



The Heartland Arts Fund Survey: Preliminary Findings

In 2004 the Heartland Arts Fund surveyed performing arts presenters in communities across the 15-state heartland region in order to better understand constituent needs and gather insights on how to best help them achieve their goals. We mailed out 3,217 and received 546 completed surveys or a return rate of 17%.

Perhaps the single most telling fact from the recently completed data tabulation is that there is no archetypal presenter for the Heartland Arts Fund (HAF) region. HAF presenters reflect a diverse field with widely varying budgets, communities, missions, and programs. While all HAF presenters are united in the common bond of presenting live performances by performing artists, how they make that meaningful within their communities reflects the full spectrum of opportunities available.

So what can be said about "the field" that the HAF serves? Based on the 546 completed surveys that comprise our data set we know the results are at the 95% confidence level. That means that if the study were replicated it would not vary by more than 4.3% in 95 out of 100 times the study was conducted. So it is a pretty accurate picture of "the field" we serve and can provide some useful direction as we plan for the future.

Some facts worth considering about the HAF field:

- Forty percent of the field have annual budgets of \$100,000 or less and 16% have budgets greater than \$1 million; community size and annual budgets increase in unison.
- Half of the field serve communities of 50,000 or fewer and have annual audiences of 10,000 or fewer; attendance increases as budgets and community size increase.
- Minorities make up 23% of the communities served but only 15% of audiences served.
- On average, ten seats would be filled with 4 adults, 3 kids, 2 senior citizens, and one college student.
- Two-thirds of audiences are single ticket buyers and one-fourth are season ticket holders; presenters with increasing budgets have more season ticket holders than other presenters.
- Music is the most frequently presented discipline by a wide margin, followed closely by theater; dance is less than half as often presented; only one out of four presenters with budgets less than \$50,000 present theatre and only one out of 10 present dance.
- Presenters of all sizes are patching their budgets together with ticket sales, earned income, and contributions; the larger the budget of the organization the larger and more diversified their funding is from all sources.
- Artist fees take up 37% of presenter budgets and most presenters say that artist fees have gone up over the past three years on average 18%; small presenters (\$50,000 annual budget or less) spend more than 55% of their budget on artist fees while large presenters (\$250,000 annual budget or more) spend 23%.
- Overall the field relies on word of mouth, direct mail from managers/agents, or contact by the artist most frequently as sources for information about artists; much less frequently they travel to see work, attend conferences, and use registries. However, large presenters attend national conferences while small presenters use state rosters or catalogs to find artists.
- The majority of presenters say their organization spent \$500 or less for training for the entire staff last year; training increases in relation to budget and community size.

Despite a current operating environment characterized by shrinking resources and fragile infrastructures, the ability of HAF presenters to imagine new and creative methods for enriching their communities remains extraordinary. This is a lively, diverse, and passionate group that wants to continue to serve their audiences with the most meaningful performances, educational activities, partnerships, and residency opportunities available.