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**FIELD AT A GLANCE: ECONOMIC IMPACT ON ARTS PRESENTING**  
*ACTIVITY AND ATTENDANCE STABILIZE WHILE FUNDRAISING IS A CONCERN*

Arts Presenters' latest tracking survey\* of presenting organizations and performing arts facilities examined the continuing impact of the economic downturn on the field of arts presenting during the month of February 2009. The scope, focus and breadth of this survey explored the economic impact on activity, ticket sales and fundraising among 'presenter' members of the *Association of Performing Arts Presenters*. The response pool for the recent survey includes 173 member organizations, of which 141 member organizations are presenters with their own facilities. Our members and the wider field are concerned with the overall impact the current economic shift has on the performing arts field's operating environment and the increase in the difficulty of resolving many of the challenges presenting organizations had already been facing on the whole. These challenges include audience erosion, organizational sustainability and capacity building, adaptation of multi-media and new technologies and leadership development. \*AMS Planning and Research (Fairfield, CT) conducted this survey

Managing Change: During the month of February, approximately 30% of presenters with facilities made some change to their production calendars. Over 30% either reduced or eliminated planned productions and a majority (57%) have reforecast revenue, while 58% have reduced some planned expenditures. Nearly 40% of respondents instituted a hiring freeze; 11% have reduced fulltime headcount; and 14% reduced part-time headcount.

Fundraising: Among presenters with facilities, over 50% reported that fundraising efforts have failed to meet budgeted goals in one or more categories. Corporate philanthropy decline has affected 54% of this sample population, while 44% indicated they are have not been able to meet individual fundraising goals. Similarly, 40% of those surveyed were unable to meet financial goals through foundation giving, government support and/or sponsorship contributions.

Resident Company Programming: In all cases except theater, the majority of resident organizations in performing arts centers are reportedly behind their budget forecasts.

Arts Presenters' 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 on six continents 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 independent producers, 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; two-thirds of the membership and wider presenting field are organizations with small budgets under \$1.5 million (the largest segment of which is under \$500,000)
- 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.