

Current Application: Boerne Performing Arts; Opera Theater San Antonio; Texas Public Radio

The arts as a whole encompass a wide variety of genres and media. Using the Standard Industrial Classification system, Americans for the Arts (AFTA) (2017g) lists the six following broad categories when classifying businesses and organizations within the arts sector:

- Museums and collections
- Performing arts
- Visual arts and photography
- Film, radio, and TV
- Design and publishing
- Arts schools and services

As of April 2017, 673,656 businesses are included in the above-mentioned categories, which represent 4.01% of all US businesses. Those businesses created jobs for 3.48 million people, or 2.04% percent of all US employees.

#### GROWTH IN THE ARTS INDUSTRY

While the 2008 Great Recession hindered arts-related business, 2012 marked the industry's comeback. There were 95,000 nonprofit arts organizations in 2013 and 656,000 more arts businesses, along with an astounding figure of \$151 billion in consumer spending. The number of nonprofit arts organizations has been steadily growing since 2011, however they continue to experience financial challenges. The share of philanthropy going to the arts has also shown a steady increase over the last five years reported, from 4.60% in 2009 to 4.97% in 2013. Meanwhile, arts attendance has fluctuated slightly. In 2013, 31% of the adult population attended a live performing arts event (e.g. symphony, opera, ballet, dance), similar to 2012, but markedly less than in 2003, when 40% attended such an event.

However, attendance at live popular music concerts increased slightly from 2003 to 2013, moving from 23% to 25%. Art museums' attendance also held steady with 13% of the population attending at least once. Overall, increases in employment and the level of charitable giving bode well for the longevity of the arts in the national economy (Kushner & Cohen, 2016).

#### EDUCATIONAL IMPACT

Due to overemphasis of testing in response to widening gaps in achievement three decades ago, educational curricula has since narrowed, thus inching out subjects like the arts. In 2015, however, Congress passed the Every Student Succeeds Act which allows states more control over their curricula, with encouragement to ensure "all students have access to a well-rounded education, which includes the arts and music" (Workman, 2017, p.1).

#### *Deeper Learning Skills*

Arts education develops deeper learning skills – an umbrella term meaning the skills and knowledge students need in order to attain success in college and future careers. Students who develop these skills master academic content, solve complex problems, collaborate with others, effectively communicate, and learn how to learn. Arts education incorporates many of the strategies that facilitate the development of these skills. Deeper learning skills are particularly imperative in transitional periods such as entering college from high school or entering the workforce (Workman, 2017).

#### *Effect on Student Success*

Researchers have found that learning in the arts engages and nurtures numerous cognitive

capacities, including focused perception, problem solving, elaboration, and creative thinking. Studies prove that sustained learning in the arts narrows the achievement gap by producing greater success in academics. Students involved in the arts have been shown to outperform their peers on nearly every measure. More specifically, learning in the arts may be uniquely linked to higher achievement for young children, students in need of remedial tutoring (Arts Education Partnership [AEP], 2013), and economically disadvantaged students; “at-risk school students who complete more than one arts class are half as likely to drop out” (Texas Cultural Trust [TCT], 2017, p. 1). Furthermore, students who complete more arts classes in Texas have up to 15% higher pass rates on standardized tests, and students who are enrolled in arts courses attend an additional week of school annually (TCT, 2017).

The Arts Education Partnership offers a searchable database that currently lists 239 research studies which examine the effects of arts education on student outcomes in the following areas:

1. Academic Outcomes
2. Cognitive Outcomes
3. Personal Outcomes
4. Social and Civic Outcomes

(AEP, n.d.)

#### **ARTS AND COMMUNITY**

The cultural landscape of a community plays a key role in the personal cohesion of that community. According to Gallup and the Knight Foundation, certain drivers create connections between people and their communities, and these drivers are not the typical elements in which people associate community ties such as a job, safety, or the economy: “rather, people give higher ratings for elements that relate directly to their quality of daily life” (Matthews, 2013). The arts are among the top five of these drivers.

53.6% of adults in the United States attended some sort of visual and/or live performing arts event in 2012 (National Endowment for the Arts, 2015b). Those events included:

- Outdoor performing arts festivals (20.8%)
- Classical music (8.8%), jazz (8.1%), or Latin, Spanish, or salsa music (5.1%)
- Ballet (2.7%), or other dance (5.6%)

- Opera (2.1%)
- Musical (15.2%) or non-musical plays (8.3%)
- Free music, theatre, or dance (15.9%)
- Art museums/galleries (21%)
- Visual arts festival/craft fairs (22.4%)
- Parks, monuments, buildings, or neighborhoods visited for historic or design value (23.9%)

(NEA, 2015a)

The National Endowment for the Arts (2012a) suggests a correlation between the number of arts organizations per capita in a state, percentage of state residents with a bachelor’s degree or higher, and the percentage of residents living below the poverty line. Texas has low performing arts and museum attendance compared to the rest of the country, but this may be because the number of museums per capita is 26% below the national average. Additionally, Texas is ranked below average in education attainment and above average in poverty.

#### **ARTS AND HEALTH**

“Studies have proven 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 employee retention” (State of the Field Committee [SFC], 2009, p. 1).

In surveys conducted by the Society for the Arts in Healthcare partnered with the Joint Commission and Americans for the Arts in 2004, 2007, and 2008, 45% of healthcare institutions (hospitals, long-term care, palliative/hospice care) responding reported using arts programs. The primary reasons for these programs were cited as “benefits to patients and contributions to a healing environment” (SFC, 2009, p.5). The types of art programs provided included:

- Permanent display of art (36%)
- Performances in public places (23%)
- Bedside activities (21%)
- Healing gardens (18%)
- Rotating exhibits (16%)

- Multicultural programs (15%)
- Arts carts (13%)
- Staff orchestra or chorus (15%)
- Commissioned painting or sculptures (11%)
- Arts activities for staff (10%)
- Arts activities in waiting rooms (8%)
- Staff theater group (2%)

While not much research has gone into the question of cost savings due to arts use in healthcare settings, there is substantial evidence that the arts:

- Can serve as a therapeutic and healing tool
- Reduce stress and loneliness during hospitalization
- Foster self-expression
- Reduce patients' use of medication
- Reduce length of hospital stay
- Improve compliance with recommended treatment

(SFC, 2009)

The success of arts programs to effect healing is evidenced by the expansion of the Creative Forces arts program from two to twelve Department of Defense (DoD) military treatment centers around the country. This unique partnership between the National Endowment for the Arts (NEA) and the DoD uses creative arts therapies to treat patients with traumatic brain injury and associated psychological health issues (AFTA, 2016). Patients receiving art therapy have shown "improvement in sleep, memory, pain, cognitive function, and the ability to confront emotional challenges" (NEA, n.d.)

A growing movement called "Arts in Healthcare" advocates for the inclusion of art in medicine in order to positively impact patient care, hospital environments, and the families and support systems of patients. The movement has experienced growth in the past fifteen years. Additionally, medical schools have begun to incorporate short courses in the arts (Malchiodi, 2010).

#### **ARTS AND DIGITAL MEDIA**

Although technology has changed how arts are consumed, the demand for the arts has not waned. Major changes have occurred in certain areas such as booksellers and music stores.

Many musicians and authors deal directly with consumers online thus bypassing traditional businesses. Books can be self-published, print on demand, or online through downloadable ebooks, which negatively affect bookseller revenues. Digital downloads and streaming music services have contributed to a significant number (almost 50%) of music stores closing (Kushner & Cohen, 2016). In a 2012 survey of arts participation, 71.4% of adults reported using electronic media to view or listen to art and 44.2% used electronic media to email, post, or share art (NEA, 2015a).

A study by the National Endowment for the Arts found that there is a positive correlation between those viewing art on electronic media and their attendance of live art events. Contrary to the opinion that the internet is a replacement for participation in the arts, electronic media has increased interest and attendance of art activities. Data from NEA's study suggests electronic media participants:

- Attend art events 2 to 3 times more frequently
- May be exposed to a wider range of art forms and increase interest in the arts
- Are from diverse ethnic backgrounds
- Are educated consumers that reside in both urban and rural areas
- Enjoy digital media at all ages

(NEA, 2010)

#### **ARTS AND THE AGING POPULATION**

The study of aging well in our society is taking on momentum as the population becomes increasingly older. The life expectancy of the average citizen has increased from 45 years in 1900 to 79 in 2000 and 10,000 people are turning 65 every day (NEA, 2016). Research studies of participation in the arts by adults over age 60 reveal numerous health and quality of life benefits including:

- Improved memory, cognition, and attention
- Improved posture, balance, and motor skills
- Improved emotional and social wellbeing
- Improved communication
- Increased self-awareness & understanding
- Reduced anxiety

(Tsegaye, et al., 2016)

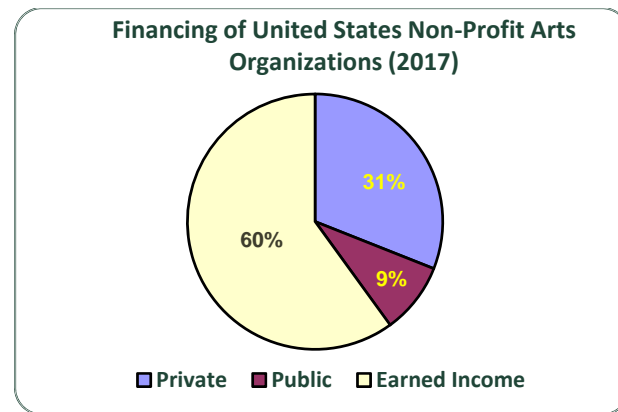
Furthermore, the NEA examined data from the Health and Retirement Study to conclude the correlation between the arts and health outcomes of Americans 55 years and older. The study distinguished between behavior as “creating art” (i.e. visual-art making, dancing, singing or playing an instrument, making photography or film, or writing stories in the past year) and perception as “attending art” (i.e. going to an art museum, gallery, arts and craft fair, a live performance, or a film). Older adults who participated in both creating and attending art had higher levels of cognitive functioning and lower rates of limitations to daily physical functioning. Additionally, between 2002–2014, the cognitive functioning of this group had decreased at a slower rate than older adults who did not participate in either nor older adults who only created art (NEA, 2017, p. 3).

#### FUNDING FOR THE ARTS

Funding is a critical issue for many nonprofit arts organizations. Despite all the research supporting the benefits of the arts and the continued growth of the arts industry, there continues to be a decrease in public funding for various types of arts programs. “In 2013, a time of improved economic health, 42 percent of arts nonprofits still failed to generate positive net income” (Kushner & Cohen, 2016, p. v). In the decade from 2003 through 2013, both federal and state funding for the arts declined (4% and 38% respectively in 2013 constant dollars). Conversely, local government support increased 16% over the same period (Kushner & Cohen, 2016).

In 2017, federal support remained flat since 2016 at \$148 million while state support increased 8% to \$368.2 million. Local government support increased for a 6<sup>th</sup> consecutive year to \$827 million, a 4% increase from 2016 (AFTA, 2017h).

As can be seen in the following charts, community arts programs rely heavily on earned profits and private dollars, with national and state funding representing less than a tenth of total arts funding. Of the private sources of funding, the majority of arts programs receive those funds from individual donors.



(AFTA, 2017i)

In 2013, 42 percent of nonprofit arts organizations had an operating deficit. “Larger-budget organizations were more likely to run a deficit, though no specific arts discipline is particularly more likely to run a deficit” (Kushner & Cohen, 2016, p. 102).

According to the National Endowment for the Arts (2012b), charitable foundations in 2010 contributed \$2.2 billion to the arts, while 28% of businesses gave roughly 5% of their grants budget to the arts. During 2007–2010, corporate giving dropped 45% more than donations from foundations. San Antonio’s adopted budget for 2018 shows that \$6.3 million will go to arts and cultural agencies (City of San Antonio, 2017).

#### ECONOMIC IMPACT

The arts produce significant economic benefits by generating local government revenue, stimulating employment opportunities, and developing business and tourism. The American nonprofit arts and culture industry generated \$166.3 billion in economic activity in 2015, including \$63.8 billion in spending by arts organizations and \$102.5 billion in event-related spending by arts audiences (AFTA, 2017a). The arts generate \$5.5 billion annually for the Texas’ economy while contributing \$343.7 million in state sales tax revenue annually. Texas’ arts and cultural attractions contribute to the state’s levels of tourism and the economic benefits of tourism. Furthermore, Texas’ creative sector employs one in fifteen Texans; employment in this sector is projected to increase by 20% by 2024 (Texas Cultural Trust [TCT], 2017).

In 2015, “the Arts and Culture Industry generated \$34.6 million for the five largest metro areas”



(TCT, 2017, p. 3). This sector produced \$330.8 million in taxable sales in the San Antonio Metropolitan Area (SAMA). Furthermore, employees in the creative industry in SAMA, representing 6% of the total local workforce, had a higher average wage than non-creative workers in 2015: \$73,298 compared to \$41,848 respectively (TCT, 2017). The sum of expenditures made by nonprofit arts and cultural organizations and induced event-related audience spending in San Antonio during Fiscal Year 2015 was \$423.4 million (AFTA, 2017a).

The most recent AFTA Creative Industries report for Texas limited the included data to active businesses registered with Dun & Bradstreet (AFTA, 2017f). Because not all arts-related businesses register, especially smaller non-profit arts organizations and individual artists, the following table should be considered a conservative estimate of the arts-centric businesses in Texas and the KCF counties of interest in 2017.

CREATIVE INDUSTRIES IN TEXAS (as of April 2017)										
Category	Texas		Bandera		Bexar		Comal		Kendall	
	Business	Employee	Bus	Empl	Bus	Empl	Bus	Empl	Bus	Empl
Arts Schools/Svcs	1,406	6,700	0	0	82	389	9	15	5	19
Design/Publishing	20,052	71,030	6	9	1,313	4,890	128	225	53	86
Film, Radio, TV	5,702	42,158	2	3	362	2,908	26	82	16	36
Museums/Collections	1,118	10,237	2	6	63	870	9	81	4	8
Performing Arts	8,459	29,517	11	29	652	2,759	50	106	20	45
Visual Arts/Photography	16,399	59,803	18	41	1,068	2,905	115	193	46	101
<b>Total</b>	<b>53,136</b>	<b>219,445</b>	<b>42</b>	<b>88</b>	<b>3,786</b>	<b>14,721</b>	<b>337</b>	<b>702</b>	<b>144</b>	<b>295</b>

(AFTA, 2017b,c,d,e&f)

**SAN ANTONIO AND THE ARTS**

SA2020 is a nonprofit organization, conceived in 2010 through the collaboration of many local civic and business leaders, to guide the City of San Antonio through a decade of growth and revitalization. SA2020 identified eleven major areas for improvement, among which is arts and culture. Its overarching mission with regard to arts and culture is positioning the city to lead the world as a creative community. “San Antonians sought to increase investment and involvement in the arts through broader participation” (SA2020, 2018).

Key indicators with supporting measures were determined, baseline data was reported, and targets for the year 2020 were set and published as interactive graphs on the SA2020 website (SA2020, 2018).

The following table presents the baseline values (2010), the most recent data (2016), and the target goal (2020) in each indicator:

SA2020 ARTS & CULTURE PROGRESS REPORT			
Indicator	2010	2016	2020
Funding (\$ invested)	\$6.4m	\$7.4m	\$12.8m
Attendance	1.8m	3.5m	3.6m
Economic Impact	\$3.9b	\$4.0b	\$5.0b
Employment	21.2k	20.4k	42.4k
Satisfaction	55%*	66%	80%
*baseline in 2012		(SA2020, 2018)	

As shown in the preceding table, funding for the arts, while improving, is not improving rapidly enough to reach the targeted goal of \$12.8 million invested in the year 2020. Attendance is on track with the 2020 goal as of 2016; in 2015 it exceeded the 2020 goal. The economic impact indicator showed progressive improvement in 2014 and 2015, but data in 2016 declined; there is improvement, but not rapid enough improvement to achieve the 2020 goal. Employment in the creative sector is considered off track and declining compared to the baseline data. Satisfaction with the arts and culture sector flat lined at 55% from 2012-2015, but jumped 11

percentage points in 2016; thus, improvement is evident, but not rapidly enough to achieve 80% satisfaction by 2020 (SA2020, 2018).

A limited survey of 3,002 San Antonio residents, visitors to the city in the past 12 months, and arts patrons conducted in 2017 reflected perceptions of the state of cultural arts in the community:

- 93% of respondents consider seeing and experiencing art in San Antonio as “important”
- Arts festivals, parades, and fairs is rated highest in terms of interest among respondents
- 2/3 of respondents indicated they would be interested in culturally-specific programs involving Mexican/Latino, Indigenous/Native American, and women’s culture
- The primary barrier to attending art and cultural events in the city is cost; the secondary barrier is inconvenient days and times

(City of San Antonio Department of Arts & Culture, 2017, p. 10-11)

Experiencing the arts culturally enriches people with intrinsic benefits that keep them steadily interested in attending and participating in the arts (Texas Commission on the Arts, 2017). Its significance becomes personally important to the individual, and therefore collectively essential for their community.

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