



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

3rd Annual Update - March 2015

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Supported by the California Arts Council,
in conjunction with the Cultural Data Project



Welcome

For the past three 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 and statewide that we can reliably track over time.

We are eager to share with you both the aggregate and median data spanning five years in this update that will allow you to review and compare the activity in the San Francisco Bay Area (SFBA) and California respectively. We have selected the following six “Key Benchmark Indicators” to allow us to track and posit activities in our sector:

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

While the CDP is a free and 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 CDP profile. Therefore, hundreds and most likely thousands of choreographers, dance companies, studios, theaters and other dance businesses are not currently adding their information to the CDP and subsequently 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, *Dance Activity in the San Francisco Bay Area: A Report on Key Benchmarks*, just over 10% of dance organizations in the SFBA were submitting their data to the CDP, 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 in the SFBA and throughout California, Dancers' Group has decided to capture as much reliable information as possible that brings a thoughtfully researched perspective to bare.

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 the research methodology at the end of this report, starting on page 11. We'd also encourage you to review the first and second year reports, which can be accessed at dancersgroup.org/research.

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 caculturaldata.org to get started creating your own profile.

We are pleased to add another year of data that provides a glimpse of what we believe is a dynamic, vibrant and growing sector.

Happy reading.



Wayne Hazzard
Executive Director

San Francisco Bay Area Dance Activity Key Benchmarks

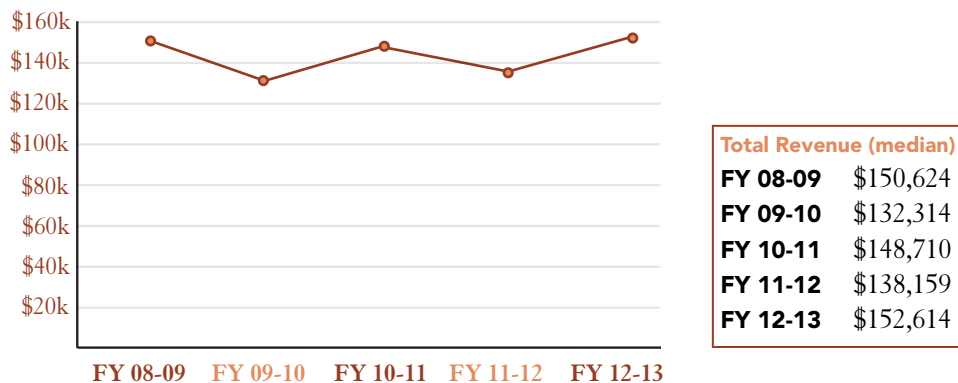
Aggregate Data:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12	FY 12-13
# of CDP Organization Profiles	85	89	78	69	81
Total Revenue	\$66,158,002	\$81,426,849	\$87,506,657	\$76,236,238	\$94,703,567
# of Paid Employees (FTE)	847	828	766	738	764
# of Paying Participants	830,528	814,337	754,922	692,351	719,280
# of Non-Paying Participants	493,822	890,689	373,384	792,837	812,898
Individual Donations	\$15,388,004	\$12,017,491	\$11,797,794	\$11,955,970	\$18,006,086
# of Individual Donors	14,590	15,366	14,929	14,642	15,755

Benchmarks:

Total Revenue (median)

Median revenue among CDP organizations in the San Francisco Bay Area has remained fairly stable over the past five years, averaging approximately \$145,000 per year.



Paid Employees (median)

The median number of paid employees, measured as full time equivalent (FTE) positions, continues to slightly decline, with an overall drop of 22% over the past 5 years.

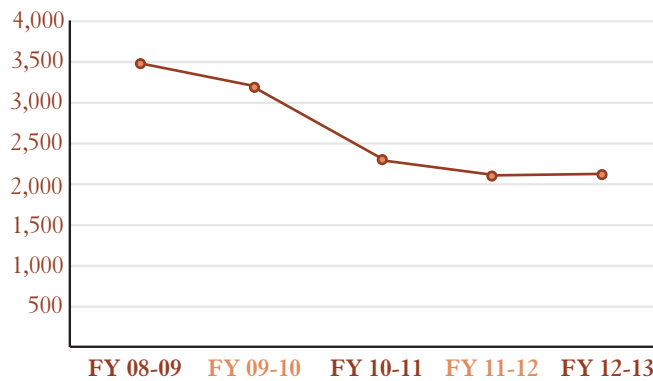


San Francisco Bay Area Dance Activity Key Benchmarks (cont.)

Participation

The median number of paid participation, a key indicator of community support, has steadily declined by 38% over the past 5 years. This has been partially offset by an increase in non-paying participation over the same period. Overall, total participation has decreased by 20%.

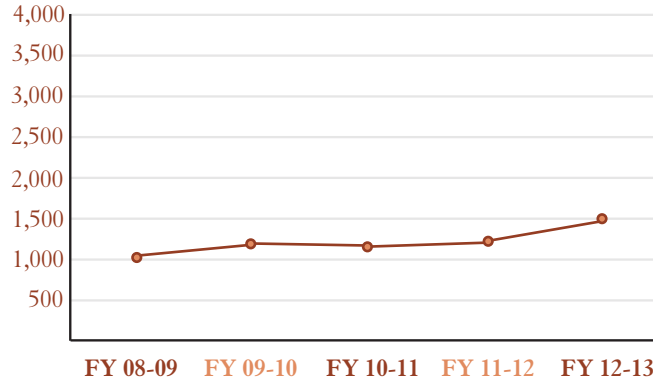
Paying Participants (median)



Paying Participants (median)

FY 08-09	3,500
FY 09-10	3,279
FY 10-11	2,360
FY 11-12	2,145
FY 12-13	2,159

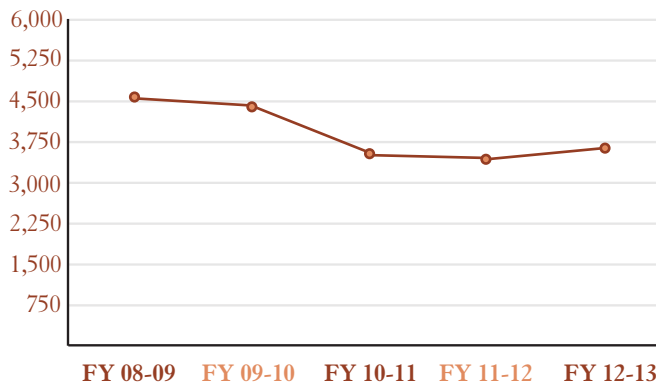
Non-Paying Participants (median)



Non-Paying Participants (median)

FY 08-09	1,050
FY 09-10	1,200
FY 10-11	1,175
FY 11-12	1,275
FY 12-13	1,500

Total Participants (median)



Total Participants (median)

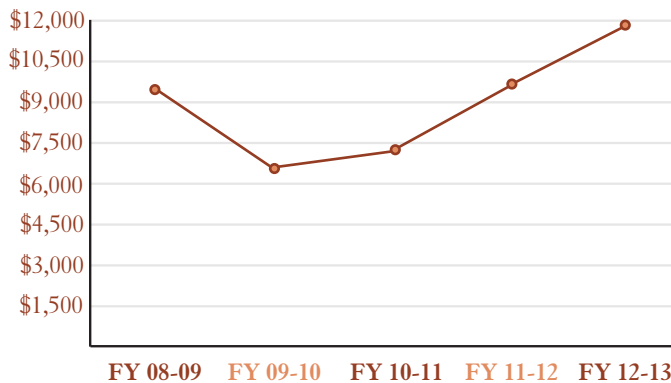
FY 08-09	4,550
FY 09-10	4,479
FY 10-11	3,535
FY 11-12	3,420
FY 12-13	3,659

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 (32%) in FY 09-10, but has since steadily grown and recently exceeded FY 08-09 levels. The number of individual donors during this time increased by 56%. When viewed in relation with the growth in total individual donation support, the average value of a donation has declined by 18% over the five year period.

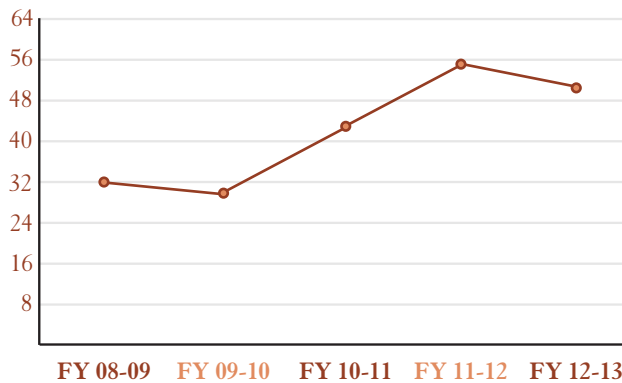
Total Individual Donations (median)



Total Individual Donations (median)

FY 08-09	\$9,369
FY 09-10	\$6,406
FY 10-11	\$7,311
FY 11-12	\$9,447
FY 12-13	\$11,959

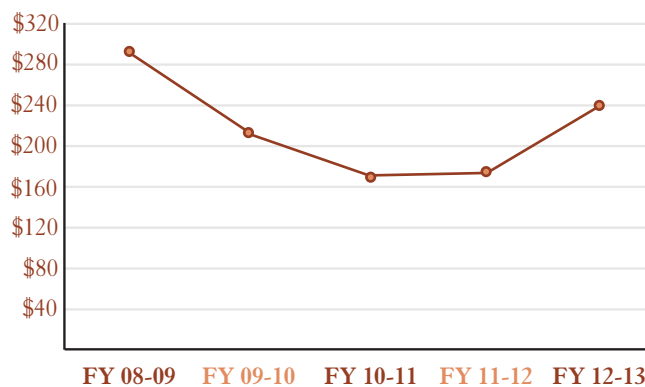
Total Number of Individual Donations (median)



Total Number of Individual Donors (median)

FY 08-09	32
FY 09-10	30
FY 10-11	43
FY 11-12	55
FY 12-13	50

Average Value of an Individual Donation



Average Value of an Individual Donation

FY 08-09	\$293
FY 09-10	\$214
FY 10-11	\$170
FY 11-12	\$172
FY 12-13	\$239

California

Dance Activity Key Benchmarks

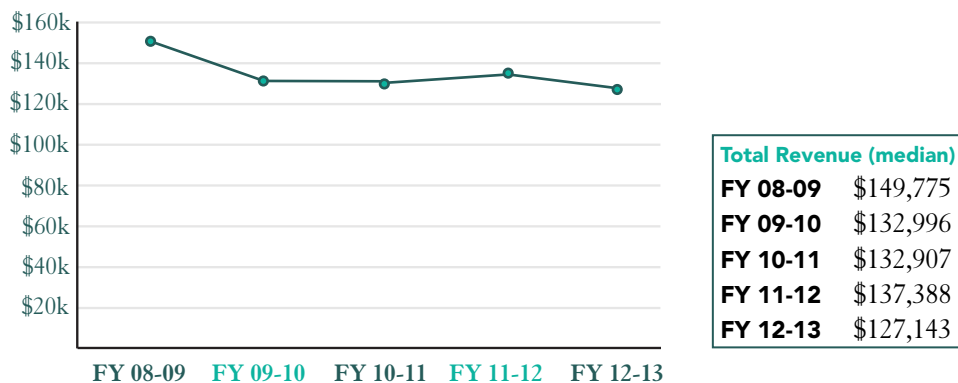
Aggregate Data:

	FY 08-09	FY 09-10	FY 10-11	FY 11-12	FY 12-13
# of CDP Profiles	151	159	145	116	138
Total Revenue	\$89,119,779	\$105,068,681	\$109,623,090	\$90,223,335	\$107,679,162
# of Paid Employees (FTE)	1,318	1,307	1,233	955	999
# of Paying Participants	1,184,645	1,117,368	1,127,949	967,665	1,104,962
# of Non-Paying Participants	727,767	621,759	624,093	574,627	795,123
Individual Donations	\$18,070,008	\$14,611,683	\$13,964,077	\$12,580,396	\$18,920,707
# of Individual Donors	20,834	23,271	19,863	16,573	18,916

Benchmarks:

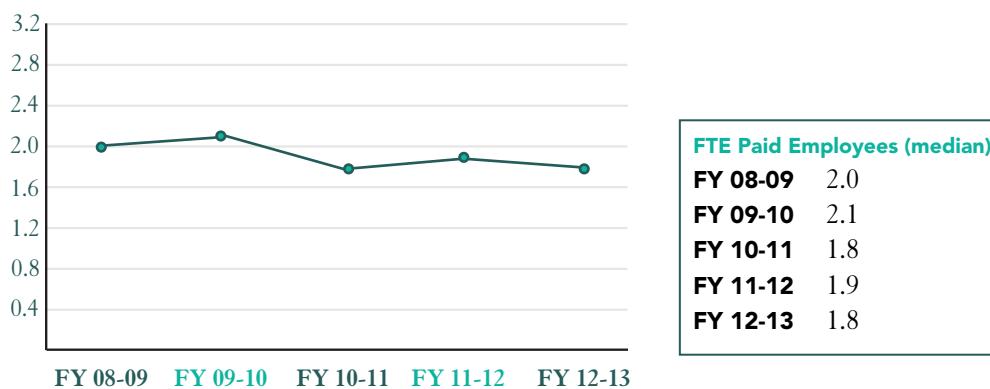
Total Revenue (median)

Revenue among California organizations has slowly been decreasing over the past five years, with an overall decline of 15%.



Paid Employees (median)

The median number of paid employees, measured as full time equivalent (FTE) positions, remained fairly stable with a slight decline (13%) over the five year period.

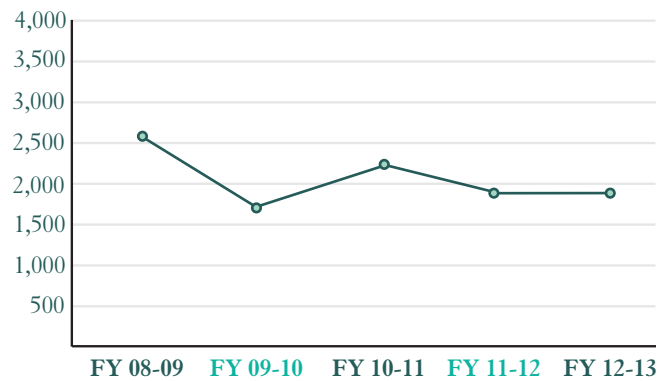


California Dance Activity Key Benchmarks (cont.)

Participation

A key indicator of community support, paid participation, has declined over the past five years by 25%. This has partially been offset by a 75% increase in non-paying participation over the same period, resulting in a 3% overall total participation increase.

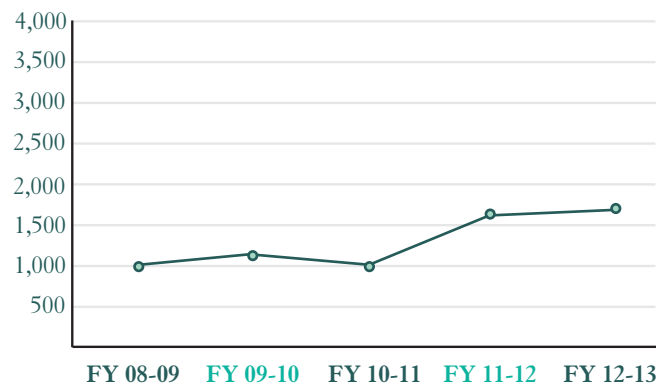
Paying Participants (median)



Paying Participants (median)

FY 08-09	2,554
FY 09-10	1,701
FY 10-11	2,203
FY 11-12	1,936
FY 12-13	1,925

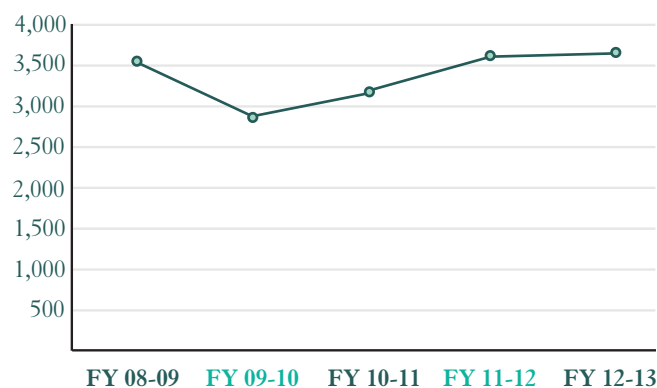
Non-Paying Participants (median)



Non-Paying Participants (median)

FY 08-09	1,000
FY 09-10	1,100
FY 10-11	1,000
FY 11-12	1,669
FY 12-13	1,745

Total Participants (median)



Total Participants (median)

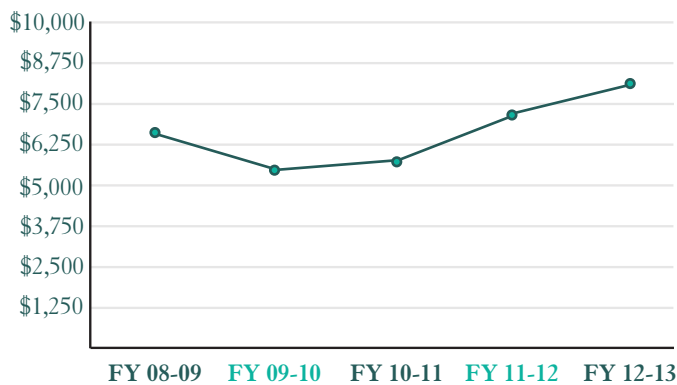
FY 08-09	3,554
FY 09-10	2,801
FY 10-11	3,203
FY 11-12	3,605
FY 12-13	3,670

California Dance Activity Key Benchmarks (cont.)

Individual Donations

Similar to what happened in the San Francisco Bay Area, total individual donations took a dip in FY 09-10, but has since recovered and exceeded FY 08-09 levels. The median number of individual donors increased by 41% over the same period. When viewed in relation with the growth in total individual donations, the average value of a donation has slightly declined by a total of 10% over the five year period.

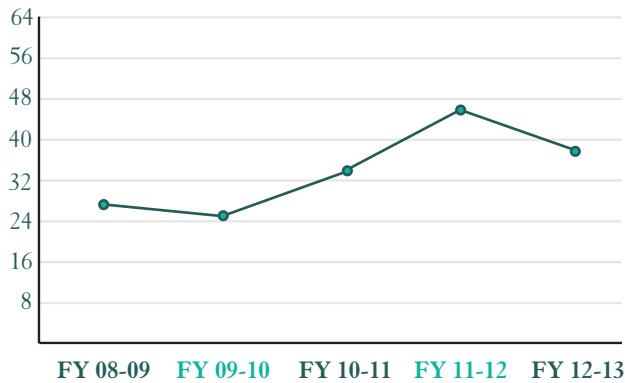
Total Individual Donations (median)



Total Individual Donations (median)

FY 08-09	\$6,500
FY 09-10	\$5,560
FY 10-11	\$5,882
FY 11-12	\$7,267
FY 12-13	\$8,282

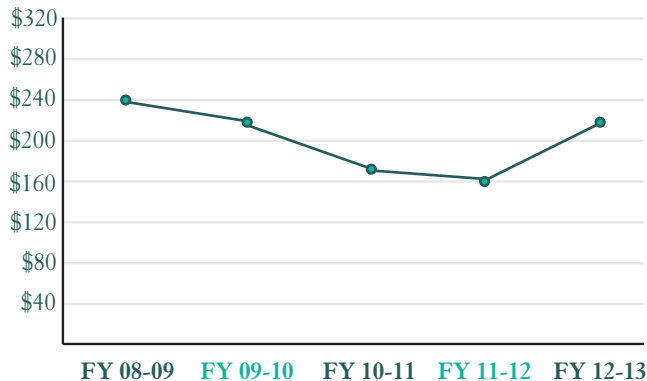
Total Number of Individual Donors (median)



Total Number of Individual Donors (median)

FY 08-09	27
FY 09-10	25
FY 10-11	34
FY 11-12	45
FY 12-13	38

Average Value of an Individual Donation



Average Value of an Individual Donation

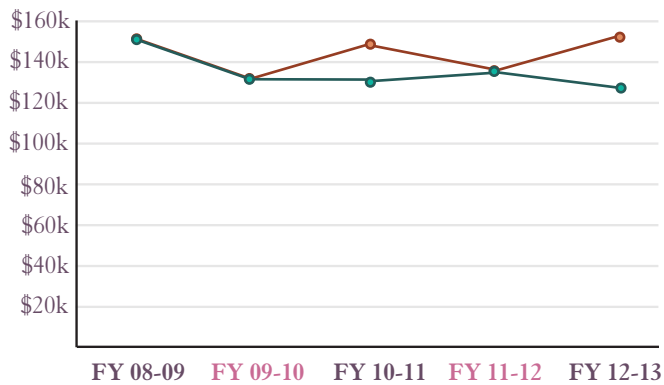
FY 08-09	\$241
FY 09-10	\$222
FY 10-11	\$173
FY 11-12	\$161
FY 12-13	\$218

Benchmark Comparisons

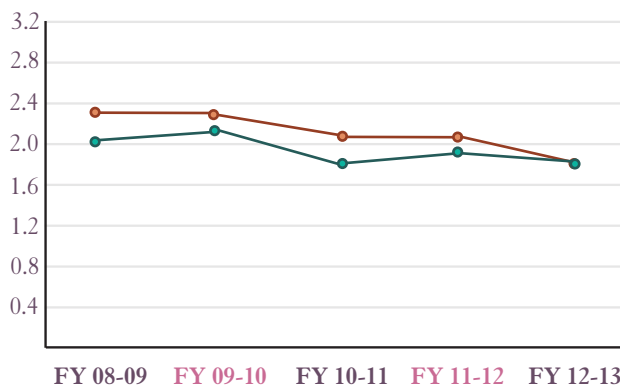
To provide a glimpse of the health of the San Francisco Bay Area in relation to the state of California, we have compared both sets of benchmarks in the following charts. As can be seen, both sets of data follow similar trends across all benchmarks, with the only significant differences showing up in the FY 09-10 paying participation data.

- San Francisco Bay Area
- California

Total Revenue (median)



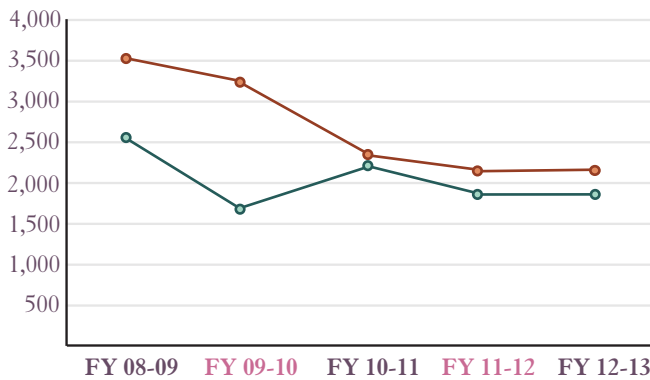
Full-Time Equivalent (FTE) for Paid Employees (median)



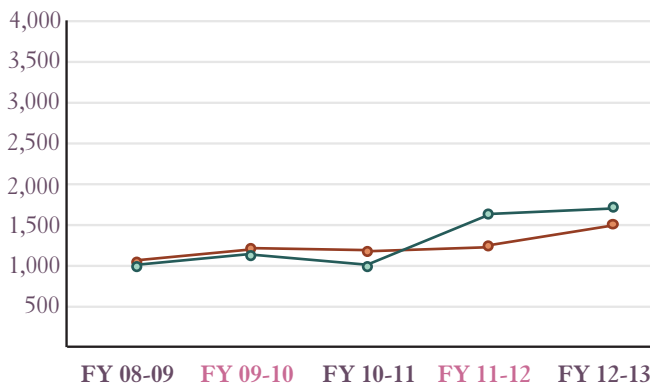
California Dance Activity Key Benchmarks (cont.)

- San Francisco Bay Area
- California

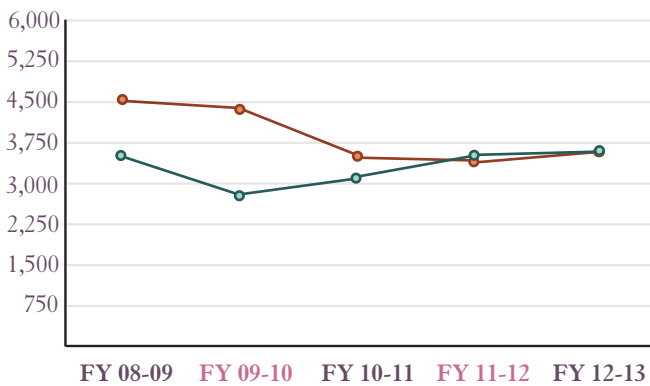
Paying Participants (median)



Non-Paying Participants (median)



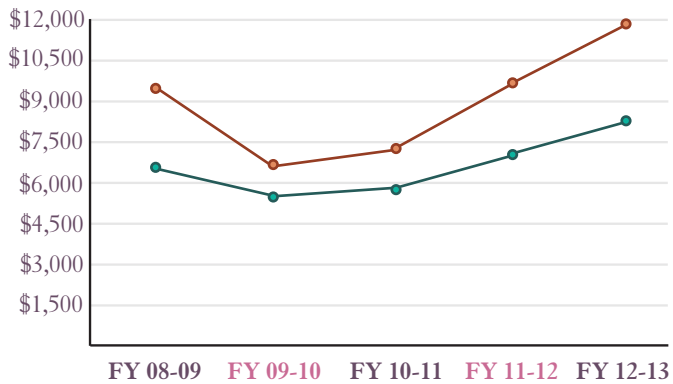
Total Participants (median)



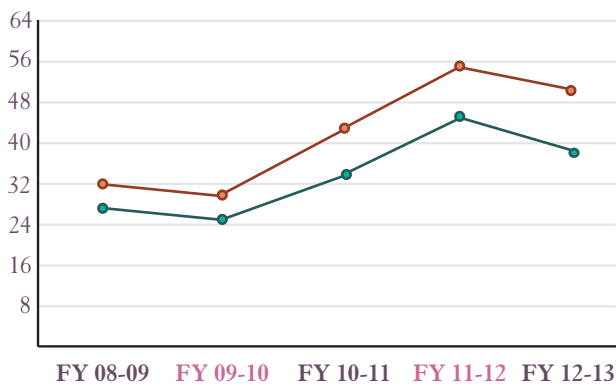
California Dance Activity Key Benchmarks (cont.)

- San Francisco Bay Area
- California

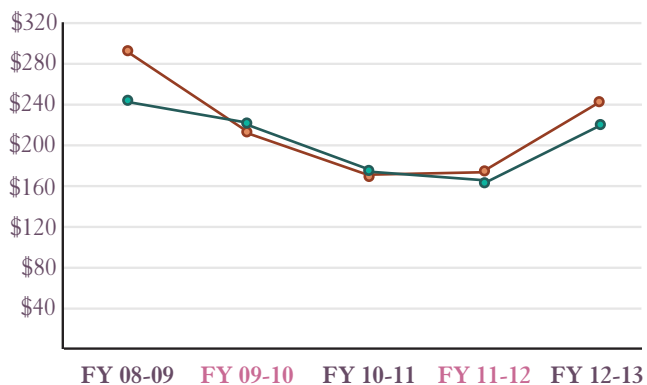
Total Individual Donations (median)



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 Participants¹
- Individual Donations
- Non-Paying Participants²
- Number of Individual Donors

These indicators were selected as 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

¹ Paying Participants includes attendance for performances, classes and workshops.

² 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.

Acknowledgements

This report was developed under the leadership of Wayne Hazzard, Executive Director of Dancers' Group, Michelle Lynch Reynolds, 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.



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

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