

DOCUMENT RESUME

ED 121 182

HE 007 612

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 TITLE The 1975-76 Concert Season: A Prediction.
 INSTITUTION Association of Coll., Univ. and Community Arts Administrators, Inc., Madison, Wis.
 SPONS AGENCY National Endowment for the Arts, Washington, D.C.
 PUB DATE Oct 75
 NOTE 31p.

EDRS PRICE MF-\$0.83 HC-\$2.06 Plus Postage
 DESCRIPTORS Costs; Dance; Dramatics; Fees; *Financial Support; *Higher Education; Music; *Program Costs; Programs; *Surveys; Tables (Data); *Theater Arts; Trend Analysis

ABSTRACT

The Association of College, University and Community Arts Administrators, Inc. (ACUCA) surveyed 162 colleges and universities and 33 nonprofit institutions that will present professional performing arts programs in the 1975-76 concert season. Some highlights are: (1) 195 institutions will present 3,515 performances that cost \$12,015,119 in artist fees in 1975-76; (2) the average fee for these performances will be \$3,418; (3) 195 institutions will spend \$4,014,923 in other direct costs, or an average of \$1,237 per performance; (4) on the average, each performance costs \$4,655 to present in fees and other direct costs; (5) 195 institutions will spend \$16,030,042 in total direct costs to present 3,515 performances to the public; (6) average fees have increased 37.8 percent in 1975-76 compared to 1974-75; (7) average other direct costs of presentation have increased 24 percent in 1975-76 compared to 1974-75; (8) on the average, the direct cost of presenting a performing arts event has risen 66.7 percent in the last three years; (9) there will be a 57 percent decrease in performances of vocal recitals and a 33 percent decrease in symphony performances in 1975-76 compared to 1974-75; (10) there will be a 34.8 percent increase in theater performances and a 36.1 percent increase in contemporary dance performances in 1975-76 compared to 1974-75; (11) 40 percent of the respondents report an increase in subscription sales for the 1975-76 season while only 13 percent report a decrease compared to 1974-75. (Author)

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THE 1975-76 CONCERT SEASON:

A PREDICTION

RESEARCHED AND ANALYZED BY

ROBERT MOON

U S DEPARTMENT OF HEALTH,
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ASSOCIATION OF COLLEGE, UNIVERSITY AND
COMMUNITY ARTS ADMINISTRATORS, INC.

FALL, 1975

INTRODUCTION

Since 1965, the Association of College, University and Community Arts Administrators, Inc., has conducted six Profile Surveys to determine programming trends. Each of those surveys has been concerned with past seasons, and each has provided meaningful data on types of programs presented, sources of income and funding, performance costs, etc. But none of the past studies has examined a season in its early stages to determine if new trends are emerging.

This Predictory Study is the result of a mutual concern of the National Endowment for the Arts and ACUCAA regarding the impact of current economic conditions on the "market" for the touring, professional performing arts for the 1975-76 season. We hope it will provide some answers about the current state of the performing arts; it does reveal some developments that will need close scrutiny in forthcoming months and for next season. If some of the information regarding artists' fees, other direct costs and programming trends persist, some performance types may face considerably fewer engagements in the future.

The data were gathered and analyzed by Robert Moon. We thank the National Endowment for the Arts for their concern and interest in this aspect of the arts, and for making the study possible. Our thanks, also, to Genevieve Mittnacht for her special assistance with the survey.

William M. Dawson
Executive Director, ACUCAA

October, 1975

TABLE OF CONTENTS

| | Page |
|---|------|
| INTRODUCTION | ii |
| HIGHLIGHTS | 1 |
| TRENDS AND COMPARISONS | 2 |
| SCOPE AND METHODOLOGY | 7 |
| The Population | |
| Response Rate | |
| Representativeness of the Sample | |
| THE PROGRAMS | 12 |
| Total Performances | |
| Total Performances by Program Type | |
| FINANCING THE ARTS | 14 |
| Total Artist and Performance Fees by Program Type | |
| and as a Percent of the Total | |
| Average Fee by Program Type | |
| Comparison of Fees and Total Performances by Program Type | |
| Total Other Direct Costs by Program Type | |
| Average Other Direct Costs by Program Type | |
| Sources of Budget | |
| Changes in Budget Sources | |
| Nature of the Funding/Spending Changes for the 1975-76 Season | |
| Total Amount of Subsidy | |
| MARKETING THE ARTS | 27 |

HIGHLIGHTS

The study surveyed 162 colleges and universities and 33 nonprofit institutions which will present professional performing arts programs in the 1975-76 concert season. Below are some highlights drawn from the study:

- 195 institutions will present 3,515 performances that cost \$12,015,119 in artist fees in 1975-76.
- the average fee for these performances will be \$3,418.
- 195 institutions will spend \$4,014,923 in other direct costs, or an average of \$1,237 per performance.
- on the average, each performance costs \$4,655 to present in fees and other direct costs.
- 195 institutions will spend \$16,030,042 in total direct costs to present 3,515 performances to the public.
- average fees have increased 37.8% in 1975-76 compared to 1974-75.
- average other direct costs of presentation have increased 24% in 1975-76 compared to 1974-75.
- on the average, the direct cost of presenting a performing arts event has risen 66.7% in the last three years.
- there will be a 57% decrease in performances of vocal recitals and a 33% decrease in symphony performances in 1975-76 compared to 1974-75.
- there will be a 34.8% increase in theater performances and a 36.1% increase in contemporary dance performances in 1975-76 compared to 1974-75.
- 40% of the respondents report an increase in subscription sales for the 1975-76 season while only 13% report a decrease compared to 1974-75.

TRENDS AND COMPARISONS

This survey reveals some encouraging facts about the 1975-76 concert season. Budget sources in almost every category will increase compared to last year. Over two-thirds of those who report funding changes for the current season report an increase in funds. Increased subscription sales are reported by 40% of the respondents, while only 13% report a decrease.

However, the following two tables present a comparative analysis with previous ACUCAA Profile Surveys and reveal a less encouraging picture.

Three-Year Comparison Table

| | <u>1972-73</u> <u>Profile</u> <u>Survey V</u> | <u>1974-75</u> <u>Profile</u> <u>Survey VI</u> | <u>1975-76</u> <u>Predictory</u> <u>Survey</u> |
|--|---|--|--|
| Average performances per institution | 18.1 | 18.4 | 18.0 |
| Average fees per performance | \$2,274 | \$2,479 | \$3,418 |
| Average other direct costs per performance | \$ 518 | \$ 997 | \$1,237 |
| Average total direct costs per performance | \$2,792 | \$3,476 | \$4,655 |
| Average subsidy per institution | \$32,251 | \$45,920 | \$53,004 |
| | | | |
| Total performances | 3,521 (194)* | 3,211 (174)* | 3,515 (195)* |
| Total fees | \$8,005,266 (194) | \$7,959,092 (174) | \$12,015,119 (195) |
| Total other direct costs | \$1,813,474 (194) | \$2,534,332 (174) | \$4,014,923 (195) |
| Total direct costs | \$9,818,740 (194) | \$10,493,424 (174) | \$16,030,042 (195) |
| Total subsidy | \$6,256,742 (154) | \$7,209,544 (157) | \$8,307,390 (156) |

*Numbers in parentheses signify number of responding institutions.

Rates of Change Summary Table

| | Percent Change from 1972-73 to 1975-76 | Percent Change from 1974-75 to 1975-76 |
|--|---|---|
| Average performances per institution | -.5% | -2.1% |
| Average fees per performance | +50.3 | +37.8 |
| Average other direct costs per performance | +138.8 | +24.0 |
| Average total direct costs per performance | +66.7 | +33.9 |
| Average subsidy per institution | +64.3 | +15.4 |

One fact to emerge from this survey is that costs are rising at a rapid rate. Compared to last year (1974-75), average fees have increased 37.8% in 1975-76. Average other direct costs have risen 24% and average subsidy per institution has risen 15.4%. In the last three years, average fees have risen 50.3%, other average direct costs were up 138.8%, and average subsidy per institution increased 64.3%. Average total direct costs per performance (sum of the average fee and average other direct costs) rose 33.9% since last year and 66.7% since 1972-73.

The average number of performances per institution per year will be slightly less than the 18.1 average per year in 1972-73 and the 18.4 average in 1974-75, decreasing to 18.0 in 1975-76. One interpretation may be that increased costs mean fewer performances. The following tables present some interesting examples.

Comparison of Performances of Program Types per 1000, Average Fee, Average Other Direct Costs,
and Average Total Direct Costs for the Years 1972-73, 1974-75 and 1975-76

| | <u>Performances per 1000*</u> | | | <u>Average Fee</u> | | | <u>Average Other Direct Costs</u> | | <u>Total Average Direct Costs</u> | |
|-----------------------|-------------------------------|----------------|----------------|--------------------|----------------|----------------|-----------------------------------|----------------|-----------------------------------|----------------|
| | <u>1972-73</u> | <u>1974-75</u> | <u>1975-76</u> | <u>1972-73</u> | <u>1974-75</u> | <u>1975-76</u> | <u>1974-75</u> | <u>1975-76</u> | <u>1974-75</u> | <u>1975-76</u> |
| Theater | 143.4 | 127.0 | 171.2 | \$3,110 | \$2,303 | \$2,957 | \$ 862 | \$1,043 | \$3,165 | \$4,000 |
| Intrumental recitals | 138.0 | 146.3 | 126.8 | 1,765 | 1,115 | 1,759 | 544 | 837 | 1,659 | 2,526 |
| Chamber music | 110.1 | 128.9 | 106.6 | 1,505 | 1,164 | 1,420 | 494 | 546 | 1,658 | 1,966 |
| Contemporary dance | 63.9 | 75.6 | 102.9 | 2,438 | 3,261 | 3,524 | 1,352 | 1,242 | 4,613 | 4,784 |
| Symphony | 97.9 | 90.3 | 60.5 | 4,343 | 3,354 | 7,230 | 870 | 2,091 | 4,224 | 9,321 |
| Opera and choral | 69.5 | 56.0 | 59.4 | 3,841 | 3,489 | 4,929 | 1,546 | 1,918 | 5,035 | 6,847 |
| Jazz | 49.4 | 64.7 | 55.4 | 2,490 | 1,964 | 2,421 | 751 | 870 | 2,715 | 3,291 |
| Folk | 74.4 | 82.5 | 54.0 | 1,687 | 1,537 | 1,183 | 686 | 479 | 2,223 | 1,662 |
| Mime | | | 52.3 | | | | | 902 | | 2,792 |
| Rock | 80.6 | 71.0 | 51.7 | 4,710 | 4,887 | 6,996 | 1,921 | 2,278 | 6,808 | 9,274 |
| Ballet | 41.1 | 42.9 | 46.0 | 4,510 | 4,937 | 5,804 | 2,425 | 2,425 | 7,362 | 8,229 |
| Ethnic Dance | | | 43.8 | | | | | 2,225 | | 6,404 |
| Big name entertainers | 57.9 | 45.4 | 38.9 | 5,573 | 5,442 | 6,161 | 1,853 | 1,512 | 7,295 | 7,673 |
| Vocal recitals | 73.2 | 68.8 | 29.5 | 1,350 | 972 | 3,077 | 416 | 969 | 1,388 | 4,046 |

*Because a different number of total performances were reported each year, each program type was converted to number of performances per thousand so that comparisons could be made between years. For example, out of a norm of 1,000 performances in each year, theater was presented 143.4 times in 1972-73, 127.0 times in 1974-75, and 171.2 times in 1975-76.

Rates of Change for Performances per 1000, Average Fee, Average Other
Direct Cost, and Average Total Direct Cost by Program Type
for the Years 1972-73, 1974-75 and 1975-76

| | Performances per 1000* | | Average Fee | | Average Other Direct Cost | Average Total Direct Cost |
|-----------------------|---|---|---|---|---|---|
| | Percent Change 1972-73 to 1975-76 | Percent Change 1974-75 to 1975-76 | Percent Change 1972-73 to 1975-76 | Percent Change 1974-75 to 1975-76 | Percent Change 1974-75 to 1975-76 | Percent Change 1974-75 to 1975-76 |
| Theater | +19.4% | +34.8% | -4.9% | +28.4% | +20.9% | +26.3% |
| Instrumental recitals | - 8.7 | -13.3 | - .3 | +57.7 | +53.8 | +52.2 |
| Chamber Music | - 3.1 | -17.3 | -5.6 | +21.9 | +10.5 | +18.5 |
| Contemporary dance | +161.0 | +36.1 | +44.5 | + 8.0 | - 8.1 | + 3.7 |
| Symphony | -38.2 | -33.0 | +66.4 | +115.6 | +140.3 | +120.6 |
| Opera and choral | -14.5 | + 6.0 | +28.3 | +41.3 | +24.0 | +35.9 |
| Jazz | +12.1 | -14.3 | - 2.7 | +23.3 | +15.8 | +21.2 |
| Folk | -27.4 | -34.5 | -29.8 | -23.0 | -30.1 | -25.2 |
| Rock | -35.8 | -27.1 | +48.5 | +43.2 | +18.5 | +36.2 |
| Ballet | +11.9 | + 7.2 | +28.7 | +17.6 | 0 | +11.7 |
| Big name entertainers | -32.8 | -14.3 | +10.5 | +13.2 | -18.4 | + 5.1 |
| Vocal recitals | -59.6 | -57.0 | +127.9 | +216.6 | +132.9 | +191.4 |

*Because a different number of total performances were reported each year, each program type was converted to number of performances per thousand so that comparisons could be made between years.

For example, the average total direct costs of vocal recitals rose 191.4% in the last year, while there was a 57% decrease in performances. Symphony concert costs rose 120.6%, while number of performances fell 33%. On the other hand, theater costs rose 52.2% and performances also rose by 34.8%. Of the eleven program types where average total direct cost rose between 1974-75 and 1975-76, seven of these program types (63.6%) shows a decrease in average number of performances, while only four (36.4%) program types showed an increase in performances. While costs are obviously a factor in determining number of performances, there are other elements that determine number of performances (demand of audiences, availability of program types, facilities available, etc.) as well.

The continued decline in the number of symphony presentations and vocal recitals since 1972-73 must be viewed with concern for organizations and artists involved with these art forms. Alternatively, the steady increase in performances of contemporary dance is an encouraging sign for dance companies and dancers.

Theater road shows show a surprising increase in the number of total performances, considering that many tours originally planned were cancelled during the spring and summer of 1975. However, the average fee did not increase as sharply as for some other program types, and a number of tours were partially underwritten by state and regional arts agencies.

After a steady increase in the average number of performances per institution over the past six years, the slight but real decrease for the 1975-76 season should be viewed with concern. This is particularly true in view of the great increase in fees, other direct costs, and in the increase in institutional subsidy. It should also be noted that this study does not include indirect costs such as salaries and wages, fringe benefits, utilities, maintenance and other essential service areas; all of these have undoubtedly increased as well.

It is impossible to tell at this time if the average performance decrease marks a trend for future seasons; the ultimate cost increases may mean fewer performance opportunities in time to come. Equally important, it may mean fewer opportunities for the public to share those performances.

SCOPE AND METHODOLOGY

By the summer of 1975, ACUCAA's active membership consisted of 340 colleges and universities and 66 nonprofit institutions involved in the presentation of professional performing arts programs. Active members consist of institutions of higher learning and nonprofit community, state, and regional public service organizations, such as museums, arts councils and performing arts centers, which have the presentation of a performing arts program as one of their functions or which are concerned with the performing arts.

The questionnaire was sent to the 406 active members on August 25, 1975, with a return deadline of September 15, 1975. Associate, Library, and the various categories of Affiliate Members were not included in the survey. Follow-up phone calls were made in early September.

Response Rate

| | <u>Total ACUCAA Membership</u> | <u>1975-76 Prediction Survey</u> | <u>Response Rate</u> |
|-------------------------|------------------------------------|--|--------------------------|
| Nonprofit institutions | 66 | 33 | 50.0% |
| Colleges & universities | <u>340</u> | <u>162</u> | <u>47.6%</u> |
| Total | 406 | 195 | 48.0% |

The 47.6% response rate is higher than the 42.8% response rate for Profile VI, although it is not as high as the 61.9% response rate for Profile V. Considering the time limitations of the survey (three weeks to obtain the data) and the time of the year (many arts administrators are vacationing in late August and early September), the response rate was gratifying.

Representativeness of the Sample

1. Type of Institution

| | <u>ACUCAA Membership</u> | <u>Response Rate/1975-76 Prediction Survey</u> |
|-------------------------|------------------------------|--|
| Nonprofit institutions | 16.3% | 16.9% |
| Colleges & universities | 83.7% | 83.1% |

As the above chart shows, the Prediction Survey sample is representative of the membership of ACUCAA as far as type of institution is concerned.

2. Regional Groupings

The ACUCAAA has divided its membership into regional groupings by states as follows:

Regional Groupings

Middle Atlantic

New Jersey
New York
Pennsylvania

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

West North Central

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

South Atlantic

Delaware
Washington, DC
Florida
Georgia
Maryland
North Carolina
South Carolina
Virginia
West Virginia

Mountain

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

East South Central

Alabama
Kentucky
Mississippi
Tennessee

Pacific

Alaska
California
Hawaii
Oregon
Washington

East North Central

Illinois
Indiana
Michigan
Ohio
Wisconsin

West South Central

Arkansas
Louisiana
Oklahoma
Texas

Canada

Puerto Rico

The regional groupings are the same as those used in ACUCAAA's Profile Surveys.

As the following chart shows, the respondents to the Prediction Survey closely match the geographic groupings of the total ACUCAAA membership. The West North Central and South Atlantic regions are slightly underrepresented and the East North Central region is slightly overrepresented.

| <u>Regional Location</u> | <u>P e r c e n t</u> | |
|--------------------------|------------------------------------|--|
| | <u>Total ACUCAA Membership</u> | <u>1975-76 Concert Season Prediction</u> |
| | N = 406 | N = 195 |
| Middle Atlantic | 21.2% | 19.5% |
| New England | 6.1 | 5.1 |
| West North Central | 9.6 | 7.7 |
| South Atlantic | 13.7 | 11.5 |
| Mountain | 4.3 | 5.6 |
| East South Central | 5.9 | 6.6 |
| Pacific | 9.3 | 9.7 |
| East North Central | 20.9 | 23.6 |
| West South Central | 4.5 | 6.1 |
| Canada-Puerto Rico | <u>4.5</u> | <u>4.6</u> |
| | 100% | 100% |

3. Student Enrollment of Colleges and Universities

| <u>Student Enrollment</u> | <u>P e r c e n t</u> | |
|---------------------------|---|---|
| | <u>Total ACUCAA Colleges & Universities</u> | <u>C/U Response 1975-76 Concert Season Prediction</u> |
| | N = 340 | N = 162 |
| Under 3000 | 25.5% | 25.8% |
| 3000 - 4999 | 11.1 | 6.8 |
| 5000 - 9999 | 24.9 | 20.8 |
| 10,000-19,999 | 23.6 | 25.1 |
| 20,000+ | 14.9 | 21.5 |

The schools with enrollments of 3000 to 4999 and 5000 to 9999 are underrepresented in the Prediction Survey response and the larger schools (over 20,000) are overrepresented.

4. Educational Level of Colleges and Universities

| <u>Educational Level</u> | <u>P e r c e n t</u> | |
|---|---|---|
| | <u>Total ACUCAA Colleges & Universities</u> | <u>C/U Response 1975-76 Concert Season Prediction</u> |
| | N = 340 | N = 162 |
| Two year college | 10.0% | 10.9% |
| Four year college | 14.9 | 20.8 |
| Four year college and graduate program | 75.1 | 68.3 |

Four year colleges are overrepresented and schools with graduate programs are underrepresented in the response sample.

5. Public and Private Schools

| | <u>P e r c e n t</u> | |
|---------|------------------------------------|---|
| | <u>Total ACUCAA Membership</u> | <u>1975-76 Season Prediction Survey</u> |
| | N = 340 | N = 162 |
| Public | 68.4% | 68.8% |
| Private | 31.5 | 31.2 |

The respondents to the Prediction Survey closely match the total ACUCAA membership in the breakdown between public and private schools.

6. Comparison with all Colleges and Universities in the United States

| | <u>P e r c e n t</u> | | |
|---------------------------------------|--|------------------------------------|--|
| | <u>All Colleges & Universities</u> | <u>Total ACUCAA Membership</u> | <u>1975-76 Prediction Survey</u> |
| | N = 3,004* | N = 340 | N = 162 |
| Two year colleges | 35.9% | 10.0% | 10.9% |
| Four year colleges (undergraduate) | 28.6 | 14.9 | 20.8 |
| Four year college (graduate) | 35.4 | 75.1 | 68.3 |
| Public | 47.7* | 68.4 | 68.8 |
| Private | 52.3 | 31.5 | 31.2 |

*Educational Directory, 1974-75, by Arthur Podolsky. U.S. Department of Health, Education and Welfare: National Center for Education Statistics, Education Division.

The college and university membership of ACUCAA is underrepresented by two and four year undergraduate schools and overrepresented by graduate schools compared to all colleges and universities. Public schools are overrepresented and private schools are underrepresented when comparing ACUCAA's college and university membership to the national population of institutions of higher learning.

THE PROGRAMS

Total Performances

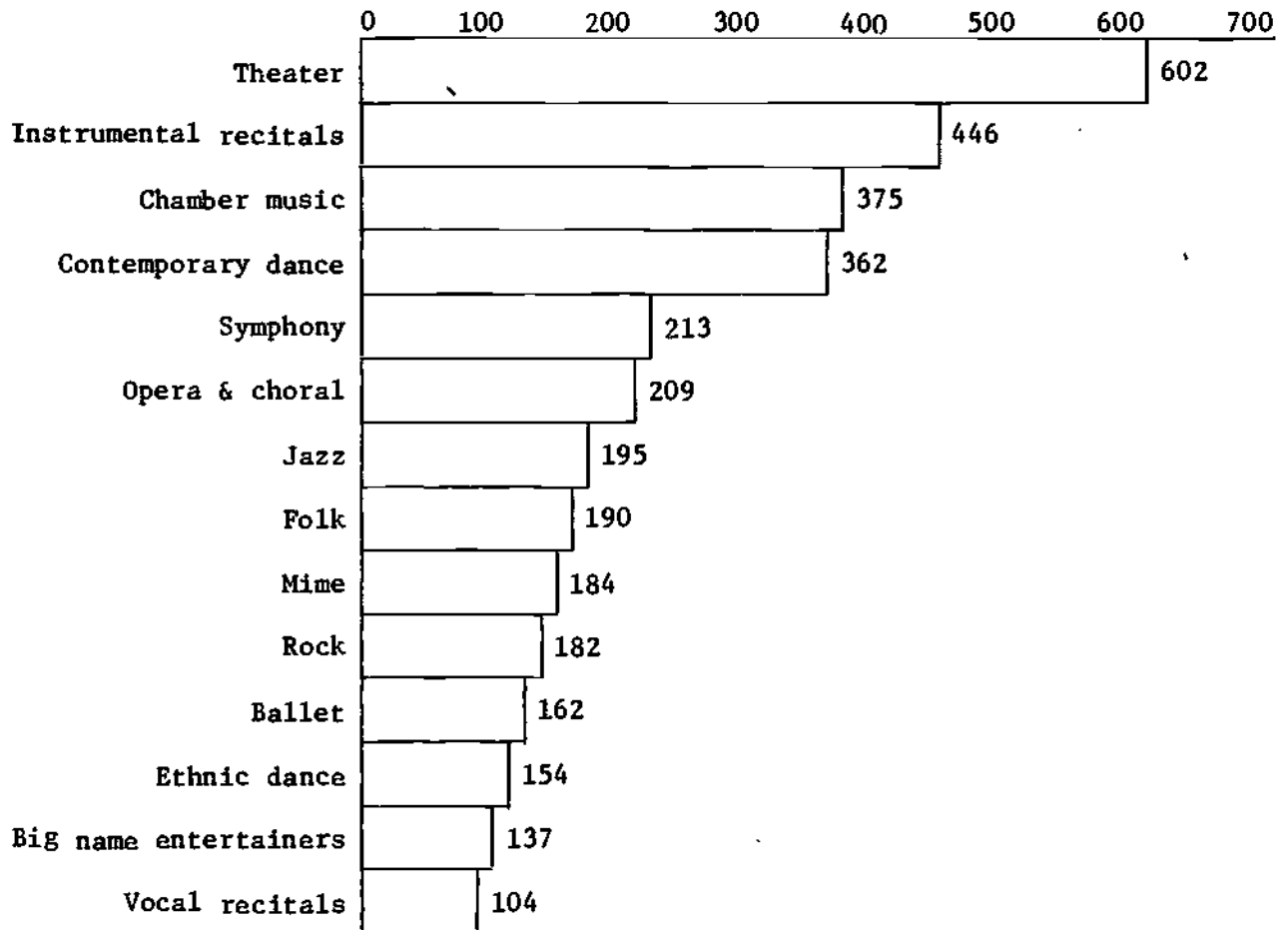
In 1975-76, 195 institutions will present 3,515 performances. (These performances were contracted as of October 1, 1975.) This indicates an average of 18 performances per institution, and will be slightly less than the averages of 18.1 and 18.4 for the 1972-73 (Profile Survey V) and 1974-75 (Profile Survey VI) concert seasons, respectively.

Theater will be presented more than any other art form--602 times. Contemporary Dance will rise from sixth to fourth rank with 362 performances. The number of vocal recitals presented will decrease significantly from 1974, 221 or 6.8% of the total performances, to 104 or 2.9% in 1975-76. Theater Road Shows, Instrumental Recitals, Chamber Music and Contemporary Dance will comprise slightly more than 50% of the total number of performances.

Despite 304 more performances reported for 1975-76 than for 1974-75, only Theater Road Shows, Contemporary Dance, Opera and Choral, and Ballet show an increase in the total number of performances contracted.

Total Performances by Program Type

N = 3515 performances



FINANCING THE ARTS

Total Artist and Performance Fees by Program Type
and as a Percent of the Total

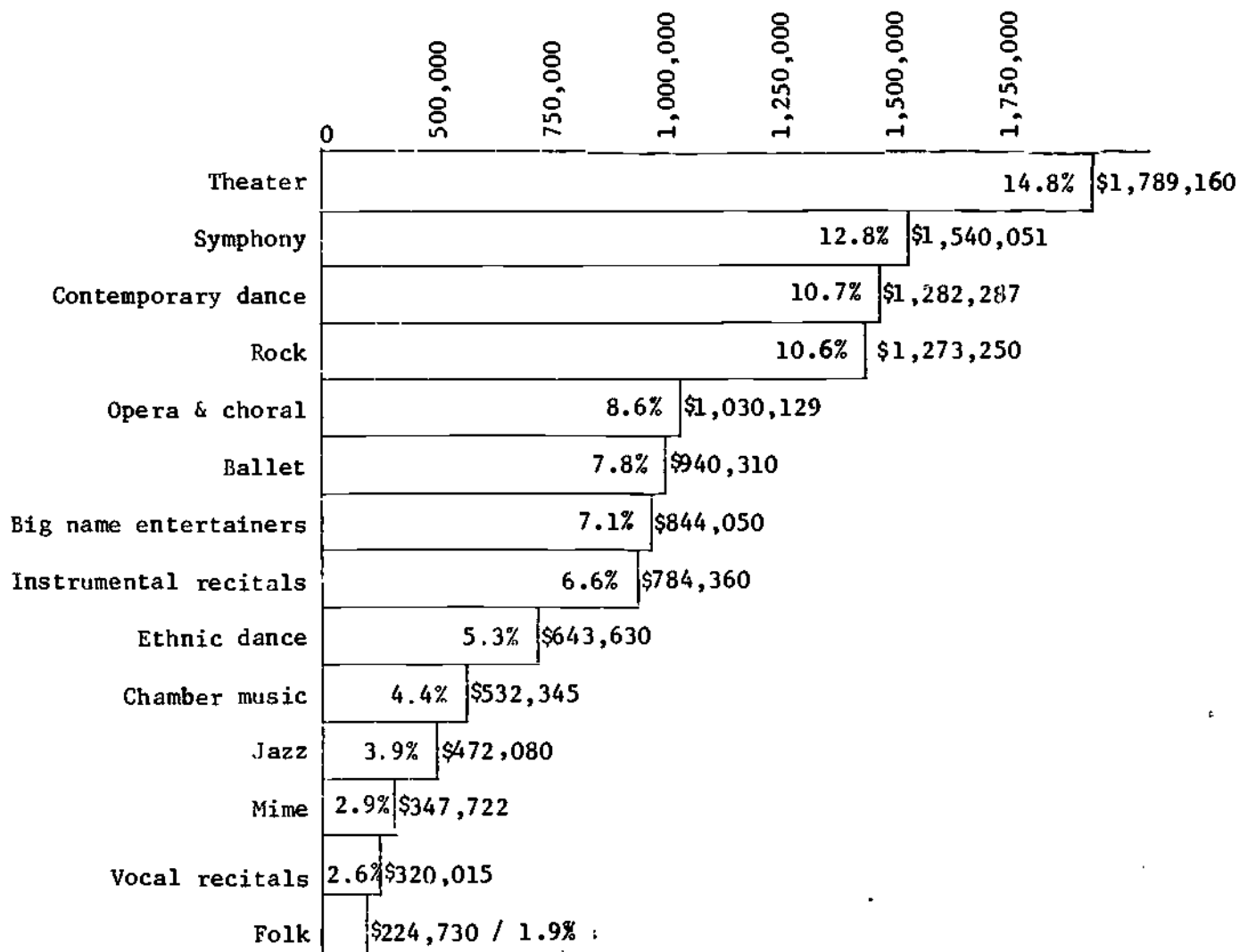
In 1975-76, the 3,515 events scheduled will cost \$12,015,119 in artist and performance fees. Of the total dollars for fees, 49% will be spent on theater, symphony, contemporary dance and rock. As the number of performances of contemporary dance, mime and ethnic dance increases, so do the dollars spent for these art forms. In 1974-75, 174 institutions spent \$792,354, or slightly less than 10% of the total fees expended, on these art forms. In 1975-76, 195 institutions will spend \$2,273,639, or slightly less than 19% of the total fees, on these three art forms.

Total Artist and Performance Fees by Program Type and
as a Percent of the Total

N = 3515 events

Total Artist and Performance Fees = \$12,015,119

Average Fee = \$3,418

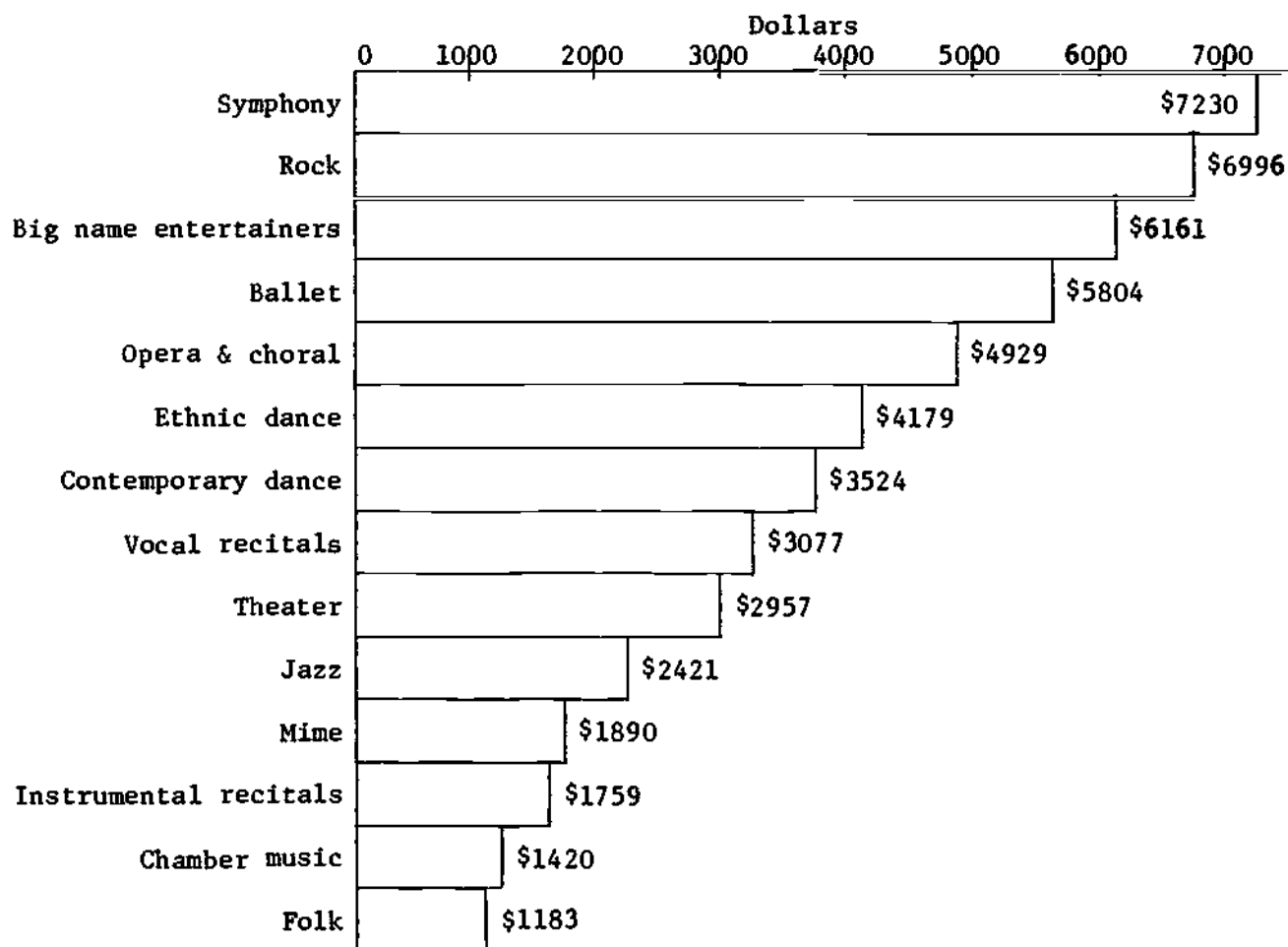


Average Fee by Program Type

Average fees for the 1975-76 concert season for all program types will be \$3,418. This is a 39% increase over the 1974-75 season's average of \$2,479. The table on page 16 shows how much average fees by performance types will rise in 1975-76.

Average Fee by Program Type N = 3,515 performances

Average Fee = \$3,418



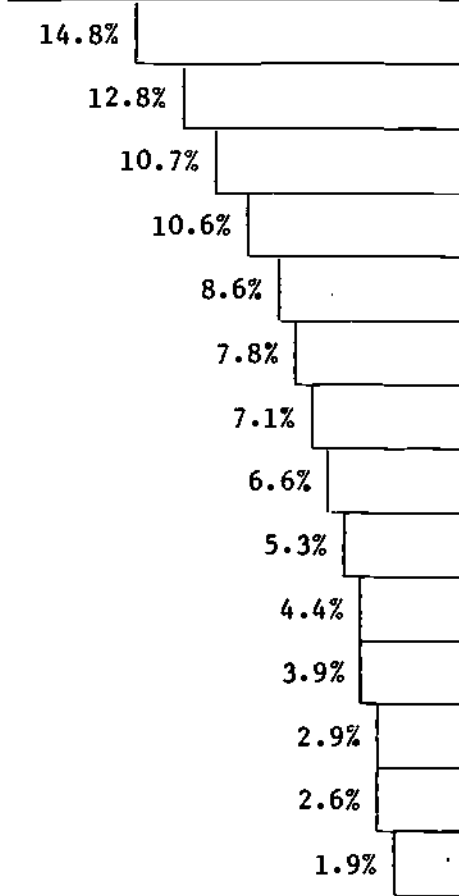
| <u>Program Type</u> | <u>A v e r a g e F e e</u> | | <u>Percent Change</u> |
|-----------------------|------------------------------------|----------------------------------|-----------------------|
| | <u>Profile Survey VI / 1974-75</u> | <u>Prediction Survey 1975-76</u> | |
| Symphony | \$3,354 | \$7,230 | +115.6% |
| Rock | 4,887 | 6,996 | + 43.2 |
| Big name entertainers | 5,442 | 6,161 | + 13.2 |
| Ballet | 4,937 | 5,804 | + 17.6 |
| Opera & choral | 3,489 | 4,929 | + 41.3 |
| Ethnic dance | | 4,179 | |
| Contemporary dance | 3,261 | 3,524 | + 8.0 |
| Mime | | 1,890 | |
| Theater | 2,303 | 2,957 | + 28.4 |
| Jazz | 1,964 | 2,421 | + 23.3 |
| Vocal recitals | 972 | 3,077 | +216.6 |
| Instrumental recitals | 1,115 | 1,759 | + 57.7 |
| Chamber music | 1,164 | 1,420 | + 21.9 |
| Folk | 1,537 | 1,183 | - 23.0 |

Comparison of Fees and Total Performances by Program Type

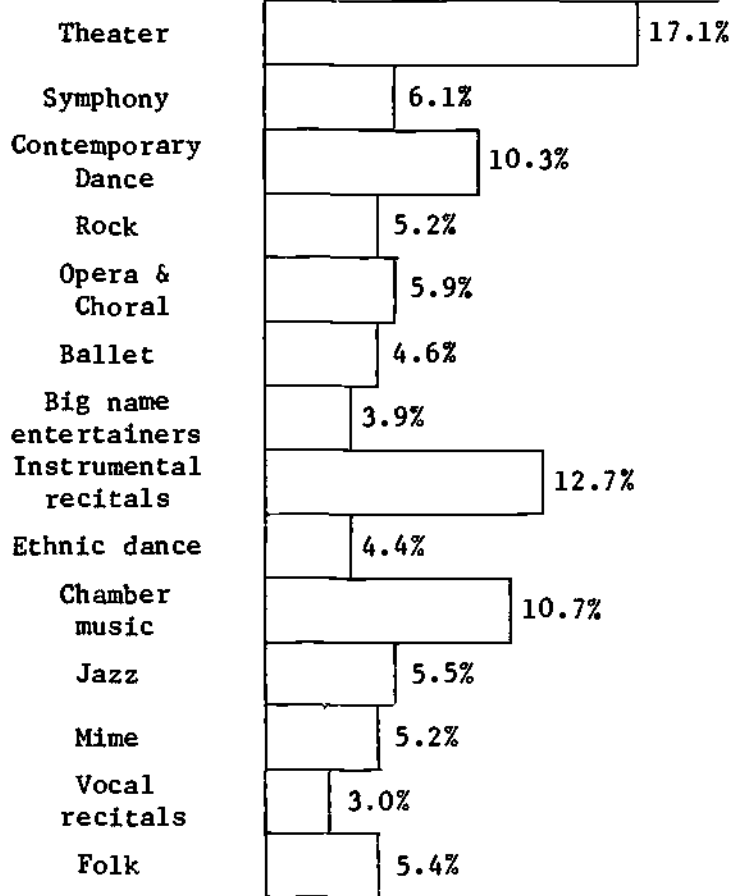
Symphony, rock, opera and choral, ballet and big name entertainers represent a large percentage of the total fee expenditure, but represent only a small percentage of the total performances. (For example, symphonies represent 12.8% of the total fees expended for only 6.1% of the total performances.)

Comparison of Percent of Fees and Total Performances by Program Type

Total Dollars=\$12,015,119
 Total Dollars Spent as a %
 20 15 10 5 0



Total Performances=3515
 Total Performances as a %
 0 5 10 15 20



Total Other Direct Costs, by Program Type

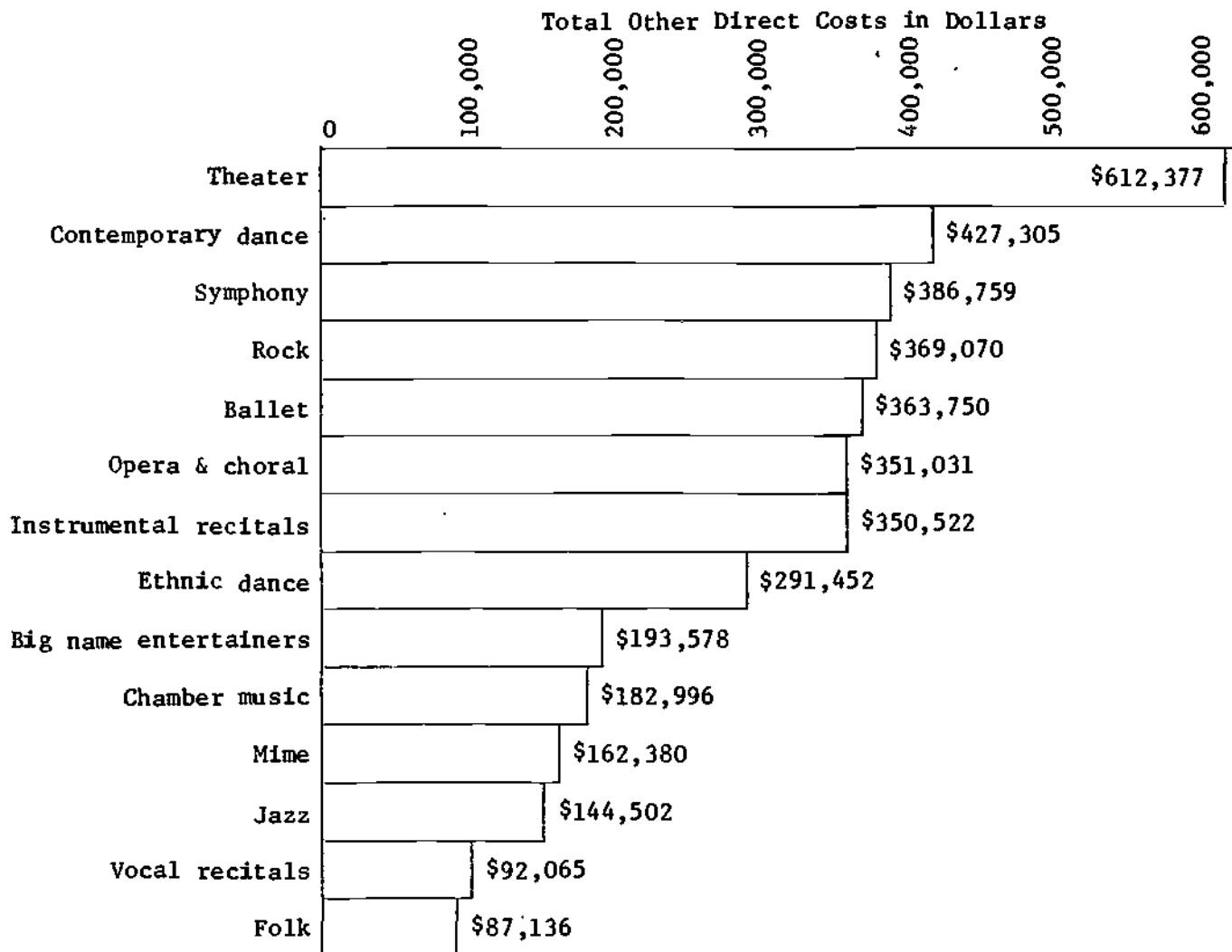
"Other direct costs" include hall rental, promotion and publicity, tickets, program printing, etc., but do not include artist and performance fees.

Theater not only will have the largest number of dollars spent on fees, but also the highest total other direct costs. The average other direct cost per performance will rise from \$997 in 1974-75 to \$1,237 in 1975-76, representing a 24% increase.

Total Other Direct Costs by Program Type N = 3,246 performances*

Total Other Direct Costs = \$4,014,923

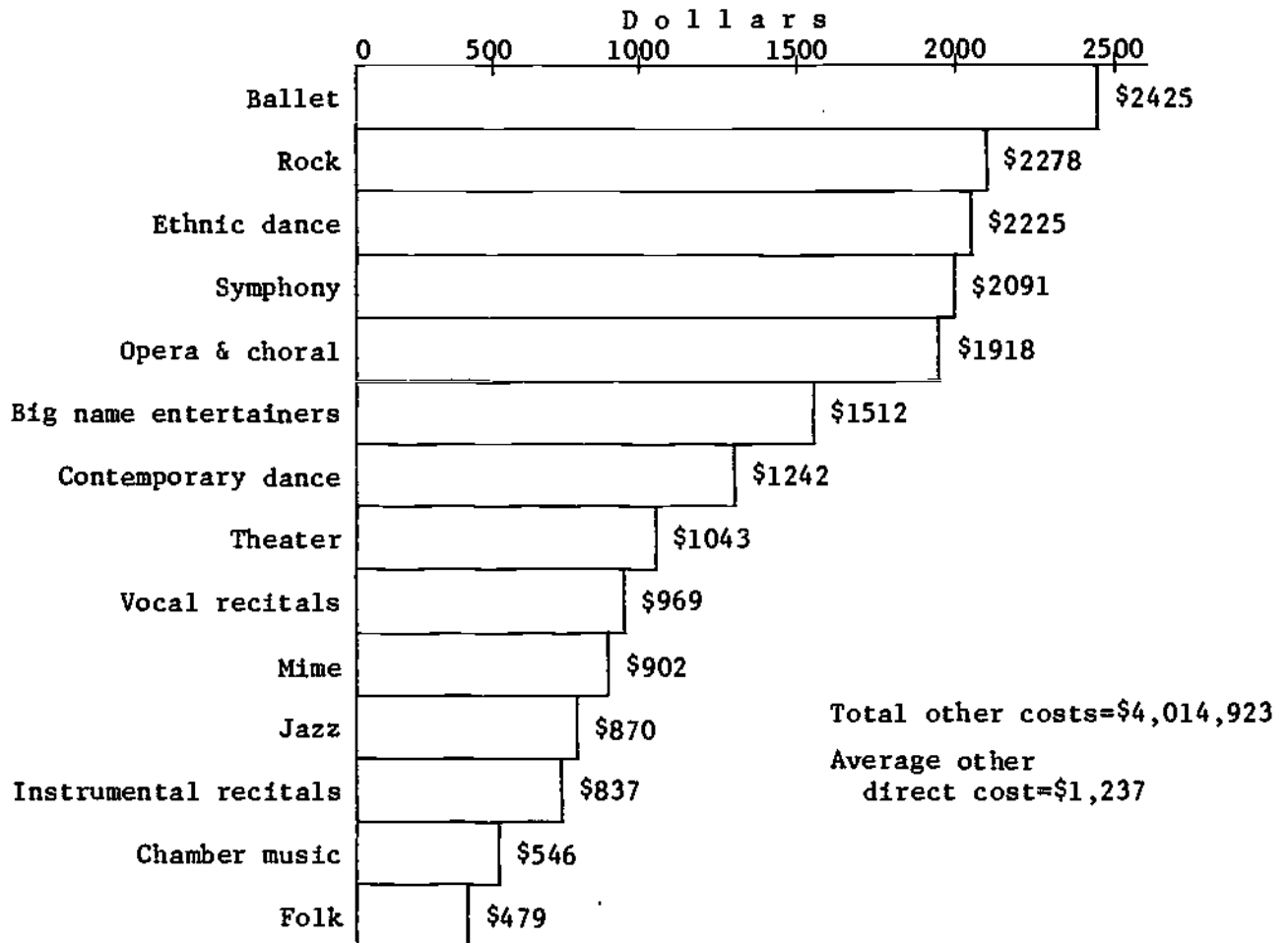
Average Other Direct Costs = \$1,237 per performance



*There were 3,246 performances for which other direct costs were reported.

Average Other Direct Cost by Program Type

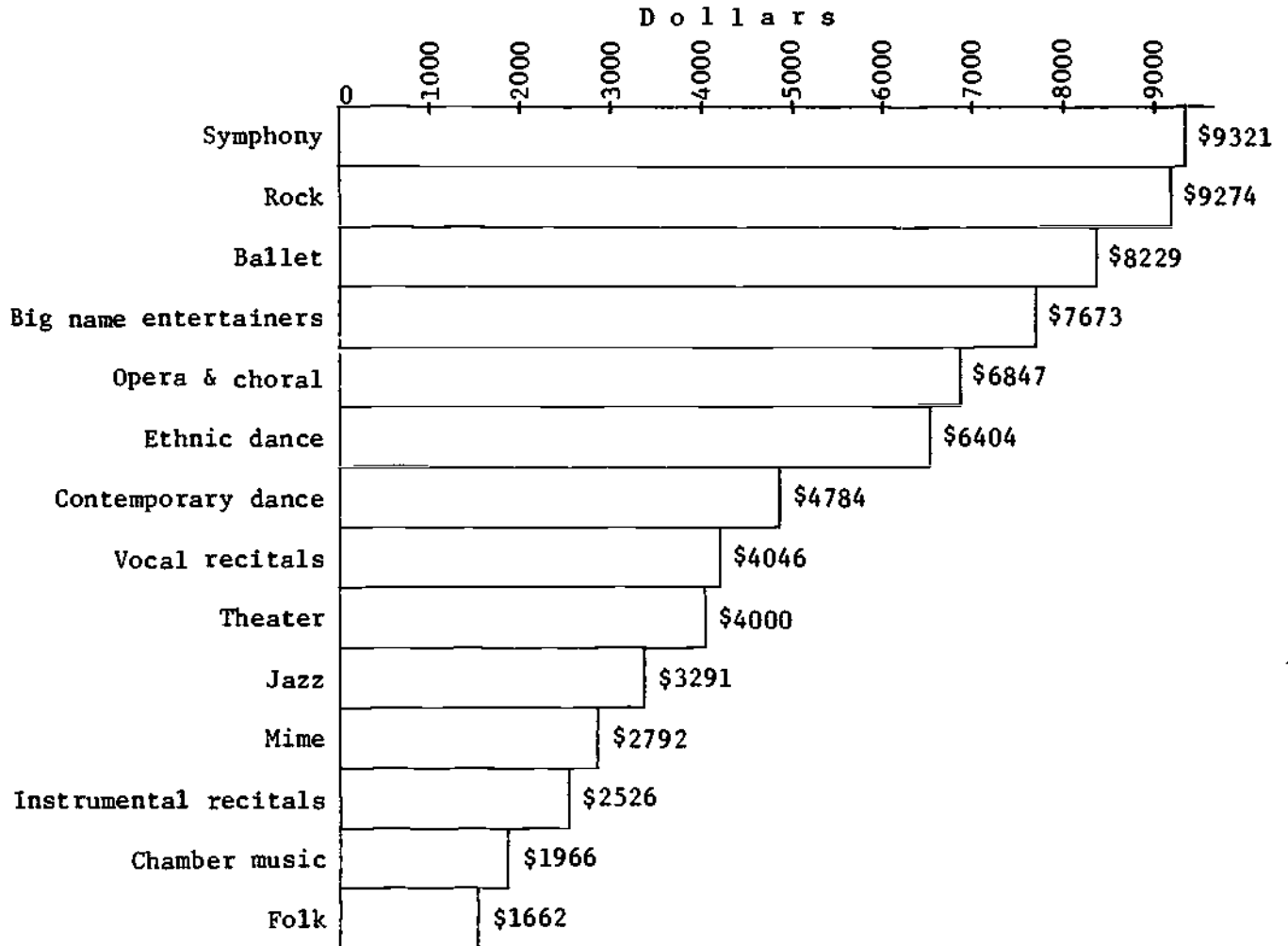
N = 3,246 performances



Average Total Direct Costs* of Presentation by Program Type

N = 3,515 performances for fees

N = 3,246 performances for other direct costs



*Average total direct costs is the sum of average fee and average direct other costs for each performance type.

Sources of Budget

The following three tables indicate estimated budget sources for the institutions surveyed. Student activity fees and ticket sales revenue remain the leading sources of revenue, but money received from state arts agencies and the National Endowment for the Arts will increase significantly in the 1975-76 concert season.

Of the colleges and universities reporting, 89.7% will receive income from ticket sales, while 78.5% of the nonprofit institutions receive money from ticket sales. Nonprofit institutions receiving money from their state arts agencies comprise 75.0% of the sample, while 49.3% of the colleges and universities will receive such funding.

Sources of Budget N = 184 respondents

Colleges, Universities and Nonprofit Institutions

| | <u>Percent*</u> |
|---|-----------------|
| Ticket Sales | 88.0% |
| Student Activity Fees | 55.9 |
| State Arts Agencies | 53.2 |
| National Endowment for the Arts | 50.0 |
| Academic or Curricular Funds | 33.7 |
| Individual/Corporate Foundation Contributions | 30.4 |
| Memberships | 22.8 |
| Community Government | 13.0 |
| Tuition Income | 9.2 |

*Percent of those respondents indicating "yes" to each budget source.

Sources of Budget N = 156 respondents

Colleges and Universities

| | <u>Percent*</u> |
|---|-----------------|
| Ticket Sales | 89.7% |
| Student Activity Fees | 62.8 |
| National Endowment for the Arts | 50.6 |
| State Arts Agencies | 49.3 |
| Academic or Curricular Funds | 35.9 |
| Individual/Corporate/Foundation Contributions | 25.6 |
| Memberships | 19.2 |
| Tuition Income | 10.2 |
| Community Government | 8.3 |

Sources of Budget N = 28 respondents

Nonprofit Institutions

| | <u>Percent*</u> |
|---|-----------------|
| Ticket Sales | 78.5% |
| State Arts Agencies | 75.0 |
| Individual/Corporate/Foundation Contributions | 57.1 |
| National Endowment for the Arts | 46.4 |
| Memberships | 42.8 |
| Community Government | 39.2 |
| Academic or Curricular Funds | 21.4 |
| Student Activity Fees | 17.8 |
| Tuition Income | 3.5 |

*Percent of those respondents indicating "yes" to each budget source.

Changes in Budget Sources

The table below indicates whether each budget source for the 1975-76 season will increase (more), decrease (less), or remain the same (same) as compared to the 1974-75 season.

| <u>Budget Sources (no. of responses in parentheses)</u> | <u>More in 1975-76 than in 1974-75</u> | <u>Less in 1975-76 than in 1974-75</u> | <u>Same</u> |
|---|--|--|-------------|
| Student Activity Fees (103) | 34.9% | 12.7% | 51.4% |
| Ticket Sales (162) | 59.2 | 8.0 | 29.6 |
| Tuition Income (17) | 35.3 | 11.7 | 47.0 |
| Academic or Curricular Funds (62) | 24.1 | 30.6 | 43.5 |
| State Arts Agencies (98) | 49.0 | 15.3 | 26.5 |
| National Endowment for the Arts (92) | 57.6 | 13.0 | 26.0 |
| Individual/Corporate/Foundation Contributions (56) | 44.6 | 21.4 | 30.3 |
| Memberships (42) | 47.6 | 7.1 | 42.8 |
| Community Government Budgets (24) | 29.1 | 8.3 | 58.3 |

Figures are given as percentages of the response for each budget source. Example: Of the 103 responses naming Student Activity Fees as a budget source, 34.9% will receive more in 1975-76 than in 1974-75, 12.7% will receive less, and 51.4% will receive the same.

Every budget source except academic or curricular funds will increase more often than it will decrease in 1975-76, as compared to 1974-75. Biggest net increases are in ticket sales, NEA funds, state arts agency funds, membership income, and individual/corporate/foundation contributions.

It is crucial to realize that the largest increases in budget sources come from funds outside of the university institutions (ticket sales, NEA, state arts agencies, contributions, memberships). Funding from within academic institutions rose less sharply (student activity fees) or showed a net decrease (academic or curricular funds). It appears evident that the college and university market's viability in the future will depend more on ticket revenue and nonuniversity sources as academic demands on institutional budgets divert funding from performing arts programs.

Nature of the Funding/Spending Changes for the 1975-76 Season

Of the 93 respondents who indicated that "a major funding change" is occurring this year, 69.8% indicate it is an increase and 30.2% report a decrease. Of these changes, 60.8% are temporary adjustments and 39.2% are permanent policy changes.

Nature of Funding/Spending Changes for the 1975-76 Season

| | <u>Colleges & Universities</u> | <u>Nonprofit Institutions</u> | <u>Total</u> |
|----------------------------|--|-----------------------------------|--------------|
| | N = 77 | N = 16 | N = 93 |
| Increase Since Last Season | 68.8% | 75.0% | 69.8% |
| Decrease Since Last Season | 31.2 | 25.0 | 30.2 |

Nature of Funding/Spending Changes for the 1975-76 Season

N = 56 respondents

| | <u>Percent</u> |
|-------------------------|----------------|
| Permanent Policy Change | 39.2% |
| Temporary Adjustment | 60.8 |

Funding/Spending Change is Permanent or Temporary

N = 40 respondents

| | <u>Percent</u> |
|---|----------------|
| Funding Increase is a Permanent Policy Change | 42.5% |
| Funding Increase is a Temporary Adjustment | 35.0 |
| Funding Decrease is a Permanent Policy Change | 7.5 |
| Funding Decrease is a Temporary Adjustment | 15.0 |

Of the 40 institutions that responded in both categories (increase/decrease and permanent/temporary), 42.5% indicated their funding increase was permanent and 35.0% indicated the increase was temporary.

Changes in Funding/Spending Patterns Since Last Season

N = 140 respondents

Each respondent was asked what the biggest major change in their funding/spending pattern was since last season. The following were mentioned most often.

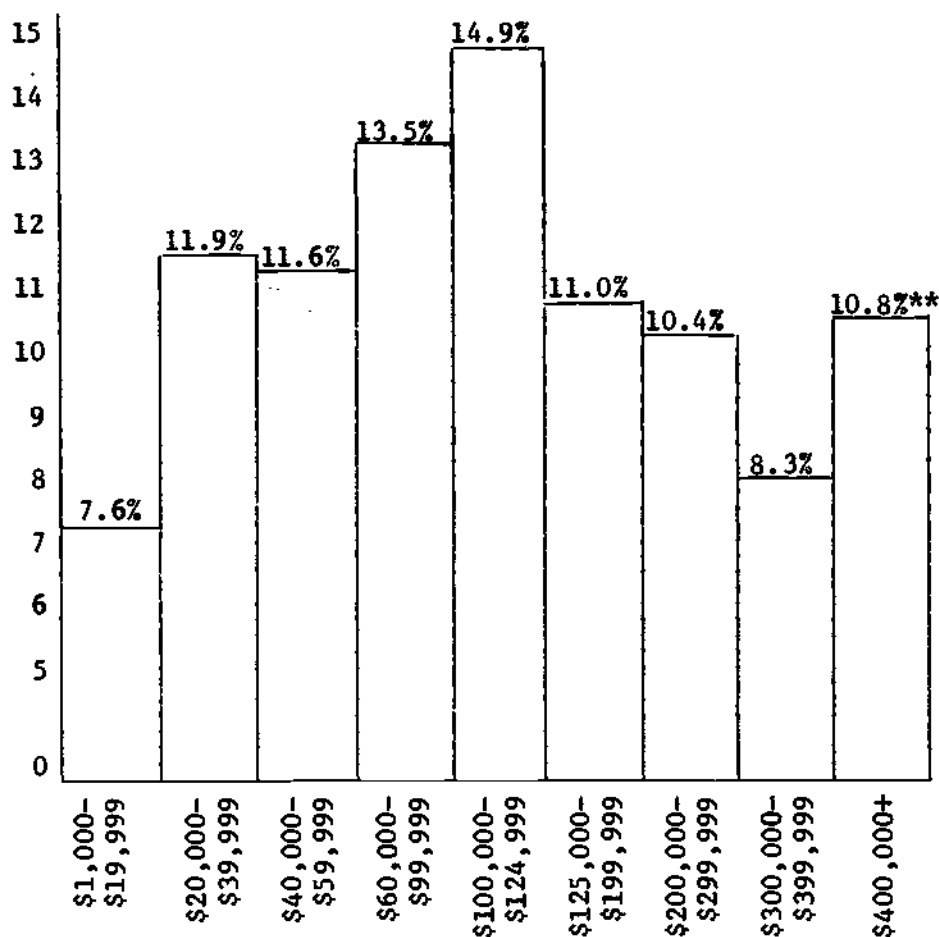
| | |
|---------------------|------|
| More outside grants | (19) |
| Increased budget | (11) |
| Higher artist fees | (10) |
| Expanded program | (9) |
| Reduced program | (8) |

Total Amount of Subsidy*

Eighty percent of the respondents predict some subsidy in the 1975-76 season. The total amount predicted is \$8,307,420. The average subsidy will be \$53,253 for all institutions. Of the nonprofit institutions, 20 will receive a total of \$1,060,093 in subsidy or an average subsidy of \$53,004, while colleges and universities will average \$53,289.

Total Amount of Subsidy to be Received in 1975-76 Season

N = 156 institutions



*Funds other than ticket sales received from a wide variety of sources such as student activity fees, individual and corporate donations, gifts, grants from governmental agencies, etc.

**One respondent reported a subsidy of \$900,000, the only response over \$400,000.

MARKETING THE ARTS

Respondents to the study were asked to indicate whether subscription sales for the 1975-76 season were above, below, or approximately the same as last season at the same date.* As of October 1, 1975, 41% reported sales above last year, while only 16% reported them to be less than last year.

Subscription Sales for 1975-76 Season as Compared to 1974-75 Season

N = 121 respondents

| | <u>Percent</u> |
|---|----------------|
| Subscription Sales ABOVE 1974-75 Season | 41.3% |
| Subscription Sales BELOW 1974-75 Season | 14.9% |
| Subscription sales the SAME as 1974-75 Season | 43.8% |

*At least 121 of the 195 respondents, or 62.0%, use subscription sales as a method of marketing the performing arts.