

Organization Analysis

1975 - 2020

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Introduction

In 2020, ArtsFund celebrates 50 years of giving in the Seattle region. To help mark this occasion – and as part of its ongoing commitment to knowledge building for the field – it undertook a data analysis project.

Specifically, ArtsFund mined its 50 years of grantee application data to identify historic patterns that could shed light on current trends in the arts community. This project, undertaken in the midst of the Covid-19 pandemic, was also guided by a desire to demonstrate the resilience of the arts community. During the time covered by this analysis, the Seattle area experienced recessions, wars, and vast technological as well as demographic shifts.

Guiding Questions: This was guided by the following key questions, developed over time and based upon the available data:

- What general trends in organization size, audience, and funding can be discerned from the data?
- What trends among ArtsFund grantees developed in the wake of the 2009 recession?
- How do arts groups reflect and mirror changes in community growth over the years?
- What insights can be gained from our community's history that might be useful moving forward?

This report summarizes an analysis of grant data gathered by ArtsFund as part of its annual grantmaking process. Much of the data were held in paper files and as part of this project, ArtsFund hired temporary staff to convert these paper data into electronic form. Our analysis revealed an ongoing evolution in the data elements gathered by ArtsFund, with many elements being added over the years.

Reviewers: The analysis was completed by William Vesneski, PhD in coordination with ArtsFund staff members Sarah Sidman, Katy Corella, and Susan Coliton, who served as Interim Executive Director during the research period. Key findings and conclusions were reviewed by a group of community stakeholders: [names here]

Limitations: While we believe these data and our analyses provide valuable insights, it is important to acknowledge their limitations. The data were gathered for the purpose of grants management and administration – not research. Thus, they have gaps. More importantly, all of the data were self-reported by the organizations. While ArtsFund staff reviewed all applications thoroughly and worked to maintain the integrity of the data gathered, there may be some inconsistencies based upon how organizations interpreted and responded to the ArtsFund applications.

Funding for the project was provided by Vulcan Philanthropy.

Grantee Sample

Overall, our analysis includes more than 800 organizations who received funding from ArtsFund between 1970 and 2020. As the table to the right indicates, the sample is quite small for the early years but grows and remains consistent for much of the last four decades. There were some limitations in the data and these informed our analyses. In particular:

- We frequently combine data from the 1970s and 1980s because of the small number of grantees.
- The specific data elements gathered by ArtsFund evolved over time, with the most detailed data gathered beginning in 2000. For this reason we focus this report on the years between 2000 and 2020.

The sample also includes 394 seated organizations and 92 non-seated organizations (486 total reporting). Disciplines are reported below.

Table 2. Disciplines in Sample

| Discipline | Number | Percent of Sample |
|-------------------|--------|-------------------|
| Music | 210 | 28% |
| Theater | 210 | 28% |
| Exhibiting | 94 | 13% |
| Multidisciplinary | 76 | 10% |
| Dance | 56 | 8% |
| Literary | 35 | 5% |
| Film and media | 34 | 5% |
| Opera | 26 | 4% |

Table 1. Organizations by Year

| Year | Number |
|--------------|------------|
| 1970 | 2 |
| 1975 | 12 |
| 1980 | 13 |
| 1985 | 20 |
| 1990 | 38 |
| 1995 | 54 |
| 2000 | 66 |
| 2002 | 62 |
| 2004 | 67 |
| 2006 | 77 |
| 2008 | 75 |
| 2010 | 71 |
| 2012 | 58 |
| 2014 | 55 |
| 2016 | 55 |
| 2018 | 51 |
| 2020 | 27 |
| Total | 803 |

Growth Trends

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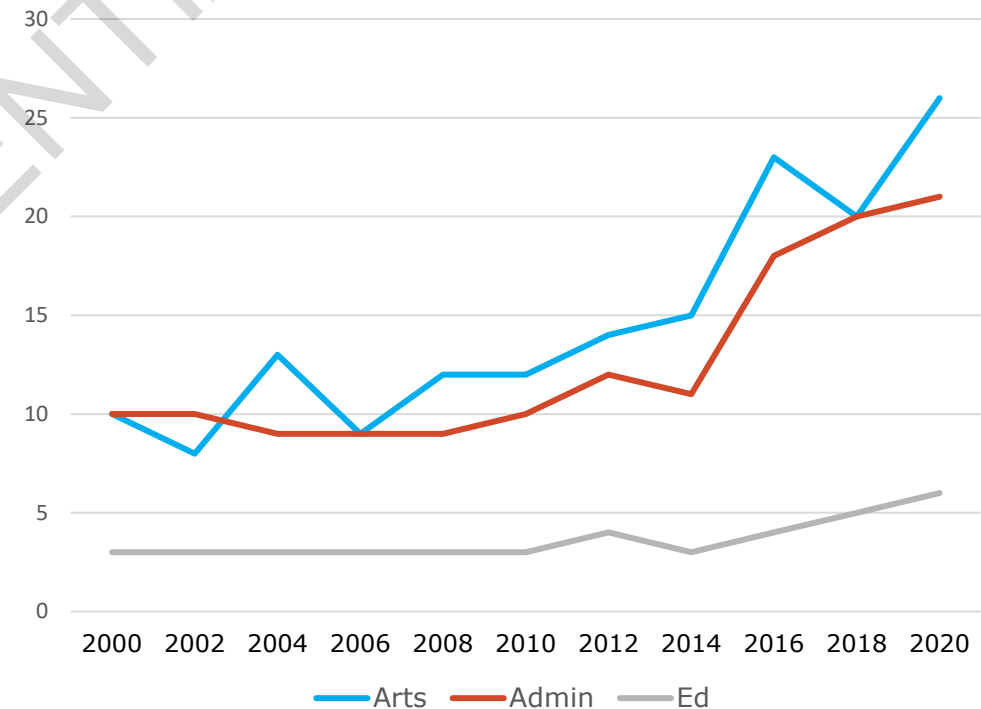
Employee Growth in Arts Organizations

The first major finding concerns the overall number of people employed by arts organizations. Beginning with 2000 data, our analysis indicates that there has been steady growth in the number of employees among arts organizations. We also found that the greatest growth has been among Arts and Administrative personnel. Overall, the largest group of employees are artistic staff, with part-time artistic employees more common than full-time employees. Figure 1 summarizes the overall expansion of employment in the sector.

Table 3. Number of Employees

| Year | Arts (FT) | Arts (PT) | Admin (FT) | Admin (PT) | Ed (FT) | Ed (PT) |
|------------|-----------|-----------|------------|------------|----------|----------|
| 2000 | 10 | 27 | 10 | 8 | 3 | 6 |
| 2002 | 8 | 31 | 10 | 8 | 3 | 7 |
| 2004 | 13 | 25 | 9 | 6 | 3 | 10 |
| 2006 | 9 | 28 | 9 | 5 | 3 | 8 |
| 2008 | 12 | 20 | 9 | 3 | 3 | 10 |
| 2010 | 12 | 22 | 10 | 4 | 3 | 12 |
| 2012 | 14 | 20 | 12 | 5 | 4 | 4 |
| 2014 | 15 | 22 | 11 | 5 | 3 | 4 |
| 2016 | 23 | 21 | 18 | 5 | 4 | 4 |
| 2018 | 20 | 20 | 20 | 5 | 5 | 5 |
| 2020 | 26 | 23 | 21 | 6 | 6 | 6 |
| Avg | 15 | 24 | 13 | 5 | 4 | 7 |

Figure 1. Average Full Time Staff Over Time



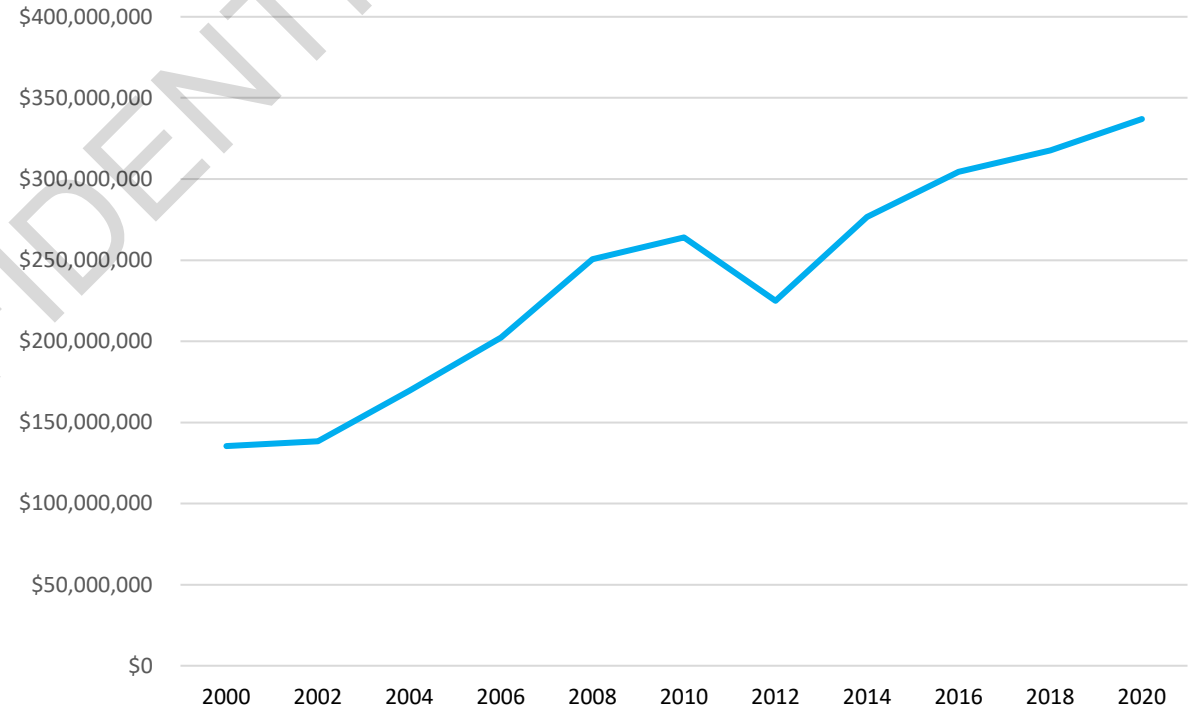
Growth of Sector

The table and figure below detail the overall growth of arts budgets during the last 20 years – a 148% increase. They show that organizations supported by ArtsFund generate significant economic activity with total income more than doubling over the last 20 years. This statistic is impressive particularly given the depth of the recession in 2009, the impact of which can be seen in the figure with a notable dip in 2012. All of the data indicate that the arts community stood resilient in the face of this historic economic event.

Table 4. Total Income for Grantees

| Year | Total Income |
|------|---------------|
| 2000 | \$135,524,713 |
| 2002 | \$138,445,308 |
| 2004 | \$169,580,607 |
| 2006 | \$202,328,714 |
| 2008 | \$250,670,758 |
| 2010 | \$264,089,590 |
| 2012 | \$225,025,771 |
| 2014 | \$276,543,930 |
| 2016 | \$304,355,620 |
| 2018 | \$317,629,413 |
| 2020 | \$336,950,614 |

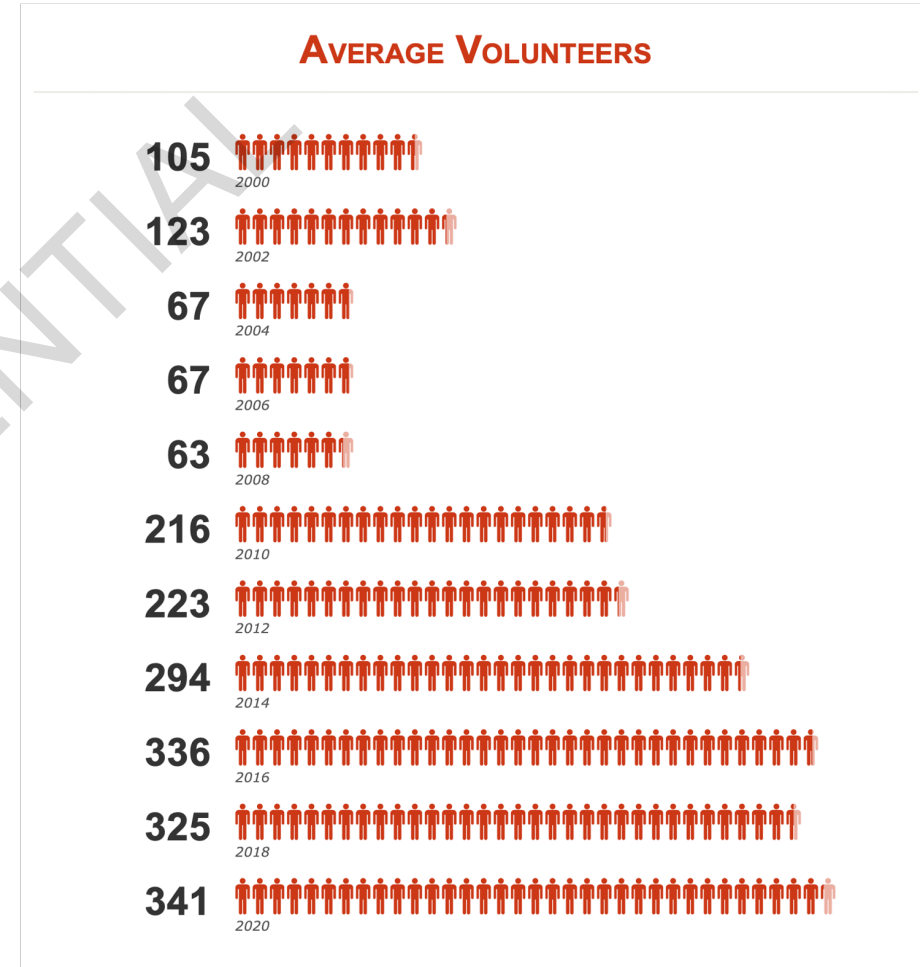
Figure 2. Total Income for Grantees



Volunteers

Like employees, volunteer ranks have also grown markedly, especially after the 2009 recession. Over the last decade, the average number of volunteers grew from 216 per organization to 341.

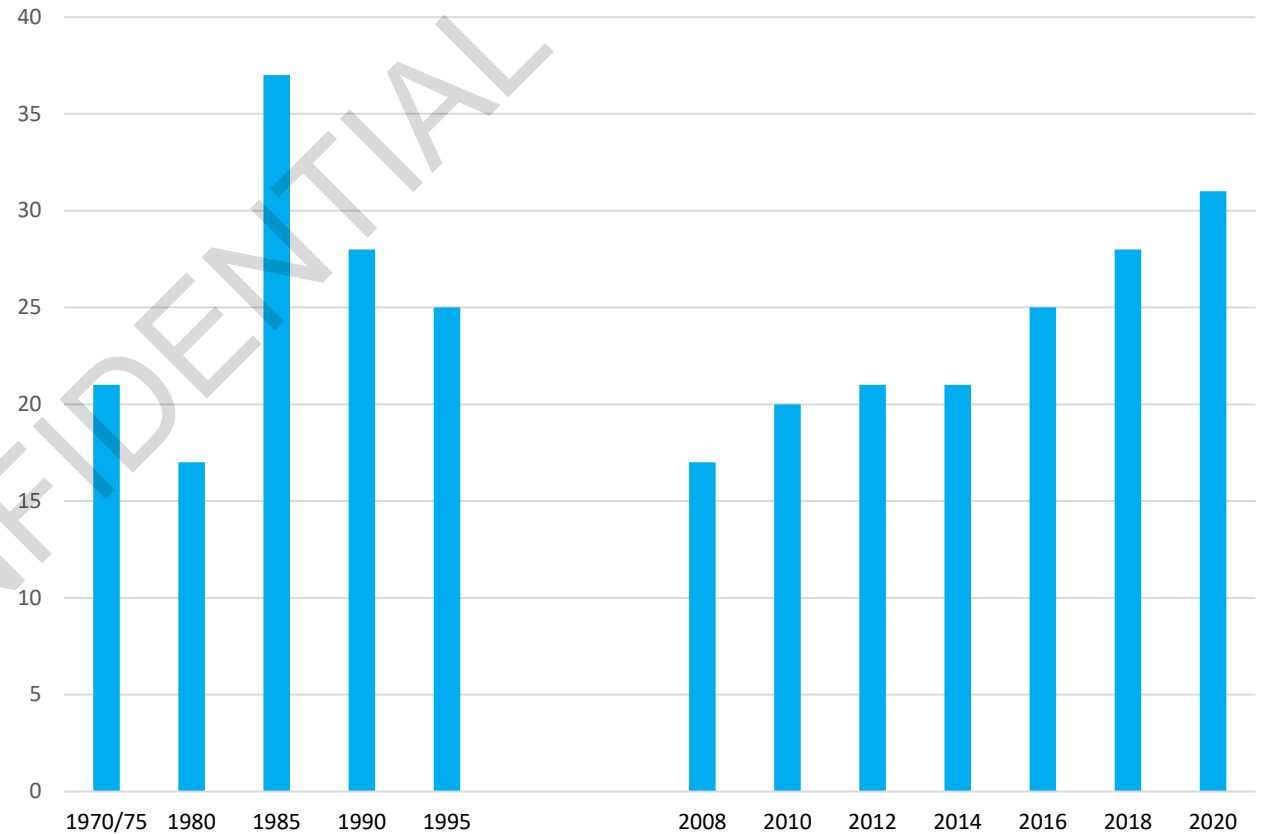
The significant growth in volunteers over the years suggests a deepening level of community engagement and connection between local arts organizations and residents.



Boards of Directors

Just as volunteer numbers have grown, boards of directors have also experienced steady expansion. Since 2008, the size of boards of directors has grown to a point where they are now at almost their highest mark, second only in size to the record set in 1985.

Figure 3. Average Board Size 1970-1995/2008-2020

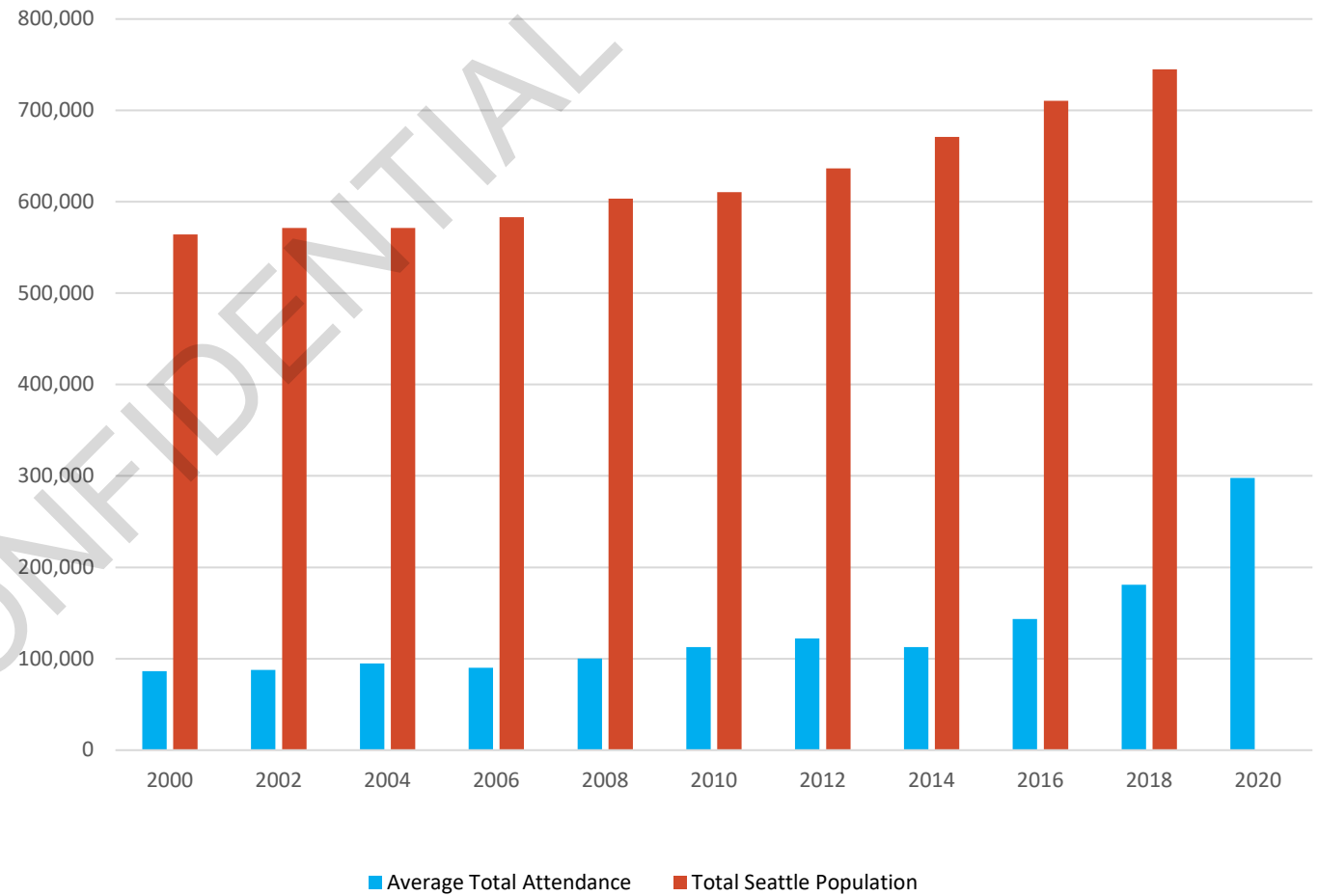


Attendance

Figure 4 presents average total attendance for organizations in the ArtsFund sample and compares it to Seattle's growth over the last 20 years. We focus on Seattle growth because it is the population hub for ArtsFund's giving area.

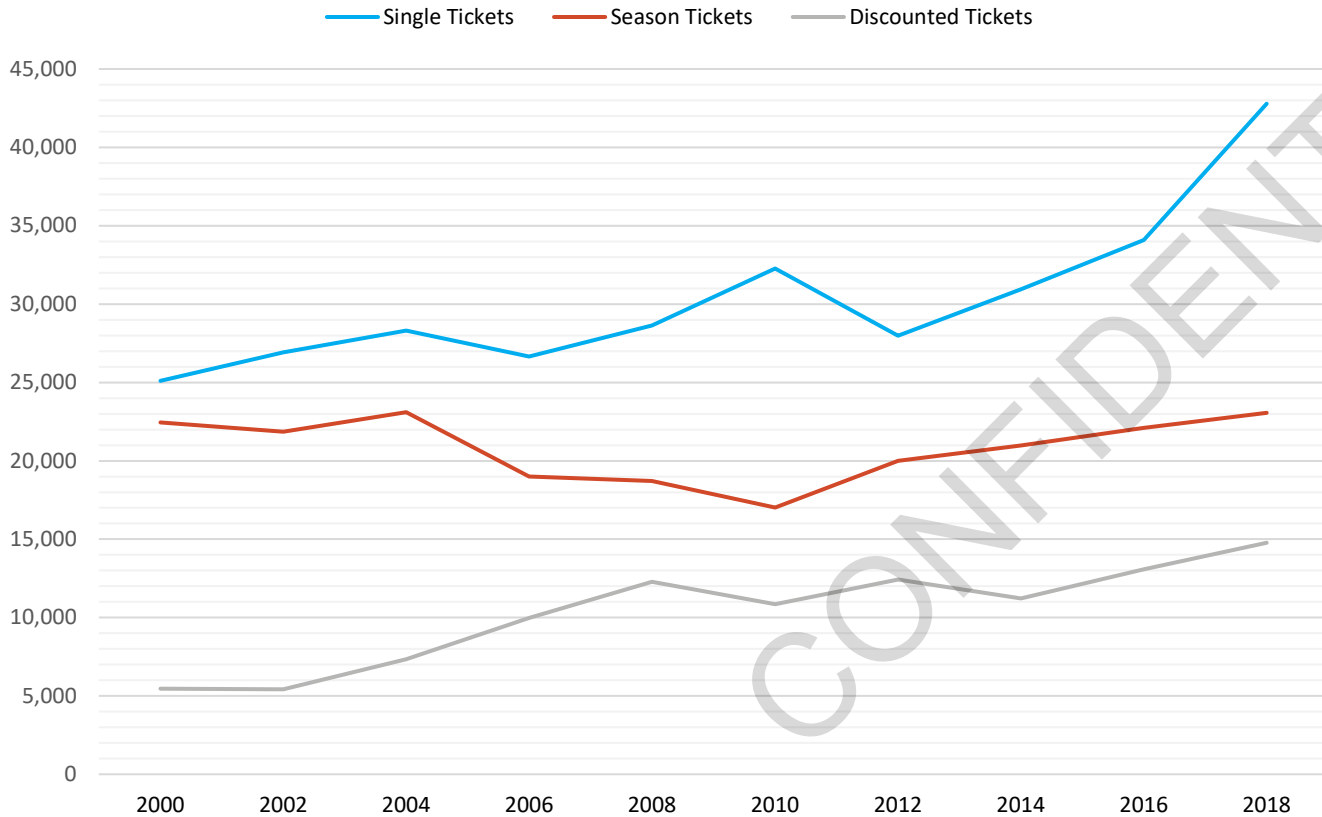
Overall, attendance has grown markedly from an average of 85,539 in 2000 to more than 297,000 in 2020 – a 244% increase. This statistic compares to a 32% increase in population for Seattle.

Figure 4. Average Yearly Attendance



Ticket Sales

Figure 5. Average Ticket Sales by Type



Just as attendance at arts organizations has grown, so have overall ticket sales. However, as Figure 4 points out, there has been a more rapid rate of increase in the number of single tickets (blue line) sold compared to other ticket types. In fact, in 2020, sales of discounted tickets (grey line) were nearly on par with season ticket sales (red line). This reverses the trend in 2000 when single tickets and season tickets were nearly equal to one another. Overall, however, the figure demonstrates the overall marked increase in ticket sales, beginning in 2018.

Earned and Contributed Income

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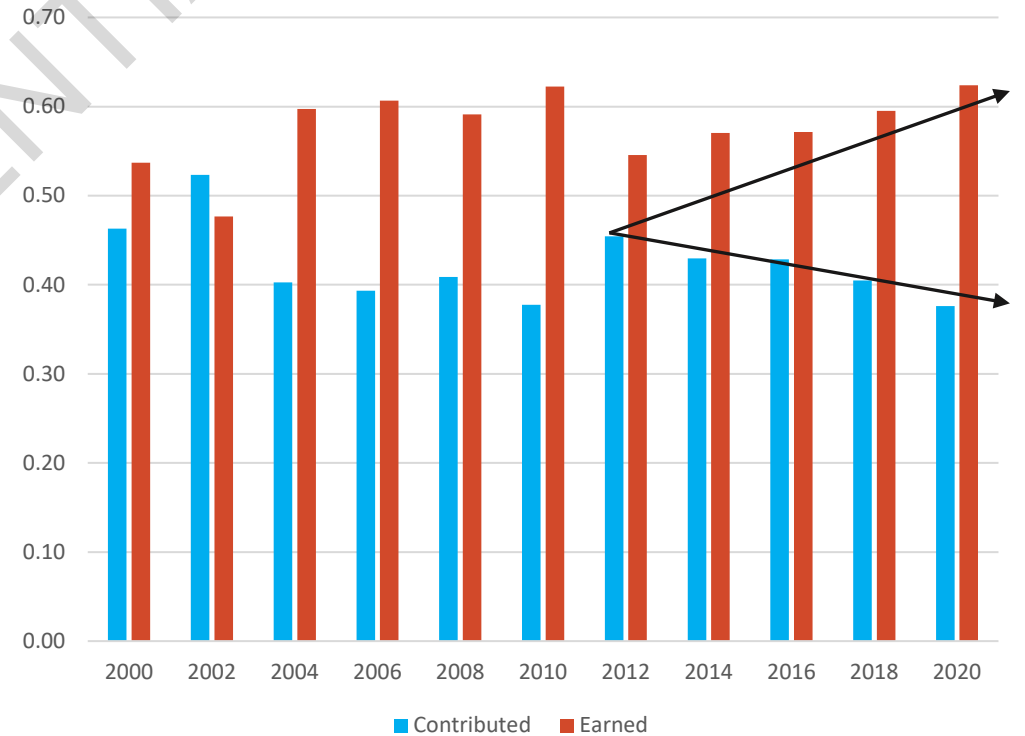
Earned and Contributed Income

The table and figure below show that earned income comprises the greater percentage of total income. The gap between the two has been growing since 2012 (shown by black arrows). It is interesting to note that 2002 is the only year when contributed income exceeded earned income.

Table 5. Total Income for Grantees

| Year | Total Contributed Income | Total Earned Income |
|------|--------------------------|---------------------|
| 2000 | \$62,738,766 | \$72,785,947 |
| 2002 | \$72,437,492 | \$66,007,816 |
| 2004 | \$68,310,290 | \$101,270,317 |
| 2006 | \$79,600,949 | \$122,727,765 |
| 2008 | \$102,463,989 | \$148,206,769 |
| 2010 | \$99,748,710 | \$164,340,880 |
| 2012 | \$102,253,837 | \$122,771,934 |
| 2014 | \$118,836,474 | \$157,707,456 |
| 2016 | \$130,431,707 | \$173,923,913 |
| 2018 | \$128,605,968 | \$189,023,445 |
| 2020 | \$126,713,346 | \$210,237,268 |

Figure 6. Percent Earned and Contributed



Earned and Contributed Income by Organization Size

Based upon their size, organizations vary in their mix of earned and contributed income. Table 6 shows that small organizations (less than \$1M) pull far more of their budgets from contributed dollars than earned dollars. This is the reverse of large (more than \$5M) and medium (\$1M to \$5M) sized organizations that draw their revenue much more heavily from earned income. The largest percentage in the table was for small organizations, which received 65% of their income from contributions in 2018. The figures on the following pages illustrate these trends more fully.

More information about the budgets of organizations in the sample can be found in the Appendix.

Table 6. Percentage of Income by Organization Size

| Year | Contributed | | | Earned | | |
|------|-------------|--------|-------|--------|--------|-------|
| | Small | Medium | Large | Small | Medium | Large |
| 2000 | 52% | 53% | 40% | 48% | 47% | 60% |
| 2002 | 55% | 49% | 38% | 45% | 51% | 62% |
| 2004 | 49% | 45% | 39% | 51% | 55% | 61% |
| 2006 | 53% | 56% | 36% | 47% | 44% | 64% |
| 2008 | 48% | 53% | 43% | 52% | 47% | 57% |
| 2010 | 55% | 46% | 43% | 45% | 54% | 57% |
| 2012 | 63% | 52% | 51% | 37% | 48% | 49% |
| 2014 | 63% | 60% | 48% | 37% | 40% | 52% |
| 2016 | 59% | 58% | 46% | 41% | 42% | 54% |
| 2018 | 65% | 57% | 42% | 35% | 43% | 58% |
| 2020 | -- | 61% | 39% | -- | 39% | 61% |

Earned and Contributed Income for Small and Medium Organizations

Figure 7 provides details about the contributed and earned income mix for small organizations while Figure 8 provides similar information for medium sized organizations. Both figures reveal the growing percentage of contributed income since 2010. Interestingly, the gap between the two types of income is most stark for small organizations.

Figure 7. Contributed/Earned for Small Organizations

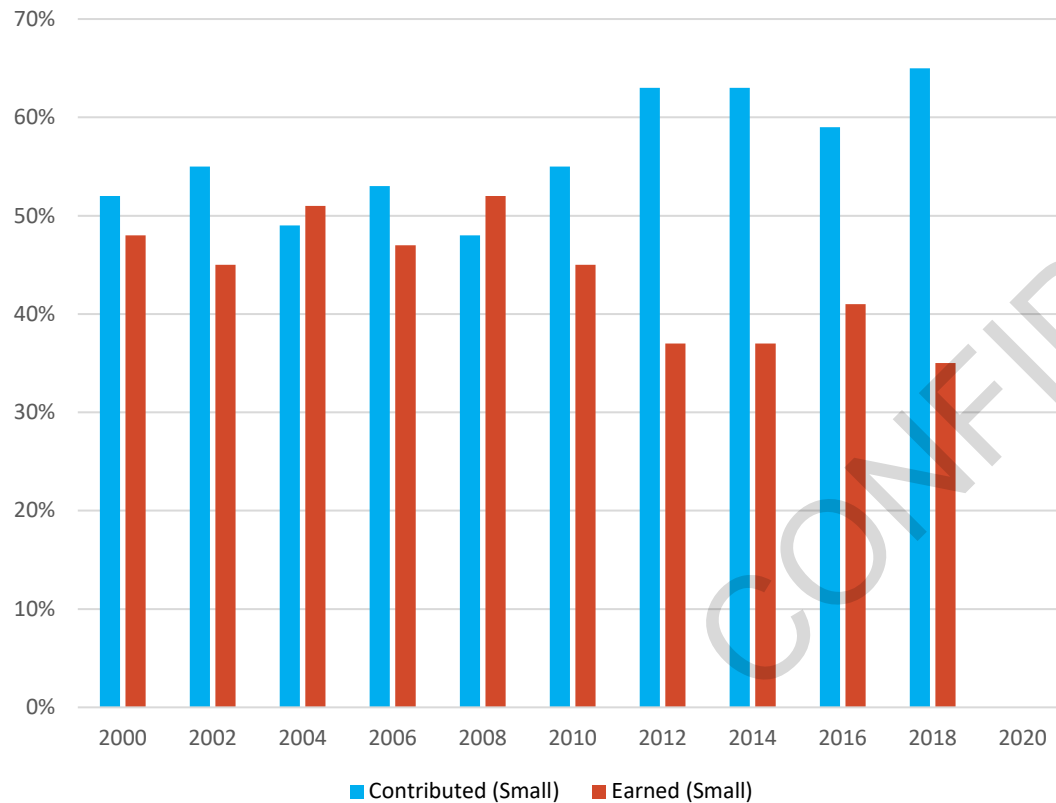
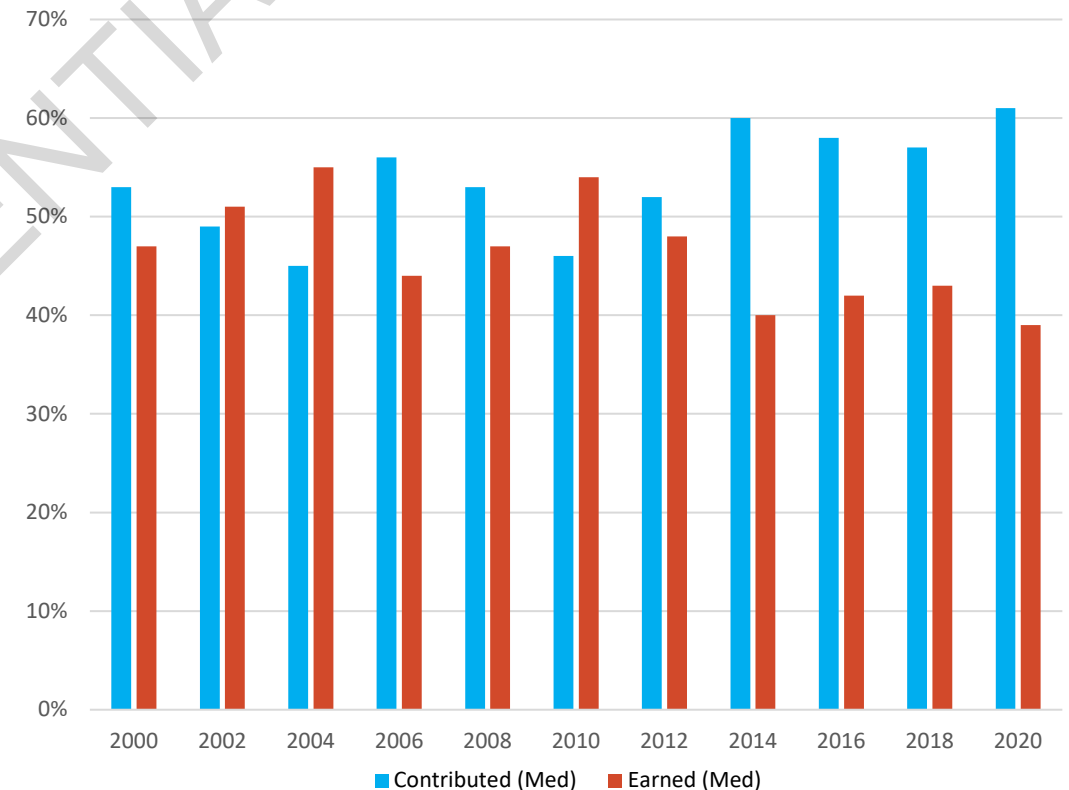
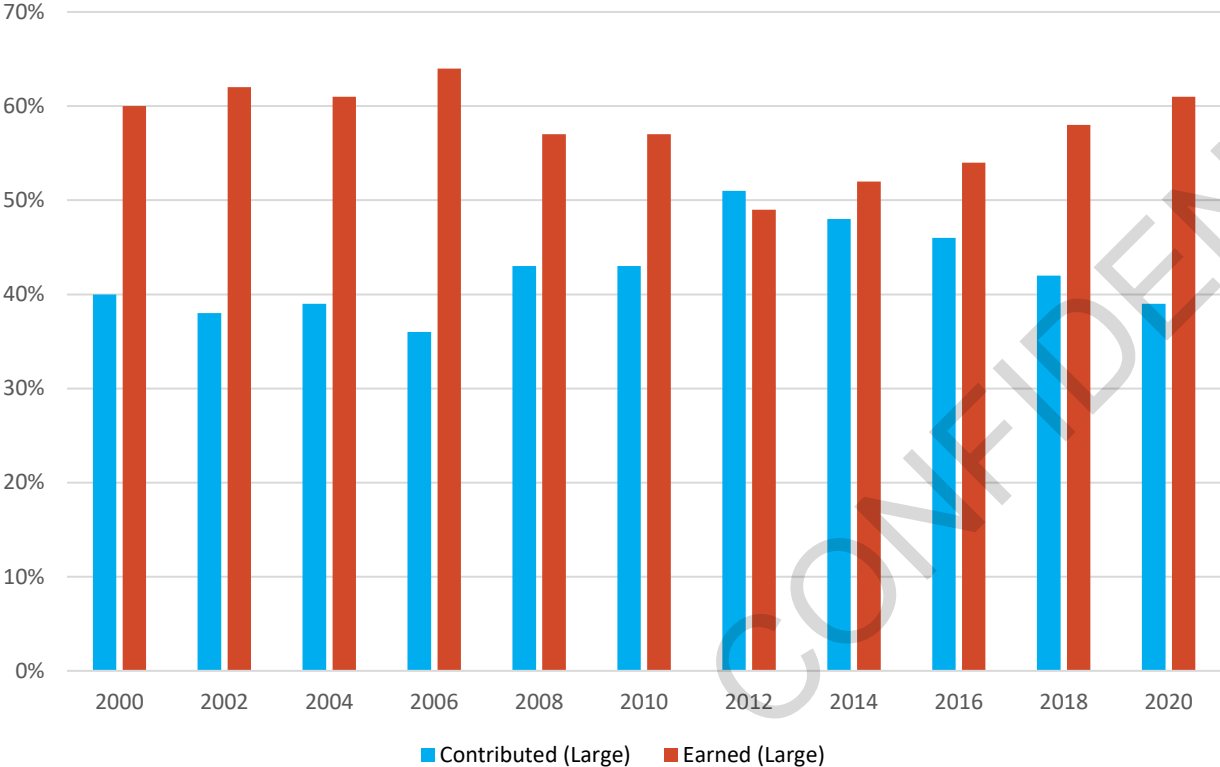


Figure 8. Contributed/Earned for Medium Organizations



Earned and Contributed Income for Large Organizations

Figure 9. Contributed/Earned Income for Large Organizations



The figure provides details about the mix of income for large organizations. It shows that between 2012 and 2014, these income sources were nearly equal but that the gap has grown since then. Nevertheless, it is not as striking as it was between 2000 and 2006.

Sources of Contributed Income

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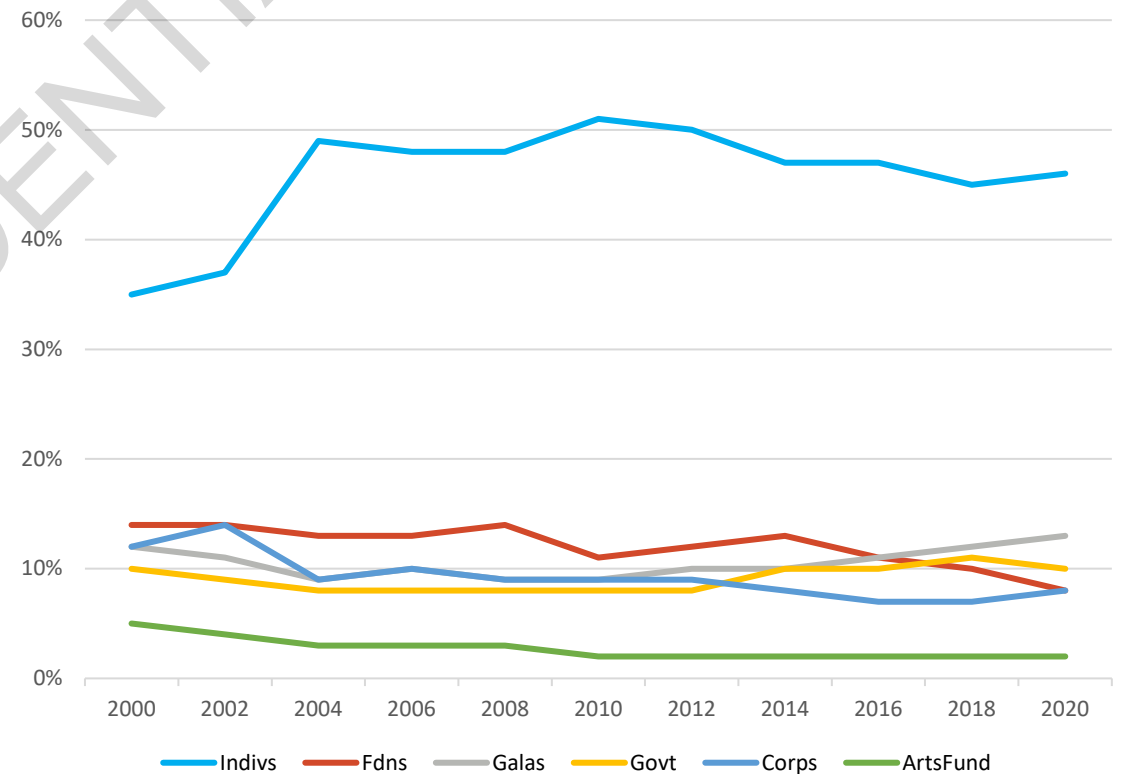
Sources of Contributed Income

To better understand trends in giving to arts organizations over time, we analyzed the sources of contributed income. We begin our analysis in 2000. Overall, we found that the largest source of funds to arts groups is individuals (dark blue line) – and that their importance has only grown over the last two decades. As Figure 10 reveals, the share of budget attributed to individual giving has grown dramatically. Government funding (yellow) has dropped precipitously. While difficult to see, there has been a steady erosion in corporate giving since 1990 (light blue).

Table 7. Sources of Contributed Income for Small Organizations

| Year | Indivs | Fdns | Galas | Govt | Corps | ArtsFund |
|------|--------|------|-------|------|-------|----------|
| 2000 | 31% | 23% | 18% | 15% | 9% | 5% |
| 2002 | 28% | 26% | 18% | 16% | 8% | 5% |
| 2004 | 33% | 21% | 20% | 14% | 8% | 3% |
| 2006 | 32% | 20% | 22% | 15% | 9% | 3% |
| 2008 | 28% | 20% | 19% | 19% | 9% | 4% |
| 2010 | 30% | 19% | 22% | 15% | 11% | 3% |
| 2012 | 30% | 20% | 22% | 16% | 10% | 2% |
| 2014 | 34% | 16% | 22% | 14% | 11% | 2% |
| 2016 | 33% | 18% | 26% | 13% | 7% | 3% |
| 2018 | 37% | 19% | 22% | 12% | 7% | 3% |
| 2020 | | | | | | |

Figure 10. Major Categories of Contributed Income



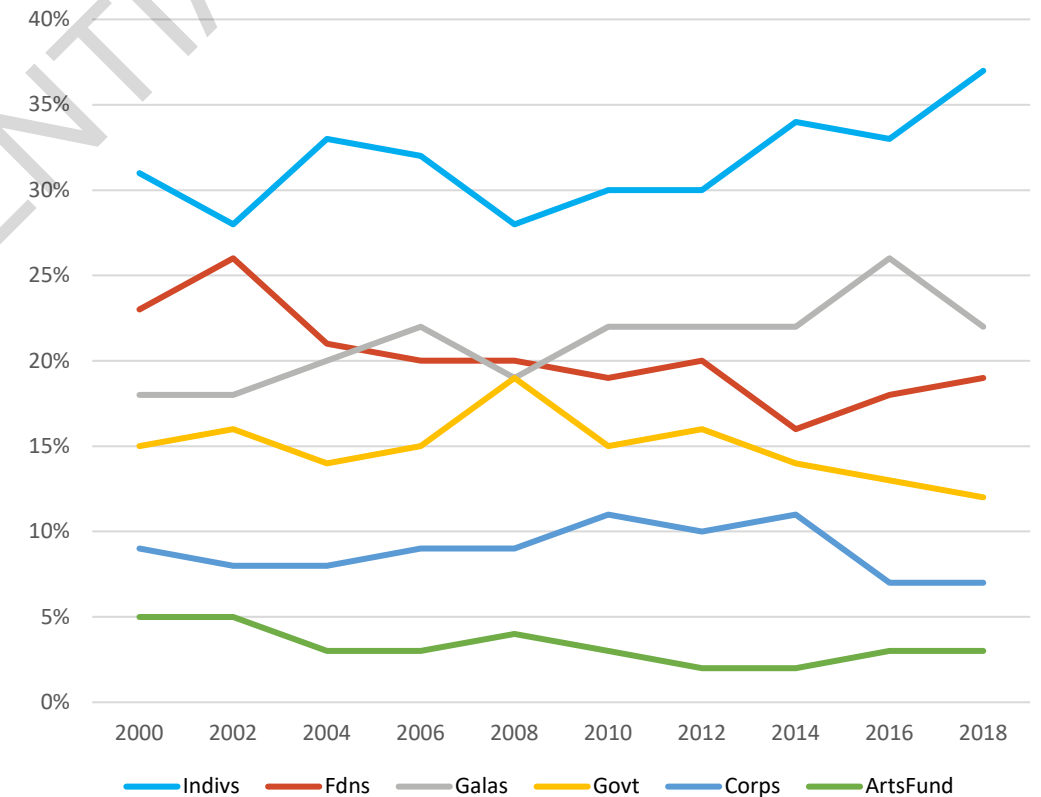
Sources of Contributed Income for Small Organizations

Small organizations draw on a wide diversity of contributed income sources. In fact, of the six categories of contributed income listed in Table 8, four always account for more than 10% of total contributions. This diversity of funding is unique to smaller organizations and is not seen in the following tables and figures for medium and large organizations. This income diversity may account for the resilience of the grassroots arts scene in Seattle. While this diversity is heartening, the data also show that there has been a general decrease in the percentage of funds coming from foundations.

Table 8. Contributed Income for Small Organizations

| Year | Indivs | Fdns | Galas | Govt | Corps | ArtsFund |
|------|--------|------|-------|------|-------|----------|
| 2000 | 31% | 23% | 18% | 15% | 9% | 5% |
| 2002 | 28% | 26% | 18% | 16% | 8% | 5% |
| 2004 | 33% | 21% | 20% | 14% | 8% | 3% |
| 2006 | 32% | 20% | 22% | 15% | 9% | 3% |
| 2008 | 28% | 20% | 19% | 19% | 9% | 4% |
| 2010 | 30% | 19% | 22% | 15% | 11% | 3% |
| 2012 | 30% | 20% | 22% | 16% | 10% | 2% |
| 2014 | 34% | 16% | 22% | 14% | 11% | 2% |
| 2016 | 33% | 18% | 26% | 13% | 7% | 3% |
| 2018 | 37% | 19% | 22% | 12% | 7% | 3% |
| 2020 | -- | -- | -- | -- | -- | -- |

Figure 11. Contributed Income for Small Organizations



Sources of Contributed Income for Medium Organizations

Individual giving constitutes a much larger share of annual contributions for medium organizations than it does for smaller organizations. Foundations, galas, and government generally constitute similar percentages while corporate giving has decreased since 2000.

Figure 12. Contributed Income for Medium Organizations

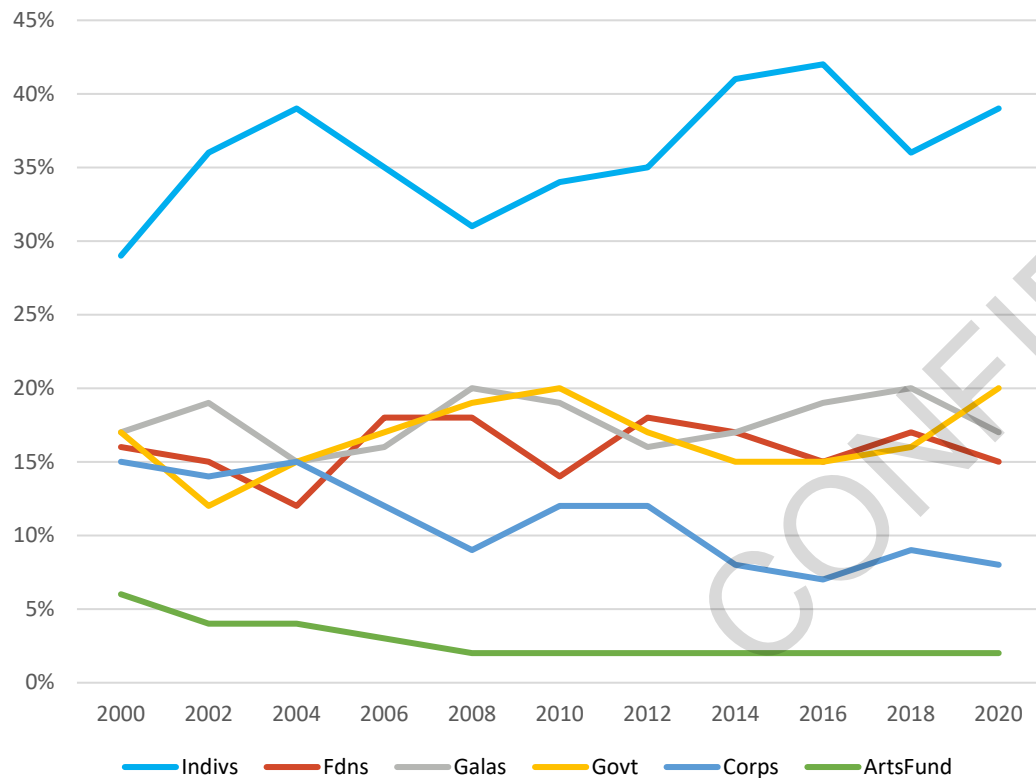


Table 9. Contributed Income for Medium Organizations

| Year | Indivs | Fdns | Galas | Govt | Corps | ArtsFund |
|------|--------|------|-------|------|-------|----------|
| 2000 | 29% | 16% | 17% | 17% | 15% | 6% |
| 2002 | 36% | 15% | 19% | 12% | 14% | 4% |
| 2004 | 39% | 12% | 15% | 15% | 15% | 4% |
| 2006 | 35% | 18% | 16% | 17% | 12% | 3% |
| 2008 | 31% | 18% | 20% | 19% | 9% | 2% |
| 2010 | 34% | 14% | 19% | 20% | 12% | 2% |
| 2012 | 35% | 18% | 16% | 17% | 12% | 2% |
| 2014 | 41% | 17% | 17% | 15% | 8% | 2% |
| 2016 | 42% | 15% | 19% | 15% | 7% | 2% |
| 2018 | 36% | 17% | 20% | 16% | 9% | 2% |
| 2020 | 39% | 15% | 17% | 20% | 8% | 2% |

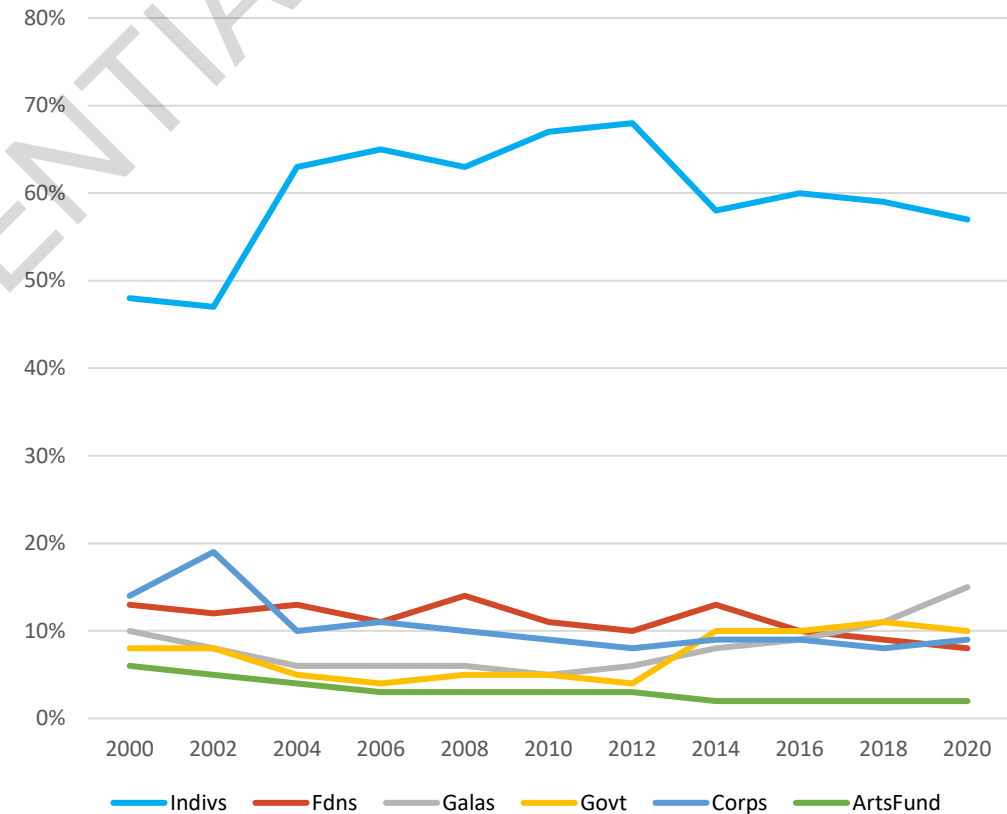
Sources of Contributed Income for Large Organizations

Compared to any other sized organizations, individual giving provides the largest share of contributed income to large organizations. This share peaked between 2004 and 2020 when it grew to almost 70% of contributed income.

Table 10. Contributed Income for Large Organizations

| Year | Indivs | Fdns | Galas | Govt | Corps | ArtsFund |
|------|--------|------|-------|------|-------|----------|
| 2000 | 48% | 13% | 10% | 8% | 14% | 6% |
| 2002 | 47% | 12% | 8% | 8% | 19% | 5% |
| 2004 | 63% | 13% | 6% | 5% | 10% | 4% |
| 2006 | 65% | 11% | 6% | 4% | 11% | 3% |
| 2008 | 63% | 14% | 6% | 5% | 10% | 3% |
| 2010 | 67% | 11% | 5% | 5% | 9% | 3% |
| 2012 | 68% | 10% | 6% | 4% | 8% | 3% |
| 2014 | 58% | 13% | 8% | 10% | 9% | 2% |
| 2016 | 60% | 10% | 9% | 10% | 9% | 2% |
| 2018 | 59% | 9% | 11% | 11% | 8% | 2% |
| 2020 | 57% | 8% | 15% | 10% | 9% | 2% |

Figure 13. Contributed Income for Large Organizations



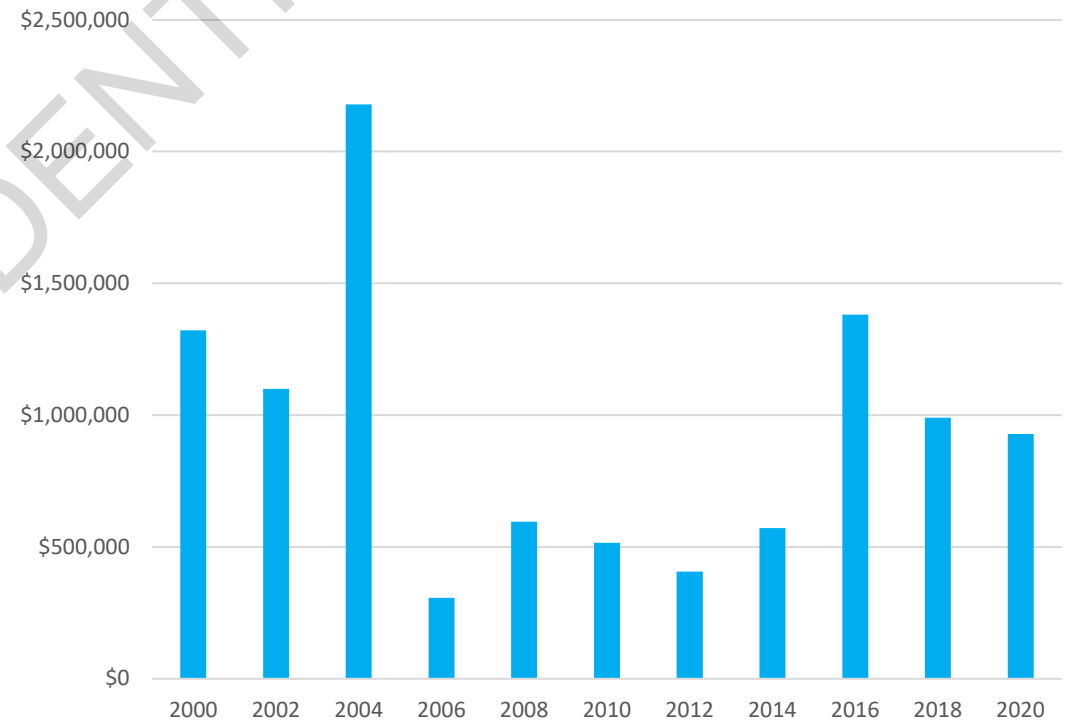
Endowment Contributions

Data about endowment contributions can be found below. They indicate that the 2004 was a peak year for endowment contributions with a recent uptick in contributions in 2016.

Table 11. Number of Endowment Contributions

| Year | Number of Contributions |
|------|-------------------------|
| 2000 | 23 |
| 2002 | 23 |
| 2004 | 16 |
| 2006 | 20 |
| 2008 | 22 |
| 2010 | 17 |
| 2012 | 21 |
| 2014 | 20 |
| 2016 | 22 |
| 2018 | 17 |
| 2020 | 13 |

Table 14. Average Value of Contribution



Spending on Expenses

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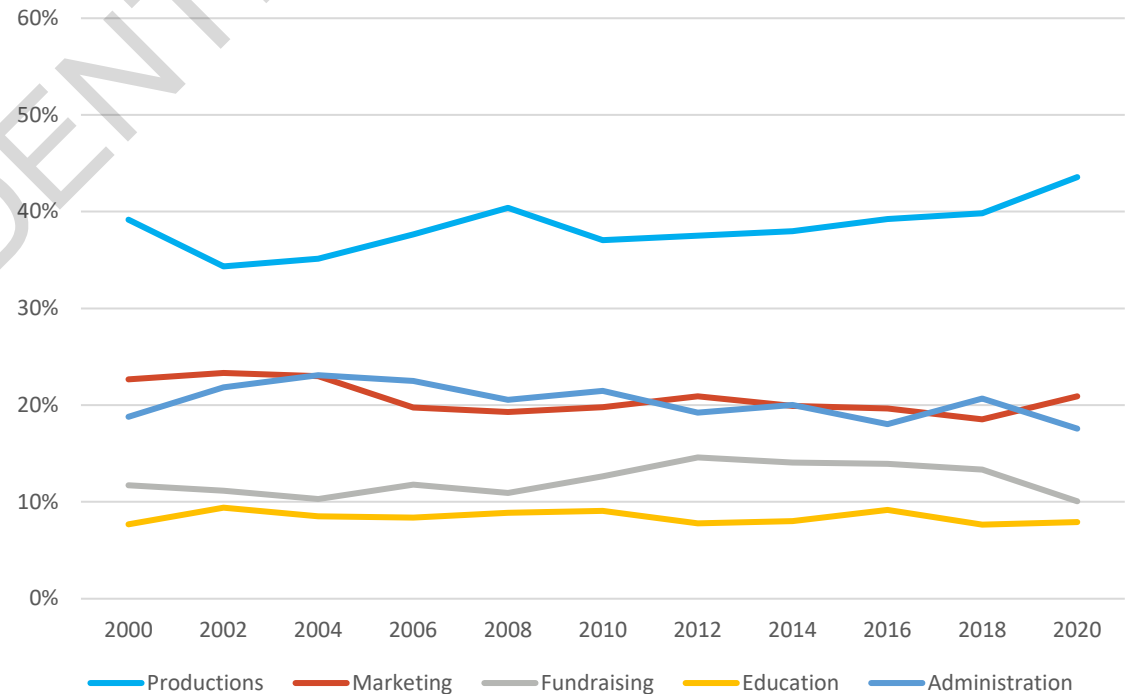
Major Expenses by Category

Along with analyzing sources of contributed income we also examined trends in expenses over time. Overall, it shows that expenses associated with production of art (light blue) is the largest category and that it has grown, slightly, over time. Expenses for education (yellow) are the lowest. All expenses, other than productions, have remained largely stable over the last 20 years.

Table 12. Major Expenses

| Year | Productions | Marketing | Administration | Fundraising | Education |
|------|-------------|-----------|----------------|-------------|-----------|
| 2000 | 39% | 23% | 19% | 12% | 8% |
| 2002 | 34% | 23% | 22% | 11% | 9% |
| 2004 | 35% | 23% | 23% | 10% | 9% |
| 2006 | 38% | 20% | 22% | 12% | 8% |
| 2008 | 40% | 19% | 21% | 11% | 9% |
| 2010 | 37% | 20% | 21% | 13% | 9% |
| 2012 | 38% | 21% | 19% | 15% | 8% |
| 2014 | 38% | 20% | 20% | 14% | 8% |
| 2016 | 39% | 20% | 18% | 14% | 9% |
| 2018 | 40% | 19% | 21% | 13% | 8% |
| 2020 | 44% | 21% | 18% | 10% | 8% |

Figure 15. Major Expenses Over Time



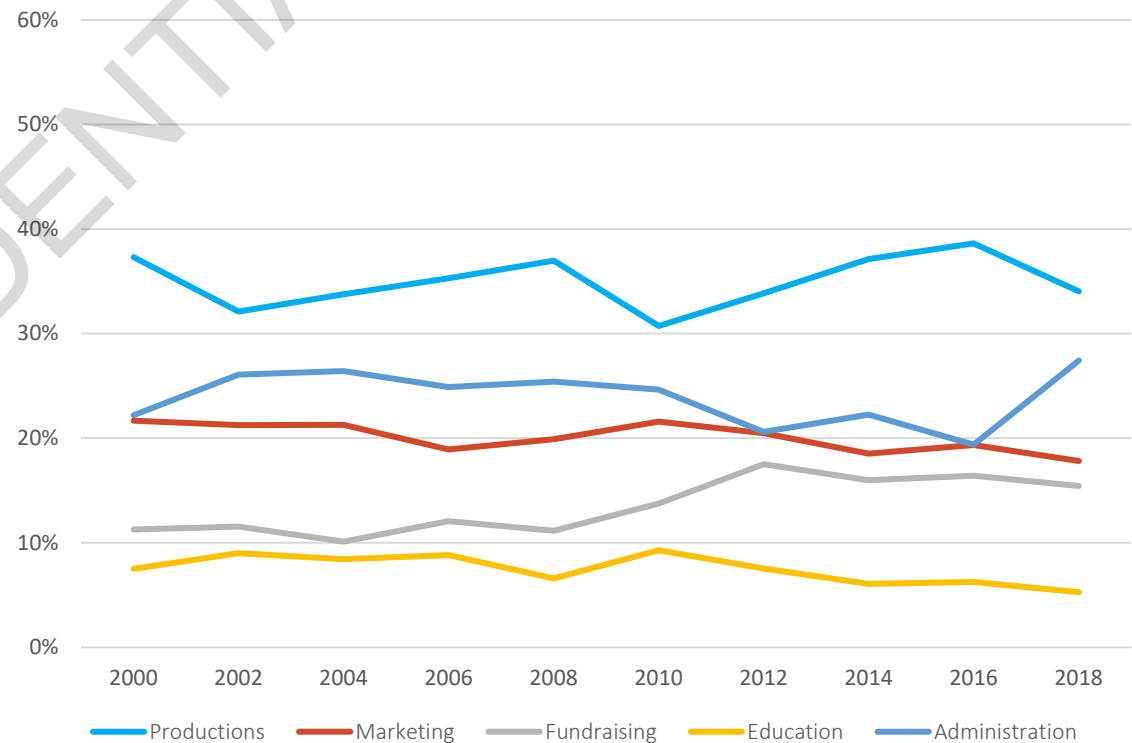
Major Expenses for Small Organizations

Small organizations show several key features in their expenses. In particular, there was a general decrease in the percentage of expenses focused on administration between 2002 and 2016 with a notable uptick in 2018. This trend was accompanied by an overall uptick in fundraising expenses between 2004 and 2016. It is also interesting to see that between 2012 and 2016, marketing, fundraising and administration expenses were all very close to one another with little differences between them.

Table 13. Major Expenses for Small Organizations

| Year | Productions | Marketing | Administration | Fundraising | Education |
|------|-------------|-----------|----------------|-------------|-----------|
| 2000 | 37% | 22% | 22% | 11% | 8% |
| 2002 | 32% | 21% | 26% | 12% | 9% |
| 2004 | 34% | 21% | 26% | 10% | 8% |
| 2006 | 35% | 19% | 25% | 12% | 9% |
| 2008 | 37% | 20% | 25% | 11% | 7% |
| 2010 | 31% | 22% | 25% | 14% | 9% |
| 2012 | 34% | 20% | 21% | 18% | 8% |
| 2014 | 37% | 19% | 22% | 16% | 6% |
| 2016 | 39% | 19% | 19% | 16% | 6% |
| 2018 | 34% | 18% | 27% | 15% | 5% |
| 2020 | 37% | 22% | 22% | 11% | 8% |

Figure 16. Major Expenses for Small Organizations



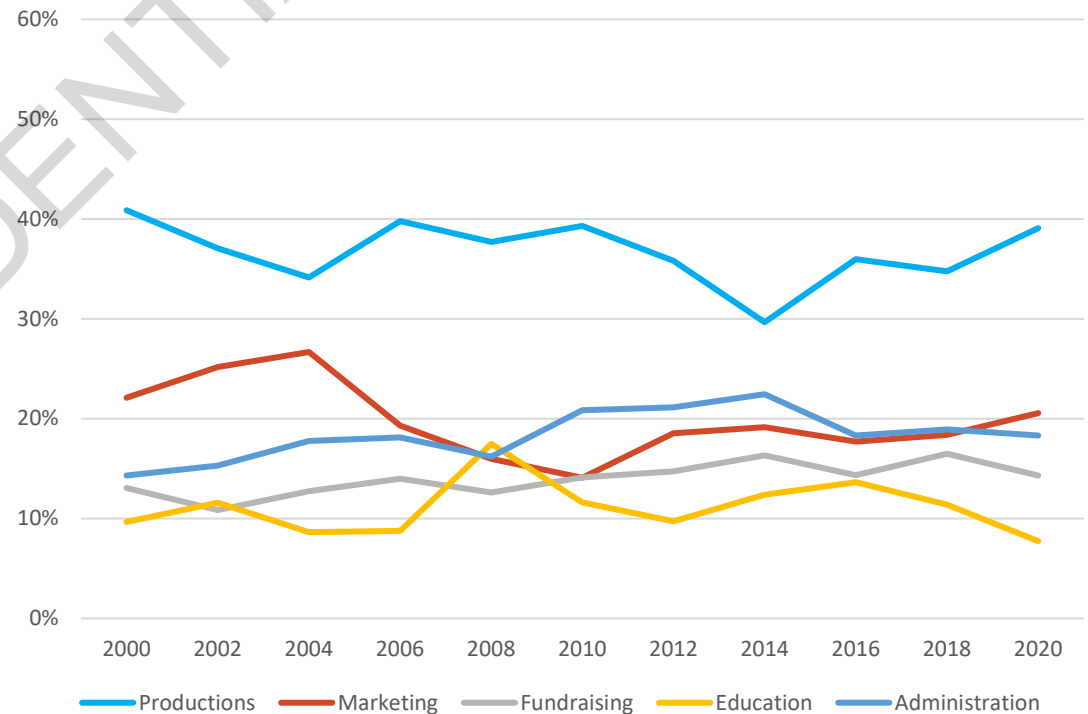
Major Expenses for Medium Organizations

Medium organizations have generally directed fewer funds toward marketing expenses since 2004 and there has been a slight but steady increase in spending on fundraising. Interestingly, these organizations spend a greater percentage of their budgets on education expenses than do smaller groups – so much so that in 2008, it was the second largest expense category.

Table 14. Major Expenses for Medium Organizations

| Year | Productions | Marketing | Administration | Fundraising | Education |
|------|-------------|-----------|----------------|-------------|-----------|
| 2000 | 41% | 22% | 14% | 13% | 10% |
| 2002 | 37% | 25% | 15% | 11% | 12% |
| 2004 | 34% | 27% | 18% | 13% | 9% |
| 2006 | 40% | 19% | 18% | 14% | 9% |
| 2008 | 38% | 16% | 16% | 13% | 17% |
| 2010 | 39% | 14% | 21% | 14% | 12% |
| 2012 | 36% | 19% | 21% | 15% | 10% |
| 2014 | 30% | 19% | 22% | 16% | 12% |
| 2016 | 36% | 18% | 18% | 14% | 14% |
| 2018 | 35% | 18% | 19% | 17% | 11% |
| 2020 | 39% | 21% | 18% | 14% | 8% |

Figure 17. Major Expenses for Medium Organizations



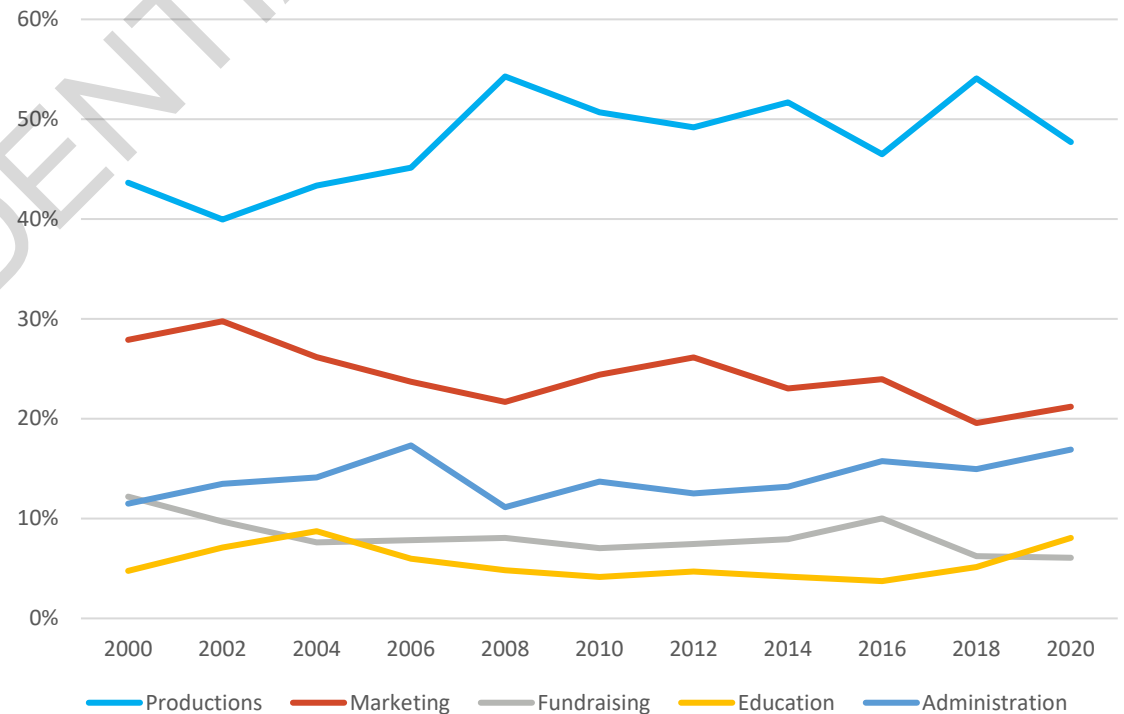
Major Expenses for Large Organizations

Productions are the greatest expense for large organizations – except for 2002, more than half of expense budgets were directed toward producing art. There has also been a general decrease in marketing budgets and a parallel rise in administration costs for these organizations. These groups direct the smallest percentage of their expense budgets toward education costs.

Table 15. Major Expenses for Large Organizations

| Year | Productions | Marketing | Administration | Fundraising | Education |
|------|-------------|-----------|----------------|-------------|-----------|
| 2000 | 44% | 28% | 11% | 12% | 5% |
| 2002 | 40% | 30% | 13% | 10% | 7% |
| 2004 | 43% | 26% | 14% | 8% | 9% |
| 2006 | 45% | 24% | 17% | 8% | 6% |
| 2008 | 54% | 22% | 11% | 8% | 5% |
| 2010 | 51% | 24% | 14% | 7% | 4% |
| 2012 | 49% | 26% | 13% | 7% | 5% |
| 2014 | 52% | 23% | 13% | 8% | 4% |
| 2016 | 46% | 24% | 16% | 10% | 4% |
| 2018 | 54% | 20% | 15% | 6% | 5% |
| 2020 | 48% | 21% | 18% | 6% | 8% |

Figure 18. Major Expenses for Large Organizations



Conclusions

ArtsFund has been supporting the local arts community through community-based grantmaking for 50 years. During that time there have been significant shocks and challenges to the arts in Seattle – these include wars, major economic recessions, and significant growth and change. Our research makes clear that throughout this time, the arts have remained a vital and vibrant element of the local landscape.

Our analysis of more than 800 grant applications, most submitted over the last 20 years, reveals several key features of the arts community. Most notably, there has been a dramatic expansion in both the economic activity associated with arts nonprofits as well as in their audiences. In part, this growth parallels the growth in Seattle’s population. However, as our research shows, growth in audience size far outpaces growth in the population.

Our research also reveals important shifts in the nature of ticket sales over the years. As local organizations have known for some time, there has been a rapid rate of increase in the number of single ticket purchasers compared to other ticket types. (though, there has also been a steady rise in season ticket purchases.) While this finding might suggest that individuals have become less invested in their local arts groups, our analyses suggest otherwise. In particular, we found a notable uptick in the number of volunteers and, also, growth in rates of individual giving to arts groups. In fact, for every size organization individual contributions are the primary sources of income.

Budgetary data also indicate that the expense associated with producing art is the largest expense for groups in our sample. It is far larger larger than any other expense - including fundraising, marketing and administration. The data also reveal an ongoing and notable commitment to directing funds toward educational programming – this is especially true for mid-sized organizations.

Overall, our analysis suggest that the arts are a vibrant and vital component of the local community. More significantly, the community is able to withstand historical shocks. In fact, the overall trajectory evidenced by our analysis has been one of steadfast resilience. We write this report in the midst of the Covid-19 pandemic. The data suggest that the local arts community will both be able to withstand the challenges posed by the pandemic, and if history is any predictor of the future, will grow and expand in the years to come.

Appendix: Budgets of Organizations in Sample

We completed analyses based upon the budget of grantees who received funding between 2000 and 2020. Altogether, there were 662 organizations who received funding this period. We chose this 20-year period because these were the years with the most detailed financial information in the applications.

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