



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

4th Edition - April 2016



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Supported by the California Arts Council in conjunction
with DataArts (formerly the Cultural Data Project)

Welcome

For the past four years, Dancers' Group has spearheaded research on California's dynamic dance community, gathering statistics from DataArts (formerly the Cultural Data Project) that we can reliably track over time as indicators of the health of dance in the San Francisco Bay Area (SFBA) and statewide.

Six Key Benchmark indicators were identified to track and posit activities in our sector. Our goal was to create a short-list of reliable indicators that reflect the economic impact of the arts, and serve as evidence of community support in the most direct, measurable way, which we believe would be meaningful over time:

- Revenue
- Paid Full Time Equivalent (FTE) Positions
- Paying Participation
- Non-Paying Participation
- Individual Donations
- Number of Individual Donors

We realize that 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 a brief overview of the research methodology on the following page.

One significant change from previous reports has been the process for identifying organizations to include at the state level. In order to provide clearer comparisons between the local and state data, the requirements for inclusion at the state level were expanded to match those for local organizations. Because of this change, the state data (both benchmarks and aggregate) for all six years of reporting has been updated and now reflects a more inclusive pool of organizations.

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 to get started creating your own profile.

As we add another year of data to this report, it is exciting to watch the trends of the dynamic and vibrant dance sector develop, giving us valuable insight into the health and vitality of the field.

Happy reading,



Wayne Hazzard
Executive Director

Who's Included

About the Organizations Represented in the DataArts Statistics

While submitting a free profile to DataArts is an expansive tool for all artists and organizations, its primary users have been those ready and eligible to apply to philanthropic entities—foundations and government funders—that require the applicant to have a DataArts profile. Therefore, hundreds and likely thousands of dance companies, choreographers, studios, theaters and other dance businesses are not currently adding their information to DataArts and thus we are not able to capture their information in this research project.

Because of this, the benchmark data only represents a fraction of the total dance activity. At the time of the first report in 2013, *Dance Activity in the San Francisco Bay Area: A Report on Key Benchmarks*, Dancers' Group conducted a regional census and determined that just over 10% of dance organizations were submitting their data to DataArts, most of which have large annual budgets and those with 501(c)3 status.

Yet, with very little research taking place on the health of the dance field, Dancers' Group has decided to capture as much reliable information as possible that brings a thoughtfully researched perspective to bare. We believe that while the data primarily reflects the most established portion of the dance community, watching these trends over time can provide insight on movement within the broader dance community.

Parameters for Inclusion in this Report

The parameters for gathering statistics from DataArts that reflect the health benchmarks in this study are:

1. Includes profiles from organizations residing within California. The San Francisco Bay Area data set includes only 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.

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 (NISAP) code were included, as well as multi-disciplinary and cultural organizations with an estimated 80% or more of their activity devoted to dance were included. Organizations omitted 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 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 2013 report, it is estimated that just over 10% of the total dance organizations in the San Francisco Bay Area region submit annual profiles to DataArts.

While some of the methodology has been updated to address increased parameters for inclusion, for more detailed information on the general methodology and the gathering and processing of data, 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.

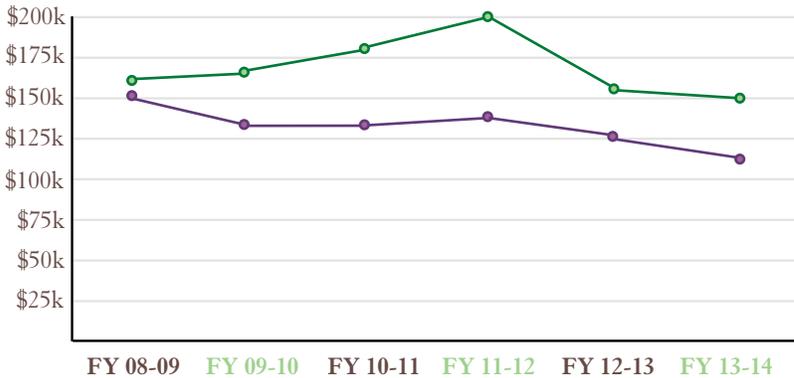
Key Benchmarks: Revenue & Staff

Revenue, as opposed to expenses, was chosen to reflect the economic impact of dance due to its more direct relationship with the other benchmarks. Statewide, revenue has steadily declined over the past 6 years, with a net loss of approximately 22%. Within the SFBA, there was a growth spurt peaking in FY11-12, though it swiftly declined, dropping about 6% over the course of the 6 years.

Total Paid FTE Positions are also a measure of economic impact, and provide perspective on the volume of people employed within the field. Trends in staffing reflect those in revenue, with statewide levels steadily declining by a net of 28% and local levels peaking in FY11-12, but declining overall by 30%.

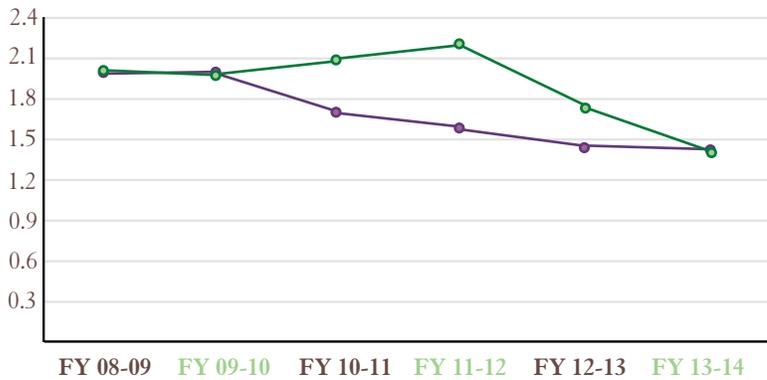
- California
- San Francisco Bay Area

Total Revenue (median)



	California	SF Bay Area
FY 08-09	\$151,364	\$162,319
FY 09-10	\$133,797	\$167,726
FY 10-11	\$132,789	\$180,388
FY 11-12	\$136,895	\$203,922
FY 12-13	\$126,859	\$155,612
FY 13-14	\$117,766	\$152,995

Paid Employees (median)



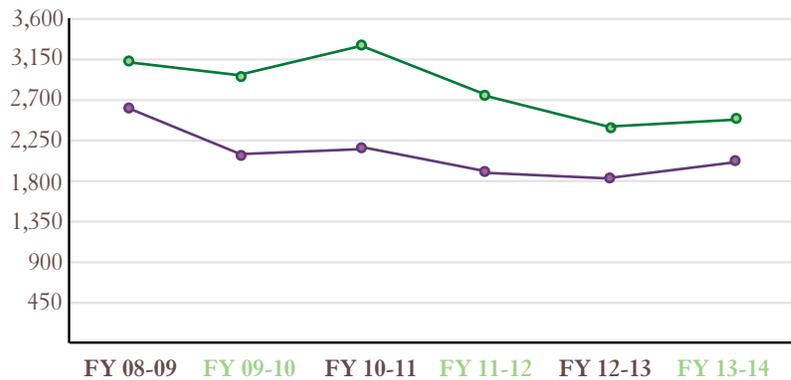
	California	SF Bay Area
FY 08-09	2.00	2.04
FY 09-10	2.04	2.00
FY 10-11	1.71	2.10
FY 11-12	1.58	2.22
FY 12-13	1.46	1.75
FY 13-14	1.45	1.44

Key Benchmarks: Participation

Paying Participation helps quantify whether active community participation is changing over time, while **Non-Paying Participation** reflects public interest and engagement beyond direct financial support. Paying Participation has slowly declined over the past six years both statewide (-22%) and within the SFBA (-20%). This has partially been offset by modest growth in Non-Paying Participation over the same period, resulting in a 13% overall decrease locally and a 15% decrease statewide.

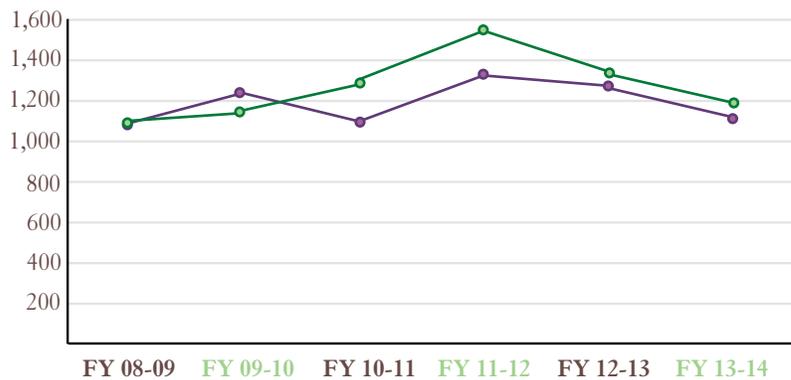
- California
- San Francisco Bay Area

Paying Participation (median)



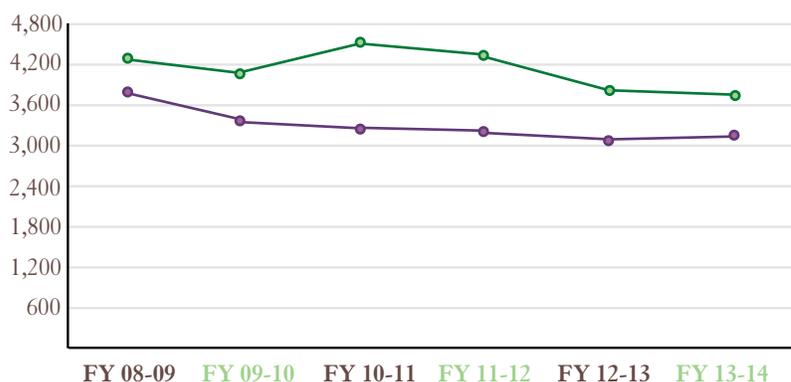
	California	SF Bay Area
FY 08-09	2,645	3,150
FY 09-10	2,113	2,984
FY 10-11	2,200	3,248
FY 11-12	1,888	2,785
FY 12-13	1,824	2,403
FY 13-14	2,050	2,511

Non-Paying Participation (median)



	California	SF Bay Area
FY 08-09	1,092	1,100
FY 09-10	1,234	1,150
FY 10-11	1,097	1,296
FY 11-12	1,314	1,563
FY 12-13	1,269	1,360
FY 13-14	1,145	1,200

Total Participation (median)



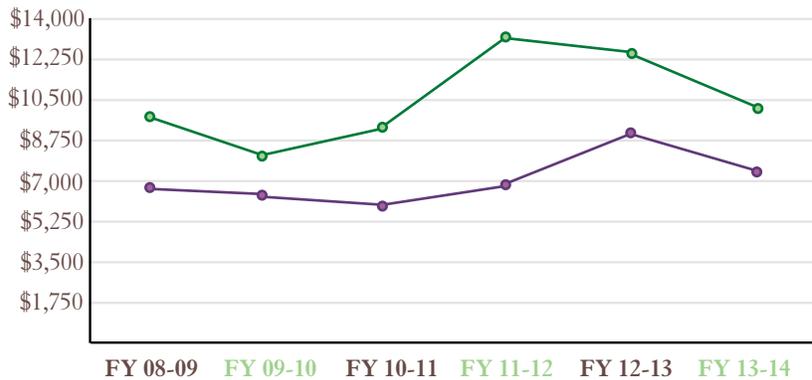
	California	SF Bay Area
FY 08-09	3,737	4,250
FY 09-10	3,347	4,134
FY 10-11	3,297	4,544
FY 11-12	3,202	4,348
FY 12-13	3,093	3,763
FY 13-14	3,195	3,711

Key Benchmarks: Individual Donations

Individual Donations help track measurable fiscal support from the community. Total individual donations have fluctuated over the past six years, but generally have grown minimally over time (SFBA: 1%; Statewide 7%). The number of donors during this time has steadily increased (SFBA: 46%; Statewide 48%), which, when viewed in relation with the modest growth in individual support, means the average value of a donation has notably declined over the past six years. (SFBA: 31%; Statewide 27%).

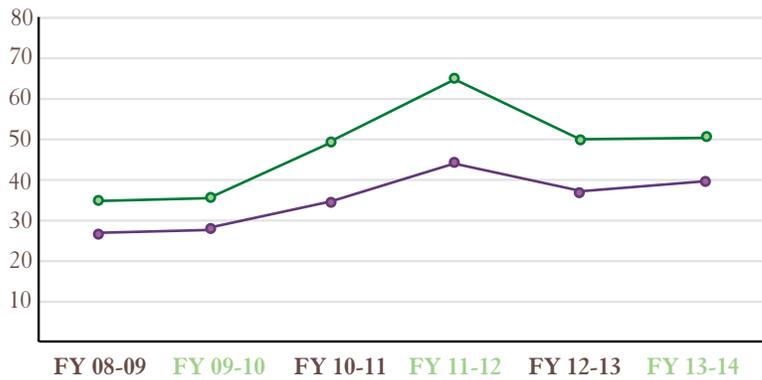
- California
- San Francisco Bay Area

Total Individual Donations (median)



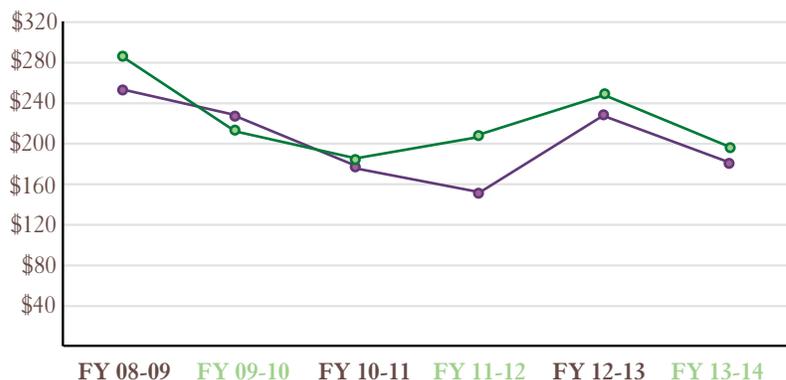
	California	SF Bay Area
FY 08-09	\$6,797	\$9,940
FY 09-10	\$6,453	\$7,697
FY 10-11	\$6,007	\$9,330
FY 11-12	\$6,883	\$13,451
FY 12-13	\$8,835	\$12,350
FY 13-14	\$7,306	\$9,984

Total Number of Individual Donations (median)



	California	SF Bay Area
FY 08-09	27	35
FY 09-10	28	36
FY 10-11	34	50
FY 11-12	45	65
FY 12-13	38	50
FY 13-14	40	51

Average Value of an Individual Donation (median)



	California	SF Bay Area
FY 08-09	\$252	\$284
FY 09-10	\$230	\$214
FY 10-11	\$177	\$187
FY 11-12	\$153	\$207
FY 12-13	\$233	\$247
FY 13-14	\$183	\$196

Aggregate Data

The information in this report derives from the most complete current six years worth of data available through DataArts at the time of the writing of this report. The data is reported in two ways: as aggregates and 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.

We provide some of the aggregate data below as a useful gauge of gross quantity of activity in the region. 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. Similarly, in FY 13-14, the massive growth in # of Individual Donations is entirely attributed to one new organization which reported 30,000 individual donors. Other aggregates are subject to the same caveat.

San Francisco Bay Area:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12	FY 12-13	FY 13-14
# of CDP Profiles	91	103	99	98	105	108
Total Revenue	\$69,742,073	\$87,967,166	\$93,570,134	\$88,666,973	\$100,844,626	\$103,421,987
# of Paid Employees (FTE)	894	901	923	942	890	825
# of Paying Participants	897,845	944,146	926,490	931,917	870,730	898,097
# of Non-Paying Participants	879,418	959,095	889,835	959,877	994,089	2,428,536
Individual Donations	\$16,020,115	\$12,839,578	\$12,404,385	\$13,012,217	\$18,591,235	\$17,763,708
# of Individual Donors	16,674	19,453	18,655	18,608	20,316	48,655

California:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12	FY 12-13	FY 13-14
# of CDP Organization Profiles	174	186	185	182	196	197
Total Revenue	\$96,060,259	\$113,938,120	\$119,579,301	\$116,358,321	\$122,118,228	\$123,810,527
# of Paid Employees (FTE)	1,445	1,440	1,415	1,379	1,299	1,200
# of Paying Participants	1,349,150	1,344,335	1,358,426	1,347,658	1,338,915	1,531,163
# of Non-Paying Participants	1,158,781	1,253,947	1,203,103	1,202,994	1,301,224	2,720,437
Individual Donations	\$18,850,268	\$15,530,895	\$15,047,970	\$15,245,125	\$20,374,088	\$19,315,212
# of Individual Donors	23,555	27,567	24,361	24,407	25,510	53,840

Acknowledgements

This report was developed by Wayne Hazzard, Executive Director of Dancers' Group, Michelle Lynch Reynolds, Program Director of Dancers' Group, and consultant Kegan Marling.

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The data used for this report was provided by DataArts, 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 DataArts. For more information on DataArts, visit culturaldata.org.



Dancers' Group promotes the visibility and viability of dance. Since its founding in 1982, we have served San Francisco Bay Area artists, the dance community and audiences through programs and services that are as collaborative and innovative as the creative process itself. In response to the needs of its constituents, Dancers' Group has evolved to fulfill a dual function as a service organization and as a presenter of performance opportunities that maximize the visibility of dance in the Bay Area.

dancersgroup.org

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