

# Health of the Dance Field in the San Francisco Bay Area and California

2nd Annual Update - February 2014

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# Welcome

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**Numbers, especially financial figures, are powerful indicators of what has transpired in a community. When these numbers are captured on the business of dance, they can also provide an opportunity to make visible the cultural and economic impact dance has and will continue to have on the San Francisco Bay Area and beyond.**

For the past two years, Dancers' Group has spearheaded a research project gathering data from the California Cultural Data Project (CDP) that serve as key indicators of the health of dance in the San Francisco Bay Area that we can track over time. Research like this is an elusive task that most likely provides a particular perspective based on the available information. Yet, with little research on dance in our region going on, we have stepped in to provide a glimpse of what we believe is a vibrant and growing sector.

Our 2nd Annual Update is the beginning of this long-term tracking, adding the most recent data available—through June 2012—into the mix. We are eager to share with you comparable data on dance throughout California as captured in the CDP in this update. You'll be able to review the activity in the San Francisco Bay Area and California respectively, as well as take a look at how the data compares.

As you might guess, with each year that gets added on, the more we can see trends in our field, both locally and statewide.

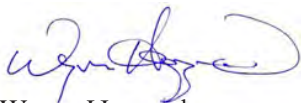
As shown in the initial report, *Dance Activity in the San Francisco Bay Area: A Report on Key Benchmarks*, the CDP data represents a fraction of the total dance activity. At the time, just over 10% of dance organizations were submitting their data to the CDP, most of which have large annual budgets and 501(c)(3) status. If you are reading this report as a representative of a dance organization, large or small, and are interested in having your work and impact included in future updates, we encourage you to visit [culturaldata.org](http://culturaldata.org) to get started.

We realize some of you may have read the initial report while others are seeing this data for the first time. Whether as a refresher or as an introduction, we have included the research methodology at the end of the report, starting on page 10. We'd also encourage you to review the first report, which can be accessed at [dancersgroup.org/research](http://dancersgroup.org/research).

As you dive in, you'll see charts for six Key Benchmark Indicators:

- Revenue
- Paid FTE Positions
- Paying Participants
- Non-Paying Participants
- Individual Donations
- Number of Individual Donors

Enjoy!



Wayne Hazzard  
Executive Director

# San Francisco Bay Area Dance Activity Key Benchmarks

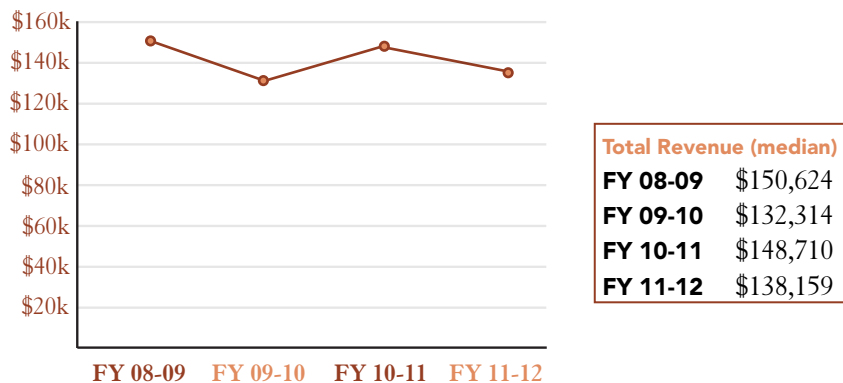
## Aggregate Data:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12
# of CDP Organization Profiles	85	89	78	69
Total Revenue	\$66,158,002	\$81,426,849	\$87,506,657	\$76,236,238
# of Paid Employees (FTE)	847	828	766	738
# of Paying Participants	830,528	814,337	754,922	692,351
# of Non-Paying Participants	493,822	890,689	373,384	792,837
Individual Donations	\$15,388,004	\$12,017,491	\$11,797,794	\$11,955,970
# of Individual Donors	14,590	15,366	14,929	14,642

## Benchmarks:

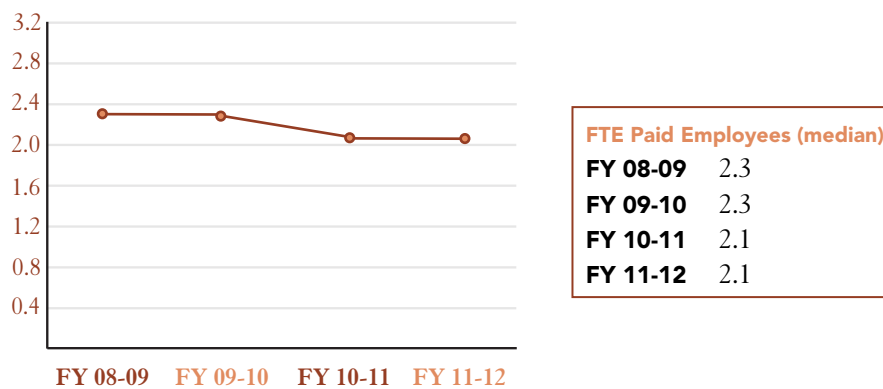
### Total Revenue (median)

Median revenue among CDP organizations has remained fairly stable over the past four years, with an overall slight decline of 8.3%.



### Full-Time Equivalent (FTE) for Paid Employees (median)

The median number of paid employees, measured as FTE positions, declined by 6.7% between FY 08-09 and FY 11-12.

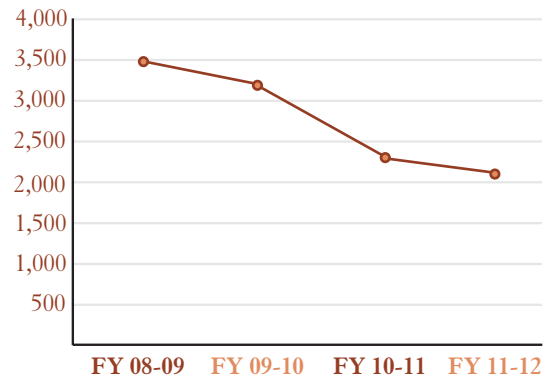


## San Francisco Bay Area Dance Activity Key Benchmarks (cont.)

### Participation

The median number of paid participation, a key indicator of community support, has steadily declined by 38.7% between FY 08-09 and FY 11-12. This has only been partially offset by a slight increase in median non-paying participation over the same period. Overall, total participation has decreased by 24.8%.

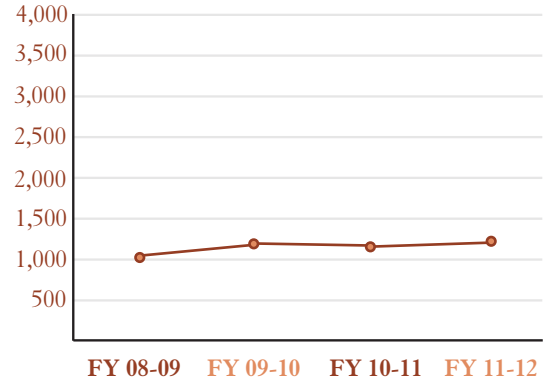
#### Paying Participants (median)



#### Paying Participants (median)

<b>FY 08-09</b>	3,500
<b>FY 09-10</b>	3,279
<b>FY 10-11</b>	2,360
<b>FY 11-12</b>	2,145

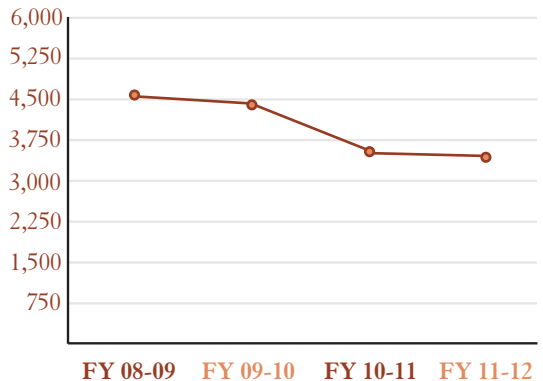
#### Non-Paying Participants (median)



#### Non-Paying Participants (median)

<b>FY 08-09</b>	1,050
<b>FY 09-10</b>	1,200
<b>FY 10-11</b>	1,175
<b>FY 11-12</b>	1,275

#### Total Participants (median)



#### Total Participants (median)

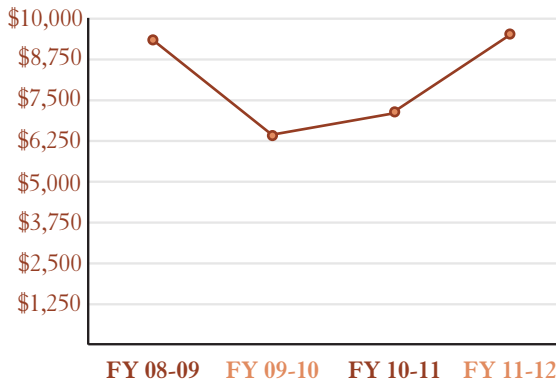
<b>FY 08-09</b>	4,550
<b>FY 09-10</b>	4,479
<b>FY 10-11</b>	3,535
<b>FY 11-12</b>	3,420

## San Francisco Bay Area Dance Activity Key Benchmarks (cont.)

### Individual Donations

The median number of total individual donations, the other important indicator of community support, took a significant dip (31.6%) in FY 09-10, but has since recovered to FY 08-09 levels. The median total number of individual donors increased by 71.9% over the same period. When viewed in relation with the minimal growth in total individual donation, the average value of a donation has declined by a precipitous 41.3% over the four year period.

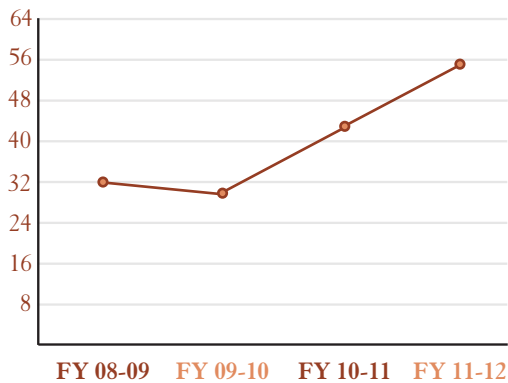
**Total Individual Donations (median)**



**Total Individual Donations (median)**

<b>FY 08-09</b>	\$9,369
<b>FY 09-10</b>	\$6,406
<b>FY 10-11</b>	\$7,311
<b>FY 11-12</b>	\$9,447

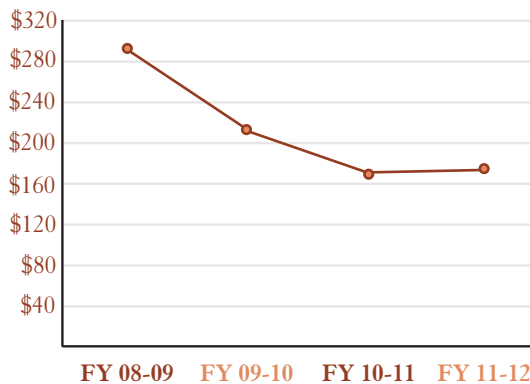
**Total Number of Individual Donations (median)**



**Total Number of Individual Donors (median)**

<b>FY 08-09</b>	32
<b>FY 09-10</b>	30
<b>FY 10-11</b>	43
<b>FY 11-12</b>	55

**Average Value of an Individual Donation**



**Average Value of an Individual Donation**

<b>FY 08-09</b>	\$293
<b>FY 09-10</b>	\$214
<b>FY 10-11</b>	\$170
<b>FY 11-12</b>	\$172



# California

## Dance Activity Key Benchmarks

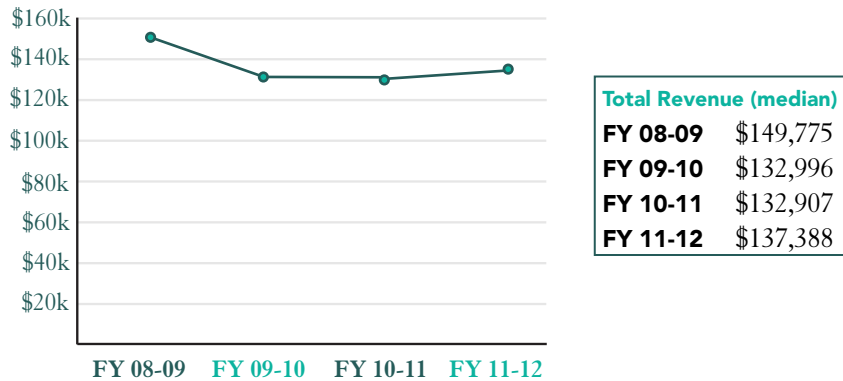
### Aggregate Data:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12
# of CDP Organization Profiles	151	159	145	116
Total Revenue	\$89,119,779	\$105,068,681	\$109,623,090	\$90,223,335
# of Paid Employees (FTE)	1,318	1,307	1,233	955
# of Paying Participants	1,184,645	1,117,368	1,127,949	967,665
# of Non-Paying Participants	727,767	621,759	624,093	574,627
Individual Donations	\$18,070,008	\$14,611,683	\$13,964,077	\$12,580,396
# of Individual Donors	20,834	23,271	19,863	16,573

### Benchmarks:

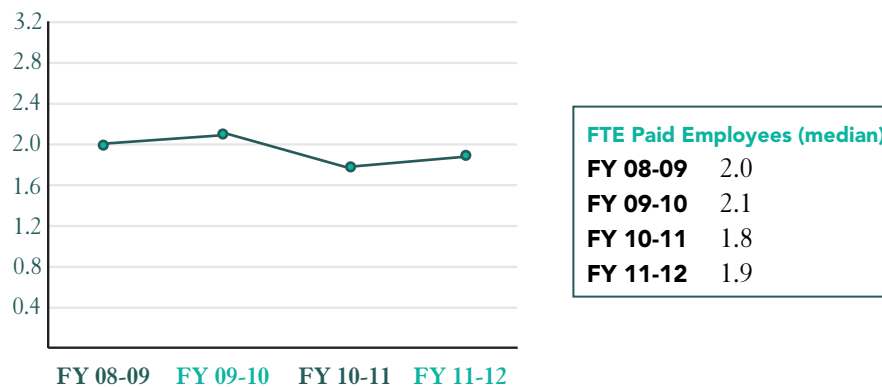
#### Total Revenue (median)

Revenue among California organizations has remained fairly stable over the past four years, with an overall slight decline of 8.3%.



#### Full-Time Equivalent (FTE) for Paid Employees (median)

The median number of paid employees, measured as FTE positions, remained fairly stable with only a slight decline of 6.9% between FY 08-09 and FY 11-12.

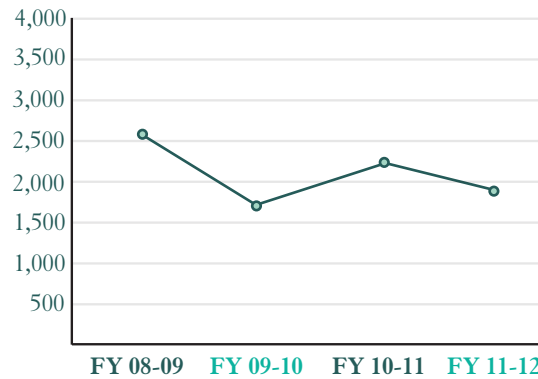


## California Dance Activity Key Benchmarks (cont.)

### Participation

The median number of a key indicator of community support, paid participation, has declined between FY 08-09 and FY 11-12, by 24.2%. This was offset by a significant increase in non-paying participation (primarily in FY 11-12) of 66.9% over the same period. Overall total participation has increased by 1.4%.

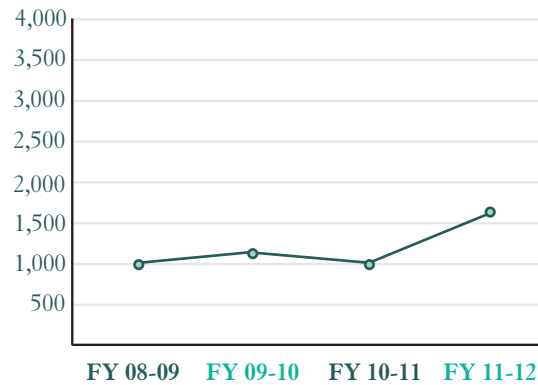
#### Paying Participants (median)



#### Paying Participants (median)

<b>FY 08-09</b>	2,554
<b>FY 09-10</b>	1,701
<b>FY 10-11</b>	2,203
<b>FY 11-12</b>	1,936

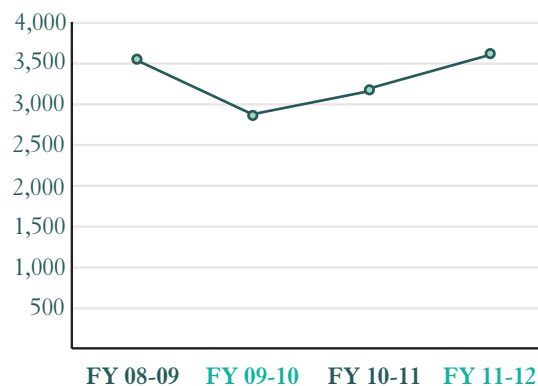
#### Non-Paying Participants (median)



#### Non-Paying Participants (median)

<b>FY 08-09</b>	1,000
<b>FY 09-10</b>	1,100
<b>FY 10-11</b>	1,000
<b>FY 11-12</b>	1,669

#### Total Participants (median)



#### Total Participants (median)

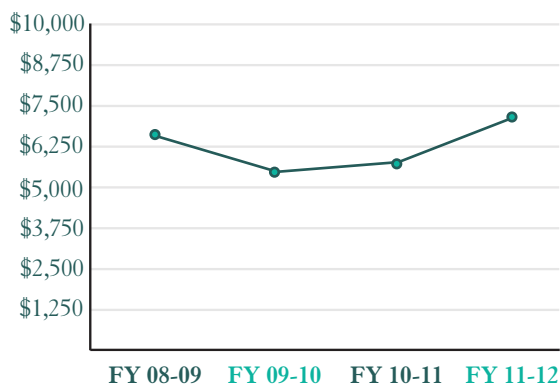
<b>FY 08-09</b>	3,554
<b>FY 09-10</b>	2,801
<b>FY 10-11</b>	3,203
<b>FY 11-12</b>	3,605

## California Dance Activity Key Benchmarks (cont.)

### Individual Donations

The median number of total individual donations, the other important indicator of community support, took a significant dip (31.6%) in FY 09-10, but has since recovered to FY 08-09 levels. The median total number of individual donors increased by 71.9% over the same period. When viewed in relation with the minimal growth in total individual donation, the average value of a donation has steadily declined by a total of 41.3% over the four year period.

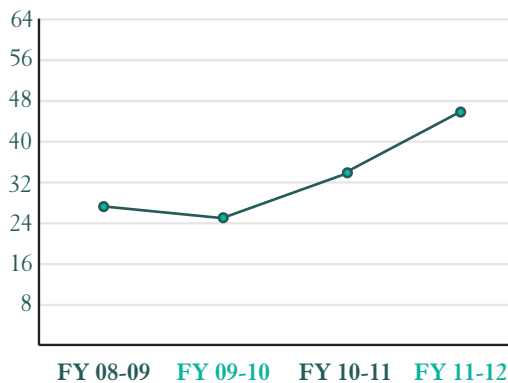
#### Total Individual Donations (median)



#### Total Individual Donations (median)

<b>FY 08-09</b>	\$6,500
<b>FY 09-10</b>	\$5,560
<b>FY 10-11</b>	\$5,882
<b>FY 11-12</b>	\$7,267

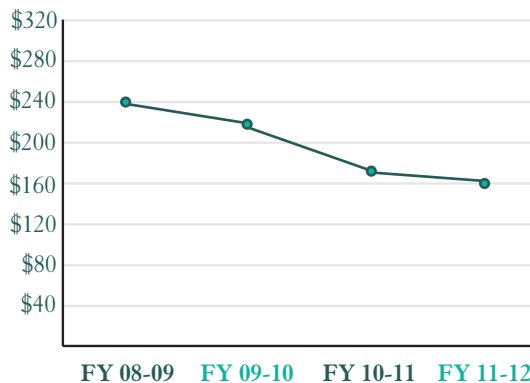
#### Total Number of Individual Donors (median)



#### Total Number of Individual Donors (median)

<b>FY 08-09</b>	27
<b>FY 09-10</b>	25
<b>FY 10-11</b>	34
<b>FY 11-12</b>	45

#### Average Value of an Individual Donation



#### Average Value of an Individual Donation

<b>FY 08-09</b>	\$241
<b>FY 09-10</b>	\$222
<b>FY 10-11</b>	\$173
<b>FY 11-12</b>	\$161

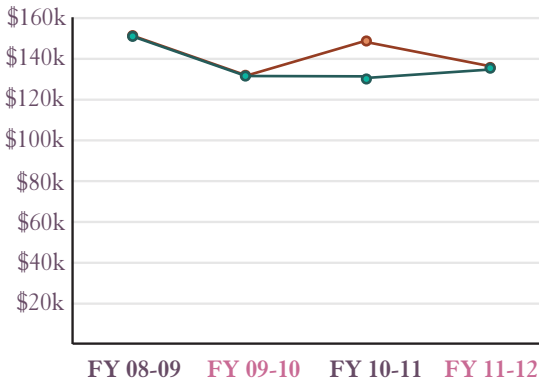


# Benchmark Comparisons

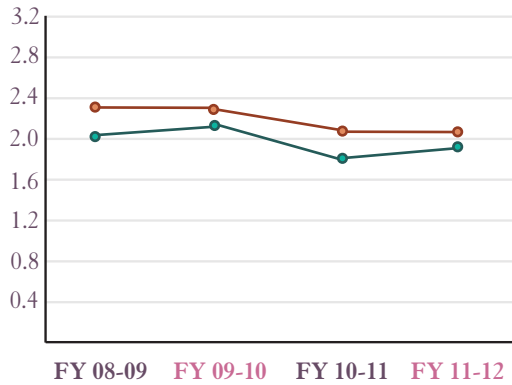
To provide a glimpse of the health of the San Francisco Bay Area in relation to the state of California, we have compared both sets of benchmarks in the following charts. As can be seen, both sets of data follow similar trends across all benchmarks, with the only significant differences showing up in the participation data.

- San Francisco Bay Area
- California

**Total Revenue (median)**



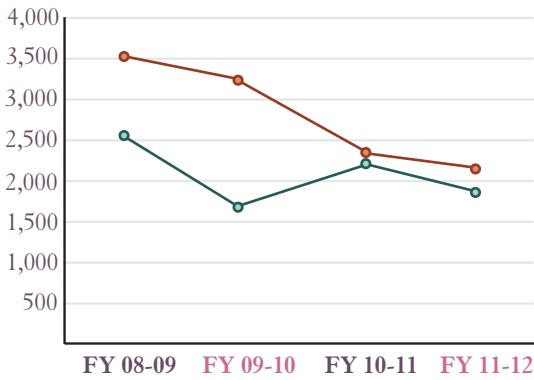
**Full-Time Equivalent (FTE) for Paid Employees (median)**



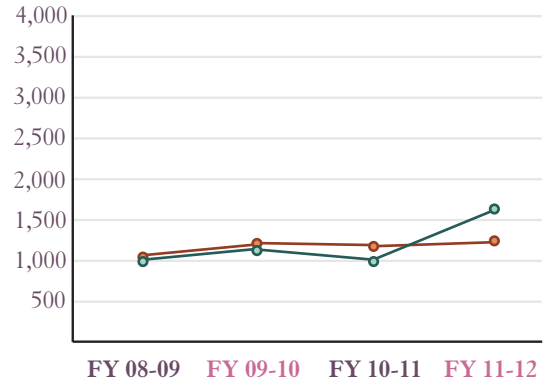
## California Dance Activity Key Benchmarks (cont.)

- San Francisco Bay Area
- California

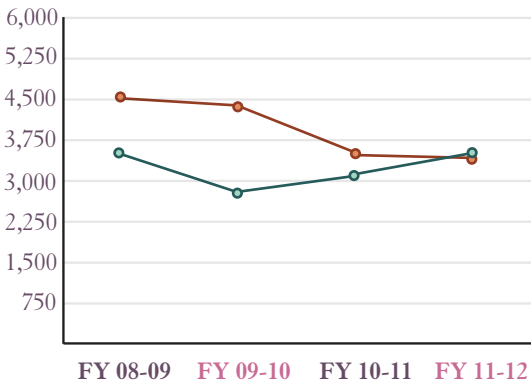
**Paying Participants (median)**



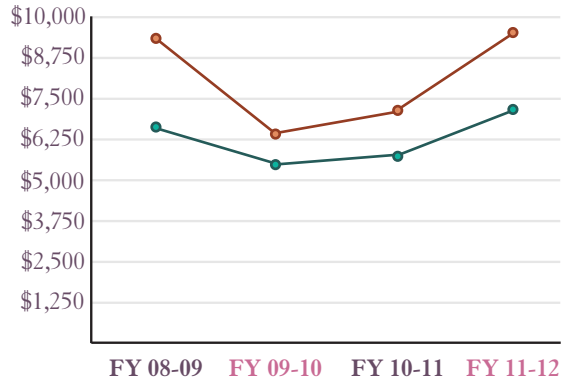
**Non-Paying Participants (median)**



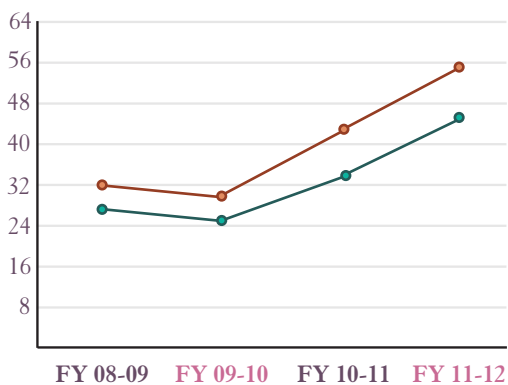
**Total Participants (median)**



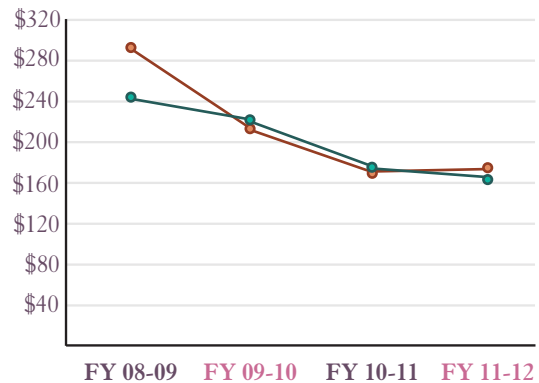
**Total Individual Donations (median)**



**Total Number of Individual Donations (median)**



**Average Value of an Individual Donation**



# Methodology

## Selection of Key Benchmark Indicators

The indicators we have selected to track longitudinally are:

- Revenue
- Paid FTE Positions
- Paying Participants<sup>1</sup>
- Individual Donations
- Non-Paying Participants<sup>2</sup>
- Number of Individual Donors

These indicators were selected as our key benchmarks to reflect the economic impact of the arts, and as evidence of community support in the most direct, measurable way, which we believe would be meaningful over time.

Revenue was chosen as a benchmark to reflect the economic impact of dance in the region from year to year. We selected revenue, as opposed to expenses, as a comparison point to the other benchmarks that relate to income, namely paying participants and individual donations.

Total paid Full Time Equivalent (FTE) positions are a measure of economic impact, as this provides perspective on the volume of people employed within the dance sector. We chose this metric instead of the dollar amount paid to employees because the latter could include the variation of staff salary increases, muddying potential insight about total staff FTEs moving either up or down.

Paying participants and individual donations (number of donors, average donation size, and amount of individual contributions) quantify whether active community participation/measurable support is changing over time. The number of non-paying participants also reflects public interest and engagement in dance.

We considered other potential key benchmarks, as the CDP offers so many options. However, our goal was to create a short-list of reliable indicators that were most useful in creating an overview of dance and its relationship to its audiences and communities, and the economy of the region.

## Parameters for Organization Inclusion

The parameters for gathering CDP Data that reflect the health benchmarks in this study are:

- 1. The San Francisco Bay Area section includes organizations residing in the 11 counties covered by Dancers' Group's work: Alameda, Contra Costa, Marin, Monterey, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma. The statewide section includes all counties in California.**
- 2. Includes only organizations identified primarily as dance based.** Organizations who self-identified as "Dance" or "Folk/Traditional Dance" for their National Standard for Arts Information Exchange Project (NISP) code were included in both the San Francisco Bay Area and state-wide data.

In addition, multi-disciplinary and cultural organizations with an estimated 80% or more of their activity devoted to dance were included in the San Francisco Bay Area regional report. These were included because Dancers' Group's intimate knowledge of the Bay Area community allowed

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<sup>1</sup> Paying Participants includes attendance for performances, classes and workshops.

<sup>2</sup> Non-Paying Participants only includes attendance for performances, as CDP does not track non-paying participation for classes and workshops.

## Methodology (cont.)

qualitative assessments of their percentage of dance activity. Without that level of knowledge of dance entities in California as a whole, and other methods for determining this eligibility were beyond the scope of a state-wide analysis, the state-wide data does not include any multi-disciplinary or cultural organizations with an estimated 80% or more of their activity devoted to dance.

Since our analysis is primarily based on median data, this difference in the number of Bay Area organizations has had a negligible impact on the benchmarks reported in this document. However, this difference can impact how the aggregate data between the Bay Area and California is viewed. Bay Area organizations only comprises 49% of the state-wide data, however, the aggregate data might suggest that the Bay Area represents a larger portion of the state-wide data due to its similarity to the Bay Area aggregate data. This difference in aggregate data is due to the volume of multi-disciplinary and cultural organizations with an estimated 80% or more of their activity devoted to dance that are included in the Bay Area data but not included in the state-wide data.

Organizations omitted from both sections—Bay Area and California—include multi-disciplinary entities and programs working within sheltered institutions such as universities or municipalities (such as dance classes at local Parks and Recreation Centers). Unfortunately, this excludes some culturally-specific operations whose traditions do not separate dance from related cultural expressions inseparable from dance, such as mask-making, music, regalia, etc. as these distinctions were beyond the scope of this study to clarify.

**3. Includes organizations that submitted a CDP profile for fiscal years that fall within the range of the study.** For the purposes of this study, we elected to use annual ranges of July 1 through June 30. For example, organizations identified as “FY11-12” have a fiscal year that ends between July 1, 2011 and June 30, 2012. As illustrated in the initial report, it is estimated that just over 10% of the total dance organizations in the San Francisco Bay Area region submit annual CDP profiles.

### Representation of Data

The Key Benchmarks derive from the most complete current four years worth of data available through CDP at the time of the writing of this report. The data is reported in two ways: as aggregates and as median figures.

Medians are used to track health indicators, rather than average data points, as this is a common practice when significant outliers on either end of the range are known to exist in the data. This reduces the influence of outliers that otherwise skew results to an unacceptable degree. For this report, medians were chosen to eliminate the skewing effect of the largest budget dance organizations in the region, which were otherwise significantly skewing the results.

One note regarding the aggregate data: these figures can be subject to misunderstanding due to the impact of the largest-budget dance companies in the region. For example, for FY11-12, the three largest organizations in the San Francisco Bay Area data pool represent 74% of the total aggregate revenue. Other aggregates are subject to the same caveat.

For more detailed information on the methodology for gathering and processing the data used in this report, please refer to the original report - *Dance Activity in the San Francisco Bay Area: A Report on Key Benchmarks* - which can be downloaded at [dancersgroup.org](http://dancersgroup.org).

# Acknowledgements

**This report was developed under the leadership of Wayne Hazzard, Executive Director of Dancers' Group, Michelle Lynch, Program Director of Dancers' Group, and consultant Kegan Marling.** The team wishes to thank Lora Gordon and her staff at CDP, and the California Arts Council for supporting this study.

The data used for this report was provided by the Cultural Data Project (CDP), an organization created to strengthen arts and culture by documenting and disseminating information on the arts and culture sector. Any interpretation of the data is the view of Dancers' Group and does not reflect the views of the Cultural Data Project. For more information on the Cultural Data Project, visit [culturaldata.org](http://culturaldata.org).



**Dancers' Group** promotes the visibility and viability of dance. Founded in 1982, we serve San Francisco Bay Area artists, the dance community and audiences through programs and services that are as collaborative and innovative as the creative process. As the primary dance service organization for the second largest dance community in the country, Dancers' Group's many programs help artists produce work, build audiences and connect with their peers and the community. [dancersgroup.org](http://dancersgroup.org)

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