



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

6th Edition - April 2018

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**Supported by the California Arts  
Council in conjunction with DataArts**





# Welcome

**Dancers' Group is fortunate to continue a unique research project that focuses on California's dynamic dance community, gathering statistics from DataArts, an online financial management, data collection, and research tool designed to strengthen the arts and cultural sector.**

For six years – with data that covers nine years – Dancers' Group has reliably tracked a series of indicators to understand the health of dance in the San Francisco Bay Area and statewide.

For this research project, six **Key Benchmarks** were identified to track and posit activities in our sector. Our objective was to create a short-list of reliable indicators that reflect the economic impact of the dance ecosystem, and serve as evidence of community support in the most direct, measurable way, which we believe would be meaningful over time. The benchmark indicators are:

- Revenue
- Personnel Expenses
- Paying Participation
- Non-Paying Participation
- Individual Donations
- Number of Individual Donors

In prior reports, the second key benchmark was “Full Time Equivalent Paid Positions.” Due to changes in the way DataArts collects staffing information, we determined that tracking Personnel Expenses will now provide the most robust metric for monitoring employment. This report reflects this metric change in all years captured since 2008.

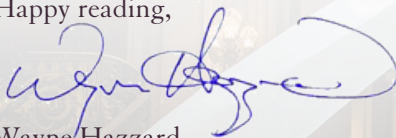
Whether as a refresher or as an introduction to this annual research, we have included an overview of the research methodology on the following page.

If you are reading this report as a representative of a dance organization—with any budget size—and your organization does not have a DataArts profile we encourage you to visit [CulturalData.org](https://culturaldata.org) to create a free profile.

Also on the [CulturalData.org](https://culturaldata.org): find out which foundations use this data, check out the monthly new user webinars, and browse informative articles.

If you find this report informative please let us know: we are always interested in learning how these trends, that are reflective of a lively dance sector, provide valuable insight into the health and vitality of the field.

Happy reading,



Wayne Hazzard  
Executive Director

# Who's Included

## About the Artists and Organizations Represented in the DataArts Statistics

DataArts primarily captures information from artists and organizations applying to philanthropic entities—foundations and government funders—that require the applicant to submit a DataArts Funder Report. Because of this, the benchmark data only represents a small fraction of the total dance activity occurring in California. 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 entities were submitting their data to DataArts, and those that submitted primarily represented 501c3 organizations with stable annual budgets.

Hundreds and likely thousands of dance companies, choreographers, studios and other dance businesses are not currently adding their information to DataArts. 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 although 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 only 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 (NISIP) 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.



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](http://dancersgroup.org).

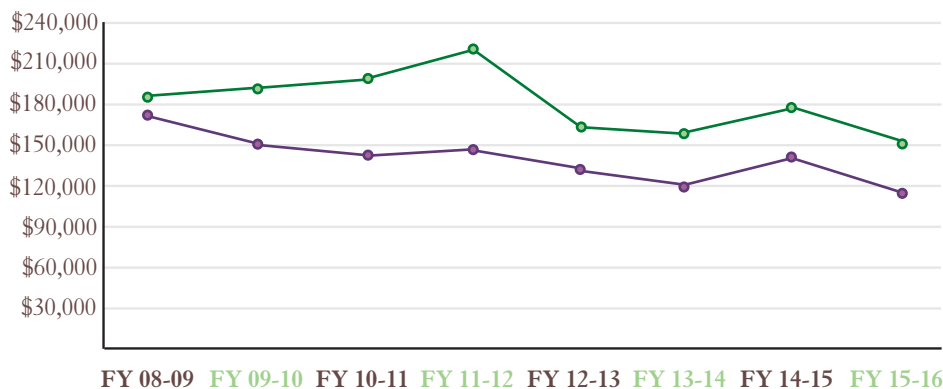
# Key Benchmarks: Revenue & Personnel

**Median Revenue** reflects the typical income of mid-range dance organizations, and provides context for all other benchmarks in this report. Over the past eight years, revenue statewide has shown a very slight but steady decline. Within the San Francisco Bay Area, the median revenue had shown modest improvement through 2011-12, but then dropped by nearly 25% and has continued to slowly decline, with both regions currently reporting their lowest revenue since 2008.

**Personnel Expenses** measures the typical expenses for employees, independent contractors, and additional personnel for mid-range organizations — offering insight on employment within the field. Staffing trends reflect the slow but steady decline in median revenue, with statewide levels over the past eight years down by a net of 29%, and San Francisco Bay Area declining overall by 27%.

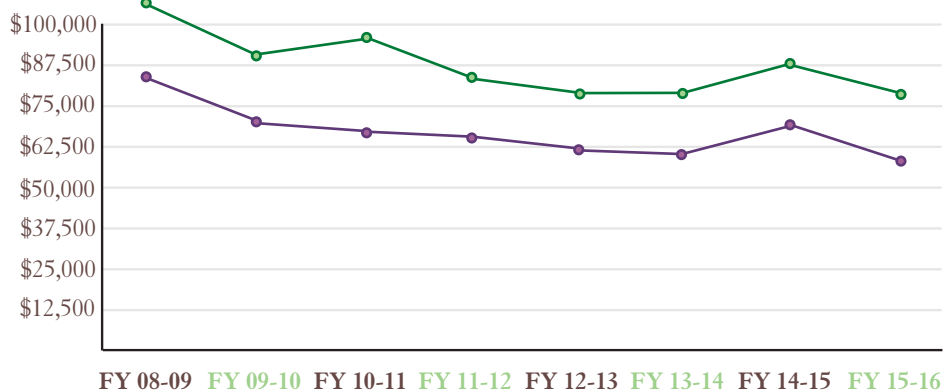
- California
- San Francisco Bay Area

**Median Revenue (adjusted for inflation)**



	California	SF Bay Area
FY 08-09	\$175,673	\$188,387
FY 09-10	\$152,778	\$191,521
FY 10-11	\$146,988	\$199,676
FY 11-12	\$148,460	\$221,150
FY 12-13	\$135,590	\$166,322
FY 13-14	\$123,862	\$160,915
FY 14-15	\$143,337	\$182,506
FY 15-16	\$117,787	\$153,769

**Personnel Expenses (median, adjusted for inflation)**



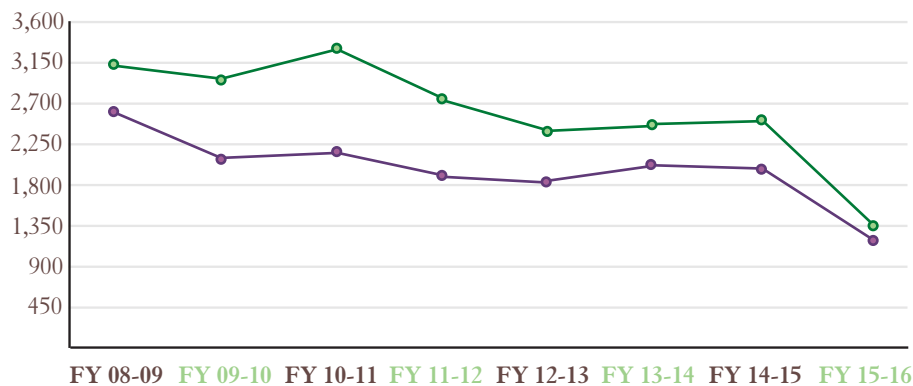
	California	SF Bay Area
FY 08-09	\$83,635	\$108,007
FY 09-10	\$69,236	\$90,931
FY 10-11	\$65,124	\$95,330
FY 11-12	\$64,158	\$84,066
FY 12-13	\$61,116	\$79,123
FY 13-14	\$60,501	\$80,703
FY 14-15	\$70,401	\$88,092
FY 15-16	\$59,372	\$79,364

# Key Benchmarks: Participation

Participation is an important indicator of overall community engagement in the dance field, and is tracked through **Paying Participation**, which includes performances, workshops, and other paid attendance events, and **Non-Paying Participation**, which includes all events free to the general public. Over the past eight years, paying participation has slowly declined while non-paying participation has steadily grown, resulting in fairly consistent total participation numbers. However, in the most recent year there was a significant drop of over 40% total participation in both regions. At this time, it is impossible to know if this is a change in the way figures were reported by organizations, a statistical anomaly, or a reflection of a broader trend.

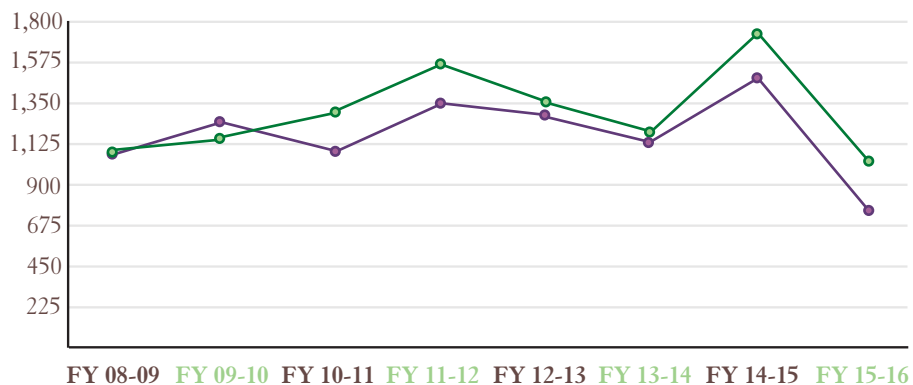
- California
- San Francisco Bay Area

## Paying Participation (median)



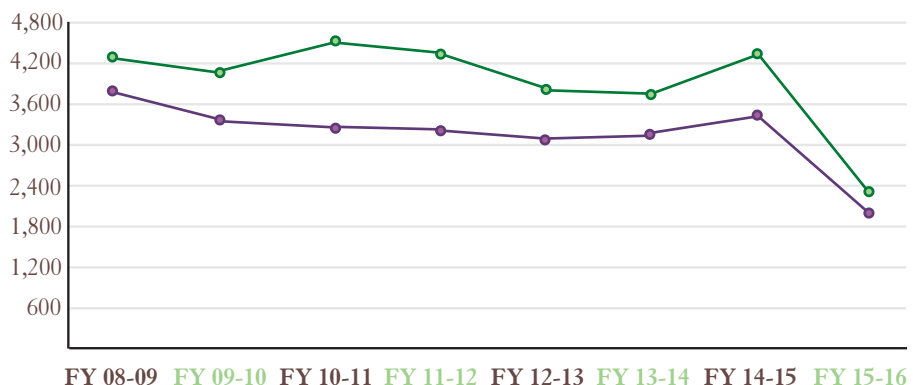
	California	SF Bay Area
FY 08-09	2,645	3,150
FY 09-10	2,113	2,984
FY 10-11	2,200	3,248
FY 11-12	1,888	2,785
FY 12-13	1,824	2,403
FY 13-14	2,050	2,511
FY 14-15	2,000	2,588
FY 15-16	1,200	1,351

## 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
FY 14-15	1,500	1,750
FY 15-16	773	1,035

## Total Participation (median)



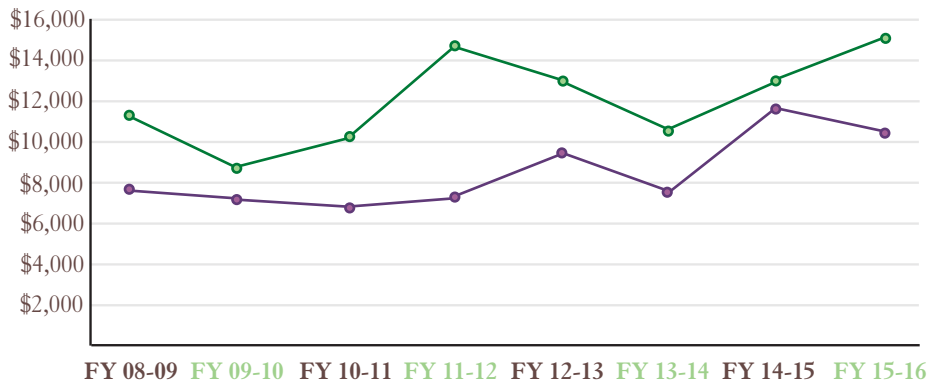
	California	SF Bay Area
FY 08-09	3,737	4,250
FY 09-10	3,347	4,134
FY 10-11	3,297	4,544
FY 11-12	3,202	4,348
FY 12-13	3,093	3,763
FY 13-14	3,195	3,711
FY 14-15	3,500	4,338
FY 15-16	1,973	2,386

# Key Benchmarks: Individual Donations

**Individual Donations** reflect the typical community donations made to a mid-sized dance organization, and are a meaningful indicator of measurable fiscal support from the community. Over the past eight years, total donations have fluctuated, but in general have modestly grown over time. In that same time period the number of donors has also steadily increased, meaning the average value of a donation in the past eight years has fluctuated yet remained relatively level (around \$240 statewide and \$245 in the SF Bay Area).

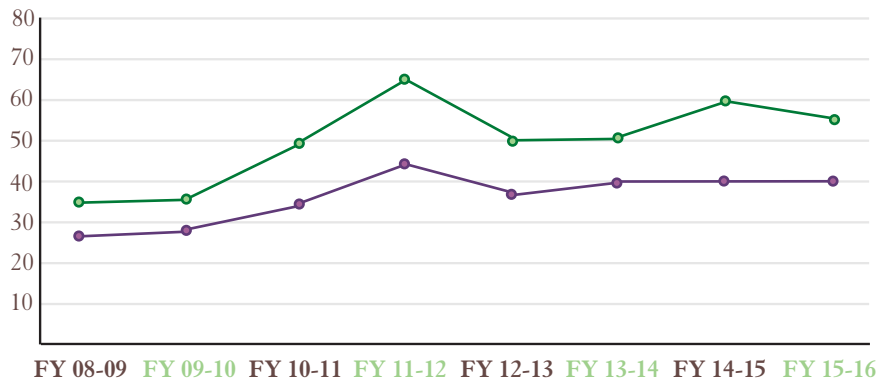
- California
- San Francisco Bay Area

**Total Individual Donations (median, adjusted for inflation)**



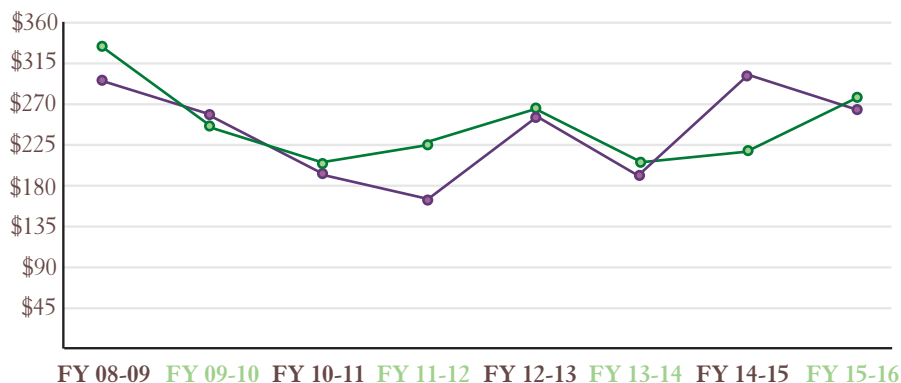
	California	SF Bay Area
FY 08-09	\$7,889	\$11,536
FY 09-10	\$7,368	\$8,789
FY 10-11	\$6,649	\$10,328
FY 11-12	\$7,465	\$14,587
FY 12-13	\$9,443	\$13,200
FY 13-14	\$7,684	\$10,501
FY 14-15	\$11,824	\$13,202
FY 15-16	\$10,530	\$15,302

**Total Number of Individual Donors (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
FY 14-15	40	60
FY 15-16	40	55

**Average Value of an Individual Donation (median, adjusted for inflation)**



	California	SF Bay Area
FY 08-09	\$292	\$330
FY 09-10	\$263	\$244
FY 10-11	\$196	\$207
FY 11-12	\$166	\$224
FY 12-13	\$249	\$264
FY 13-14	\$192	\$206
FY 14-15	\$296	\$220
FY 15-16	\$263	\$278



# Aggregate Data

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

In this report, medians are used to track health indicators rather than averages as this is a common practice when significant outliers are known to exist. This reduces the influence of outliers that otherwise skew results to an unacceptable degree, which we found in our data due to a few large budget organizations that significantly differed from the majority of entities.

We provide aggregate data below as a useful gauge of gross quantity of activity in the region, yet they can be subject to misunderstanding due to the impact of the largest-budget dance companies in the region. For example, in most years the three largest organizations represent nearly two thirds of the total aggregate revenue. Similarly, in FY 13-14 the massive growth in # of Individual Donors is entirely attributed to one new organization which reported 30,000 donors. Other aggregates are subject to the same caveat.

Financial aggregate figures have not been adjusted for inflation.

## San Francisco Bay Area:

	# of Profiles	Total Revenue	Personnel Expenses	Paying Participants	Non-Paying Participants	Individual Donations	# of Indiv. Donors
<b>FY 08-09</b>	91	\$69,742,073	\$55,833,142	897,845	879,418	\$16,020,115	16,674
<b>FY 09-10</b>	103	\$87,967,166	\$55,324,194	944,146	959,095	\$12,839,578	19,453
<b>FY 10-11</b>	99	\$93,570,134	\$56,762,191	926,490	889,835	\$12,404,385	18,655
<b>FY 11-12</b>	98	\$88,666,973	\$59,421,673	931,917	959,877	\$13,012,217	18,608
<b>FY 12-13</b>	105	\$100,844,626	\$56,578,687	870,730	994,089	\$18,591,235	20,316
<b>FY 13-14</b>	108	\$103,421,987	\$59,601,377	898,097	2,428,536	\$17,763,708	48,655
<b>FY 14-15</b>	95	\$91,336,499	\$60,155,762	752,043	982,932	\$14,972,295	19,460
<b>FY 15-16</b>	119	\$95,266,964	\$60,443,608	686,618	2,580,619	\$15,024,679	38,106

## California:

	# of Profiles	Total Revenue	Personnel Expenses	Paying Participants	Non-Paying Participants	Individual Donations	# of Indiv. Donors
<b>FY 08-09</b>	174	\$96,060,259	\$68,829,524	1,349,150	1,158,781	\$18,850,268	23,555
<b>FY 09-10</b>	186	\$113,938,120	\$68,418,067	1,344,335	1,253,947	\$15,530,895	27,567
<b>FY 10-11</b>	185	\$119,579,301	\$69,555,142	1,358,426	1,203,103	\$15,047,970	24,361
<b>FY 11-12</b>	182	\$116,358,321	\$73,568,153	1,347,658	1,202,994	\$15,245,125	24,407
<b>FY 12-13</b>	196	\$122,118,228	\$66,014,356	1,338,915	1,301,224	\$20,374,088	25,510
<b>FY 13-14</b>	197	\$123,810,527	\$68,713,157	1,531,163	2,720,437	\$19,315,212	53,840
<b>FY 14-15</b>	177	\$116,191,130	\$72,093,716	1,140,632	1,241,577	\$17,774,706	36,792
<b>FY 15-16</b>	220	\$122,610,645	\$73,691,912	990,603	2,986,750	\$18,179,772	44,721

# 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.** The team wishes to thank DataArts and the California Arts Council for supporting this study.

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](http://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](http://dancersgroup.org)

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**This project and Dancers' Group are funded by:** Bernard Osher Foundation, Bloomberg Philanthropies, California Arts Council, Fleishhacker Foundation, J.B. Berland Foundation, Kenneth Rainin Foundation, Koret Foundation, National Endowment for the Arts, San Francisco Arts Commission, San Francisco Grants for the Arts, Walter & Elise Haas Fund, William & Flora Hewlett Foundation and the Zellerbach Family Foundation.



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