

# A Portrait of the Cultural Ecosystem

## INTRODUCTION

For more than a year, the Sustain Arts research team has located, gathered, cleaned, reconciled, integrated, and analyzed more than a dozen highly relevant national, regional, and local data sets that collectively begin to tell a cogent story about the arts and cultural sector in the region. These data sets enable us to examine the interrelationships among organizations and their capitalization patterns, shifting demographics, and participation trends.

By bringing these types of data together, we can begin to see how sector growth and development does or does not align with demographic changes or emerging cultural preferences. And we can begin to see whether capitalization flows favor established or emerging cultural organizations and how broadly (or narrowly) they serve the cultural needs of the community.

The result is ***Sustain Arts/Bay Area: A Portrait of the Cultural Ecosystem***, a snapshot of key learnings from the 11 counties stakeholders agreed had the largest share of arts and cultural activity in the region: Alameda, Contra Costa, Marin, Monterey, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma. This portrait accompanies a state-of-the-art online platform that allows users to explore the data in-depth.

### THE DATA

Taken together, the data aggregated create a model of the sector with a level of detail previously unavailable. Establishing core trends across time provides local stakeholders with an empirical knowledge base and common language in which to ground substantive conversations about the future of the field. A comprehensive list of our data sources and definitions can be found at: [bayarea.sustainarts.org](http://bayarea.sustainarts.org).

### ABOUT SUSTAIN ARTS

A project of the Hauser Institute for Civil Society at Harvard University, in partnership with the Foundation Center and Fractured Atlas, Sustain Arts equips communities with meaningful data about arts and cultural activity, answering the critical questions: Who creates art and culture? Who participates? and How is it all funded?

### ON THE PLATFORM

Sustain Arts/Bay Area is composed of two resources, intrinsically linked by the arts and cultural data of the region. While ***A Portrait of the Cultural Ecosystem*** offers our view on the current health of the sector, it accompanies a dynamically updated, visual data platform that allows those interested the ability to mine for individualized insights on funding, place, and participation.

Throughout this document, we'll indicate places on the platform where data from this visual summary can be augmented to answer your unique questions.

### Explore Location

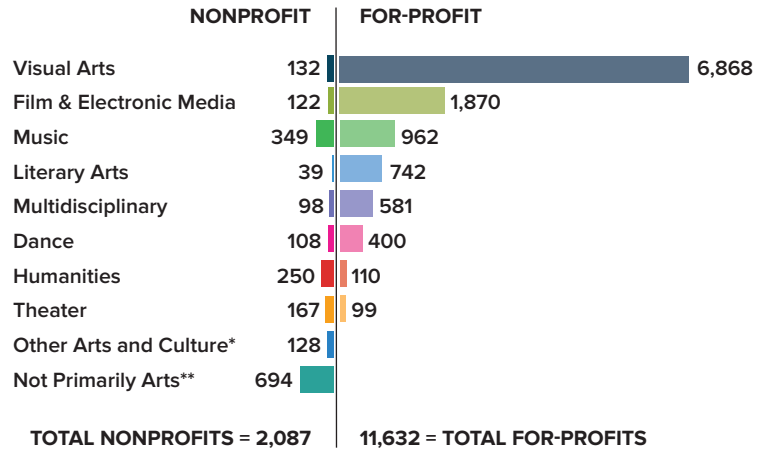


Use our interactive, online maps to discover the for-profit and nonprofit arts and cultural organizations in your Bay Area neighborhood.

## For-profit Organizations Dominate the Scene

There are more than five for-profit arts and cultural organizations for every nonprofit in the Bay Area.

### ARTS AND CULTURAL ORGANIZATIONS BY DISCIPLINE, 2012



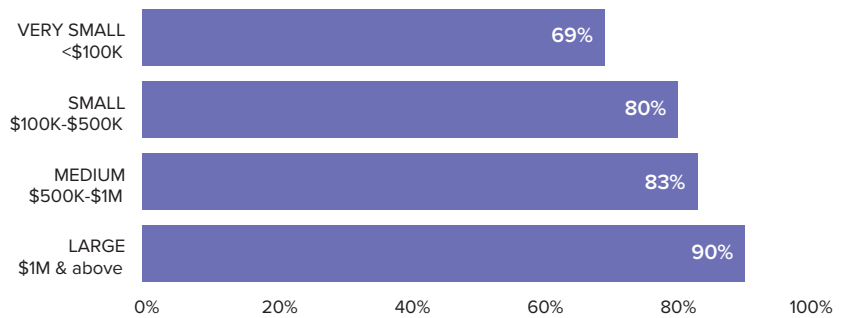
\* e.g., arts councils, arts centers  
 \*\* e.g., libraries, universities

DATA SOURCES: Guidestar, 2014 (nonprofit organizations). Includes organizations that filed an IRS Form 990 between 2011 and 2013. Infogroup, 2014 (for-profit organizations). Includes creative enterprises from InfoUSA's business database. There are 41 different arts and cultural industries that comprise the 11,623 for-profits in the Bay Area; the top five make up 50% of those and are: Architectural Services (1,674), Graphic Design (1,428), Commercial Printing (941), Independent Artists, Writers and Performers (905), and Photography Studios (904).

## One in Five Arts and Cultural Nonprofits Folded in the Past Decade

Smaller organizations were the least likely to survive. Are there natural limits or an optimal “carrying capacity” associated with the nonprofit arts ecosystem? Or, does a crowded creative sector serve as a stimulus for innovation?

### SURVIVAL RATES OF ARTS AND CULTURAL NONPROFITS BY SIZE, 2000-2010

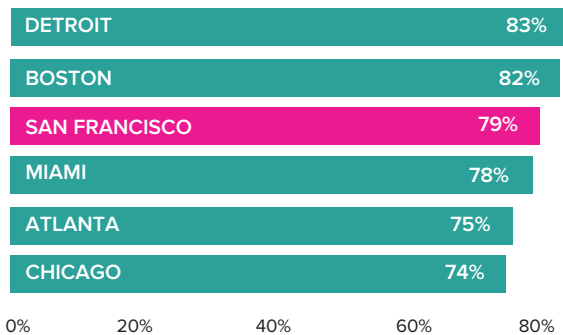


DATA SOURCE: National Center for Charitable Statistics, 2014. Includes organizations that filed an IRS Form 990 in 2000 with over \$50,000 in revenue.

# Survival Rates on Par with Other Cities

The turnover rate of arts and cultural organizations in San Francisco from 2000 to 2010 was comparable to other cities.

## SURVIVAL RATES OF ARTS AND CULTURAL NONPROFITS BY METROPOLITAN AREA, 2000-2010



DATA SOURCE: National Center for Charitable Statistics, 2013. Includes organizations that filed an IRS Form 990 in 2000 with over \$50,000 in revenue.

## ON THE PLATFORM

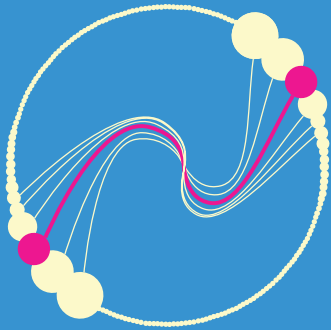
### Explore Organizations

Search bar with a magnifying glass icon and a text input field.

Sort by: [Dropdown menu]

Looking for a particular organization or to identify all those in your discipline? Try our advanced search and generate lists based on custom parameters.

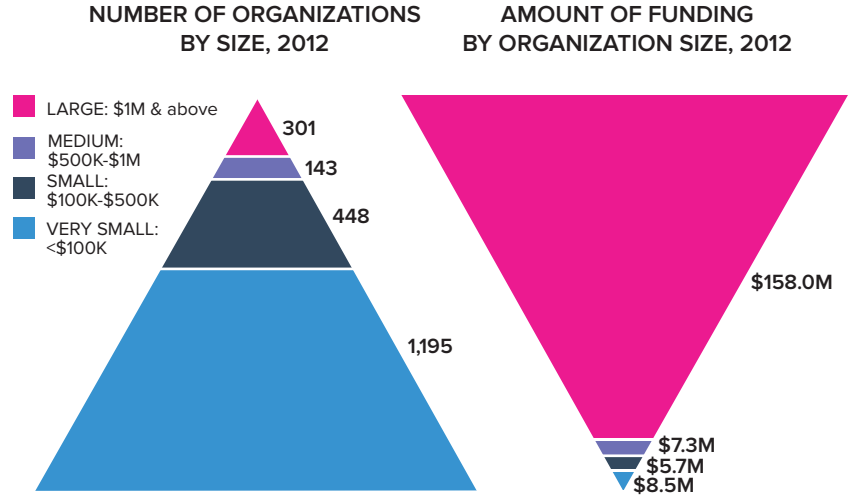
## Explore Funders and Recipients



Use our interactive chord diagram to view the link between nonprofits and institutional funders in the region. Filter by discipline, grantee budget size, location, and grant size.

## Funding is Unevenly Distributed

Less than 15 percent of nonprofits have budgets over \$1 million, but they receive over three quarters of foundation funding for the arts in the Bay Area. Is this the right balance for the arts and cultural ecosystem?

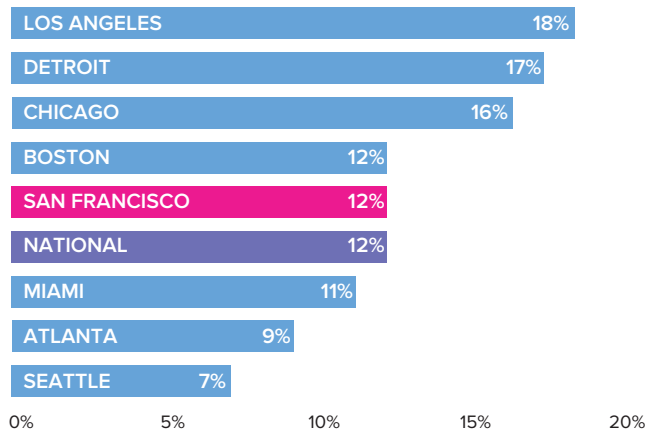


DATA SOURCES: Guidestar, 2014 (number of organizations). Includes organizations that filed an IRS Form 990 between 2011 and 2013. Foundation Center, 2013 (amount of funding). Based on all grants of \$10,000 or more awarded by a set of 50 U.S. foundations that were responsible for 85 percent of foundation giving for arts and culture in the region from 2004 through 2012. For community foundations, only discretionary grants are included. Grants to individuals are not included in the file nor are grants made by local, state or government agencies.

## Foundation Support in the Region in Line with the National Average

In 2012, of total foundation dollars awarded in each of eight metropolitan areas, San Francisco ranked fifth in the share of those dollars that go to arts and culture.

### SHARE OF METRO AREA FOUNDATION DOLLARS SUPPORTING ARTS AND CULTURE, 2011

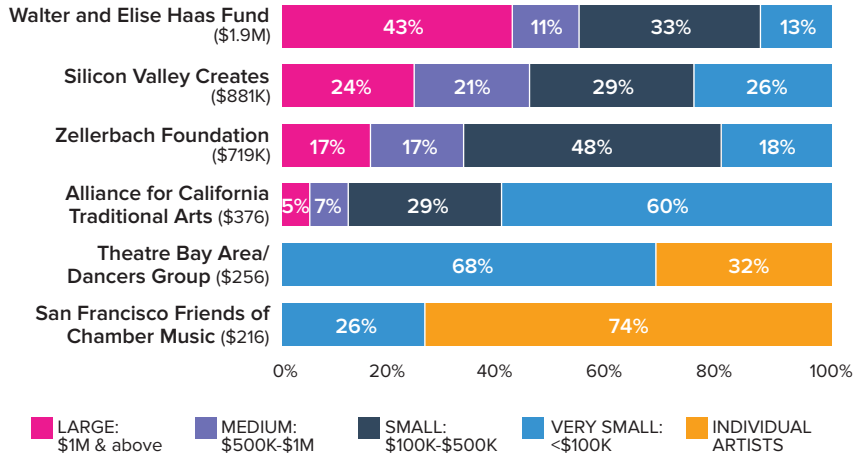


DATA SOURCE: Foundation Center, 2015. Based on all grants of \$10,000 or more awarded by a national sample of larger U.S. foundations. For community foundations, only discretionary grants are included. Grants to individuals are not included in the file.

# Re-Granting Supports Small Organizations

More than half of dollars re-granted by intermediary organizations support arts and cultural organizations with annual revenues of less than \$100,000.

## RE-GRANTING DOLLARS TO INDIVIDUALS AND ORGANIZATIONS BY SIZE OF RECIPIENT, 2011-2013

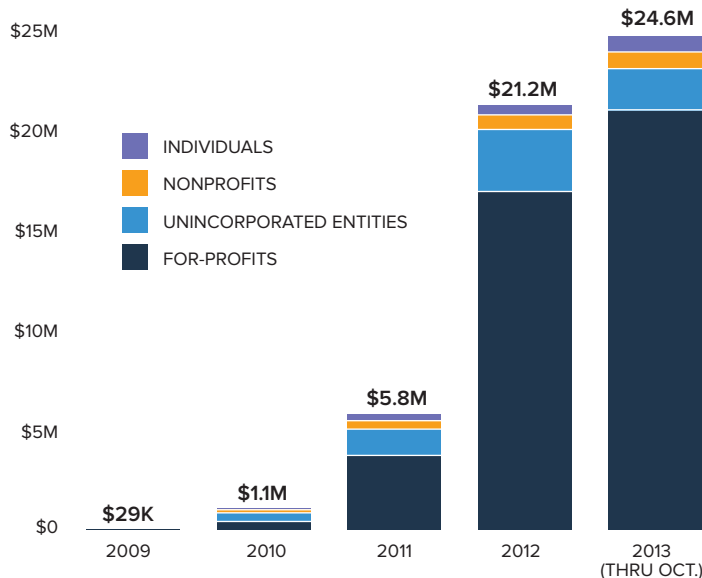


DATA SOURCE: Sustain Arts, 2014. There are a large number of nonprofits that serve as intermediaries for public and private funders interested in supporting individual artists, fiscally-sponsored projects, and organizations with small budgets. For the purposes of our analysis we have collected data on six regranting programs that either support projects across disciplines, make a large volume of grants each year, or provide large grant awards.

# Alternative Giving Vehicles, Such as Kickstarter, Are Making a Mark

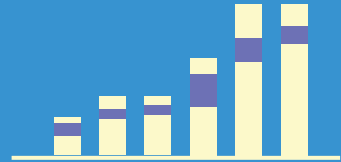
More than \$24.6 million was raised on the crowdfunding platform for arts and culture-related projects in the Bay Area in 2013.

## KICKSTARTER FUNDING FOR ARTS AND CULTURE, 2009-2013



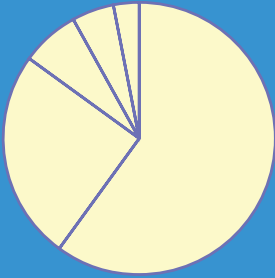
DATA SOURCE: Kickstarter, 2013. Includes funded projects in Sustain Arts' seven arts and cultural disciplines, as well as food, games, product design, and technology.

## Explore Funding by Discipline



View trends in total funding to different artistic disciplines over time.

Explore Demographics

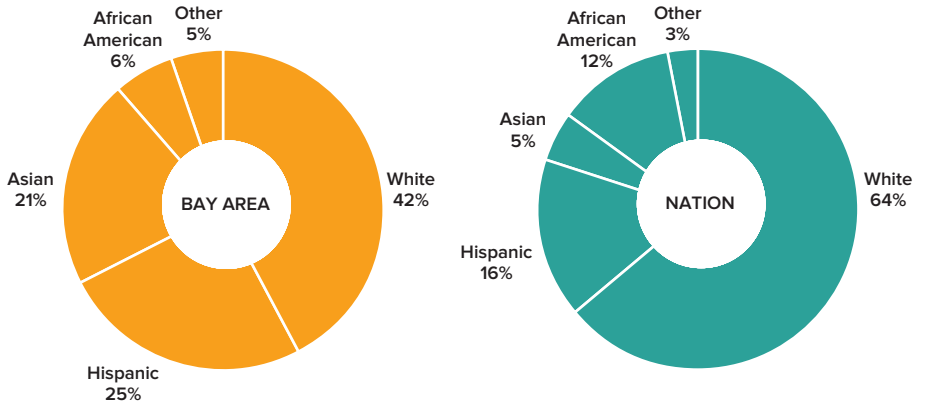


Target zip codes of interest to view that neighborhood's evolving participation trends and demographics.

# People of Color Make Up More Than Half of the Bay Area Population

The Bay Area is demographically diverse—people of color make up 58 percent of the population, as compared to 36 percent of the nation as a whole.

DEMOGRAPHICS OF THE SAN FRANCISCO BAY AREA, 2010

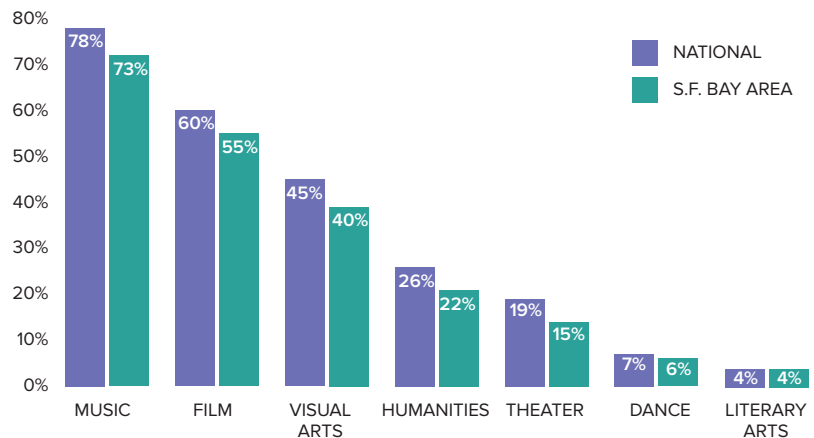


DATA SOURCES: PolicyMap, 2013 (Bay Area). United States Census Bureau, 2015 (National).

# Regional Arts Participation May Lag Behind Nation

Demographic analyses suggest that arts participation rates in the Bay Area may lag behind national averages. Comparing demographics and related participation rates of national arts audiences to those in the region suggests public demand for theater, humanities, and dance may be lower than the nation.

ESTIMATED NATIONAL AND REGIONAL PARTICIPATION RATES IN ARTS AND CULTURAL ACTIVITIES, 2010

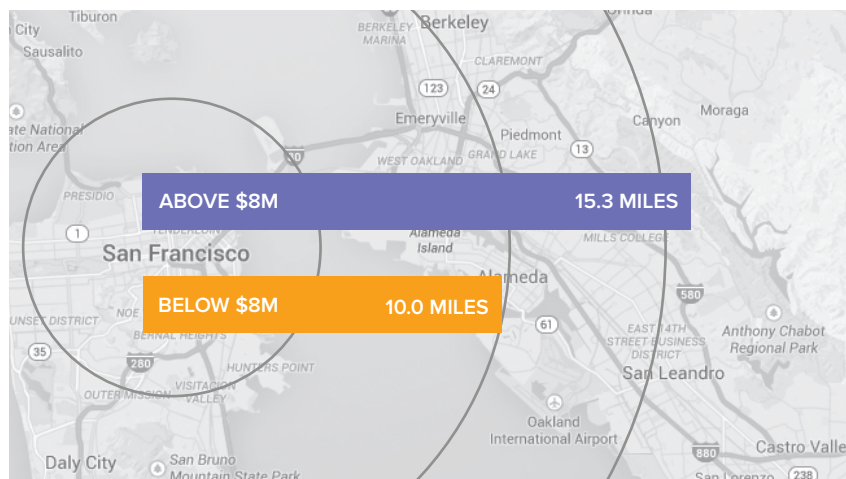


DATA SOURCE: National Endowment for the Arts' Survey of Public Participation in the Arts, 2012.

# Larger Organizations Draw Audiences From a Larger Geographical Area

On average, Bay Area residents travel 14 miles to visit nonprofit arts and cultural organizations. The larger the organization, the further Bay Area residents will travel to visit it.

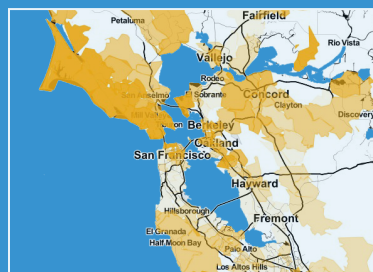
## AVERAGE DISTANCE TRAVELED TO ARTS ORGANIZATIONS BY SIZE, 2014



DATA SOURCE: TRG Arts Community Database, 2014. For 116 nonprofit arts and cultural organizations in the Bay Area, includes household location of ticket buyers, members, donors, volunteers, subscribers, class participants, and general visitors.

## ON THE PLATFORM

### Explore Participation



View participation by discipline and zip code to understand the demand for arts and culture in the region.

Visit the project at [sustainarts.org/bay-area](https://sustainarts.org/bay-area)

 **sustainarts** is a project of

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