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.

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?
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

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Nonprofit</th>
<th>For-Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual Arts</td>
<td>132</td>
<td>6,868</td>
</tr>
<tr>
<td>Film &amp; Electronic Media</td>
<td>122</td>
<td>1,870</td>
</tr>
<tr>
<td>Music</td>
<td>349</td>
<td>962</td>
</tr>
<tr>
<td>Literary Arts</td>
<td>39</td>
<td>742</td>
</tr>
<tr>
<td>Multidisciplinary</td>
<td>98</td>
<td>581</td>
</tr>
<tr>
<td>Dance</td>
<td>108</td>
<td>400</td>
</tr>
<tr>
<td>Humanities</td>
<td>250</td>
<td>110</td>
</tr>
<tr>
<td>Theater</td>
<td>167</td>
<td>99</td>
</tr>
<tr>
<td>Other Arts and Culture*</td>
<td>128</td>
<td></td>
</tr>
<tr>
<td>Not Primarily Arts**</td>
<td>694</td>
<td></td>
</tr>
<tr>
<td><strong>Total Nonprofits</strong></td>
<td>2,087</td>
<td><strong>11,632</strong></td>
</tr>
</tbody>
</table>

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


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

<table>
<thead>
<tr>
<th>Size</th>
<th>Survival Rate</th>
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<tbody>
<tr>
<td>Very Small</td>
<td>69%</td>
</tr>
<tr>
<td>Small</td>
<td>80%</td>
</tr>
<tr>
<td>Medium</td>
<td>83%</td>
</tr>
<tr>
<td>Large</td>
<td>90%</td>
</tr>
</tbody>
</table>

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.

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

Number of Organizations by Size, 2012

- LARGE: $1M & above
- MEDIUM: $500K-$1M
- SMALL: $100K-$500K
- VERY SMALL: <$100K

San Francisco

AMOUNT OF FUNDING BY ORGANIZATION SIZE, 2012

- <$1M: $5.7M
- $1M & above: $8.5M
- TOTAL: $158.0M

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

- LOS ANGELES: 18%
- DETROIT: 17%
- CHICAGO: 16%
- BOSTON: 12%
- SAN FRANCISCO: 12%
- NATIONAL: 12%
- MIAMI: 11%
- ATLANTA: 9%
- SEATTLE: 7%

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

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<tbody>
<tr>
<td>Walter and Elise Haas Fund ($1.9M)</td>
<td>13%</td>
<td>33%</td>
<td>11%</td>
<td>43%</td>
</tr>
<tr>
<td>Silicon Valley Creates ($881K)</td>
<td>26%</td>
<td>29%</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Zellerbach Foundation ($719K)</td>
<td>18%</td>
<td>48%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Alliance for California Traditional Arts ($376K)</td>
<td>32%</td>
<td>60%</td>
<td>29%</td>
<td>5%</td>
</tr>
<tr>
<td>Theatre Bay Area/Dancers Group ($256)</td>
<td></td>
<td>68%</td>
<td>7%</td>
<td>24%</td>
</tr>
<tr>
<td>San Francisco Friends of Chamber Music ($216)</td>
<td>74%</td>
<td>26%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

Sustain Arts/Bay Area | Foundation Center
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

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

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

- **ABOVE $8M**: 15.3 MILES
- **BELOW $8M**: 10.0 MILES

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.