenting. Nearly 2,000 members represent the nation's leading performing arts centers; civic and university performance facilities; the full spectrum of artist agencies and managers; a growing roster of self-representing artists; and national consulting practices and vendors that service the field. A non-profit 501(c)3 organization governed by a volunteer board of directors, Arts Presenters is led by its President and CEO Sandra Gibson, now in her eighth year. In addition to presenting the annual APAP Conference NYC -- the world's top forum and marketplace for the performing arts, with more than 4,000 performing arts professionals attending -- Arts Presenters continues to be the world's leading resource, knowledge and networking destination for the advancement of performing arts presenting.

Arts Presenters' government affairs program is an integral part of the association's operations. Through our distinct efforts and in partnership with several coalitions including the Performing Arts Alliance (PAA), Arts Presenters serves as the principal advocate for professional presenting organizations, artists and artist managements. Arts Presenters informs legislators and policy makers about the importance of the performing arts field by advocating for the development of national policies that recognize and strengthen the contribution performing arts and arts organizations make.

Member Information:

- Representing an industry of more than 7,000 nonprofit and for-profit organizations, Arts Presenters members hail from all 50 states and 28 countries across the globe;
- Member organizations range from large performing arts centers in major urban cities, outdoor festivals and rural community-focused organizations to academic institutions, artists, artist managers, agents, as well as producing and touring companies;
- Our membership includes a range of organizations with multi-million dollar budgets to individuals who are artists or performing arts professionals;
- Arts Presenters members bring performances to more than 2 million audience-goers each week and spend in excess of \$2.5 billion dollars annually;
- Arts Presenters represents a diversity of fields including: all forms of dance, music, theater, family programming, puppetry, circus, magic, attractions and performance art.

Field Information

An Urban Institute survey commissioned by Arts Presenters yielded the following research on the presenting field:

- 68% of presenting organizations present international artists;
- 77% develop programs and performances for K-12 students;
- 54% provide services for patrons with hearing, sight or mobility impairments;
- 50% facilitate programs for adult education and outreach.

What is a presenter? The term "presenter" is a broad term that includes organizations such as performing arts centers, academic institutions, local arts agencies, festivals and fairs.

Dance: The Field at a Glance

Dance/USA, the national service organization for professional dance, seeks to advance the art form by addressing the needs, concerns and interests of artists, administrators and organizations. Dance/USA believes that dance is essential to a healthy society, demonstrating the infinite possibilities for human expression and potential, and facilitating communication within and across cultures.

Dance/USA represents over 400 members: ballet companies, modern companies, ethnic companies, jazz companies, culturally specific companies, traditional companies, tap companies, dancer service and presenting organizations, artist managers, Individuals and other organizations nationally and internationally. **Dance/USA's member companies range in size from operating budgets of under \$100,000 to over \$50 million.**

Over two-thirds of America's professional dance companies are less than 45 years old. As an established art form with national identity and presence, dance has burst onto the scene almost entirely within living memory. When the National Endowment for the Arts instituted its Dance Touring Program in the 1970's, great dance became accessible to every community in America.

Detailed census in four cities (NYC, Minneapolis/Saint Paul, Washington DC, and Chicago) show that companies over \$500,000 make up only about 2% - 3% of the total dance making entities in large metropolitan areas. Small cities, however, are less likely to have diverse dance communities. **Dance/USA estimates that there are approximately 3,000 serious dance-making entities in the United States today.** Most of the smaller ones are culturally specific or modern/contemporary.

According to the National Dance Education Organization, **dance in K-12 Education** is vitally important in the ability to: Read symbol systems; Compute, interact and communicate within a multicultural society; Understand the development of subject matter content; Develop critical thinking skills; Understand what it is to create, perform, and critically analyze; Develop skills for the 21st century workforce; Connect to life.

Professional dance in America is geographically diverse. As of December 31, 2006, dance companies with operating budgets above \$500,000 can be found 38 states plus the District of Columbia and Puerto Rico. Twenty-nine, or 21% of the total, are based in New York City. The next largest metropolitan gathering of dance companies in this budget range is in the San Francisco Bay Area, followed by Philadelphia and Minneapolis.

Dance and the Economy

Based on hard data collected in 2007, the 81 largest and most visible dance companies from 2006:

- **Employed over 6,000 people** in a mix of full-time and part-time positions
- Earned \$156.7 million, or 38% of their income, from performances
- Had operating expense budgets totaling \$452.2 million
- **Paid approximately \$237.5 million in wages and benefits**
- Earned \$76.2 million from sales, tuitions and activities other than performances

There are over **600 professional dance companies** in America as well as over **1,000 pre-professional** and **semi-professional** groups.

The 81 largest and most visible dance companies from 2006:

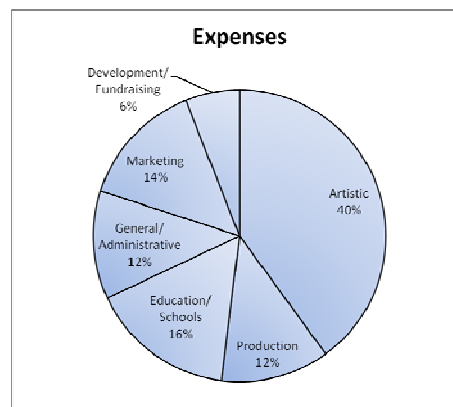
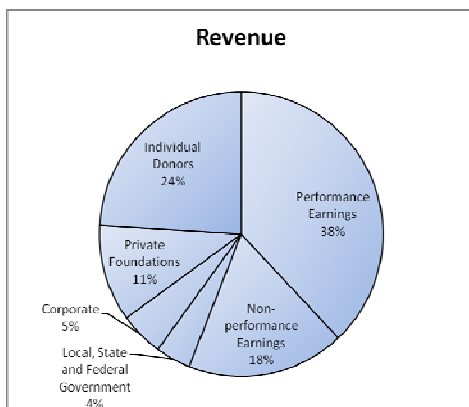
- Performed for total home audiences of nearly **2.9 million people**
- Had over **24,300 volunteers**, including over 2,700 members of Boards of Trustees

Support

The 81 largest and most visible dance companies from 2006 received:

- \$16.7 million from **state, local and government contributions**
- \$21.6 million from **corporate** contributions
- \$46.2 million from **private** foundations
- \$98.7 million from **individual contributions** through donations, benefit events, guilds, and United Arts drives

The percentage breakdown of revenue and expenses, as an average, for the 81 largest dance companies in America in 2006:





The Educational Theatre Association (EdTA) is a professional organization for theatre education. Our membership includes nearly 5,000 adults and more than 90,000 active students, primarily in grades 9-12. EdTA's mission is to support the effort to have theatre arts recognized in all phases of education. EdTA operates the International Thespian Society (ITS), a student honorary organization.

The American Alliance for Theatre & Education represents theatre artists and educators serving young people. Our membership consists of theatre educators for pre-K through university level, teaching artists, professional youth theatre and theatres for young audiences, playwrights, and students, researchers, and administrators in the field of theatre education.

Theatre Education at a glance

- In the 2008-09 school year, there were 21,715 K-12 educational drama programs throughout the United States, including 18,060 public school programs and 3,655 private school programs.¹
- Forty-six states offer certification or endorsements for drama specialists.²
- Forty-six states have adopted standards for theatre education.³
- *Peterson's Four-Year Colleges, 2009* listed 731 colleges and universities offering degree granting programs in theatre, including 55 schools that offer drama teacher education training.
- At least 47 states have one or more theatres devoted to young performers and/or young audiences, and 18 out of the 20 largest U.S. metropolitan areas have children's theatres or theatres for youth.⁴

Two recent surveys of EdTA educator membership produced the following data on school theatre. Survey one focused on teacher training:⁵

- 20 percent of respondent have been teaching for five years or less; 36 percent for six to fifteen years; and another 36 percent have sixteen to more than twenty-five years experience as theatre educators. A large majority of respondents (72 percent) teach grades 9-12.
- Nearly 57 percent teach theatre full-time; 54 percent teach other subjects as well. The most common other subject areas taught are English and speech. Many other respondents teach either choir or general music classes.
- A majority of the teachers (56 percent) have advanced degrees, and an additional 20 percent are working towards one.
- 76 percent of respondents said they were certified to teach theatre in their state; conversely, twenty-four percent said they were not certified. A small number (17 percent) possess an endorsement.

- 55 percent of teachers received specific training in theatre education through a college or university program and, among those, 69 percent felt the program adequately prepared them for the theatre classroom.
- Continuing education was required by 80 percent of respondents by their school districts with 50% of those districts providing them with release time and financial support.

The second survey focused on trends and changes in curricular and co-curricular theatre programs during the 2008-09 school year:⁶

- 41 percent said their programs were co-curricular (with both an academic and extra-curricular component); 46 percent said their programs were both curricular and co-curricular; 9 percent characterized their programs as entirely extra-curricular.
- 54 percent stated that the number of curricular theatre classes in their school has remained the same; 25 percent said they have more classes; and 21 percent indicated that available classes had decreased.
- The majority of respondents (70 percent) said that budgetary changes had not prompted changes in the number of curricular theatre classes offered in their programs; 11 percent noted an increase in classes; and 17 percent said classes had been eliminated due to budget cuts.
- Fifty-eight percent said that mandatory testing in other core subjects had not impacted their class offerings, and 19 percent said that testing had resulted in cutbacks in available theatre classes.
- 66 percent said administrative support had helped maintain the financial support for their theatre programs at current levels; 24 percent asserted that lack of administrative support had resulted in budgetary decreases; and 10 percent said support had helped increase their budget.
- The top two sources of theatre funding are box office receipts and fundraising, with school budgets being a close third.

Two trends emerged from this survey: many teachers indicated that their theatre classes were being consolidated to free up more curricular time for other core subjects, and others said their class time are being shortened. Teachers also commented that there is a “lack of respect” for theatre (and the other arts) as a core academic subject by both administrators and colleagues; that they were finding it increasingly difficult to compete for curricular time against tested subjects; and they were concerned that their budgets and programs would be cut back substantially in the 2009-10 school year.

For more information about EdTA, contact Christopher Hunt, Director of Marketing, at chunt@edta.org, 513-421-3900, ext. 228.

For more information about AATE, contact Leigh E. Jansson, Director of Operations and Programming, at leigh@aate.com, 301-951-7977.

¹ MTD Marketing and the Arts Education Research Group

² Calculated using the Arts Education Partnership State Arts Education Policy Database

³ Calculated using the Arts Education Partnership State Arts Education Policy Database

⁴ AATE calculated data

⁵ Online EdTA survey conducted 10/18/08-10/23/08 (a total of 807 members completed the survey).

⁶ Online EdTA survey conducted 2/2/09-2/9/09 (a total of 550 members completed the survey)

March 2009

Quick Orchestra Facts

Orchestras are a Vital Part of America's Musical Landscape and Civic Life...

With more than 1,800 symphony, chamber, collegiate, and youth orchestras across the country, America is brimming with extraordinary musicians, live concerts, and orchestras as unique as the communities they serve.

Orchestral music making is flourishing in our country, strengthening creativity and nourishing spirits. Orchestras fuel local economies, attract new business development, educate young people, and - through the power of music - unite individuals and cultures in good times and bad.

How many communities and people are involved with orchestras?

Orchestras exist in all 50 states, in virtually every community, with annual budgets ranging from less than \$12,000 to more than \$83 million.

350-400	professional orchestras , which means they have paid musicians
800-900	volunteer orchestras
150-200	collegiate/conservatory orchestras
400-500	youth orchestras

More than half a million individuals are involved in orchestras, including **conductors, staff, board members, musicians, and volunteers**. And that's not even counting millions of people in the audience!

Who goes to orchestra concerts?

More people (and younger) than you realized! In the 2006-07 season, they played to an audience of just over **29 million attendees** nationwide. At traditional classical subscription concerts, **half of the audience has been 55 or younger** for the last several decades. The total number of concerts performed has risen by nearly 16% in the last decade. In 2006-07 America's orchestras performed more than 37,000 concerts.

16,014	Education
7,690	Classical
2,210	Pops
2,774	Community Engagement
2,123	Chamber/Ensemble
6,358	Other Concerts (including choral, opera, ballet, summer, family, and festival events)

What is the financial structure of orchestras?

Orchestral activity is supported by a combination of public and private support – and every piece is critical. Orchestras are not supported by ticket sales alone. As members of the nonprofit charitable community, orchestras depend upon private philanthropy and civic support.

2006-07 ORCHESTRA REVENUE

Private contributions	39%
Concert Income	33%
Endowment	15%
Other Earned Income	8%
Government Grants	5%



Orchestra revenue totaled \$1.86 billion in 2006-07. Their economic impact exceeds several times that amount as orchestras create jobs, engage in commerce with local businesses, and spur local expenditures on related goods and services (hotels, restaurants, parking facilities, and more).

Why does a community support its orchestra?

Orchestras are an important part of the community fabric. Communities with orchestras attract volunteers, voters, philanthropists and other active, civic-minded participants, as the presence of an orchestra can be an indicator of a community's economic and cultural strength. From a survey of 800 random households in 10 American cities¹, the vast majority of citizens believe that the presence of live, professional performing arts in the community...

- **Improves the quality of life**
- **Promotes understanding of other cultures**
- **Fosters pride in the community**
- **Contributes to the education and development of children²**

What role do orchestras play in music education and community engagement?

Orchestras are essential and active partners in increasing access to lifelong music education. They enhance the quality of life in their communities by collaborating with school systems and other local partners to deliver a wide array of education and community programs. Education and community engagement activity in America's orchestras is growing fast, with nearly three times as many events as a decade ago. Orchestras now offer nearly 18,000 education concerts, more than 2,000 community engagement concerts, and more than 40 kinds of programs, including:

- **Pre-school programs**
- **In-depth, multi-year community residencies**
- **Long-term partnerships with schools**
- **Instrumental instruction**
- **Educational classes for seniors**
- **Programs in libraries and hospitals**

How can children reap even more of the benefits of music education?

Music education is an indispensable part of life-long learning, and participation in music programs prepares students to succeed in school, work, and life. That's why the great majority of orchestras engage in advocacy on behalf of in-school music education in their communities. Also, kids "play their part" by joining an orchestra. Being part of an orchestra encourages young people to develop their talents and to experience teamwork, self-discipline, and individual expression. There are nearly **500 youth orchestras across America**. New orchestras are created each year to help meet the growing demand for music education and positive activities for young people. These orchestras involve more than **50,000 young musicians** in the joy of music making and all its ancillary benefits.

Leadership, Service, and Advocacy for America's Orchestras

The mission of the League of American Orchestras is to lead, encourage, support, and serve orchestras as they assure the vitality of the musical experience, strengthen the entire orchestral organization, and deepen their connections with their public and their communities. Founded in 1942, the League serves nearly 1,000 member symphony, chamber, youth, and university orchestras of all sizes, and supports a network of thousands of administrators, board members, musicians, conductors, volunteers, and business partners.

*Contact: Heather Noonan, Vice President for Advocacy, League of American Orchestras
hnoonan@americanorchestras.org, (202) 776-0215*

All statistics in the guide are from the most up-to-date League data available except the following -
1. (p.3) The Value of the Performing Arts in Ten Communities, Performing Arts Research Coalition.

FIELD AT A GLANCE: MUSIC EDUCATION

MENC: The National Association for Music Education is the national voice for all aspects of music education. With more than 142,000 members, MENC works to ensure every student's access to a well balanced, high-quality music education taught by highly qualified teachers. As the world's largest arts education organization, MENC has been primarily responsible for the establishment of music education as a profession, for music's designation as a core subject in the school curriculum, and for spearheading the National Standards for Arts Education. MENC's advocacy is an outgrowth of our mission: *To advance music education by encouraging the study and making of music by all.*

OVERVIEW

“Every student in the nation should have an education in the arts.”

This is the opening statement of “The Value and Quality of Arts Education: A Statement of Principles,” a document from the nation’s ten most important educational organizations, including the American Association of School Administrators, the National Education Association, the National Parent Teacher Association, and the National School Boards Association.

Today, America is not meeting that mandate.

According to the “Arts Education in Public Elementary and Secondary Schools: 1999-2000” Fast Response Survey System (FRSS) report produced by the National Center for Educational Statistics (NCES), 94 percent of the nation’s public elementary schools have music instruction. However, only 20 percent offer instruction at least three times a week. By hours per year, these statistics show that only 43% of students receive at least 41 hours of music instruction annually.¹

This trend is also present in the 1997 National Assessment of Educational Progress (NAEP). It reports an eighth grade sample showing 91 percent receiving music instruction. However, this promising statistic includes those students with music instruction *one day or fewer per week*. At a more meaningful level, only 43 percent of students receive music instruction at least three times a week – a level consistent with the FRSS mark of 41 hours of annual music instruction,² and arguably consistent with the levels that should be expected in a credible, standards-based program.

These trends are reinforced with data from the Center for Education Policy showing that 20 percent of school districts reported reducing time spent on music and art instruction.³ Likewise, a National Association of State Boards of Education report states that Arts and Foreign Language instruction has been marginalized and is increasingly at risk of being completely eliminated as part of the public schools' core curriculum.⁴

The good news, however, is that those in the music education profession are highly qualified with FRSS showing that 92 percent of music teachers have a bachelors or masters degree in the field. And on a typical day, these teachers will teach an average of six different classes of students.⁵

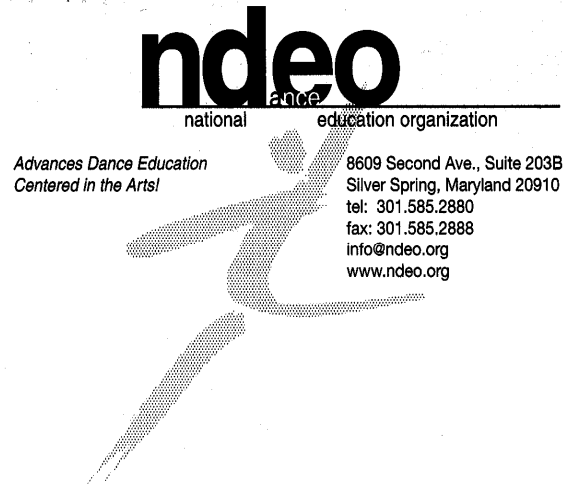
1 Arts Education in Public Elementary and Secondary Schools: 1999-2000, FRSS, 2002.

2 National Assessment of Educational Progress, NCES, 2001.

3 NCLB: Narrowing the Curriculum?, CEP, 2005.

4 The Complete Curriculum: Ensuring a place for the arts and foreign languages in American's schools, NASBE, 2003.

5 Arts Education in Public Elementary and Secondary Schools: 1999-2000, FRSS, 2002.



The National Dance Education Organization

represents dance arts in private studios/schools of dance, K-12 education, higher education, community centers, and arts organizations.

Research shows children in early childhood are sensory, motor, and concrete thinkers who learn best from processing information physically through bodily movement and through their senses. (Piaget, Werner, Cassirer, Vygotsky, and Kestenbergl.)

- **U.S. Education Needs** early childhood programs that use dance and creative movement to teach academic skills. Research is needed to determine the effects of early motor development and creative dance on brain function and cognition.

Research shows that children learning to read through movement outperform students learning to read through traditional methods. (Rose, McMahon and Parks, 2003; Rose, "Reading through Dance.")

- **U.S. Education Needs** to provide teachers with professional development in kinesthetic learning. Research is needed on the impact of movement education in the transfer of learning.

Research shows that students of multicultural and minority populations in secondary schools test as kinesthetic learners. (Clara C. Park, 1997a, 1997b, 2000; Stephen E. White 1992)

- **U.S. Education Needs** interdisciplinary dance programs taught by teachers trained in the use of artistic, communicative, and expressive movement.

Research shows that brain function in learning dance demonstrates that both hemispheres of the brain are actively engaged. (Brown and Parsons, *Scientific American*, June 2008)

- **U.S. Education Needs** to support innovative teaching methods using "Brain Dance" techniques which prove effective in all ages of learning. (Gilbert, 2006)

Research shows that creativity and innovation are essential characteristics for employment in the American economy. (National Center on Education and the Economy, 2007.) Dance taught as an artistic discipline develops 21st century skills required in our workforce – the ability to focus, be persistent and engaged in one's work; exercise tolerance, cooperation and collaboration; to solve big problems and exercise critical thinking; and be creative, imaginative and innovative. (AEP ImaginNation 2008; Research in Dance Education database 2009.) Dance supports these skills.

- **U.S. Education Needs** to support dance arts education which, research shows, supports 21st century skills in the workforce, society, and life.

The National Dance Education Organization supports research, teaching and learning in all these vital areas. Funding, education, and active support are needed to impact U. S. education.



Opera: The Field at a Glance

Founded in 1970, OPERA America has an international membership that includes nearly 200 Company Members, 300 Associate and Business Members, 2,000 Individual Members and over 16,000 subscribers to its electronic news service. OPERA America is based in New York City.

Over half of the member companies were established after 1970, and one quarter of the total were established since 1980, making the growth of opera throughout North America a relatively new phenomenon. In addition to its North American membership, OPERA America works in partnership with Opera Europa to serve 91 affiliated companies in Europe and with Opera.ca to serve 19 professional companies in six provinces in Canada.

Economic Impact

OPERA America and Opera.ca member companies had collective budgets of \$809 million and employed over 20,000 people on a full-time and part-time basis in 2005-2006. Including related expenditures by audience members and employees, **opera is a multibillion-dollar industry.**

Most Frequently Produced Operas

The most frequently produced operas in the 2007-2008 season were: *La bohème*, *Tosca*, *La traviata*, *The Marriage of Figaro*, *Carmen*, *Don Giovanni*, *The Elixir of Love*, *The Magic Flute*, *Aida*, *Madama Butterfly* and *Turandot*.

The most frequently produced North American operas in the 2007-2008 season were: *Amahl and the Night Visitors*, *Cyrano*, *A Little Night Music*, *Cold Sassy Tree*, *Porgy and Bess* and *West Side Story*.

New Works

In 2006-2007, North American opera companies produced 10 world premieres. Since 1990, professional opera companies in North America have produced almost 200 new operatic works.

Number of Performances

In 2005-2006, North America's professional opera companies presented 2,217 performances of 485 fully staged main season and festival productions.

OPERA America

330 Seventh Avenue, 16 Floor, New York, NY 10001
Phone: 212-796-8620 | Fax: 212-796-8631 | www.operaamerica.org



OPERA AMERICA

Education Programs

The audience for education and community programs served by U.S. and Canadian opera companies during the 2005-2006 season totaled over 2 million people.

Broadcast and Recorded Media

According to the National Endowment for the Arts, the percentage of adults viewing or listening to opera via broadcast and recorded media remains higher than live attendance. As early as 2002, **37.6 million adults experienced opera on TV, video, radio, audio recordings or via the Internet.**

Support

OPERA America and Opera.ca companies **posted \$305 million dollars in box office receipts** for FY06. Box office income represents 36% of total operating income for all companies.

As of 2007, American opera companies report the breakdown between contributed and earned revenue as roughly 50/50. Over the past five seasons, individual giving has remained the largest source of contributed revenue, and in general, the smaller the company, the greater reliance on individual gifts.

According to the OPERA America field study in 2007, most opera companies with an operating budget over \$10 million had a 5% increase in attendance over the past five seasons. Box office revenues increased by 14%, the significant disparity a result of rising ticket costs. More than ever, opera companies with operating budgets above \$10 million are relying on income generated from investment portfolios and endowments to support operating expenses. In 2007, 22% of these companies earned income resulted from investment gains, versus 13% in 2003.

Private support of OPERA America companies in the United States totaled \$468 million in FY06, representing 51% of the total income.

Support from the **National Endowment for the Arts** rose from \$1.4 million in FY05 to \$1.5 million in FY06. NEA support represented **less than 1% of all income** reported by U.S. companies in 2005-2006. Support from the **Canada Council** provided 7% of total income for **Opera.ca** companies, contributing **29%** of all public support.

Government support for American opera companies continues to pale in comparison to Canada. Only 8% of contributed revenue to U.S. companies came from public institutions in FY07, compared to 38% in Canada.

OPERA America

330 Seventh Avenue, 16 Floor, New York, NY 10001

Phone: 212-796-8620 | Fax: 212-796-8631 | www.operaamerica.org



ARTS IN HEALTHCARE

Around the world, the arts are emerging as an integral component of healthcare. Today, healthcare initiatives that involve partnerships between arts and health professionals are demonstrating real benefits—improving patient outcomes, helping people make connections, and engendering a sense of community.

Arts in Healthcare is a diverse field representing over 16,000 medical, arts, and creative arts therapies professionals dedicated to transforming the experience of healthcare by connecting people with the power of the arts at key moments in their lives. This rapidly growing field integrates the arts, including literary, performing, visual arts, and design, into a wide variety of healthcare and community settings for therapeutic, educational, and recreational purposes.

HIGHLIGHTS

Research demonstrates the benefits of the arts in healthcare in hospitals, nursing homes, senior centers, private homes, or other locations within the community. Studies show that integrating the arts into healthcare settings helps to:

- cultivate a healing environment;
- support the physical, mental, and emotional recovery of patients;
- communicate health and recovery information; and
- foster a positive environment for caregivers that reduces stress and improves workplace satisfaction and retention.

Arts in healthcare programs and creative arts therapies have been applied to a vast array of health issues—from post-traumatic stress disorder to autism, mental health, chronic illnesses, Alzheimer's and dementia, neurological disorders and brain injuries, premature infants, and physical disabilities—to improve patients' overall health outcomes, treatment compliance, and quality of life.

In 2004 and 2007, the Society for the Arts in Healthcare partnered with The Joint Commission and Americans for the Arts to conduct surveys that examined the presence of the arts in U.S. healthcare facilities. These surveys reveal that approximately 45% of responding healthcare institutions have arts programs utilizing creative arts therapists and/or professional artists in their facilities. Reasons for investing in arts programs include: to benefit patients' physical, mental, and emotional recovery; to create a healing environment; and to help patients' families.

Between 2004 and 2007, organizations funding their arts programs through their operating budgets only rose by 16%. Although it is promising that organizations reported an increase, this accounted for only about half of the arts programs in healthcare institutions. Additional support is necessary for arts in healthcare programs to adequately respond to our nation's growing healthcare needs.

BENEFITS OF THE ARTS IN HEALTHCARE

- Documented benefits of participating in **visual arts and art therapy activities** include:
 - improving depression and influencing fatigue levels in cancer patients on chemotherapy (Bar-Sela, Atid, Danos, Gabay, & Epelbaum, 2007);
 - reducing acute stress symptoms in pediatric trauma patients (Chapman, Morabito, Ladakakos, Schreier, & Knudson, 2001); and
 - improving care for veterans returning from Iraq with symptoms of combat-related post-traumatic stress disorder (PTSD) (Collie, Backos, Malchiodi, Spiegel, 2006).
- Providing **music therapy and music interventions** has been found effective in:
 - increasing comfort level post-operatively (Pölkki, Vehviläinen-Julkunen, & Pietilä, 2001);
 - decreasing use of sedatives during procedures (Loewy, Hallan, Friedman, & Martinez, 2005; Walworth, 2005); and
 - increasing quality and length of life for individuals diagnosed with terminal cancer (Hilliard, 2003).
- Literature shows that most of the experimental research about **dance and movement** has been done in the **dance/movement therapy** field. More recent findings regarding the benefits of dance include:
 - being first on a list of leisure activities that most contribute to the delay in onset of Alzheimer's disease for those at risk of the disorder (Verghese et al. 2003); and
 - improving mobility in individuals with fibromyalgia (Bojner-Horwitz, Theorell, & Anderberg, 2003).
- Interventions involving **dramatic arts, drama therapy, and psychodrama** have demonstrated the following benefits:
 - creating understanding and easing isolation for breast cancer patients (Sinding, Gray, Grassau, Damianakis, and Hampson, 2006);
 - helping medical students, residents, and staff understand the humanistic elements of end-of-life care (Steckart and Rosenfeld, 2004); and
 - addressing cognitive functioning and quality of life issues important for older adults to live independently (Noice and Noice, 2004).
- Studies using **creative writing and poetry therapy** as an intervention report:
 - improving lung function in students and adults with asthma after written emotional expression (Bray, Theodore, Patwa, Margiano, Alric, & Peck, 2003); and
 - decreasing visits to physicians and reducing symptom complaints (Pennebaker, 1997, 2004).
- Arts and healthcare research has also focused on **architecture and design** issues:
 - patients recovering from gall bladder surgery who had views of a small park with trees and flowers had better nurse evaluations, took less medication, and had shorter hospital stays than individuals with a view of an adjacent brick wall (Ulrich, 1984); and
 - intensive care patients exposed to nature pictures of water and trees experienced less post-operative anxiety than patients exposed to the other visuals suggesting that placing photographs of certain natural environments in hospital settings might positively impact post-operative recovery (Ulrich, Lunden, & Eltinge, 1993).



Theatre Communications Group
 520 Eighth Avenue 24th Floor New York NY 10018-4156
 T 212 609 5900 F 212 609 5901 www.tcg.org

Not-for-Profit Theatre in America The Field at a Glance 2007

In 1961, the not-for-profit professional theatre in America consisted of only 16 theatre companies established specifically for educational and charitable purposes. Today, thanks in large measure to the pivotal role played by the National Endowment for the Arts (NEA) since its creation in 1965, the field consists of diverse theatres—located in major metropolitan centers, urban neighborhoods, suburbs and rural communities—estimated to more than 1,910. Their wide-ranging repertoire includes classics; modern plays and musicals; new plays, adaptations and translations by American and international writers; plays for culturally specific and young audiences; and experimental, multimedia and performance-art works.

Collectively, these 1,910 theatres (those filing IRS Form 990) play to an annual audience of more than 30 million Americans. An additional 2.5 million people are served by the 1,180 outreach and educational programs offered by the 196 profiled theatres responding to TCG’s survey, including touring productions, artists-in-the-schools, teacher training, workshops and lectures in local community centers and libraries, internships for college students, special programs for at-risk children and life-long learning opportunities.

By supporting the nation’s finest theatre institutions, the NEA has contributed far beyond the actual monetary value of its grants. The leveraging effect of NEA grants attracts other private and public funding, through matching requirements as well as the symbolic imprimatur an NEA grant represents. Nearly every Pulitzer Prize-winning play since 1976 originated at an NEA-funded theatre, and a network of educational and outreach programs has sprung up across the country as a result of NEA support, ensuring access to all Americans and developing new generations of audiences.

2007 Universe of U.S. Not-For-Profit Professional Theatres	
<i>1,910 Theatres</i>	
<u>Productivity</u>	
Attendance	31,000 ,000
Subscribers	1,600 ,000
Performances	197 ,000
Productions	17 ,000
<u>Finances</u>	
Earnings	\$ 961,800,000
Contributions	\$ 919,200 ,000
Total Income	\$ 1,881,000,000
Expenses	\$ 1,742,000,000
Net Surplus	\$ 139,000,000
<u>Work Force</u>	
Artistic	61,000
Administrative	14,000
Technical	34,000
Total Paid Personnel	109,000

Theatre Facts 2007, a study by Theatre Communications Group based on its annual fiscal survey, reported on 1,714 not-for-profit professional theatres plus 196 TCG member theatres ranging in size from \$120,000 in annual operating expenses to more than \$50 million. These U.S. not-for-profit theatres employed more than 109,000 theatre workers—actors, directors, playwrights, designers, administrators and technicians—and constituted a more than \$1.7 billion industry, with an even greater economic impact generated by these institutions in their local communities. And from the 196 member theatres 53.2% of total expenses were devoted to compensation of personnel. The 1,910 theatres are estimated to have offered 197,000 performances that attracted 31 million patrons.

NEA funding impacted theatres in many ways. Direct impact came not only in the form of project grants, but also in the multiplier effect that NEA grants, through their 2-to-1 or 3-to-1 matching funds requirement, have on theatres' abilities to leverage funding. Indirectly, NEA funding was felt by theatres as it trickled down in the form of bloc grants to states and, subsequently, as city and county funding. State and local arts agencies together provided theatres with 4.3 percent of their total income.

Examples of Economic and Community Impact

With the support of a \$40,000 grant from the NEA, The Signature Theatre located in Arlington, Virginia will host the world premiere production of the musical *Giant*. Adapted from the American classic novel by Pulitzer Prize-winning author Edna Ferber (*Showboat*), *Giant* is a daring new musical that tells the powerful story of a Texas rancher and his Virginia-born wife as they face increasing challenges family in an ever-changing American landscape. The play explores two generations of Texas ranchers as they are confronted with Mexican American race relations in the face of a growing oil industry. A musical project in the making for more than two years, *Giant* was commissioned as part of Signature's American Musical Voices Project, which provides opportunities to selected composers to create new musical theater works. Artistic director Eric Schaeffer will direct 17 actors, a 12-person design team, and a 21-piece orchestra, with music and lyrics by Five-time Tony Award® nominee Michael John LaChiusa, and book by Sybille Pearson.

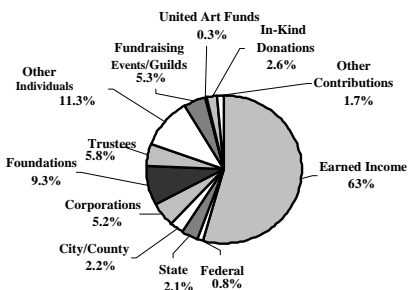
Boise Contemporary Theater received a grant for \$10,000 from the NEA to support their production of *I Have Before Me a Remarkable Document Given to Me by a Young Lady From Rwanda* by Sonja Linden. Inspired by the real life experiences of refugees in the UK, the play tells the story of two people from entirely different worlds, who meet in London in 1999, five years after the genocide in Rwanda. Juliette is a young Rwandan asylum seeker determined to write a book about the tragedy that

killed her family. Simon is a struggling middle-aged poet and novelist who teaches writing at a refugee center. The play follows their funny and touching journey to an inspiring conclusion. Throughout the run of the production, BCT offered free tickets to the local refugee community, and were met with an encouraging and enthusiastic response.

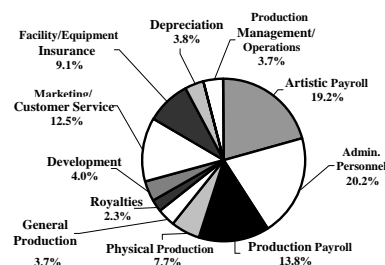
In order to commission and produce a new stage adaptation of the Thornton Wilder novel *Heaven's My Destination*, the Cleveland Play House in Ohio received a \$25,000 grant from the NEA. Wilder's 1935 novel receives its stage premiere this April under the direction of Cleveland Play House Artistic Director Michael Bloom. This hilarious tale about goodness in a fallen world, adapted by award-winning playwright Lee Blessing, follows a traveling textbook salesman and fervent religious convert, on a personal journey to lead a good life during Depression-era America. The CPH generally serves 100,000 patrons in the Greater Cleveland region including approximately 20,000 students. This production will also include a free panel discussion with panelists available who are close to Wilder and to the production, as well as experts on the play's historical context.

The NEA supports Seattle Repertory Theatre's upcoming production of Conor McPherson's *The Seafarer* with a grant for \$35,000. Directed by Wilson Milam who is a Bellevue, Washington native. Milam was nominated for a Tony Award for Best Director of a Play for Martin McDonagh's *The Lieutenant of Inishmore*. *The Seafarer* is a darkly funny and compelling new play about Ireland, the power of myth and the bond of a group of friends. Seattle Repertory Theatre engages in several forms of community outreach including pre-play warm-ups for preview performances, lobby talks and post play discussions, and of course their popular subscriber social groups, happy hour and taste of the Rep. These programs allow community members and supporters to engage socially and maintain relationships with their fellow audience members, and artists alike.

BREAKDOWN OF INCOME AS A PERCENT OF EXPENSES* (196 Profiled Theatres)



BREAKDOWN OF INCOME (196 Profiled Theatres)



*Percentages total 109.6% since income exceeded expenses by 9.6%



VSA arts Outcomes

VSA arts programs provide students with valuable academic advantages and teachers with research-based, innovative strategies to ensure participation and progress for each student by using the arts to enhance the learning process. They provide individuals with an artistic means of self-expression, create self-confidence, and teach marketable skills while fostering communication and independence. By utilizing the arts to enhance education, advance socialization, and promote inclusion, VSA arts programs are making it possible for more people with disabilities to contribute to the social, cultural and economic life of their communities.

Inclusion teaches us that all means all. Everybody. No exceptions. Cultivating creativity and imagination in the lives and learning of students with disabilities accomplishes this goal in ways that nothing else in the academic schedule does.

In 2008 alone, 495,113 students in pre-kindergarten through grade 12 were provided direct arts instruction through 66 VSA arts programs across 48 states and the District of Columbia. Over one third (38%) of these participants were students with a disability. Further:

- 84% of VSA arts affiliate education programs provide opportunities for students with disabilities to learn *side by side* with other students in an inclusive setting.
- Currently, 73% of these residency programs are aligned with state content standards or Individual Education Plans (IEP) goals. The remaining programs used locally generated standards.
- In the residency programs, program managers *agree* or *strongly agree* that 100% of students have achieved arts learning outcomes.
- 22% of these residency programs addressed social learning outcomes, and 19% of these programs integrated the arts with other subject areas like English Language Arts.

The arts demonstrate innovation toward improving teaching skills. VSA arts affiliates provided professional development to over 10,000 teachers and teaching artists. As a result of these initiated professional development opportunities, 90 to 96% of participating teachers reported increased understanding of the arts in education, and 83% could identify three or more ways of integrating the arts into their teaching.



A state-level snapshot of an affiliate's artist residency program showed:

- An increase in Artistic Skills: 94% of students improved performance on California's state standards for arts education.
- An increase in Academic Skills: 92% of students demonstrated improved academic skills through arts programming.
- A high level of Arts Integration: VSA arts of California teaching artists connected their teaching with other classroom content. The primary subject was English Language Arts; others included mathematics, geography, and occupational therapy.

In an educational era driven by academic achievement, the arts have an accepted and demonstrated capacity to capture the attention of students and teachers. Teachers value the increased focus, involvement, and demonstration of skills from students with disabilities who have the opportunity to participate in, and learn through, the arts. The arts uniquely manifest voice, choice, and access to learning that can be observed and documented through:

- Improving problem-solving skills – with an emphasis on sequencing, along with pattern recognition and creation.
- Improving motivation and comprehension – sustaining focus and time-on-task leads to demonstration of recall, such as letter recognition.
- Increasing vocabulary and improving writing – theme-based instruction provides a meaningful means of engagement and self-assessment, particularly in developing descriptions and details.

Founded in 1974 by Ambassador Jean Kennedy Smith, VSA arts is an international, nonprofit organization that works to create a society where all people with disabilities learn through, participate in and enjoy the arts.

VSA arts programming and initiatives are guided by four essential principles:

- Every young person with a disability deserves access to high quality arts learning experiences.
- All artists in schools and art educators should be prepared to include students with disabilities in their instruction.
- All children, youth, and adults with disabilities should have complete access to cultural facilities and activities.
- All individuals with disabilities who aspire to careers in the arts should have the opportunity to develop appropriate skills.