

State of NYC Dance

Who

Where

What

How

And How Much?

November 2011

dance
A BRANCH OF DANCE/USA
NYC

ACKNOWLEDGMENTS

This study was made possible by generous contributions from the Rockefeller Brothers Fund and The New York Community Trust.

Dance/NYC's research is supported, in part, by the Mertz Gilmore Foundation and the City of New York, Michael R. Bloomberg, Mayor, and the New York City Council, Christine C. Quinn, Speaker, through the Department of Cultural Affairs, Kate D. Levin, Commissioner.

The data used for this report was provided by the Cultural Data Project ("CDP"), a collaborative project of the Greater Philadelphia Cultural Alliance, The Greater Pittsburgh Arts Council, Pennsylvania Council on the Arts, The Pew Charitable Trusts, The William Penn Foundation and The Heinz Endowments. The Cultural Data Project was 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 Dance/NYC and does not reflect the views of the Cultural Data Project. For more information on the Cultural Data Project, visit www.culturaldata.org.



This program is supported, in part, by public funds from the New York City Department of Cultural Affairs, in partnership with the City Council.



The program is made possible by the New York State Council on the Arts with the support of Governor Andrew Cuomo and the New York State Legislature.

Dance/NYC

Lane Harwell, Director @flashlane
Lacey Althouse, Operations Manager

www.dancenyc.org
218 East 18th Street, 4th floor
New York, NY 10003
Phone: (212) 966-4452
Fax: (212) 988-4452



Prepared by:

Catherine Lanier, Research Consultant
Lori Byargeon, Designer

In partnership with the Municipal Art Society of New York, Vin Cipolla, President, and Anne Coates, Vice President, and with the Alliance for the Arts, Randall Bourscheidt, President Emeritus.

Dance/NYC is a branch of Dance/USA (www.danceusa.org), the national service organization for professional dance, Amy Fitterer, Executive Director.

Dance/NYC's mission is to sustain and advance the professional dance field in New York City—serving as the voice, guide and infrastructure architect for all local dance artists and managers. Dance/NYC achieves this mission through advocacy, research and convening. For Dance/NYC research, including the *Economic Impact of Dance in New York City* and the *Census of New York City Dancemakers*, visit www.dancenyc.org

Honorary Circle: Gina Gibney, Virginia Johnson, Sharon Luckman, Tina Ramirez,
Linda Shelton, Robert Yesselman, Jawole Willa Jo Zollar

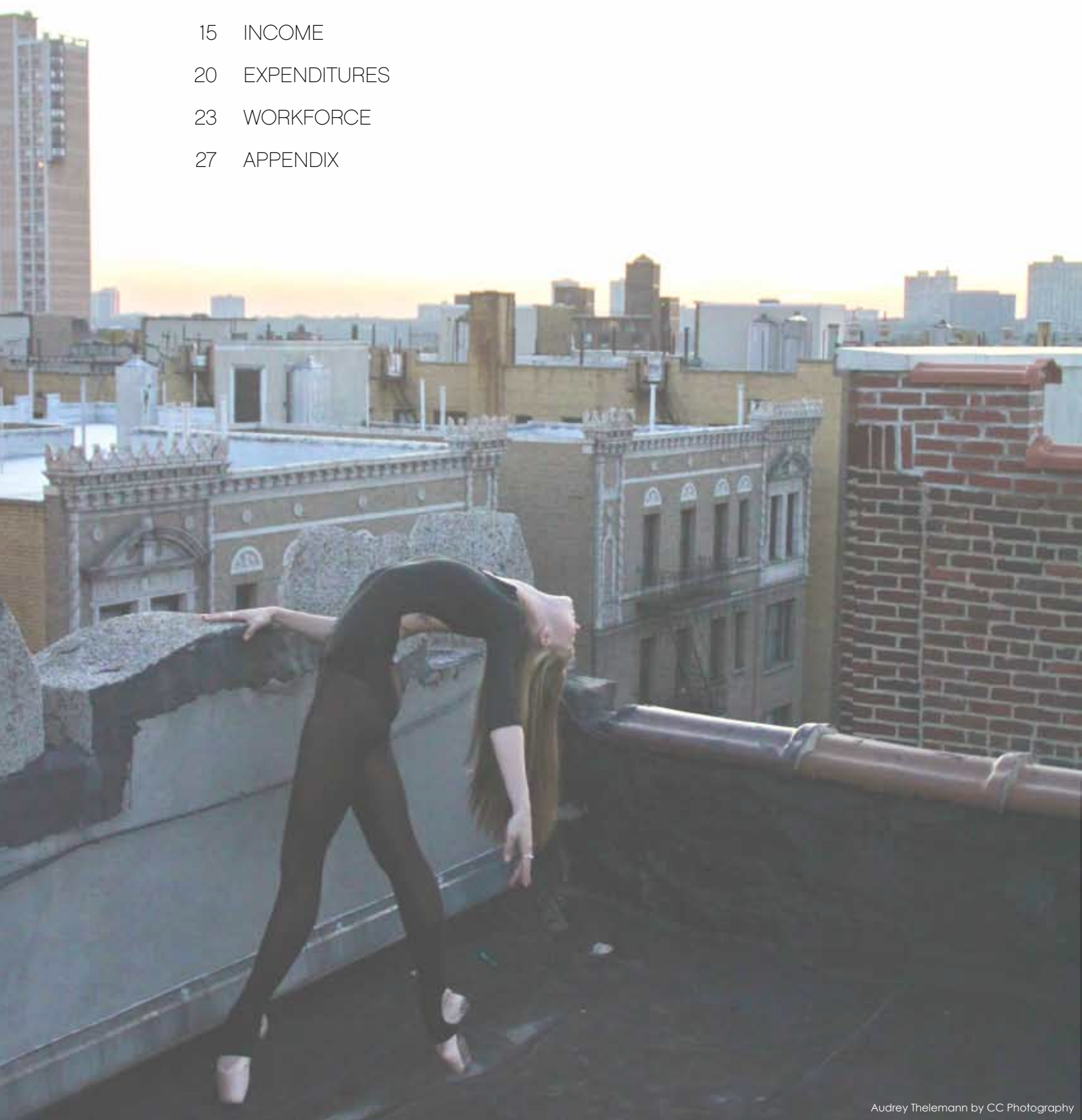
Advisory Committee: Ellen Bar, Jonah Bokaer, Dick Caples, Beverly D'Anne, Alberto Dennis, Ana Marie Forsythe,
Roland Gebhardt, David Harrison, Mark Kirschner, Harold Norris, Jill Sigman, Martin Wechsler, Sharon Williams

Junior Committee: Justina Gaddy, Benn Rasmussen, Lori Byargeon, Hollis Bartlett, Caroline Walthall, Kathleya Afandor, Marisa Ballaro, Eveline Chang, Eveline Chang, Erica Frankel, Leeanne G-Bowley, Brigid Greene, Maria Hanley, Sydnie Mosley,
Jessica Nowaski, Kaley Pruitt, Kaylen Ratto, Gary Schaufeld, Kate Wilfert, Michele Wilson, Caitlin Yuhas

State of NYC Dance

TABLE OF CONTENTS

3	INTRODUCTIONS
5	STUDY SAMPLE & METHODOLOGY
8	REPORT HIGHLIGHTS
10	ACTIVITY
15	INCOME
20	EXPENDITURES
23	WORKFORCE
27	APPENDIX



INTRODUCTION

Nuanced research on the impact of arts and culture on our economy and quality of life is essential but difficult to come by. The State of New York City Dance report, utilizing information from the Cultural Data Project, is a significant contribution to our understanding of how dancers and dance organizations are making a deep impact on our City.

Taking a thoughtful approach, the study highlights the complex challenges facing this community, as well as its many accomplishments. By offering a detailed analysis of so many aspects of the dance industry – from the performers to the producers to the audiences – this report delineates many significant contributions to the City's creative ecology.

Congratulations to Dance/NYC for once again helping to shape the dialogue around dance and its role in our larger cultural sector.

Kate D. Levin
Commissioner
New York City Department of Cultural Affairs

INTRODUCTION

The study you are about to read is the most ambitious contribution to our understanding of dance in New York City since Dance/NYC's *Census of New York City Dancemakers* (2007). Using the first-ever New York State Cultural Data Project (CDP) data, the analysis establishes key benchmarks for measuring the activity, economics and workforce of nonprofit dancemakers with budgets of more than \$25,000. But it is only a step in an ongoing process to gauge the state and opportunity for dance, and to guide policy, funding and industry management, strengthening the future of dance in New York City.

Study findings underscore the value of nonprofit dance as a contributor to and an ambassador for our City, with thousands of performances locally and on tour, hundreds of new works and millions in attendance. Total aggregate expenditures of groups analyzed are \$231 million—healthy contributions to our economy and powerful returns on investment.

Findings demonstrate industry resourcefulness in attracting diverse revenue streams—public, private and earned—and its efficiency in putting resources to work in dancemaking, with more than 70% of expenditures going to programs. City, State and Federal funding are critical to dancemakers of all sizes—a message all of us can carry to our representatives. (The City of New York is the most significant source of government funding for every budget category—a reality we expect to hold with the 2012 budget.) The relative power, and heroism, of a handful of private foundations supporting nonprofit dance is especially clear when we look at the portfolios of smaller groups. For any funder considering entering the market—join us!—there is opportunity for industry-wide, high-impact investment.

The CDP yields fresh insights on the industry's reliance on part-time, contract and volunteer labor, the all too invisible hands that subsidize and keep dance vibrant. I would speculate that these workforce dynamics—to be explored in depth in a forthcoming Dance/NYC Junior Committee report on dance workers ages 21 to 35—are a sign both of the times and of the height of dedication unique to our industry.

Finally, I can enthusiastically report on a strong start-up culture in dance, particularly among dancemakers with budgets less than \$100,000. As indicated by their income diversity, use of in-kind resources and barter economies, and disproportionately high level of new creation—premieres and commissioned work—creativity and entrepreneurship are alive.

As I said, this study is a step in an ongoing investigation of the state of dance, continuing Dance/NYC's legacy of pioneering research. Future studies will extend nonprofit findings to individual artists and alternative groups, which, as the 2007 Census tells us, comprise the lion's share (more than 50%) of 1,000-1,200 local dancemakers. This kind of research, as the foundation for advocacy, is more important now than ever before as dancemakers respond to an evolving socioeconomic arena and seek new strategies for their operations, revenues and audiences.

What you are about to read represents a team effort. On behalf of Dance/NYC and of Dance/USA, the national service organization for professional dance, I am proud to thank the project's funders: Rockefeller Brothers Fund, The New York Community Trust and the New York City Department of Cultural Affairs (DCA). I thank our research consultant Catherine Lanier for her diligence, attention to detail and the love she has found for dance in the course of this study; our research partners, the Alliance for the Arts and the Municipal Art Society, Anne Coates, Vice President; the Department of Cultural Affairs for its stewardship; and Jimmy van Bramer, Chairperson, Cultural Affairs Committee, New York City Council, for joining 150 dance artists and managers for a discussion of preliminary findings at a September 12, 2011, town hall.

With thanks also, dear reader, for all you do for NYC dance. Onward.



Lane Harwell
Director, Dance/NYC

STUDY SAMPLE AND METHODOLOGY

This report highlights findings on New York City nonprofit dance that have been developed using information from the New York State Cultural Data Project (CDP). The CDP offers detailed information on the finances, programs and employment in arts and culture, much of which has never been collected in a systematic way before. A list of data fields from the CDP used in this analysis is presented in the appendix.

The report includes all New York City-based organizations self-identifying as dance specific with annual budgets of more than \$25,000 that completed a “review complete” CDP profile for FY 2009 or 2010 by the time the study was conducted. All figures are for organizations’ 2009 or 2010 fiscal year, whichever is the earliest available. While the focus of this research is on dancemakers, the sample also includes presenters, educational institutions and service organizations all concentrating on dance. These categories are somewhat indistinct, with, for example, some presenters offering programs comparable to service organizations and some dancemakers providing substantive educational programs.

Two-Tier Sample

The study sample is two-tiered, comprised of an analytical base and a full, updated sample. The analytical base is built on information from 103 dance organizations made available to Dance/NYC on May 19, 2011. The sample was updated to include 24 additional organizations whose data became available as of October 7, 2011.*

While the additional data received in October does not change the overall patterns we saw in the analytical base, we nonetheless saw it as important to include them in a second tier to better represent the breadth and impact of New York City nonprofit dance.

The reader should note that the samples used alternate throughout the report. The full, updated sample provides the most complete picture of the absolute expenditures levels, and measures of activity including performances, attendance and new creation, while the analytical base demonstrates how the patterns of activity and sources and uses of funds vary within the sector. The table below details the numbers of groups of various types in the analytical base and full sample.

Composition of the CDP Sample

Type	Analytical Base	Full Sample
Dancemaking	81	99
Presenting	6	8
Educational	8	11
Service	8	9
Total	103	127

The CDP data provide rich detail on a broad sample of New York City dance organizations. It is not a census, however, and does not represent some important components of the dance industry.

*The CDP’s review process requires participants to respond to data inquiries from the CDP, if any, before their information is “review complete” and available to researchers.



Gregory Dolbashian, photo by Jennifer Jones

State of NYC Dance



The CDP is a new initiative that has gained wide acceptance in the field, but the smallest organizations and those without 501(c)3 status are as yet underrepresented. While the 2007 Census of New York City Dancemakers surveyed 197 dancemakers with annual budgets less than \$25K, for example, there were too few groups in the CDP sample with budgets less than \$25K to analyze, so this budget category was omitted. Similarly, while the 2007 Census showed fewer than half of the dancemakers in New York City were 501(c)3 corporations, all of the groups in the CDP sample had 501(c)3 status, so fiscally sponsored artists and organizations are not part of this analysis. It is anticipated that as the CDP grows, more of these organizations will participate and offer a more robust sample of the entire field of dance.

Other parts of the dance world fell outside the parameters of this analysis, specifically:

- Individual dance artists
- Commercial groups
- Multi-, interdisciplinary or other groups not self-identifying as dance organizations
- Dance presenters including the City-owned Brooklyn Academy of Music, Lincoln Center for the Performing Arts and New York City Center that encompass other disciplines as well as dance
- Dancemakers from elsewhere coming to New York City to perform

Dancemakers Analyzed

The analytical base from the CDP, comprised of 103 nonprofit dance organizations, represents a rich cross-section of groups in the dance universe. The 81 dancemakers at the core of this analysis vary in a multitude of artistic ways, and in terms of their economics they vary to a great degree by the size of the organization. The analysis is based on stratifying the sample into the following annual budget ranges.

Budget ranges	Organizations
More than \$5M	6
\$1M–\$5M	9
\$500,000–\$999,999	8
\$100,000–\$499,999	30
\$25,000–\$99,999	28
Total	81

The CDP data for budget ranges reveal a great deal about the differences in the operations of dancemaking organizations of varying sizes. It is important to note, however, that with this sample size certain categories are not as robust as others, especially in the \$1M–\$5M and \$500K–\$999K ranges. The findings in these budget categories should be understood as describing an important segment of dancemakers in these budget ranges rather than representing all dancemakers of the given budget size.



Dance/NYC State of NYC Dance Town Hall

Monday September 12, 5:30–7:00 pm, 92nd Street Y Harkness Dance Center

Findings based on the analytical sample were presented at a Dance/NYC town hall on September 12, 2011. Edward Henkel, Assistant Director, 92nd Street Y Harkness Dance Center; Lane Harwell, Director, Dance/NYC; and Jimmy van Bramer, Chairperson, Cultural Affairs Committee, New York City Council, made opening remarks. Research Consultant Catherine Lanier presented findings, and Anne Coates, Vice President, Municipal Art Society, led a discussion among the attendees.

Of more than 150 attendees, approximately two-thirds were dancemakers or dancemaker representatives. Of that group, approximately half were nonprofit dancemakers. Additional attendees included arts researchers, consultants, funders and representatives from the City of New York.

The town hall was not only an opportunity to give the field a sneak preview of our findings, but also to generate dialogue grounded in this research. Select discussion comments are included throughout the report, pointing to opportunities for improved policy, funding and industry management, as well as to trajectories for further reflection and research.

See the town hall video at:
<http://vimeo.com/31107022>

Dance/NYC convenings are made possible, in part, by public funds from the New York City Department of Cultural Affairs, in partnership with the City Council. They are also made possible by the New York State Council on the Arts with the support of Governor Andrew Cuomo and the New York State Legislature, and by the National Endowment for the Arts.



photo by Samantha Siegel

Catherine Lanier, Research Consultant; Anne Coates, Vice President, Municipal Art Society; Jimmy van Bramer, Chairperson, Cultural Affairs Committee, New York City Council; Lane Harwell, Director, Dance/NYC; Ben Rodriguez-Cubenas, Program Director, New York City, Rockefeller Brothers Fund



photo by Samantha Siegel

"I can't think of another time when folks from such myriad aspects of the community would gather—artists, funders, educators, presenters, researchers, administrators, etc."
—Participant, Town Hall

REPORT HIGHLIGHTS

“The data create an opportunity to tell a story in context. Look at your own organization and compare it to a picture of what’s happening in New York. Find your budget category and see how you fit in and then use that to talk to your boards, your staff, and your funders and get better at telling your story.”

—Victoria Smith, Dance/USA Manager of Research, Town Hall

DANCE AS ECONOMIC ENGINE*

The total annual expenditures of the 127 dance organizations represented in the full sample are \$230.7 million—a healthy contribution to the economy. This number breaks down as follows:

- \$192.0M Expenditures for 99 Dancemakers
- \$13.2M 8 Presenters
- \$21.6M 11 Educational
- \$3.9M 9 Service organizations

INCOME SOURCES BY BUDGET SIZE

Income sources vary significantly by group size in the analytical sample of 81 dancemakers.

- Earned income is the dominant source for organizations with budgets of more than \$500K.
- Private contributions are the most important source for dancemakers in the \$25K–\$499K range.
- Government funding is important to dancemakers of all budget sizes.

PRIVATE INVESTMENT

Findings show how vital a handful of foundations are to the City’s dance ecology.

- Dancemakers in the \$100K–\$999K budget ranges receive almost half of their contributed income from foundations.
 - Dancemakers in the \$500K–\$999K range are funded by an average of 6 foundations.
 - Dancemakers in the \$100K–\$499K range are funded by an average of 4 foundations.
- On average, these dancemakers are receiving one-quarter of their total income from this source.

NYC DANCEMAKER ACTIVITY*

New York City’s dancemakers as represented by the 99 organizations in the full sample are vibrant contributors to and ambassadors for the City with activity of:

- 1,576 Performances in New York City
- 1,312 Performances on tour
- 2.1M Paid attendance
- 234 Premieres
- 99 New works commissioned

EARNED INCOME

Findings reveal the resourcefulness of dancemakers in generating earned income.

- New York City ticket sales are the primary source of earned income for dancemakers with budgets of more than \$5M.
- Dancemakers with smaller budgets have attracted diverse sources of earned income from touring to contracted services and tuition/workshops.

ROLE OF PUBLIC FUNDING

Findings indicate the importance of City, State and Federal funding to New York City dancemakers.

- The City of New York through the Department of Cultural Affairs is the most important source of government funding in every budget range.
- State funding through the New York State Council on the Arts increases as a percent of government funding as budget size decreases, making it of great importance to the smallest groups.

*Aggregate activity and expenditure findings are based on the full CDP sample of 127 dance organizations, including 99 dancemakers. All other data is based on the analytical sample of 103 dance organizations, including 81 dancemakers.

FINANCIAL CHALLENGES

Aggregate dancemaker revenue exceeds expenditures, but by a very narrow margin, and many dancemakers operate in the red.

STRONG START UP CULTURE

The data on the smallest groups (\$25K–\$99K) reveal a strong start-up culture, as demonstrated by:

- Diverse income portfolios
- Significant in-kind resources—barter economy
- Relatively low numbers of full- and part-time staff
- High use of independent contractors/volunteers
- High level of new creation—premieres and commissions

OPPORTUNITY TO POOL ADMINISTRATIVE RESOURCES

General and administrative expenditures increase as a share of expenditures from 9.9% for the largest dancemakers (budgets of more than \$5M) to over 22% for dancemakers with budgets less than \$500K, which may signal economies of scale and an opportunity for smaller groups to pool administrative resources.

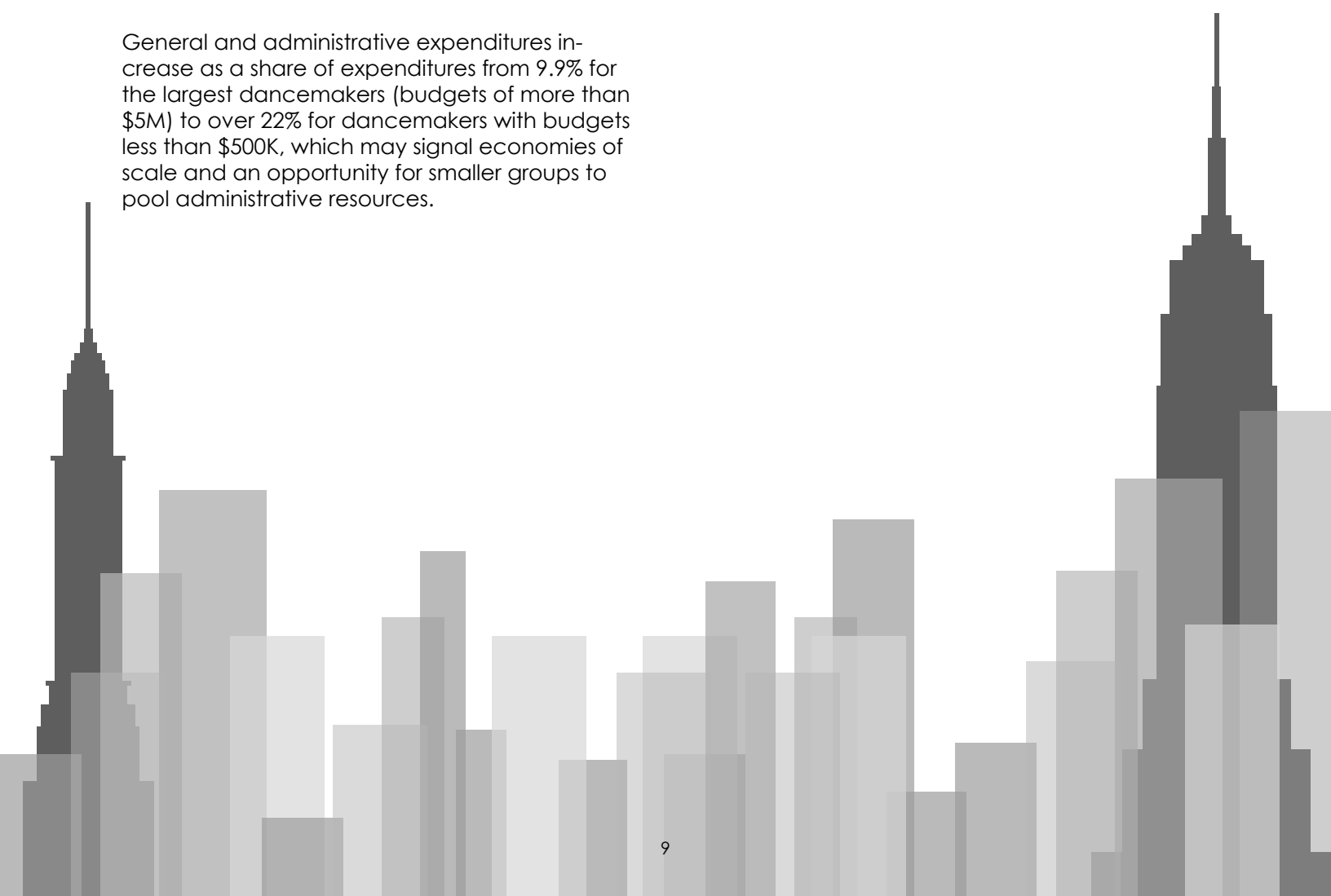
DANCE WORKFORCE

The workforce is hugely reliant on part-time, contract and volunteer employees—the all too invisible hands that subsidize and keep the industry vibrant. This may be a sign both of the times and a challenged economy, and of the height of dedication unique to the industry.

SIMILARITIES TO THE WIDER ARTS INDUSTRY

The data on New York City dance indicate strong similarities to the wider arts and cultural industry as described in Alliance for the Arts' studies, especially in terms of:

- Geography, with a large majority of all non-profit groups based in Manhattan
- Aggregate expenditures by budget size (81% of the dance total is tied to 6 dancemakers with budgets of more than \$5M)
- Meeting the imperative for earned income, which has fueled growth in the nonprofit arts since the early 1980s



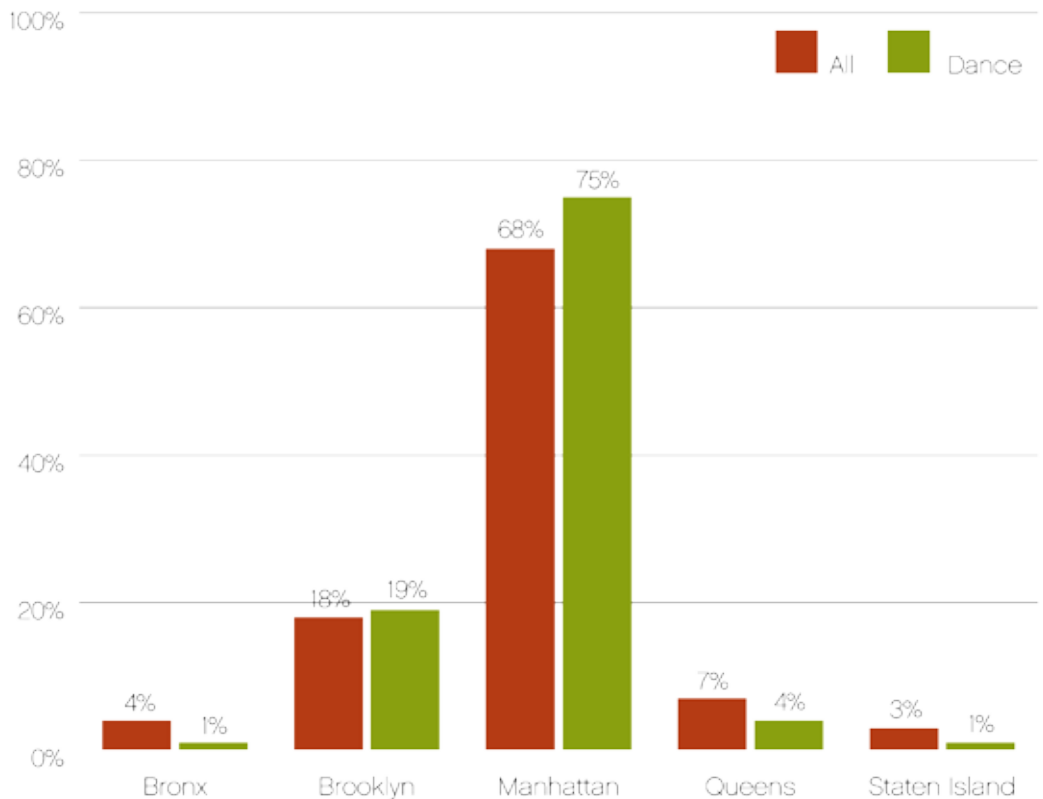
State of NYC Dance

WHERE AND WHAT? NYC DANCE ACTIVITY

Location of NYC Dance Organizations

Three-quarters of the 103 New York City dance organizations in the analytical sample are headquartered in Manhattan, with most of the remaining (19%) in Brooklyn. Approximately 4% are located in Queens and 1% in both the Bronx and Staten Island. This sample includes presenters, educational institutions and service organizations, as well as the dancemakers who are the focus of this research. As indicated by a comparison to data from the Alliance for the Arts' *State of the Arts* (June 2011), the location of dance organizations is similar to that of nonprofit arts organizations of all disciplines. This distribution with its concentration in Manhattan refers to the organizational home only, not to where dance workers or audiences live, or even where dance is performed.

NYC Art Organizations by Borough



Alliance for the Arts, *State of the Arts: Summary Overview for NYC*, June 2011.

"The workforce, audiences and their performances are not necessarily in Manhattan. They're not!"
—Participant, Town Hall

"Where are artists working? This goes directly to questions about things like retaining work spaces in the boroughs."
—Participant, Town Hall

Performances and Attendance

New York City's dancemakers in the full sample, as represented by the 99 organizations, are vibrant contributors to and ambassadors for the City, as evidenced by more than 1,500 performances annually in New York City and almost as many performances elsewhere. New York City dancemakers attract more than two million paying attendees.

Dancemaker Activity

- 1,576 Performances in New York City
- 1,312 Performances on tour
- 2.1M Paid attendance
- 234 Premieres
- 99 New works commissioned

"There is a lot of activity out there that is by definition under the radar because it's not organized in nonprofit corporations."
—Participant, Town Hall

"It would also be good to compare our information to, for instance, London or Paris."
—Participant, Town Hall

"YES, we need to be thinking global."
—Lane Harwell, Presenter, Town Hall, in response

State of NYC Dance

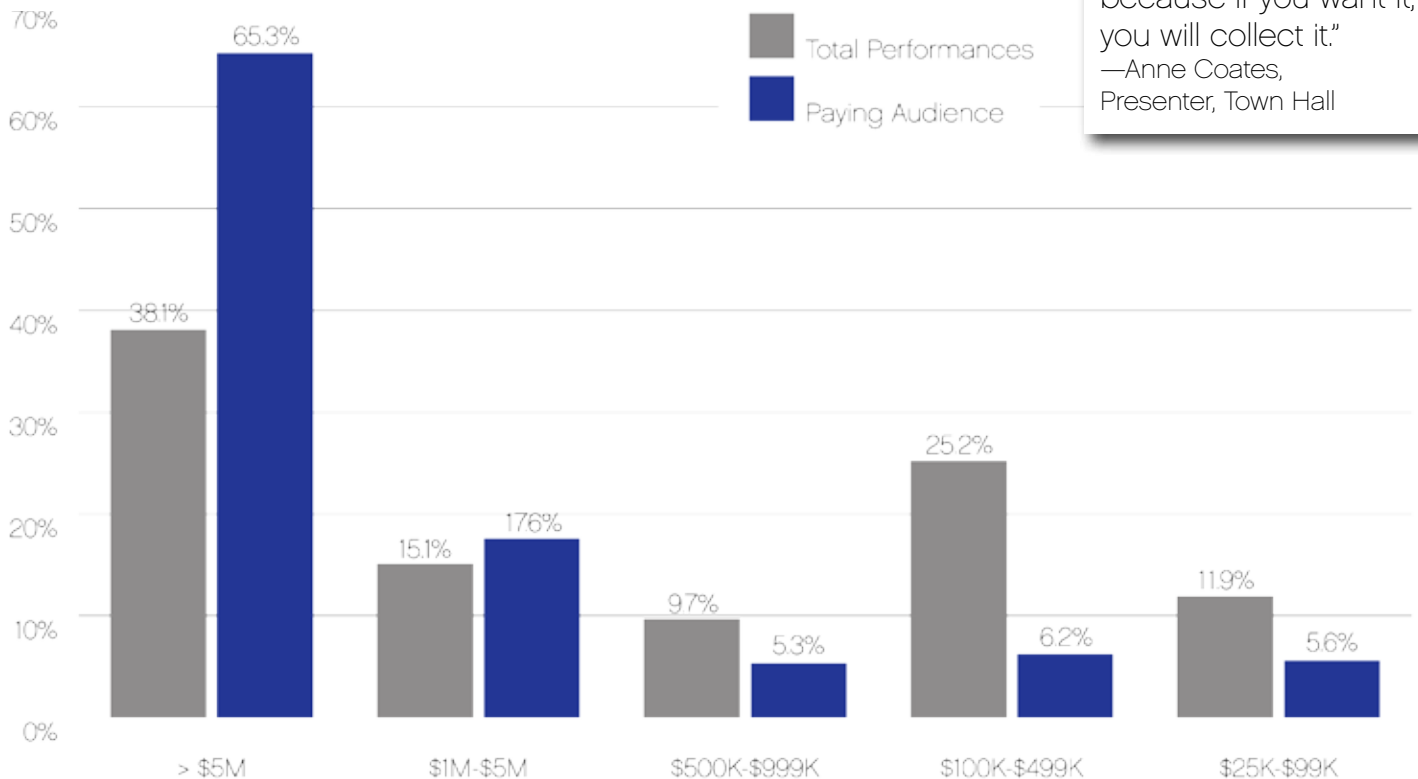


Kostas Papamaththeakis and Dwain Travis by CC Photography

The analytical sample of 81 dancemakers demonstrates how performances, whether at home or away, and their paying audiences are dispersed across the sector. The larger organizations stage performances for audiences that are much greater in size, on average, than those of their smaller counterparts.

- Dancemakers with budgets of more than \$5M account for 38% of all performances, but 65% of the paid attendance. The average performance attendance in this budget range is 1,155.
- Those with budgets of \$1M–\$5M account for 15% of performances and 18% of attendance. The average attendance per performance is 835.
- Those with budgets of \$500K–\$999K account for 10% of performances and 5% of attendance. Their average attendance is 346.*
- Those with budgets of \$100K–\$499K account for 25% of performances and 6% of attendance. Their average attendance is 149.
- Those with budgets of \$25K–\$99K account for 12% of performances and 6% of attendance. Their average attendance is 341.

Performances and Audience by Budget Size



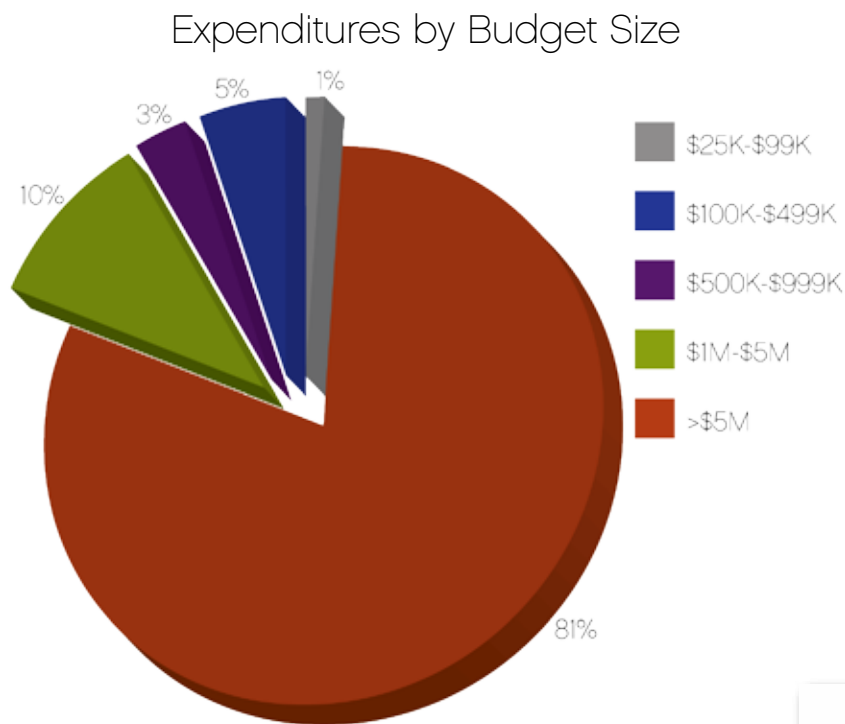
“The appetite for audience data has to be collected here. You all need to want it, because if you want it, you will collect it.”
—Anne Coates, Presenter, Town Hall

*The percentages in this budget category are surprisingly low, representing the groups in the sample and not necessarily all dancemakers of the given size.

Expenditures by Budget Size

Total aggregate expenditures for the 127 dance organizations in the full sample, including educational, presenting and service organizations, are \$230.7M, with dancemakers contributing \$192.0M.

The analytical sample of 81 dancemakers shows that the lion's share of expenditures was made by the largest dancemakers.



- 81% were made by 6 organizations with annual budgets of more than \$5M
- 10% were made by 9 organizations with budgets of \$1M-\$5M
- 3% by 8 organizations with budgets of \$500K-\$999K
- 5% by 30 organizations with budgets of \$100K-\$499K
- 1% by 28 organizations with budgets of \$25K-\$99K

These proportions are virtually identical to those of the entire New York City nonprofit cultural industry found in the Alliance for the Arts' study, *The Arts as an Industry* (2007) as shown in the table below.

Comparison of Expenditures: Nonprofit Dancemakers and All Nonprofit Culture

Budget Size	Dancemakers	All Cultural Organizations*
>\$1M	91%	93%
\$500K-\$999K	3%	3%
\$100K-\$499K	5%	3%
<\$100K	1%	1%

*The Alliance for the Arts, *The Arts as an Industry: Their Economic Impact on New York City and New York State*, 2007.



Loni Landon, photo by Jennifer Jones

Indicators of Innovation

Innovation and creativity run throughout New York City's dancemaking community. The full sample of 99 dancemakers during the study period produced:

- 234 premieres—133 world, 23 national and 78 local
- 99 new works commissioned
- 2,352 public and 463 professional classes and workshops held by dancemakers (not including those at educational institutions)
- 51 workshops for new works

Dancemakers of all sizes participated energetically in this generation of new dance as shown in the table below. While the largest dancemaking organizations account for the majority of performance activity and especially expenditures, the data from our analytical sample indicate that the smaller ones are the sources of a disproportionately large share of new work.

These findings point to a strong start-up culture in New York City dance, where creativity and entrepreneurship are alive and can be harnessed to strengthen the future of the art form.

New Dance Generation by Budget Size

	>\$5M	\$1M-\$5M	\$500K-\$999K	\$100K-\$499K	\$25K-\$99K
Premieres	15.0%	13.0%	22.5%	30.5%	19.0%
Commissions	31.3%	8.4%	22.9%	14.5%	22.9%
Workshops					
Public	10.5%	34.5%	14.2%	34.4%	6.4%
Professional	5.2%	14.5%	42.9%	27.8%	9.6%
New Works	2.1%	14.9%	17.0%	51.1%	14.9%
# dancemakers	6	9	8	30	28



Jordan Isadore, photo by Jennifer Jones

HOW AND HOW MUCH?

The Economics of NYC Dancemakers

Financial Challenges

For all this exuberance, these are difficult times financially for nonprofit dance. A review of available data from 2006 to 2009/2010, including the *Dance/NYC Census of New York City Dancemakers* and New York State Council on the Arts applications, shows an uneven patchwork of growth and decline. Dancemakers with budgets of more than \$5M have grown very slightly in real terms, but organizations in the smaller budget ranges, and particularly the smallest budget range, have struggled on the whole. There is a high degree of variation in how dance companies in each budget range have done over these years.

In the study period, according to CDP data for our analytical sample of 81 dancemakers, dancemakers as a whole are operating in the black, but on a case by case basis for many the margin is uncomfortably slim or negative.

- The largest dancemakers show a margin of aggregate revenue over expenses of 12%, but most of their cushion is derived from investment income, rather than their operations and contributions.
- Those in the \$1M–\$5M range had aggregate expenditures that exceeded their income by 6%.
- Those in the \$500K–\$999K range had 1% more aggregate revenues than expenditures.
- Those in the \$100K–\$499K and \$25K–\$99K ranges had 3% more revenues than expenditures.

"We used to be envious of Europeans but things are changing. . . . Arts organizations are actually coming to New York now and studying how New Yorkers deal with budget cuts."
—Participant, Town Hall

"I found that in my work consulting around the country that in some cases the dancers actually contribute money to the organization that's not being captured here."
—Participant, Town Hall

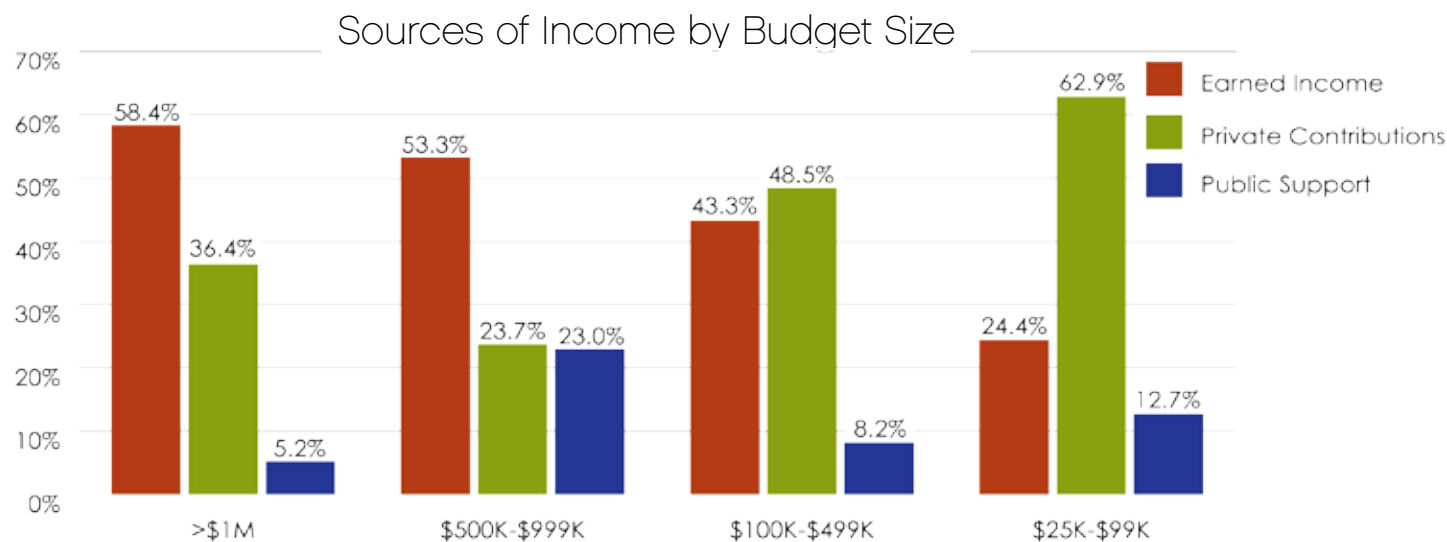
"Given the high degree of variation, we are interested in looking at those groups that have fared very well and seeing why. This is a next step."
—Lane Harwell,
Presenter, Town Hall

"Take this information to your board and to your funders and say, 'Hey, look, a little bit of capital goes a long way.'"
—Participant, Town Hall

INCOME

Sources of revenue within the analytical sample vary significantly by budget size.

- **Earned income** is most significant for the largest organizations, which derive 58% of their revenue from earned income sources, well over twice the share of 24% of revenue that the smallest organizations receive from earned income sources.
- **Private contributions** are most important for smaller organizations, especially those with budgets less than \$100K, which derive 63% of all income from these sources.
- **Public funding** is an important component, particularly for organizations in the \$500K–\$999K budget category, but comes in a distant third in importance for the other budget ranges.



Earned Income

Earned income has fueled growth in the nonprofit arts since the early 1980s, more than tripling in real terms from 1982 to 2009.* In dance, earned income plays a critical role. The many distinct sources of earned income vary significantly in importance among dancemakers of different sizes within the analytical sample.

- **New York City ticket sales** are by far the most important source of earned income earned for organizations with budgets of more than \$5M, accounting for nearly six in ten dollars earned from operations (58.7%). Three-quarters of this amount is derived from single ticket sales, while one-quarter comes from subscriptions. This is the only budget category for which subscriptions is a significant source of revenue. For organizations in budget ranges less than \$5M, admissions income, derived virtually one hundred percent from single ticket sales, is a much less important source of income earned from operations. For this group, 7.9%–15.1% of income earned from operations is from New York City ticket sales.
- **Touring** provides dancemakers in all budget categories a significant portion of their earned income. The importance of touring increases as budget size increases, reaching the highest share in groups in the \$1M–\$5M budget range, which earn almost half (44.6%) of their income from operations from touring. Touring is a less important share of earned income for groups more than \$5M than for any of the other budget categories.
- **Contracted services and performances** include income from any services performed under contract to another organization, ranging from performances to fees for services. It does not include touring income. This is least important for the largest organizations, which earn 6.7% of their income from operations from this source, and most important for the smallest organizations, which earn 33.7% from this source. Middle-sized groups derive a significant portion of their earned income from contracted services and performances (17.2%–22.6%).

*The Alliance for the Arts, *The Arts as an Industry: Their Economic Importance to the New York—New Jersey Metropolitan Region, 1993; Who Pays for the Arts? Income for the Nonprofit Cultural Industry in New York City, 2010.*

State of NYC Dance

- **Tuition and workshops** are an important source of earned income for dancemakers in every budget category. It is particularly important for those in the \$500K–\$999K and \$100K–\$499K ranges, where it accounts for one-third of aggregate earned income. It is also quite important for the smallest organizations, at one-quarter (23%) of their earned income. Tuition and workshops represent a somewhat smaller portion of earned income for dancemakers with budgets of more than \$1M.

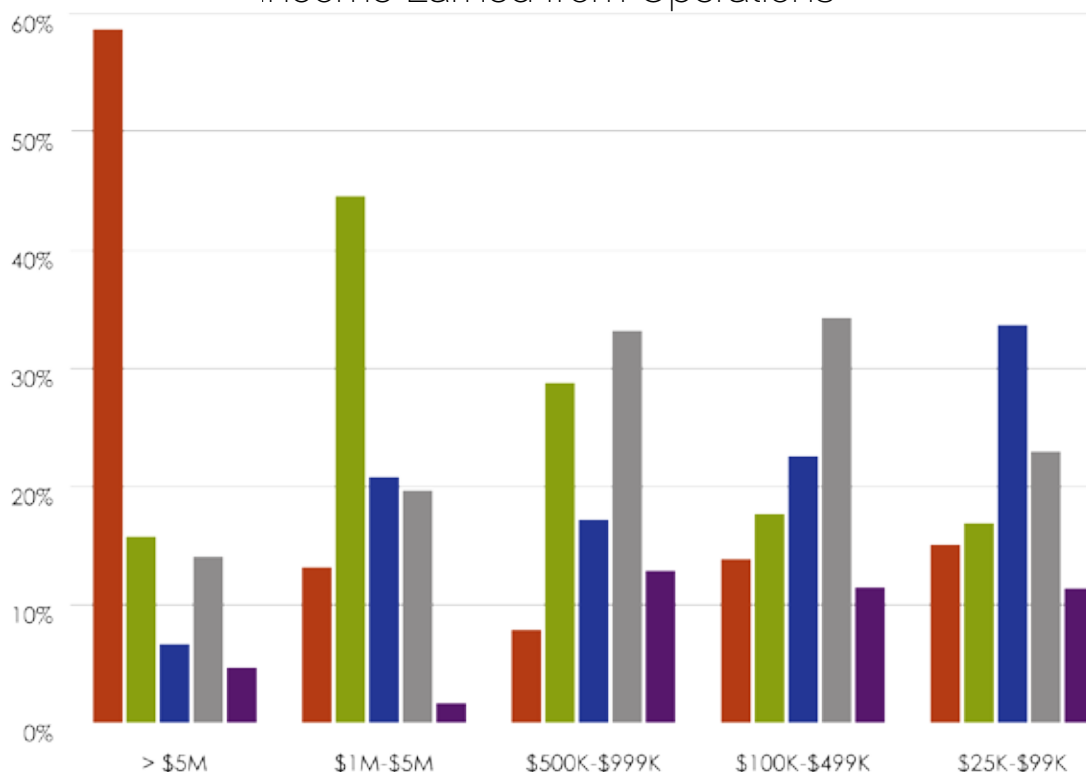
- **Miscellaneous** income, including rentals and merchandise sales, constitutes less than 5% of income from operations for the two largest categories of dancemakers with budgets of more than \$1M, but is a significant source of income for groups less than \$1M, which derive 11.3%–12.9% of their earned income from these sources.

In addition to earned income sources considered here, a very few of the largest dance groups make a significant portion of their income from investments. This is an important source for these groups, but negligible for the rest of the industry.*

“Children account for more than 10% of the total nonprofit arts audiences in New York City.”
—Anne Coates,
Presenter, Town Hall,
on Alliance for the Arts research

“There is an opportunity to dig deeper into the data on educational institutions and the educational programs of dancemakers in the CDP.”
—Lane Harwell,
Presenter, Town Hall

Income Earned from Operations



	> \$5M	\$1M-\$5M	\$500K-\$999K	\$100K-\$499K	\$25K-\$99K
NYC Ticket Sales	58.7%	13.2%	7.9%	13.9%	15.1%
Touring	15.8%	44.6%	28.8%	17.7%	16.9%
Contracted Performances/Services	6.7%	20.8%	17.2%	22.6%	33.7%
Tuition/Workshops	14.1%	19.7%	33.2%	34.3%	23.0%
Miscellaneous	4.7%	1.7%	12.9%	11.5%	11.3%

*Investment and interest income is included in the total earned income figures, but not in the analysis of the various components of earned income.

Private Contributions

“It struck me how sharply the amount of foundation income in terms of percentage of a company's income rises the smaller the company is. Given that very few dollars can make such a big difference to a small company, there is an opportunity for foundations and corporations to band together.”

—Participant, Town Hall

“I was really surprised by the amount of funding that comes from foundations because in all of the companies I have worked with over the years funding has been primarily through private individuals.”

—Participant, Town Hall

Private contributions include donations by board members, other individuals, corporations, foundations, fundraising events and other, including in-kind contributions. The share of contributed income supplied by each of these sources varies significantly by budget size.

- **Board member** contributions are a very important source of private contributions. For the two largest budget ranges, this is the largest source of private contributions, accounting for about one third of this category. For the midrange groups with budgets of \$500K–\$999K and \$100K–\$499K, board contributions fall to below 10% of total private income. Board contributions constitute a larger share, 20.9% of private contributions to the smallest groups.

- **Individual** contributions account for between 14.1% and 24.2% of private contributions. In the largest groups, it is notable that individuals are contributing fewer total dollars than board members.

- **Corporate** contributions constitute the smallest portion, 1.9% to 7.8% of private contributions for dancemakers in all budget ranges.

- **Foundations** play a vital role in supporting dance. Foundations are especially important for dancemakers in the \$500K–\$999K range and the \$100K–\$499K range, where they account for nearly half of private contributions. Groups in the \$500K–\$999K range are funded by an average of six foundations; groups in the \$100K–\$499K range are funded by an average of four. **In the \$100K–\$499K range, private contributions account for almost half (48.5%) of all income**, making the concentration of income coming from a few foundations a particularly notable finding.



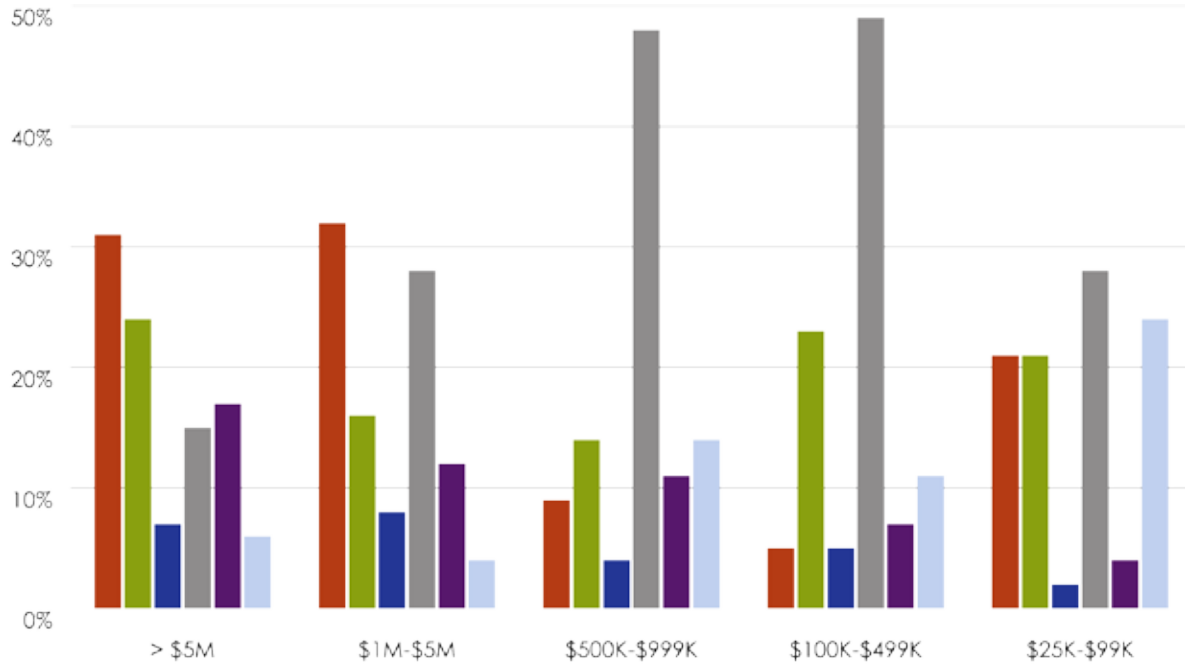
Jaedon Thomson, photo by CC Photography



State of NYC Dance

- **Fundraising events** are more important for the larger organizations, accounting for 17.4% of private contributions for the largest budget range and decreasing to 4.0% for the smallest.
- **Other** contributions, including in-kind contributions, are most important, generally speaking, for the smaller organizations. In the smallest budget size, this category accounts for a quarter (24.0%) of all private contributions. This finding is an important indication of the resourcefulness of dancemakers in this budget category.

Sources of Private Contributions by Budget Size



	> \$5M	\$1M-\$5M	\$500K-\$999K	\$100K-\$499K	\$25K-\$99K
Board	30.9%	31.8%	9.2%	5.4%	20.9%
Individual	24.2%	16.0%	14.1%	23.3%	21.5%
Corporate	7.0%	7.8%	3.6%	4.7%	1.9%
Foundation	15.0%	28.4%	47.9%	48.8%	27.7%
Fundraising Events	17.4%	12.3%	11.0%	6.9%	4.0%
Other (Incl In-kind)	5.5%	3.7%	14.2%	10.9%	24.0%

Government Funding

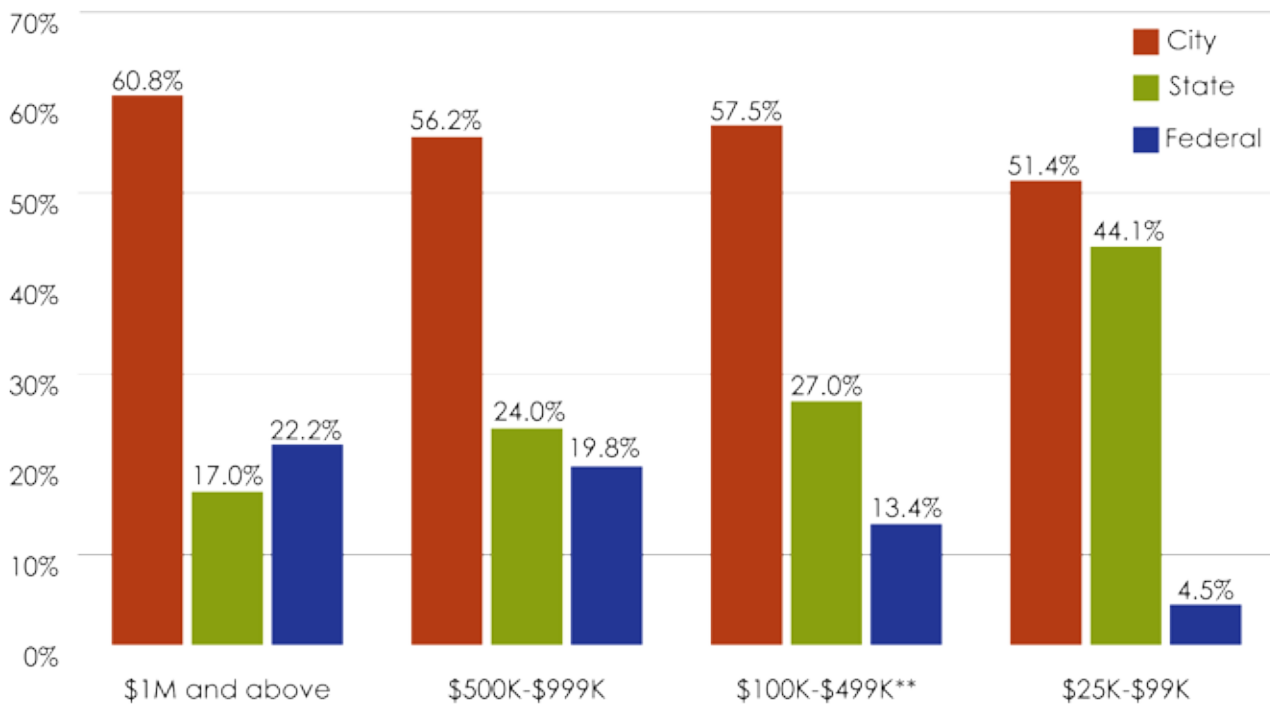
These findings indicate the importance of City, State and Federal funding to New York City dance. Government funding is of particular importance to groups in the \$500K-\$999K range, where it accounts for nearly a quarter (23.0%) of total income. In the other budget ranges, it accounts for 5.2% to 12.7% of income, as indicated at the beginning of this income section on page 14.

- **New York City** provides a majority of government funding in every budget category, accounting for 60.8% of government funding for groups with budget of \$1M and more, and declining to 51.4% of funding for groups in the \$25K-\$99K range.

- **New York State** funding increases as a share of government funding as budget size decreases, ranging from 17.0% for the largest groups to 44.1% for the smallest.

"If you're not at the table, your seat is going to be filled by some other advocacy group and some other issue. We need more money for day care, we need more money for libraries, we need more money for parks."
 —Jimmy van Bramer, Chairperson, Cultural Affairs Committee, New York City Council and Speaker, Town Hall*

Government Support by Budget Size



*Robin Pogrebin, "Groups Advocating for the Arts Feel the Pinch," *The New York Times*, August 8, 2011.

**This graph excludes County funding, which only existed for organizations in the \$100K-\$499K range, at 2.1% of their total government funding.

State of NYC Dance

EXPENDITURES

The analysis of expenditure patterns that follows shows variation by budget size as did the analysis of sources of income. It also shows dance to be mission-driven and labor-intensive across all budget ranges.

Functional Expenditures

- **Programming** accounts for the great majority of dancemaker expenditures, more than 70% in all budget ranges—suggesting efficiencies in the industry. This functional category encompasses “any costs the organization incurs in conducting activities for which the organization was created”* as distinct from fundraising and general and administrative expenditures.

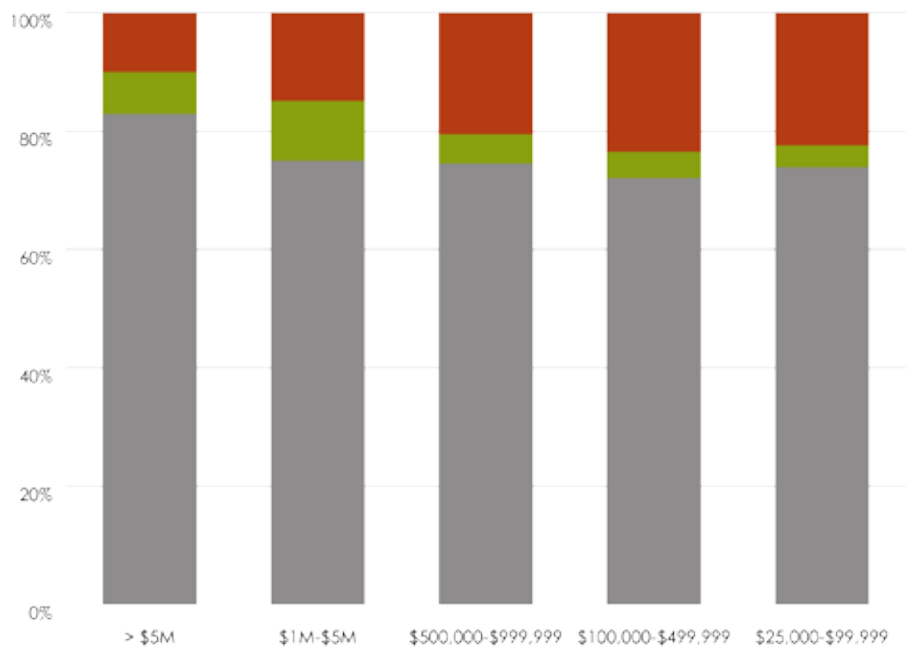
At the same time, the smaller organizations record a greater proportion of expenditures on general and administrative purposes. It is unclear how much of this difference is due to economies of scale that allow the largest organizations to spread administrative costs over a larger overall budget; the fact that smaller organizations rely more heavily on disparate sources of income, which is a strength, but understandably an administrative burden; or simply due to differences in reporting among different-size groups.

*Source: CDP Section 6, General Instructions

“I’m really interested in using all this data to create networks of small organizations. Often when I’m working on grants that take administrative hours that we don’t have, I think, wouldn’t it be great if we could get five organizations together to coauthor grants, save time and create something larger for the City of New York.”

—Participant, Town Hall

Functional Expenditures by Budget Size



General	9.9%	14.9%	20.5%	23.5%	22.4%
Fundraising	7.2%	10.1%	5.0%	4.4%	3.7%
Program	82.9%	75.0%	74.5%	72.1%	73.9%

Expenditure Categories

The CDP expenditure section asks for information on forty-four different categories of expenditure. Some of the largest ones, such as “salaries and fringe benefits,” are analyzed separately here, but many others are lumped into broader categories: for instance, “legal services” and “accounting” are in the “outside professional services” category developed for this report, while “bank fees” and “office expenses” are in the “administration and finance” category. See the appendix for a complete listing of what CDP expenses are in each category analyzed in this section.

- **Labor** is the dominant expenditure for all budget ranges. However, the total share spent on labor is twice as great for organizations with budgets of more than \$5M (62.2%) as it is for those with budgets from \$25K to \$99K (31.8%), and worker status varies significantly by budget size.
 - **Salaries and fringe benefits** decrease sharply as a share of total expenditures as budget size decreases. Organizations in the largest budget category spend 59% of their aggregate budgets on salaries and fringe benefits, while those in the smallest budget range spend only 7.5% of their total expenditures on salaries and fringe benefits.
 - **Nonsalaried workers** payments increase as a share of total expenditures as budget size decreases, with the largest budget ranges spending about 3% of expenditures on nonsalaried workers while the smallest spend 24.3% of their budgets on this category.



Tiffany Griffin, photo by CC Photography

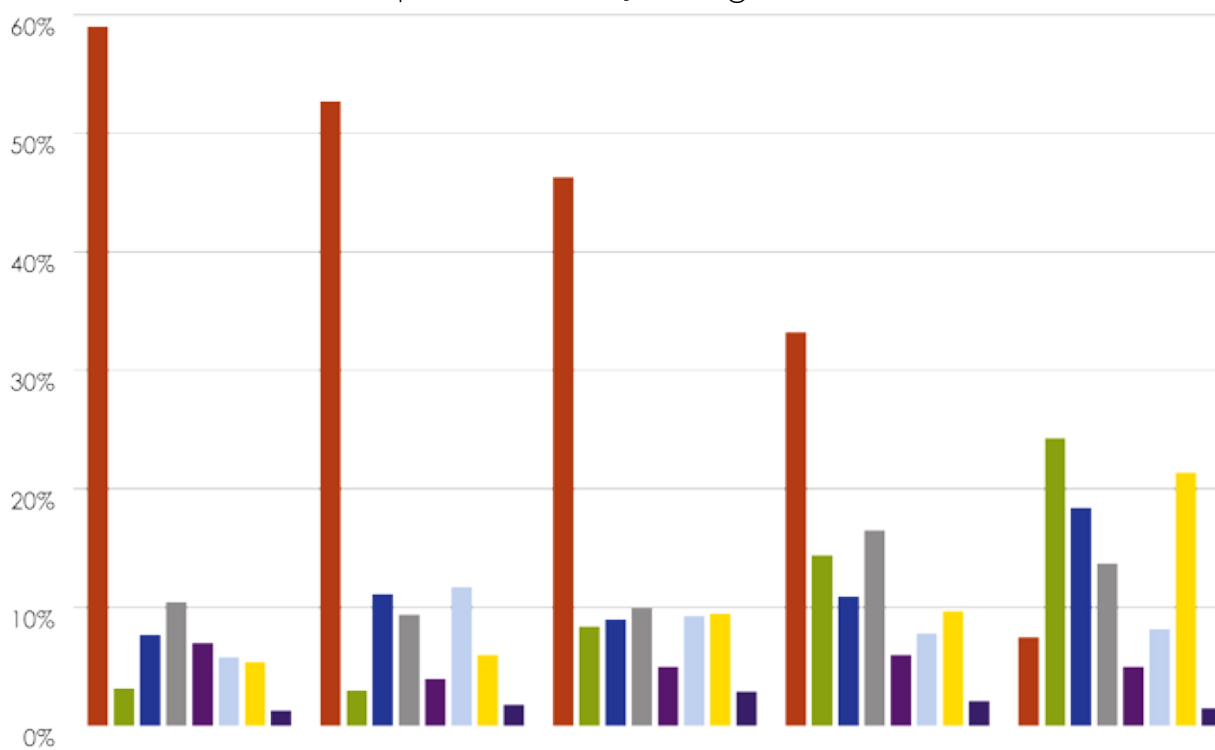
“The categories you have picked are the basic language for small businesses. Boards want this information, so they can see where they fall and see how to grow.”
—Participant, Town Hall



State of NYC Dance

- **Outside professional services** rise unevenly as a share of expenditures as budget size decreases from 7.7% in the largest category to 18.4% in the smallest.
- **Facilities and equipment** costs account for about 10% of total expenditures for groups with budget of \$500K or more, and jump to 16.5% and 13.7% for the smaller organizations.
- **Production** costs account for a marginally higher share of expenditures for groups in the largest budget range than for their smaller counterparts.
- **Travel** costs are most significant in the \$1M–\$5M budget range, consistent with the high proportion of income derived from touring for this group.
- **Administration** expenditures increase steadily from 5.4% of expenditures for the largest groups to 21.4% for the smallest.
- **Fundraising** costs are relatively constant, fluctuating between 1.3% and 2.9% of total expenditures.

Expenditures by Budget Size



Expenditure Category*	> \$5M	\$1M-\$5M	\$500,000-\$999,999	\$100,000-\$499,999	\$25,000-\$99,999
Salaries & Fringe Benefits	59.0%	52.7%	46.3%	33.2%	7.5%
Nonsalaried Workers	3.2%	3.0%	8.4%	14.4%	24.3%
Outside Professional Services	7.7%	11.1%	9.0%	10.9%	18.4%
Facilities & Equipment	10.5%	9.4%	9.9%	16.5%	13.7%
Production	7.0%	4.0%	5.0%	6.0%	5.0%
Travel & Hospitality	5.8%	11.7%	9.3%	7.8%	8.2%
Administration & Finance	5.4%	6.0%	9.5%	9.7%	21.4%
Fundraising Expenses	1.3%	1.8%	2.9%	2.1%	1.5%

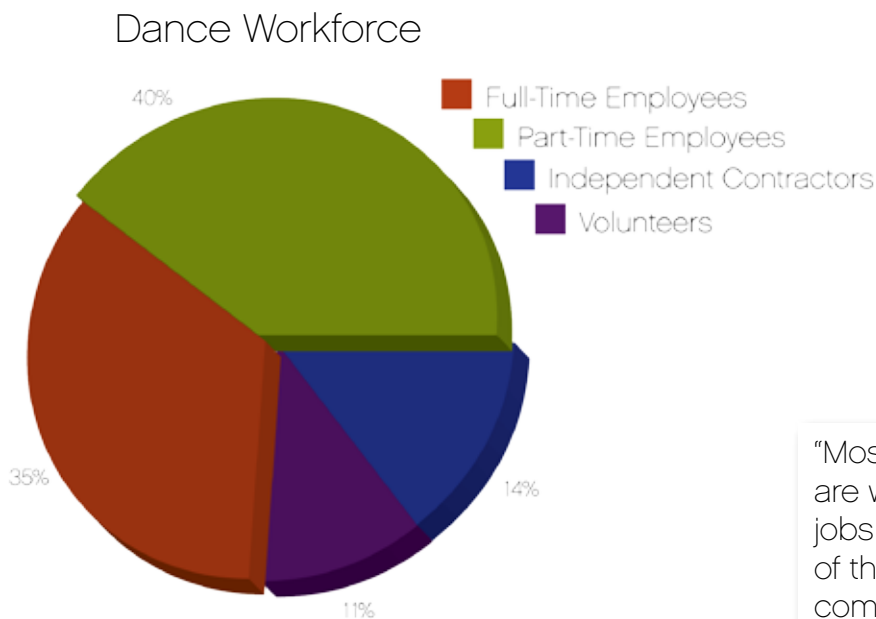
*These categories are aggregated from more granular CDP categories. See the appendix for a complete listing.

WORKFORCE

Totals

The workforce in the dancemaking organizations studied numbers 1,783 full-time equivalents. Counting each full-time, part-time, independent contractor assignment and volunteer yields three and a half times this many jobs.

- **Full-time employees** account for 35% of workers. Less than half (47%) of these full-time employees are employed as dancers, choreographers or other artists by the companies in the analytical base.
- **Part-time employees** (measured on a full-time equivalent basis) account for 40% of the workforce—62% of this segment are employed as artists. On average, part-time jobs are one-third of the hours of a full time job.
- **Independent contractors** (measured on a full-time equivalent basis) account for 14% of the workforce—57% of this group are employed as artists. On average, an independent contractor assignment is 13.9% of the hours of a full-time job—it would take more than seven assignments of this size to accumulate the hours of a full-time job.
- **Volunteers** (measured on a full-time equivalent basis) comprise 11% of the workforce—9% of them are working as artists. One-quarter of this group are full-time volunteers. For the part-time volunteers, the average amount of time donated is about three and a half hours a week.



“Most artists 21–35 are working five jobs and only half of their income comes from the dance world.”
 —Dance/NYC Junior Committee Participant, Town Hall, on Junior Committee research

Workforce by Budget Size

The employment status of the dancemaking workforce varies widely by organizational budget size.

- **Full and part-time (fte) employees** account for almost nine in ten (88.8%) of workers at organizations with budgets of more than \$5M. This share of workers declines significantly to 81.0% for the \$1M–\$5M organizations, and 75.1% for the \$500K–\$999K organizations, then falls precipitously to 48.8% of the workers in the \$100K–\$499K groups and 5.5% of the workers in the \$25K–\$99K organizations.

The breakdown between full-time employees and part-time employees (measured as full-time equivalents), shows that the largest groups offer 40% to 60% of their workforce a full-time job, but for organizations with budgets of \$500K–\$999K, full-time employment accounts for about a quarter of the workforce (26.1%), falling to 20.0% for groups in the \$100K–\$499K range and only 2.1% in the \$25K–\$99K budget category.

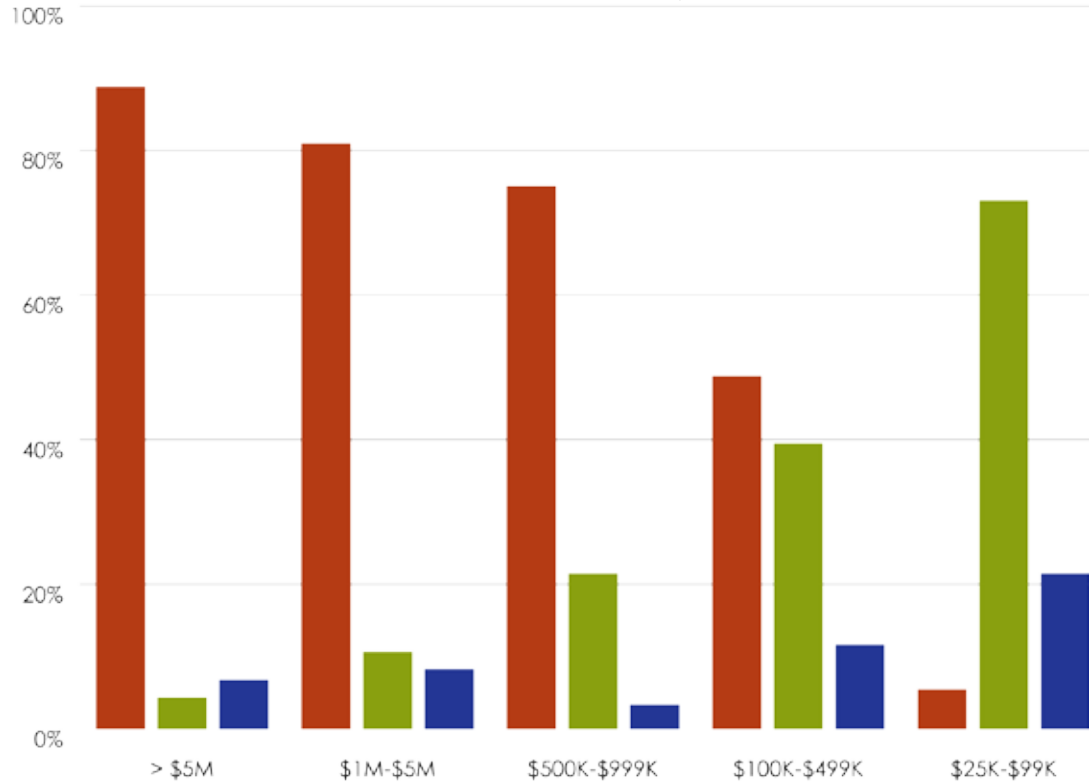
Full-and Part-time (fte) as a Percentage of Workforce by Budget Size

Budget Range	Full-time	Part-time (fte)
> \$5M	40.0%	48.8%
\$1M-\$5M	60.2%	20.8%
\$500K-\$999K	26.1%	49.0%
\$100K-\$499K	20.0%	28.8%
\$25K-\$99K	3.1%	2.3%

- **Independent contractors** are a small percentage of the workforce for the largest groups, accounting for 4.4% of the workforce on a full-time equivalent basis for groups with budgets of more than \$5M. Their share of the workforce grows sharply to 10.7% of workers in the \$1M–\$5M budget range organizations, 21.5% in organizations with budgets of \$500K–\$999K, 39.5% in organizations with budgets of \$100K–\$499K and a solid majority, 73.1% of those working for organizations in the \$25K–\$100K budget category. In these smallest groups, seven in ten of these independent contractors are working as dancers or other artists.

- **Volunteers** comprise 6.8% of the largest organizations' workers. Their share of the workforce vacillates as budget size decreases until it jumps dramatically to 21.5% of the workforce in organizations with budgets of \$25K–\$99K.

Worker Status by Budget Size



■ Employees-full and part-time (fte)	88.8%	81.0%	75.1%	48.8%	5.4%
■ Independent contractors (fte)	4.4%	10.7%	21.5%	39.5%	73.1%
■ Volunteers-full and part-time (fte)	6.8%	8.3%	3.4%	11.7%	21.5%

"I'm an artist and a director, and I see myself in this [workforce data]—part-time work, volunteerism, independent contracting. The conditions are not unique to dance, to art, to the people in the United States. But labor is a primary issue, and this shows that people in the field suffer these conditions: they don't have security; they don't have time. This is an opportunity to critically reflect and to make arguments for something different."

—Participant, Town Hall

State of NYC Dance

Making the Case for NYC Dance

This last quote is placed here as a provocation and also to demonstrate the hopefulness and the quest for opportunity that have surrounded preliminary discussions of these findings.

The analysis of CDP data helps us see the story of New York City dance—who, where, what, how and how much.

In the data, you can see the vitality and the promise of our industry even in a challenged climate. You can see how dance works as an economic engine, and as a contributor to and an ambassador for the City's creative life. You can see the importance of public funding and the influence, even heroism, of concentrated foundation support. You can see similarities between dance and the wider cultural sector.

Particularly when looking at the smallest groups, you can see a strong start-up culture characterized by income diversity, use of in-kind resources and barter economies, and new creation—how alive entrepreneurship is in New York City dance.

Our dancemakers can, we hope, see their stories in the data. But the value of the research is not simply the stories it allows you to see but the stories it allows you to imagine for dance in our City. Where there is challenge, there is opportunity—from industry collaboration to new, high-impact investment.

As a foundation for individual and collective advocacy—a stronger voice for dance in New York City—this research has the potential to generate dialogue, creative problem solving and action.

Join us. Be the change you want to see in New York City dance.



APPENDIX - CDP DATA FIELDS

CDP Category

Section 1 Organization Information

- 3 Legal name
- 12 County
- 15 Federal ID
- 16 Organization Type
- 17a NISP Discipline
- 25 # Board members
- 26 Year Founded
- 27 Year Incorporated
- 33 Fiscal Year End Date

State of Dance Category

- Name
- Borough
- Federal ID
- 501 (C) 3
- Discipline
- # Board members
- Year Founded
- Year Incorporated
- Fiscal Year End Date

Section 3 Revenue

Earned

- | | |
|---|---|
| 1 Admissions | Ticket Sales (Not on Tour) |
| 2 Ticket Sales | Ticket Sales (Not on Tour) |
| 3 Tuitions | Tuition/workshop |
| 4 Workshop & Lecture Fees | Tuition/workshop |
| 5 Touring Fees | Touring |
| 6 Special Events - Non-fundraising | Misc |
| 7 Gift Shop/Merchandise Sales | Misc |
| 7a Gift Shop/Gallery Sales | Null |
| 8 Food Sales/Concession Revenue | Misc |
| 8a Parking Concessions | Null |
| 9 Membership Dues/Fees | Misc |
| 10 Subscriptions - Performance | Subscriptions - NYC Ticket Sales |
| 10a Subscriptions - Media | Null |
| 11 Contracted Services/Performance Fees | Contracted Services/Performance Fees |
| 12 Rental Income | Misc |
| 13 Royalties/Rights & Reproductions | Null |
| 14 Advertising Revenue | Misc |
| 15 Sponsorship Revenue | Misc |
| 16 Investments-Realized Gains/Losses | Investments & Interest |
| 17 Investments-Unrealized Gains/Losses | Investments & Interest |
| 18 Interest & Dividends | Investments & Interest |
| 19 Other Earned Revenue | Misc |
| 20 Total Earned Revenue | Total Earned Revenue |
| | Income from Operations = |
| | Total Earned Revenue - Investments & Interest |

Support

21	Trustee/Board Contributions	Board Member
22	Individual Contributions	Individual
23	Corporate Contributions	Corporate
24	Foundation Contributions	Foundation
		Total Private Contributions
25	Government - City	New York City
26	Government - County	County
27	Government - State	New York State
28	Government - Federal	Federal
		Total Government Funding
28a	Tribal Contributions	Null
29	Special Events - Fundraising	Fundraising Events - Private Contributions
30	Other Contributions	Other - Private Contributions
30b	Parent Organization Support	Null
30c	Related Organization Contributions	Null
31	In-kind Contributions	Other - Private Contributions
32	Net Assets Released from Restrictions	Null
33	Total Support	(Private and Government Support Not Aggregated)
34	Total Revenue	Total Revenue

Section 6 -- Expenses

1	Total Salaries & Fringe	Salaries & Fringe
2	Accounting	Outside Professional Services
3	Advertising and Marketing	Outside Professional Services
4	Artist Commission Fees	Non-Salaried Artists
4a	Artist Consignments	Null
5	Artists & Performers - Non-Salaried	Non-Salaried Artists
6	Audit	Outside Professional Services
7	Bank Fees	Administration & Finance
8	Repairs & Maintenance	Facilities & Equipment
9	Catering & Hospitality	Travel & Hospitality
10	Collections Conservation	Administration & Finance
11	Collections Management	Administration & Finance
12	Conferences & Meetings	Travel & Hospitality
13	Cost of Sales	Administration & Finance
14	Depreciation	Facilities & Equipment
15	Dues & Subscriptions	Administration & Finance
16	Equipment Rental	Facilities & Equipment
17	Facilities - Other	Facilities & Equipment
18	Fundraising Expenses - Other	Fundraising Expenses
19	Fundraising Professionals	Fundraising Expenses
20	Grantmaking Expense	Fundraising Expenses

21	Honoraria	Non-Salaried Artists
22	In-Kind Contributions	Included in Total, Not Patterns
23	Insurance	Administration & Finance
24	Interest Expense	Administration & Finance
25	Internet & Website	Administration & Finance
26	Investment Fees	Administration & Finance
27	Legal Fees	Outside Professional Services
28	Lodging & Meals	Travel & Hospitality
29	Major Repairs	Facilities & Equipment
30	Office Expense - Other	Administration & Finance
31	Other	Administration & Finance
32	Postage & Shipping	Administration & Finance
33	Printing	Outside Professional Services
34	Production & Exhibition Costs	Production
34a	Programs - Other	Production
35	Professional Development	Outside Professional Services
36	Professional Fees - Other	Outside Professional Services
37	Public Relations	Outside Professional Services
38	Rent	Facilities & Equipment
38a	Recording & Broadcast Costs	Null
38b	Royalties/Rights & Reproductions	Non-Salaried Artists
39	Sales Commission Fees	Non-Salaried Artists
39a	Security	Null
40	Supplies - Office & Other	Facilities & Equipment
41	Telephone	Administration & Finance
42	Touring	Travel & Hospitality
43	Travel	Travel & Hospitality
44	Utilities	Facilities & Equipment
45	Total Expenses - Program	Total Program Expenditures
	Total Expenses - Fundraising	Total Fundraising Expenditures
	Total Expenses - General	Total General Expenditures
	Total Expenses	Total Expenditures
46	Change in Net Assets	Change in Net Assets

Section 11 -- Non Financial Information

A - Number of Contributors

A1	Individuals	Individuals
A2	Board	Board
A3	Corporate	Corporate
A4	Foundation	Foundation

C -- Attendance (number of people)

C1	Total Paid Attendance	Total Paid Attendance
----	-----------------------	-----------------------

C2 Total Free Attendance
 C6 Attendance-Classes/Workshops

Total Free Attendance
 Attendance - Classes/Workshops

G - Program Activity (number of events)

G2 Public Performances - At Home	Public Performances - At Home
G3 Public Performances - Away (On Tour)	Public Performances - Away (On Tour)
G6 Educational Classes/Workshops - Public	Educational Classes/Workshops - Public
G7 Educational Classes/Workshops - Professional	Educational Classes/Workshops - Professional
G12 World Premieres	World Premieres
G13 National Premieres	National Premieres
G14 Local Premieres	Local Premieres
G15 Works Commissioned	Works Commissioned
G16 Workshops or Readings of New Works	Workshops or Readings of New Works

I - Staff and Non-Staff Statistics

I1 Full-time Permanent Employees	Full-time Permanent Employees
Full-time Permanent Employees - Artists	Full-time Permanent Employees - Artists
I2 Part-time/Seasonal Employees	Part-time/Seasonal Employees
Part-time/Seasonal Employees - Artists	Part-time/Seasonal Employees - Artists
I3 Part-time/Seasonal Employees - FTEs	Part-time/Seasonal Employees - FTEs
Part-time/Seasonal Employees - FTEs - Artists	Part-time/Seasonal Employees - FTEs - Artists
I4 Full-time Volunteers	Full-time Volunteers
Full-time Volunteers - Artists	Full-time Volunteers - Artists
I5 Part-time Volunteers	Part-time Volunteers
Part-time Volunteers - Artists	Part-time Volunteers - Artists
I6 Part-time Volunteers - FTEs	Part-time Volunteers - FTEs
Part-time Volunteers - FTEs - Artists	Part-time Volunteers - FTEs - Artists
I7 Independent Contractors	Independent Contractors
Independent Contractors - Artists	Independent Contractors - Artists
I8 Independent Contractors - FTEs	Independent Contractors - FTEs
Independent Contractors - FTEs - Artists	Independent Contractors - FTEs - Artists